

AUDIENCES SPEAK IT'S TIME WE LISTEN

Opportunities at the Australian Box Office

By Nick Hayes





AUSTRALIA'S AUDIENCES SPEAK MANY LANGUAGES BUT ITS SCREENS DON'T (YET)

EXECUTIVE SUMMARY

Australia's box office tells a story of opportunity hiding in plain sight. Between 2021 and 2025, Indian films collectively out-grossed Australian films at the Australian box office, a milestone that reveals both the strength of diaspora audiences and the structural limits of current screen policy. The Foreign Film Engagement Index (FFEI) shows that while one in five Australians speaks a language other than English at home, fewer than one in ten cinema tickets are sold to non-English-language titles. The gap is not cultural apathy but market design.

Indian cinema's success — built on consistent supply, community-driven marketing and reliable theatrical access — proves the audience exists when the pathway does. By contrast, most other language markets remain invisible beyond festival circuits. The policy challenge is simple: ensure that the agency with the clearest legislative remit over Australian cinema also champions how films reach their audiences. Doing so would not compete with Australian film; it would strengthen it.

INTRODUCTION

Walk into any cinema in Sydney or Melbourne on a Saturday night and you can hear a dozen languages in the foyer; Arabic, Tagalog, Hindi, Vietnamese, Mandarin and Greek. But when the lights dim, almost every screen speaks English.

Australia's cinemas don't yet mirror the country they serve. While audiences here embrace international stories on streaming platforms, the theatrical experience remains overwhelmingly monolingual.

The world makes more films than ever, from Lagos to Seoul, Mumbai to Bogotá; yet fewer than ten per cent of Australian cinema tickets are sold to foreign-language titles. The Foreign Film Engagement Index (FFEI) measures this imbalance and highlights a simple truth: there is both cultural and commercial value in seeing more of the world on screen.

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Data sources: Numero Australia (2021 – 2025); ABS Census 2021 (Cat. 2001.0).
Classification Branch (Classification Database 2021-2025)





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AUSTRALIA BOX OFFICE LANDSCAPE 2021–2025

After a turbulent half-decade shaped by pandemic closures, global strikes, and international supply disruptions, Australia's theatrical market has stabilised. Beneath the headline recovery is a steady rise in the **average ticket price (ATP)**, driven by the popularity of large-screen formats and premium seating options.

By mid-2025, the Australian box office is tracking to match or slightly exceed 2024 levels, continuing a measured post-COVID recovery fuelled by stronger content pipelines and renewed audience confidence. Total box office is forecast at around **A\$1 billion for 2025**, a solid rebound yet still shy of the 2018–19 benchmark years, when takings exceeded **A \$1.1 billion** annually.

Globally, cinema attendance has followed a similar curve. Gower Street Analytics projects **US \$33 billion** in worldwide box-office revenue for 2025, up roughly eight per cent year-on-year, with Australia continuing to outperform relative to its population share.

Country (\$M)	2021	2022	2023	2024	2025 (est.)	Total 2021–25
 Australia	625.7	962.8	973.9	927.9	900.0	4,390.0
 New Zealand	95.3	132.4	128.7	118.5	110.0	585.0
 United Kingdom	1,076.0	1,453.0	1,634.0	1,512.0	1,640.0	7,315.0
 United States	6,795.0	8,896.0	9,260.0	8,970.0	9,450.0	43,371.0

Within Australia, the distribution landscape has shifted dramatically since 2021. **Roadshow Films**, once the dominant market force, has seen its per-title gross halve following the expiry of its Warner Bros. partnership and a thinner slate of local hits. The gap has been rapidly filled by **Universal** and **Disney**, which now lead the market alongside **Warner Bros.**, each sustaining growth through consistent international pipelines.

Independent distributors, including **Madman**, **Transmission**, and **Umbrella**, have maintained their cultural footprint through high-volume specialty and festival releases, even as overall market concentration around global studios intensifies. Their role in platforming Australian and independent content remains crucial for diversity, despite limited commercial scale.

By mid-2025, average ticket prices continued to climb with premium experiences, but attendance per title has compressed. The market has returned to equilibrium, but what audiences choose to see has changed profoundly.

Distribution Summary by Class and Order						
Class	Order	Distribs	Films	Total GBO	Admits	ATP
Event Cinema	Event	21	240	\$35,175,107	1,616,085	\$21.77
AIDA Member	Indies	20	831	\$324,734,655	21,614,271	\$15.02
Unaligned Indie	Indies	62	463	\$233,024,295	14,780,208	\$15.77
Chinese Sp	Language	8	175	\$36,818,748	2,021,602	\$18.21
Filipino Sp	Language	1	15	\$1,805,109	99,504	\$18.14
Indian Sp	Language	27	1,101	\$164,471,450	9,796,185	\$16.79
Japan & Anime Sp.	Language	4	32	\$6,544,672	373,791	\$17.51
Middle Eastern Sp.	Language	2	26	\$1,107,709	63,463	\$17.45
Vietnamese Sp.	Language	2	14	\$1,265,866	69,915	\$18.11
Hollywood Studio	Studios	5	432	\$3,279,362,145	192,612,051	\$17.03



The Release Summary by Distributor Class and Order groups films according to the commercial and cultural hierarchy of Australia's distribution sector: major studios, independent distributors (both AIDA members and unaligned indies), event and special-screening providers, and language-specialist importers. This framework underpins all comparative gross box-office (GBO) analysis in the report.

LANGUAGE COVERAGE AT THE BOX OFFICE

While English-language films remain dominant, their market share has eased from roughly **95 per cent in 2021** to around **91 per cent in 2025 (YTD extrapolated)**. The standout growth comes from the **Indian sub-continent**, where consistent multiplex access and language-specific prints have tripled total GBO in five years, propelling India to **third place overall**, behind only the United States and the United Kingdom.

Chinese and **South-East Asian** titles have roughly doubled over the same period, while **European** and **North Asian** markets have held steady in real terms. Taken together, **foreign-language cinema now accounts for close to eight per cent of Australia's box office**, up from less than five per cent in 2021, confirming a genuine diversification of the theatrical landscape.

Cluster	Languages Included	'21 GBO (A\$)	'25 est. GBO (A\$) M	Films '21	Films '25 est.	5 Year Trend Summary
English	English (AU, US, UK, NZ etc.)	585.9	820	294	340	Still dominant but down from ≈95 % share to ≈91 %; ATP inflation hides flat volume growth.
European (ex-English)	French, Italian, Spanish, Nordic, Greek etc.	10	18	90	120	Steady output; French and Nordic titles benefit from event cinema and art-house resilience.
Middle East & North Africa	Arabic, Lebanese, Turkish, Farsi, Hebrew	0.6	1.3	5	10	Tiny base but tripled since 2021; diaspora distribution hubs emerging in Sydney & Melbourne.
Indian Sub-continent	Hindi, Tamil, Urdu, Nepali, Malayalam, Bengali etc.	13.2	39	121	165	The major foreign-language engine; now a weekly presence in multiplex programming nationwide.
Chinese Languages	Mandarin + Cantonese	4.3	8	19	30	Supply fluctuates but metro audience loyal; remains Australia's #3 foreign-language segment.
North Asian	Japanese, Korean	5.8	7	15	25	Anime and K-cinema anchor youth audience growth; stable post-COVID recovery.
South-East Asian	Thai, Filipino, Indonesian, Vietnamese, Malay etc.	1	2.5	7	15	Tripled output from a small base; Vietnamese titles show the strongest diaspora response.
Other / Minor Languages	Māori + festival languages (< A\$ 1 M each)	0.5	0.8	5	8	Stable festival and community cinema representation; consistent niche audiences.
TOTAL (all clusters)		\$625 M	\$900 M	534	813	

The data highlights steady growth among non-English markets, particularly in Asia and Europe, alongside continued strength from English-language releases.

France and New Zealand have both risen sharply, reflecting renewed audience interest in cultural and special-event releases.

These patterns point to a broader shift in audience composition and release strategy, which is examined in later sections of the report.

AROUND THE WORLD AT THE BOX OFFICE

GBO by Country 2021–2025

The following tables track reported gross box office (GBO) by country of origin between 2021 and 2025.

They reveal that while the United States remains structurally dominant, India and China have become the key growth engines of foreign-language engagement, with New Zealand maintaining steady returns through cultural proximity.



By contrast, the United Kingdom and Canada appear far weaker once adjusted for studio-distributed titles, confirming that much of their historic strength was tied to Hollywood partnerships rather than independent output.

The data illustrate a polarised market—major-studio dominance at one end, diaspora-driven strength at the other—highlighting the need for policies that better connect content diversity to theatrical access.

Country of Origin	GBO	2021	MS% 21	2022	2023	2024	2025	MS% 25	GBO Rank 21	GBO Rank 25	Δ Rank 21-25
USA	\$ 3,325,423,958	409,223,429	68.2%	805,623,430	841,321,426	785,704,931	483,550,741	80.6%	1	1	0
UK	\$ 191,793,629	71,384,495	11.9%	42,574,938	26,942,307	15,093,464	35,798,424	6.0%	3	2	↑ 1
Ind	\$ 157,748,228	13,161,836	2.2%	34,234,917	45,501,415	38,773,612	26,076,447	4.3%	5	3	↑ 2
Fra	\$ 38,080,777	3,355,739	0.6%	4,771,611	7,203,986	10,597,786	12,151,656	2.0%	9	4	↑ 5
Chi	\$ 30,263,733	4,087,910	0.7%	1,056,558	8,247,664	4,922,242	11,949,360	2.0%	8	5	↑ 3
Aus	\$ 188,946,536	71,481,272	11.9%	48,628,410	18,695,548	39,649,976	10,491,330	1.7%	2	6	↓ 4
NZ	\$ 12,006,841	1,128,561	0.2%	712,650	1,090,293	4,285,343	4,789,993	0.8%	13	7	↑ 6
Kor	\$ 10,500,153	61,703	0.0%	2,523,454	2,280,246	3,205,759	2,428,991	0.4%	28	8	↑ 20
Bel	\$ 5,699,507	2,314,035	0.4%	438,469	358,881	495,000	2,093,122	0.3%	10	9	↑ 1
Jap	\$ 32,070,885	5,722,964	1.0%	6,279,089	11,630,169	6,501,167	1,937,496	0.3%	7	10	↓ 3

(Source Numero AU)

Market Alignment and Global Performance

Australia’s box office increasingly mirrors global content flows rather than domestic output. The strength of imported films, from US tentpoles to Indian blockbusters, now defines the rhythm of the theatrical calendar, while Australian titles occupy a shrinking share of national admissions.

This section examines how language, origin, and audience alignment shape that imbalance, combining ABS Census data with box-office performance to identify where growth and re-engagement are possible.

CENSUS COMPARISON AND LANGUAGE REPRESENTATION

The Census reveals a significant mismatch between Australia’s linguistic diversity and the films available in cinemas. Only Indian cinema consistently aligns with population share, sustaining regular mainstream releases across Punjabi, Hindi, and Tamil. Large Mandarin, Arabic, and Vietnamese-speaking communities remain under-represented, while emerging Southeast Asian audiences show untapped potential.

Language spoken at home compared to reported GBO					
Language / Country	'21 Census	GBO %	GBO Presence	Distribution Mode	Potential
All Chinese Lan.	3.9%	0.74%	Very low	Festival & Event	Major gap
Arabic	1.4%	0.02%	None	Sporadic	Gap
Vietnamese	1.3%	0.03%	Minimal	Event	Emerging
All Indian Lan.	4.2%	3.86%	Strong	Regular theatrical	Established
Greek / Italian	1.8%	0.09%	Moderate (fest.)	Event & cultural	Stable niche
Filipino / Tagalog	0.9%	0.04%	Negligible	Sporadic	Gap
Spanish	0.7%	0.14%	Event (fest.)	Event	Niche only
Nepali / Korean / Indonesian / Thai	<0.6%	0.22%	Negligible	Sporadic	High potential

Includes all major Indian-origin languages recorded in the 2021 Census, encompassing Hindi, Punjabi, Tamil, Telugu, Malayalam, Urdu, Gujarati, and Bengali. Combined speakers total approximately 1.06 million people, or 4.2 % of Australia's population. All Chinese Languages Includes Mandarin, Cantonese and Hakka

Indian languages remain the only foreign-language sector to achieve near parity between population and screen share (FFEI 94). Mandarin, Arabic, and Vietnamese populations remain significantly under-served relative to their demographic weight. The South-East Asian cluster shows consistent growth potential but lacks acquisition continuity or mainstream programming access.

“The 2021 Census confirms that more than one in five Australians speak a language other than English at home, yet fewer than one in ten cinema tickets are sold to foreign-language films.”

– Screen Australia Insights, 2025

The only clear alignment between population share and theatrical presence occurs with Indian cinema, which sustains regular releases across Punjabi, Hindi, and Tamil. Most other markets remain lightly served, with Mandarin, Arabic, and Vietnamese-language communities particularly under-represented in reported GBO. Emerging South-East Asian and African-diaspora audiences show early signs of engagement but limited ongoing supply.

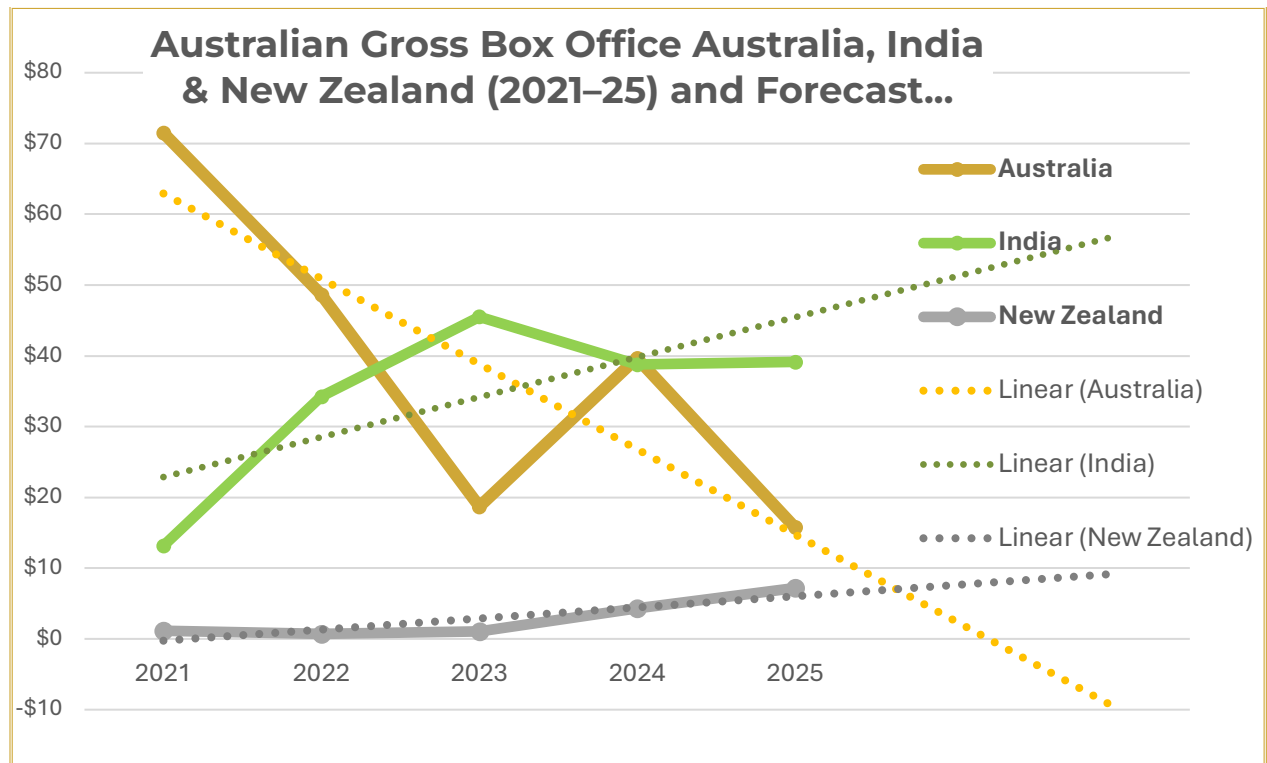
HEADLINE FINDING

The data reveal an astonishing reversal in performance

Indian films have overtaken Australian films at the Australian box office across 2021–2025.

If the current 5-year trend were to continue the New Zealand Films would overtake Australian films at the Australian Box Office in 2026 and the industry would be dead in 2027/28.

Whilst this is unlikely to happen if alarm bells are not ringing in Ultimo and in Canberra, I'm not sure what it will take.



The consolidated GBO dataset for 2023–2025 shows Indian titles such as *Pathaan*, *RRR* and *Jawan* have together grossed A\$123 million, compared with A\$74 million for Australian films. This marks the first time on record that a foreign-language cinema has out-grossed local films over a sustained three-year period in Australia. And there is a real chance France may out-gross Australia this year too...



What drives the change.

Population growth increases the ceiling for attendance, but the 2021–2025 uplift in Indian-language GBO is primarily explained by consistent weekly supply, multiplex access, premium formats, and community marketing. Even with higher Indian-origin population, per-capita engagement rises when titles are reliably available and promoted.

Why this happened (in brief).

- **Consistent supply and multiplex access:** Regular, wide bookings for Hindi and Tamil releases, with several 2023–2025 titles setting local records.
- **Expanding audience base:** India-born residents are now among Australia’s largest migrant cohorts, increasing significantly over the past decade.
- **Cinema as cultural habit:** Audiences are highly cine-literate, and cinema-going remains part of a long cultural tradition within the Indian community.
- Low digit to low-teens range, so steady Indian supply often surpass local output in weaker release cycles

How Australia Compares to Other English-Language Markets						
Metric	Australia	NZ	UK	USA	Canada*	Singapore [#]
Screens	~2,300	~400	~4,500	~40,000	~3,500	~300
% Local films on screen	3–6%	5–10%	7–10%	90–95%	6–8%	5–10%
Foreign lan. GBO share	5–10%	~5%	8–12%	3–5%	7–10%	15–20%
Indian film releases	Very high	High	High	Very high	High	Very high
Chinese/Korean films	Moderate	Med.	Low–med	Moderate	Low	High
European films	Medium	Low	High	Medium–low	Medium	Medium

Compared with peers like **Singapore** (15–20% foreign-language share) and **Canada** (7–10%), Australia remains a mid-single-digit market despite comparable multicultural demographics—underscoring both a programming gap and a missed commercial opportunity

Implications

- **Programming:** Indian titles deserve **baseline screen allocations** and **longer legs** planning (premium formats, staggered language play).
- **Marketing:** Lean into **cross-ethnic** appeal (action/anthem tracks) that has underpinned recent record runs in AU.
- **Policy lens:** Australia’s cultural KPIs often track *production* not *consumption*; the five-year crossover indicates a disconnect between **local investment** and **domestic audience outcomes**.

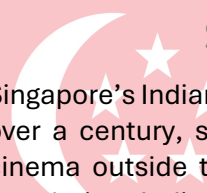
“IS ANYONE REPORTING THIS?”

I couldn’t find mainstream trades or agencies explicitly stating that Indian films have out-grossed Australian films in Australia over 2021–2025 as a single headline claim. Coverage exists on **individual record-setting Indian titles** and on **local share trends**, but **no consolidated comparison** matching this five-year crossover.

MARKET ALIGNMENT AND GLOBAL PERFORMANCE

Australia's box office increasingly mirrors global content flows rather than domestic output. Imported films — from Hollywood tentpoles to Indian blockbusters — now define the rhythm of the theatrical calendar, while Australian titles occupy a shrinking share of national admissions.

The 2021 Census confirms that more than one in five Australians speak a language other than English at home, yet fewer than one in ten cinema tickets are sold to foreign-language films. Only Indian cinema aligns with population share, sustaining mainstream releases across Punjabi, Hindi, and Tamil. Large Mandarin, Arabic, and Vietnamese-speaking communities remain under-represented.



SINGAPORE'S INDIAN CINEMA MARKET

Singapore's Indian community, which has been an integral part of the nation's social fabric for over a century, supports one of the most consistent and mainstream markets for Indian cinema outside the subcontinent. Despite representing only around nine per cent of the population, Indian films routinely command a larger share of the local box office, reflecting how deeply embedded and culturally normalised their presence is within Singapore's entertainment landscape. Tamil is one of the country's four official languages, Indian programming is a staple across media platforms, and multiplexes routinely schedule Hindi and Tamil releases alongside Hollywood and Chinese titles. This long-established infrastructure and cross-cultural familiarity mean that Indian cinema in Singapore functions not as a diaspora niche but as a natural, enduring part of the national screen mix.

REGIONAL ALIGNMENT AND ASEAN OPPORTUNITIES

POPULATION ALIGNMENT SUMMARY (ASEAN AND KEY REGIONS)

According to the *Census of Population and Housing: Cultural Diversity Data Summary 2021* (ABS, released 28 June 2022), Australia's Southeast Asian (ASEAN)-origin communities number approximately **1.14 million people**, representing **4.5–5 % of the national population**. When combined with North and South Asian diasporas, more than **12 % of Australians trace ancestry to the broader Asian region**, reflecting the country's growing cultural and linguistic diversity.





Despite this demographic scale, **films from ASEAN nations account for less than 1 % of total Australian box-office revenue** between 2021 and 2025. Vietnamese, Filipino, Thai, and Indonesian audiences in particular show strong community presence but minimal theatrical engagement. The FFEI identifies this as a core “under-served” region: high population potential, low screen access, and near-zero marketing investment.

Improving representation from these markets — through subtitling support, consistent theatrical supply, and diaspora-driven programming — would diversify content and align screen access with Australia's contemporary population mix. A modest uplift in non-English share from 8.6 % to 12 % could add an estimated A\$140 million in box-office revenue over five years, with ASEAN nations providing a key growth frontier.

REGIONAL SOFT POWER AND THE NEW COLOMBO PLAN

The continuation of the **New Colombo Plan** under Foreign Minister Penny Wong and the Albanese Government underscores Australia's ongoing commitment to regional literacy and exchange. Administered by DFAT, the program has supported more than **80,000 Australian students** since 2014 to study and undertake internships across the **Indo-Pacific**, including in ASEAN member states, Japan, Korea, India, and the Pacific. Its emphasis on people-to-people engagement complements the objectives of the **Foreign Film Engagement Index**, which measures how well Australia's screen culture reflects its regional ties. Both initiatives recognise that soft-power influence depends not only on what Australia exports, but also on how effectively it imports and platforms the stories of its neighbours.

TRANS-TASMAN TALES

 Australia	Metric	 New Zealand
\$ 188,946,536	Home-Market GBO (A\$)	\$ 12,001,067
242	Titles Released at Home	41
4.62%	Market Share	2.05%
\$781k	Ave GBO per Title (A\$)	\$292k
26 Kiwi films (63.4%)	Titles Released in Other Market (% of total avail)	36 Aussies films (14.9%)
\$ 6,524,155 (0.39%)	Other-Market GBO (A\$) (Total Market Share)	\$ 2,289,533 (0.16%)
\$ 251,698 Kiwi film in AU	Average GBO per Title in Other Market (A\$)	\$ 63,598 Aussie film in NZ
19% of NZ titles screened in AU	Cross-Market Share	65% of AU titles screened in NZ
	First Nations Film Making.	
7 titles (\$1.5 M)	Indigenous Language Films	11 titles (\$5.2 M)
2.9%	Share of local production	26.8%
0.04%	Market Share of total GBO	7.54%

Australia and New Zealand maintain one of the closest trans-Tasman screen relationships in the world. New Zealand productions achieve strong returns in Australia relative to their domestic scale, while Australian films find more limited success across the Tasman. Indigenous storytelling, spanning both Aboriginal and Māori perspectives, remains under one per cent of combined GBO yet represents the most distinctive and culturally resonant dimension of the regional market.

TRANS-TASMAN TONGUES

Indigenous and First Nations cinema across Australia and New Zealand forms a shared narrative tradition grounded in language, land, and cultural continuity.

While combined Indigenous box-office takings are modest — around **A\$ 6.7 million** (≈ 0.3 % of regional GBO) — the impact extends beyond revenue metrics.

Māori-language titles in New Zealand have achieved regular mainstream screenings, supported by local policy frameworks, dedicated festivals, and audience familiarity.

In Australia, Aboriginal and Torres Strait Islander films remain under-represented in commercial release, despite strong critical recognition and screen-agency support.

Together, they exemplify how cultural representation and language visibility — not just commercial scale — define the true health of a national cinema.



AUSTRALIAN FILM LANGUAGE COMPOSITION

Australia’s national story has never been told in a single tongue.

For more than a century, waves of migration have reshaped not only who Australians are but also the languages they speak, hear, and bring to screen. Yet while daily life has grown steadily more multilingual, **Australian cinema remains overwhelmingly monolingual.**

The following table traces the rise of linguistic diversity in Australia since 1911. It shows how the proportion of people speaking a language other than English at home has quadrupled over time. From the German and Chinese communities of the early twentieth century, through post-war European migration and later Asian and Middle Eastern communities, to today’s Indian, Filipino and Nepali growth, each wave has added to a national **mosaic of voices** that is **not yet mirrored on screen.**

Australians Speaking a Language Other Than English at Home, 1911–2025		
Census Year	% Speaking a LOTE at Home	Key Context / Notes
1911	≈ 4 %	Pre-WWI Australia overwhelmingly Anglo-Celtic; German and Chinese are the main non-English languages.
1921	≈ 5 %	Small post-WWI European intake; German still most common non-English language.
1933	≈ 6 %	Gradual growth in Southern-European and Jewish communities; overall population still >90 % British-born.
1947	10.0%	Post-war immigration begins (Italy, Greece, Germany, the Netherlands). Start of mass multilingualism.
1954	11.5%	European migration expands; English remains dominant.

1961	13.2%	Italian and Greek overtake German as top non-English languages.
1966	-	 Counted! 
1971	15.4%	End of the White Australia Policy; growing numbers from the Middle East and Asia.
1981	16.8%	Vietnamese and Lebanese migration reshape linguistic diversity.
1991	18.4%	Mandarin, Cantonese, and Arabic rise sharply; over 150 languages reported.
2001	19.0%	Continued Asian and Middle Eastern immigration; Italian and Greek begin to decline.
2011	20.4%	Chinese, Indian, and Filipino languages surge; multilingual households widespread.
2016	21.6%	Punjabi and Tagalog enter the national top ten languages.
2021	22.8%	One in five Australians now speaks a non-English language at home; more than 350 languages reported.
2025 (est.)	≈ 23–24 %	Projected steady rise driven by Indian, Nepali, Filipino, and Arabic communities; inter-generational retention increasing.

TREND SUMMARY

From roughly 4 % in 1911 to almost one-quarter in 2025, the share of Australians speaking a language other than English at home has quadrupled. Each surge aligns with a major migration phase, European post-war, Asian and Middle Eastern resettlement from the 1970s, and Indian-subcontinental growth since 2000, producing one of the world’s most linguistically diverse English-speaking nations.

Australia produces more than 75 theatrical features and documentaries a year, yet the **vast majority remain monolingual**.

A Snapshot of Linguistic Representation in Australian Cinema					
Category	Definition	Films	%	% of Pop.	
Fully or Predominantly LOTE	Majority (>70 %) non-English, non-Indigenous dialogue (e.g. <i>Shayda</i> , <i>Here Out West</i> , <i>The Furnace</i>)	5	1.6%	22.8%	
Partially Bilingual / Multilingual (LOTE)	≥10 % non-English dialogue (bilingual or multilingual, excluding Indigenous languages)	9	2.9%		
Indigenous Languages (First Nations)	Substantial or sustained use of Aboriginal or Torres Strait Islander languages (e.g. <i>Limbo</i> , <i>The New Boy</i> , <i>The Drover’s Wife</i>)	4	1.3%	3.2%	
Primary English Only	Entirely or overwhelmingly English-language content	297	94.2	74%	
Total		315	100%		



Between 2021 and 2025, fewer than one in twenty Australian films contained any sustained non-English dialogue, and fewer than one in sixty were told primarily in another language.

When weighted to size of population the variance becomes even starker

Representation Gap				
Group	Aus Pop (%)	Aus Films (%)	Var (%)	Findings
Indigenous Languages (First Nations)	3.2%	1.3%	-1.9%	59% under-representation
LOTE (Non-English, Non-Indigenous)	22.8%	4.5%	-18.3%	80% under-representation
Primarily English	74%	94.2 %	20.2%	27% over-representation

KEY TAKEAWAYS

- LOTE and Indigenous films combined **≈ 6%** of Australian releases.
- English-only titles account for more than nine in ten local features.
- Linguistic diversity on screen remains far behind the **22.8%** of Australians who speak a language other than English at home (ABS 2021).
- The last time 94.2% of Australian households spoke English at home was **1966 – 59 years ago.**

FOREIGN FILM ENGAGEMENT INDEX SUMMARY: ‘21–25

The **Foreign Film Engagement Index (FFEI)** measures how closely Australia’s theatrical market reflects the country’s linguistic and cultural diversity. It highlights both the strength of established markets such as Indian cinema and the untapped potential across under-represented diaspora communities.

The table below summarises the top-ranked language groups by FFEI score, combining diaspora size, screen access, and box-office response

Foreign Film Engagement Index 2025						
Language / Region	Pop. Share	Box Office (A\$M)	BO Share %	FFEI Score	Market Status	Growth Potential
All Indian Languages	4.2%	\$157.7	3.86%	94	Established	Sustained growth; model for diaspora success
Chinese Languages	3.9%	\$30.2	0.74%	80	Expanding	Major gap in mainstream exhibition
Filipino / Tagalog (Philippines)	0.9%	\$15.0	0.04%	47	Emerging	Rapid community growth; no dedicated supply line
Vietnamese	1.3%	\$1.3	0.03%	45	Emerging	Diaspora market forming; needs access investment
Greek / Italian (Southern Europe)	1.8%	\$3.8	0.09%	40	Mature niche	Stable but limited to heritage circuits
Arabic / Turkish (Middle East)	1.4%	-	\$0.8	40	Emerging	Potential via targeted diaspora circuits
Spanish (Latin America / Europe)	0.7%	\$5.7	0.14%	39	Niche	Cultural festival driven; minimal commercial titles
Nepali / Korean / Indonesian / Thai (Asia Cluster)	0.6% avg	\$8.9	0.22%	38	Developing	High potential; youth-led audience expansion

Population shares use ABS 2021 Census as a stable baseline; GBO uses 2021–2025 reported grosses. The FFEI compares audience base to multi-year market response. Using a single census baseline avoids volatile mid-year estimates and still reveals directionally correct alignment gaps.

Interpretation

The table below summarises the top-ranked language groups by FFEI score, combining diaspora size, screen access, and box-office response.

The **FFEI** highlights how diaspora potential, programming access, and commercial response intersect. Expanding non-Anglophone releases from 8.6 % to 12 % of total GBO could generate **approximately A\$140 million** in additional revenue over five years, while helping screen agencies identify and nurture underserved cultural markets.

These disparities in engagement point to a deeper structural issue: how foreign-language films reach audiences in the first place. The following section examines the distribution and exhibition dynamics that enable certain markets, like India, to thrive while leaving others effectively invisible. The contraction in distributor numbers since 2023 has occurred entirely outside the studio system.

All 37 inactive companies fall within the independent, event, or language-specialty tiers; the parts of the market most exposed to rising costs, reduced marketing support, and limited screen access.

Most were micro-independents or sub-regional importers whose roles have since been absorbed by larger operators, confirming that market fragility lies not in the industrial core but in the cultural periphery where new and diverse voices emerge.

Notable Omission

Despite producing nearly 1,000 films annually, **Nigeria** had only one theatrical release in Australia between 2021 and 2025 (FFEI = 9/100). This underscores the near-total absence of one of the world's most prolific film industries from Australian screens.



THE DISTRIBUTION AND MARKETING CHALLENGE

These disparities point to a deeper structural issue: how foreign-language films reach Australian audiences; or fail to.

The success of Indian cinema in Australia was not accidental. It grew from sustained investment in acquisition, marketing, and audience development over two decades. Distributors such as Mindblowing Films and major exhibitors like Hoyts committed programming time, promotional resources, and community engagement to build a consistent pipeline of titles and trust with audiences.

Having dedicated film distributors in Australia who truly understand their audience makes a significant difference to a film's box office success. Given our country's rich diversity of cultural and language groups, it's essential to work with professionals who know how to market directly to each target audience in a way that cuts through and is effective

Louis Georg – Hoyts Cinema, Programmer

By contrast, most other language markets remain dependent on festival exposure or one-off imports rather than structured acquisition and marketing strategies. The result is low visibility, limited screening availability, and little continuity from one release to the next. Building comparable success requires a coordinated effort that sources commercial titles beyond the festival circuit, promotes directly within diaspora networks, and ensures cinemas allocate consistent programming space.

Film is hard. The shift to digital dominance and micro-targeted advertising for independent and Australian films means most audiences now encounter a campaign only through a poster or trailer in their local cinema; if at all. Despite marketing assets being an explicit Screen Australia deliverable, the quality of materials such as stills, artwork, and trailers often falls well short of the standard expected under a film's contractual obligations to the Australian taxpayer.

A rigorous enforcement of those marketing deliverables would be a powerful first step toward rebuilding audience connection. If Screen Australia applied its own requirements with the same discipline used for production milestones, it would instantly improve discoverability and public perception of local films. Beyond compliance, programs modelled on the New Zealand Film Commission's Marketing Grant could breathe new life into the craft of poster design, trailer cutting, and key-art development, creative disciplines that remain essential to finding audiences in an oversaturated marketplace.

The *Screen Australia Act (2008)* already empowers the agency to promote and distribute Australian films — responsibilities rarely exercised in practice. Applying those statutory powers with the same rigour devoted to production funding could redefine how Australian cinema connects with its audiences



OPPORTUNITY HOTSPOTS

Australia's linguistic diversity is unmatched in the region, yet much of that richness remains untapped at the box office. The following hotspots highlight where audience demand, community size, and content supply converge to create the strongest opportunities for growth and representation.

Chinese-language (Mandarin and Cantonese): Largest linguistic group yet under-served theatrically. Re-entry possible through Lunar New Year or hybrid festival platforms.

Arabic and Middle Eastern diaspora: No mainstream distributor focus despite a 1.4% population share; potential lies in targeted programming within high-density migrant areas.

Filipino/Tagalog and Nepali markets: Rapidly growing communities in New South Wales and Western Australia with no consistent supplier; potential pilot screenings through community networks.

Korean and Indonesian titles: Cultural popularity outpacing theatrical representation; curated quarterly release programs could capture youth segments.

STRATEGIC TAKEAWAYS

The following takeaways distil the key lessons from Australia's box office performance, the Foreign Film Engagement Index, and the distribution landscape. They identify what drives success, where the barriers lie, and how policy and industry practice can evolve to create a more inclusive and commercially resilient theatrical market.

1. Celebrate what already works.

Indian cinema demonstrates how consistent supply, trusted distributors, and targeted marketing translate into sustainable theatrical success.

2. Bridge the visibility gap.

Countries such as France, China, Japan, and Korea produce world-class films but remain under-screened in Australia.

3. Empower new voices.

Emerging diaspora audiences, including Vietnamese, Filipino, Brazilian, and Iranian communities, represent a quiet frontier. Modest investment in subtitling and community partnerships could yield measurable returns.

4. Address total absences.

Nigeria's FFEI score of 0.02 underscores a near complete absence of representation. Simplified import pathways and festival showcases could begin to repair that blind spot.

5. Measure progress, not sentiment.

Annual FFEI updates can benchmark access and representation alongside traditional metrics.

6. Strengthen the Final Link: From Screen to Audience

The future of a diverse and sustainable cinema market depends on connecting what is made with those who are meant to see it. Strengthening this final link requires investment in both the audiences who sustain cinemas and the marketing readiness that ensures films can reach them effectively.

a. Invest in Audience Development

Lasting growth depends not only on the supply of diverse films but also on the audiences ready to receive them. Strategic support for audience development, education, outreach, and partnerships with exhibitors builds the foundation for a stronger and more inclusive market. It ensures that cultural and commercial investment reaches the people who will ultimately sustain Australian cinema.

b. Strengthen Marketing Readiness

Equally important is ensuring that films enter the marketplace with useable marketing assets. Trailers, key art, stills, and promotional materials must be available, accessible, and adaptable for cinemas and media partners. Without these tools, even strong films struggle to find audiences. Incorporating marketing readiness into development and distribution support would close a critical gap between creative intent and audience connection.

CONCLUSION

Australia's cinema ecosystem tells an incomplete story.

While streaming services deliver a polyglot of global content, theatrical screens still reflect an older monoculture. The Foreign Film Engagement Index shows that only 8.6 per cent of box-office receipts and fewer than 10 per cent of releases come from non-English-language markets, despite audiences who speak hundreds of tongues and fill foyers from Western Sydney to Perth's southern corridor.

The economic opportunity is clear.

If non-Anglophone films increased their share from 8.6% to 12%, the gain would exceed **A\$140 million in additional GBO over five years**. Singapore represents the high-water mark for foreign-language box office share at around 20%, positioning Australia's 12% target as ambitious yet achievable. That growth requires no subsidy, only the consistent supply and marketing pathways already proven by Indian cinema.

Future Audiences

In the dark of a cinema, stories travel further than words. To widen that light is not a gesture of inclusion alone; it is a recognition that Australia's future audiences are already multilingual, and that the business of cinema can grow by speaking their language.

The Case for Including Exhibition in the Screen Australia Act

What began as an investigation into foreign film opportunities at the Australian box office ends with a sobering twist. The reality of Australian cinema hits you in the face like the final scene of *Gallipoli*: sudden, devastating, and impossible to ignore.

The Screen Australia Act (2008) empowers the agency to develop, produce, promote, and distribute Australian programs, yet it stops short of explicitly supporting exhibition. The current system backs the truck up to the loading dock but never opens the roller door.

Without this final link, national screen policy remains incomplete. Ensuring that Australian films are seen on Australian cinema screens requires more than production



funding. It depends on accessible venues, diverse programming, and audiences who recognise their own stories on screen. It also requires films that arrive in the marketplace with useable marketing assets: trailers, key art, stills, and materials that cinemas and media can readily deploy to connect those stories with audiences.

A CLOSING REFLECTION

Closing the gap between audience reality and screen supply is a whole-of-sector task. Screen Australia can lead by enforcing marketing deliverables and reporting on access, but lasting change also depends on exhibitors allocating market-appropriate sessions, programming Australian films for their audiences, and continuing to provide world-class entertainment spaces. Distributors must source beyond festival circuits, and producers must deliver market-ready materials. Policy is the lever; programming and supply are the engine.

Film is hard. In a platform-agnostic world, I hope the agency with the clear, primary, and legislated remit over the cinematic remains up to the challenge of serving the art form it was established to nurture.

Screen Australia was created through the 2008 amalgamation of the Australian Film Commission, the Film Finance Corporation, and Film Australia; three agencies whose combined purpose was to develop, finance, and promote Australian cinema. The *Screen Australia Act 2008* enshrined that legacy, charging the new agency to “support and promote the development, production, promotion and distribution of Australian programs” and to “support and promote the development of screen culture in Australia.”

That remit is unambiguous. Screen Australia was built to ensure that Australian film — **the cinematic art form itself** — continues to thrive. Upholding that purpose requires more than investment; it demands cultural leadership, accountability for how films reach audiences, and faith in the enduring power of the big screen.

Nick Hayes – Sydney, October 2025

END CREDITS

With thanks to **Simon Burton at Numero** for the beautiful dataset, to the **Australian Bureau of Statistics** for helping shape the tables and anticipating the chairs; and the **Classification Branch**, I rate your work.

To my many industry colleagues who offered advice, guidance, and the occasional reality check — thank you.

And finally, to **Dad**, for taking me to see *Mit Liv som Hund* at Dendy Martin Place and showing me that the world is full of stories, and to never send a dog into space.

And to **Mum**, for a childhood immersed in epidemiology theses. Like Florence, she knows the power of a good stat to change things for the better.

ABOUT THE AUTHOR

Nick Hayes B.Sc MAICD. is a Sydney-based film executive and analyst with over twenty-five years' experience across exhibition, distribution, and audience strategy in the Australian screen industry. He has held senior roles at the **Sydney Film Festival, Dendy Cinemas, Icon Film Distribution and Umbrella Entertainment**. He currently serves on the board of **The Mercury** – Media Resource Centre in Adelaide and has previously served on the boards of **Independent Cinemas Australia (ICA)**, the **Australian Home Entertainment Distributors Association (AHEDA)** and the **Australian Independent Distributors Association (AIDA)**.

Nick is the creator of the *Know Your Audience* framework and a regular presenter on market insights, audience development and film release strategy at national festivals and industry forums.

Update note (1 November 2025):

“Australian Film Language Composition 2021–2025” section added.

“Supplementary Section” added pages 24-37 - It highlights patterns of distributor activity, output concentration, and efficiency — areas that, while beyond the report’s central findings, provide a valuable reference for policy, investment, and cultural analysis

Minor spelling, grammatical corrections and formatting refinements applied throughout.



NEW SECTION

I awoke the morning after publishing the report having reflected on the Māori language section in New Zealand filmmaking and realised how much of our conversation had focused on language entering Australia rather than what emerges from it. While a degree of lag between the languages spoken at home and their reflection in cultural output is to be expected, and perhaps inevitable, the under-representation of non-English and particularly Indigenous languages on Australian screens was striking.

It is also worth bearing in mind that Māori is an official language of New Zealand, spoken by about four percent of the population according to the 2023 census, and unified as a single national tongue. By contrast, Australia's linguistic diversity is vast. At the time of British settlement, it is estimated that more than 250 distinct Aboriginal and Torres Strait Islander languages, encompassing around 600 dialects, were spoken across the continent. Today the ABS records over 150 Indigenous languages still spoken, though many are critically endangered. It is a sobering reminder of the scale of under-representation when compared with Māori's strong institutional presence in Aotearoa New Zealand.

AUSTRALIAN FILM LANGUAGE COMPOSITION

Added to main report body Pages 11-13

SUPPLEMENTARY SECTION

This section presents supplementary insights not included in the primary report.

It highlights patterns of distributor activity, output concentration, and efficiency — areas that, while beyond the report's central findings, provide a valuable reference for policy, investment, and cultural analysis.

CULTURAL HERITAGE AND LINGUISTIC DATA

TOP TEN

Australia's population is among the most culturally and linguistically diverse in the world.

According to the **2021 ABS Census**, **one in four Australians was born overseas** and **one in five speaks a language other than English at home**.

This diversity shapes not only everyday life but also the composition of potential film audiences across the country.

The following tables list the **top ten countries of birth** and **languages spoken at home**, highlighting the scale and composition of Australia's multilingual communities.

Mandarin, Hindi and Punjabi feature among the fastest-growing languages, reflecting the influence of the **Chinese and Indian subcontinents**, which together represent nearly **nine per cent of Australia's population**.

These groups underpin some of the nation's most dynamic and expanding cinema audiences, offering clear pathways for more inclusive and commercially responsive screen strategies.

Country of Birth			
	Country	Persons	% of Aus
1	England	967 k	3.8
2	India	710 k	2.8
3	China	596 k	2.2
4	NZ	560 k	2.2
5	Philippines	311 k	1.2
6	Vietnam	268 k	1.0
7	Sth. Africa	202 k	0.8
8	Malaysia	172 k	0.7
9	Italy	172 k	0.7
10	Sri Lanka	146 k	0.6

Source: ABS Census 2021

Languages Spoken at Home			
	Language	Persons	% of Aus
1	Mandarin	685 k	2.7
2	Arabic	367 k	1.4
3	Vietnamese	321 k	1.3
4	Cantonese	295 k	1.2
5	Punjabi	239 k	0.9
6	Greek	230 k	0.9
7	Italian	228 k	0.9
8	Hindi	197 k	0.8
9	Spanish	171 k	0.7
10	Nepali	133 k	0.5
Subcontinent Subtotal		1.2M	4.7
Chinese Subtotal		1.0M	3.9



DISTRIBUTION LANDSCAPE

Between 2021 and 2025, **134 unique distributors** released at least one film theatrically in Australia. This consolidated figure accounts for joint-venture and dual-credit partnerships, ensuring every company is counted once regardless of shared or alternate branding.

DISTRIBUTOR STATUS

DISTRIBUTOR ACTIVITY STATUS		
Status	Distributors	Definition
Active	66	Consistently releasing titles (≥ 3 films in 2025, or a 2025 release with 4+ in 2024).
Occasional	31	Low-volume or sporadic distributor (1–2 films in 2025 and fewer than 4 in 2024).
Inactive	37	No theatrical releases in either 2024 or 2025.
JV	-	Grouped with lead Distributor

The active cohort forms the structural core of the sector. It includes the five global studios (Walt Disney, Warner Bros., Sony, Paramount, and Universal), a strong independent middle tier led by AIDA members such as StudioCanal, Transmission, Madman, Palace, Rialto and Sharmill, and a growing number of language-specialty distributors anchored by Indian cinema. Together these companies account for roughly half of all operating entities yet deliver close to 90 per cent of annual release volume.

At the other end of the spectrum, the occasional group plays an intermittent but culturally significant role. Boutique indies such as Titan View, Halo Films and FanForce, small diaspora-language importers like Namaste Entertainment and Spectrum Talkies, and event-cinema specialists including Cinema Live and Fathom Events all contribute irregular titles that extend linguistic and genre diversity. Their output is typically one or two releases per year, often tied to festival circuits or limited-season engagements.



DISTRIBUTION SECTOR INSIGHT

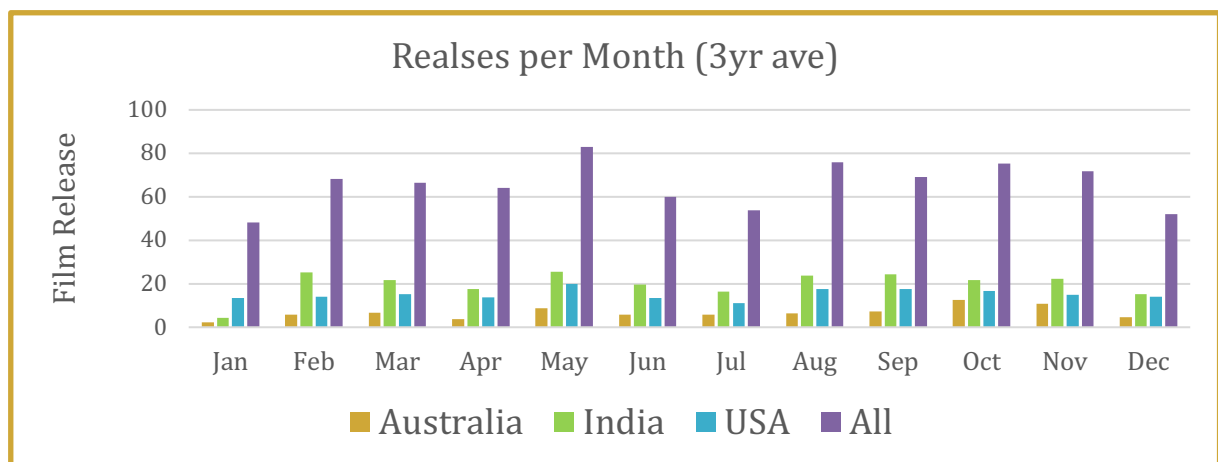
The contraction in distributor numbers since 2023 has occurred entirely outside the studio system.

Every inactive entity sits within the independent, event, or language-specialty tiers of the market — sectors most exposed to rising costs, reduced marketing support, and limited screen access.

More than four in five of the withdrawals were small independents or sub-regional importers whose functions have been absorbed by larger operators or discontinued altogether.

The five global studios and the AIDA middle tier remain stable, confirming that structural fragility lies not in the industrial core but in the cultural periphery where new and diverse voices originate.

Most were micro-independents or sub-regional importers whose roles have since been absorbed by larger operators, confirming that market fragility lies not in the industrial core but in the cultural periphery where new and diverse voices emerge.



WHEN THE MOUSE ATE THE FOX

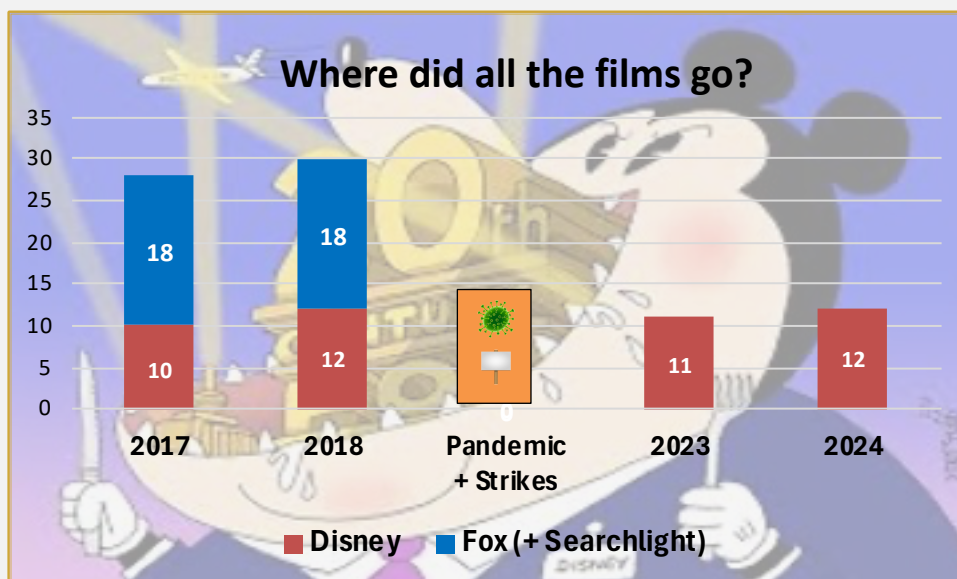
Or how to turn \$71 Billion into minus 20...

With talk of another wave of studio mergers in Los Angeles, it's worth recalling the last great shift: when The Walt Disney Company absorbed 20th Century Fox in 2019. What had once been a powerhouse of diverse, Oscar-winning films was folded into Disney's vast empire, and the result for cinemas? Well, it felt like nothing.

Before the merger, Disney, Fox, and Fox Searchlight combined for about **30 theatrical releases per year** in Australia — **12 from Disney, 12 from Fox, and 6 from Fox Searchlight**. Together, they represented about a third of the Australian box office and a rich blend of genres and tones.

In contrast, since the merger, Disney's output has averaged around **10–12 first-run new films per year**, heavily weighted toward franchise tentpoles and animated features. The rich tapestry of mid-budget dramas and adult-oriented films that Fox once brought to the table largely vanished.

While the merger did bring about a certain kind of content consolidation, it also transformed the creative landscape, **narrowing the diversity** and shifting the focus to more commercially driven content. It's a reminder that while the merger may have been a great deal for Rupert Murdoch, it certainly reshaped what could be seen on the big screen. **The decline in release volume is stark** — the chart below tells the story at a glance.





READING THE NUMBERS

The following tables summarise the key metrics that define Australia's theatrical market between 2021 and 2025. They bring together distributor activity, language representation and genre trends across more than 3,300 releases.


















To make the comparison clearer, this edition introduces *average gross box office (GBO) per film by distributor*, a measure of efficiency as well as scale.

For clarity and readability, the analysis highlights only the **Top 50 distributors by total GBO**, representing more than 95 per cent of all reported box-office revenue. This approach focuses attention on the companies shaping the market rather than listing minor or dormant entities.

Each table should be read not as raw data but as a portrait of how audiences, content and policy intersect across the contemporary release landscape.

Top 50 Distributors by Ave GBO per Film (Active & Occasional)							
	Distributor	Order	Films	GBO (M)	Admits (k)	Ave GBO (k)	Status
1	Warner Bros.	Studio	65	\$751.7	42,060.0	\$11,565	🎬
2	Walt Disney	Studio	91	\$854.6	49,622.9	\$9,391	🎬
3	Universal	Studio	104	\$779.4	47,698.6	\$7,495	🎬
4	Paramount	Studio	61	\$425.5	24,880.4	\$6,975	🎬
5	Sony	Studio	110	\$467.0	28,256.3	\$4,246	🎬
6	Roadshow	Indie	77	\$180.1	11,254.5	\$2,340	🎬
7	Studiocanal	Indie	51	\$108.5	6,865.1	\$2,128	🎬
8	A24	Indie	4	\$5.7	307.5	\$1,415	🎬
9	Transmission	Indie	37	\$35.9	2,726.0	\$970	🎬
10	Moviegoers	Language	11	\$6.2	378.4	\$568	🎬
11	Icon	Indie	27	\$13.7	1,025.1	\$509	🎬
12	Maslow	Indie	29	\$14.6	1,000.8	\$503	🎬
13	Crossroad Legacy	Indie	12	\$5.7	383.4	\$477	🎬
14	VVS Films	Indie	8	\$3.6	228.5	\$455	🎬
15	Madman	Indie	174	\$70.3	4,528.2	\$404	🎬
16	CMC Pictures	Language	54	\$19.4	1,041.3	\$360	🎬
17	Piece of Magic	Event	27	\$9.4	317.3	\$348	🎬
18	Mindblowing	Language	155	\$53.0	3,116.0	\$342	🎬
19	Kismet	Indie	53	\$15.9	1,011.3	\$300	🎬
20	Sugoi Co	Language	13	\$3.6	200.9	\$279	🎬
21	Rialto	Indie	109	\$27.7	2,061.5	\$254	🎬
22	Forum	Language	125	\$30.8	1,755.8	\$247	🎬
23	Trafalgar	Event	92	\$21.8	1,087.6	\$237	🎬
24	Niu Vision	Language	8	\$1.9	104.1	\$237	🎬
25	Pinnacle	Indie	3	\$0.7	53.6	\$229	🍿
26	Magnum	Language	20	\$4.6	263.2	\$228	🎬
27	ABCG Film	Indie	2	\$0.4	29.2	\$215	🍿
28	White Hill	Language	29	\$6.1	365.1	\$212	🎬
29	Signal	Language	26	\$4.9	274.1	\$190	🎬
30	Hi Gloss	Indie	15	\$2.8	178.3	\$183	🎬
31	MKS Retail	Language	39	\$7.1	430.2	\$181	🎬
32	Wanderlust	Language	18	\$3.0	183.3	\$167	🎬
33	Imax	Indie	25	\$4.1	326.5	\$165	🎬
34	Mushroom	Indie	6	\$1.0	62.9	\$162	🍿
35	Palace	Indie	139	\$22.3	1,441.2	\$161	🎬



36	S J Cinemas	Language	25	\$4.0	232.3	\$160	
37	3388 Films	Language	1	\$0.2	8.4	\$152	
38	VAM Paddock	Indie	1	\$0.2	10.9	\$150	
39	Grange House	Language	1	\$0.1	8.5	\$137	
40	Potential	Indie	14	\$1.9	127.8	\$132	
41	Spectrum Talkies	Language	2	\$0.3	16.3	\$131	
42	Umbrella Ent.	Language	51	\$6.6	428.2	\$130	
43	Garage	Indie	12	\$1.5	80.2	\$126	
44	China Lion Film	Language	26	\$3.2	174.0	\$124	
45	Sharmill	Indie	121	\$14.6	855.2	\$121	
46	ABS-CBN	Language	15	\$1.8	99.5	\$120	
47	Home Screen	Language	20	\$2.4	138.4	\$119	
48	Monster	Indie	6	\$0.7	49.3	\$113	
49	Zee Studios	Language	56	\$6.1	381.0	\$109	
50	Cyber Systems	Language	75	\$8.1	468.8	\$108	
Distributor Status:  Active  Occasional							

Top 10 Distributors by Number of Films (2021 – 2025)								
	Distributor	Class	Films	Films%	Total GBO (A\$ M)	Total Admits (k)	ATP	GBO/ Film (A\$ k)
1	Southern Star	Indian Sp	180	5.4%	9.2	603.2	\$ 15.19	50.9
2	Madman	AIDA Member	174	5.2%	70.3	4,528.2	\$ 15.52	403.9
3	Tolly Movies	Indian Sp	171	5.1%	16.9	1,001.9	\$ 16.86	98.8
4	Mindblowing	Indian Sp	155	4.6%	53.0	3,116.0	\$ 17.00	341.7
5	Palace	AIDA Member	139	4.2%	22.3	1,441.2	\$ 15.50	160.7
6	Forum	Indian Sp	125	3.7%	30.8	1,755.8	\$ 17.56	246.6
7	Sharmill	AIDA Member	121	3.6%	14.6	855.2	\$ 17.13	121.1
8	Sony	Hollywood Studio	110	3.3%	467.0	28,256.3	\$ 16.53	4,245.5
9	Rialto	AIDA Member	109	3.3%	27.7	2,061.5	\$ 13.45	254.4
10	Universal	Hollywood Studio	104	3.1%	779.4	47,698.6	\$ 16.34	7,494.6

54 % of all releases / 93 % of total GBO



Top 10 Distributors by GBO (2021 – 2025)								
	Distributor	Class	Films	Total GBO (A\$ M)	Mkt Share %	Total Admits (M)	ATP	GBO Per Film (A\$ M)
1	Walt Disney	Hollywood Studio	91	854.6	20.9%	49.6	\$17.22	\$9.4
2	Universal	Hollywood Studio	104	779.4	19.1%	47.7	\$16.34	\$7.5
3	Warner Bros.	Hollywood Studio	65	751.7	18.4%	42.1	\$17.87	\$11.6
4	Sony	Hollywood Studio	110	467.0	11.4%	28.3	\$16.53	\$4.2
5	Paramount	Hollywood Studio	61	425.5	10.4%	24.9	\$17.10	\$7.0
6	Roadshow	Unaligned Indie	77	180.1	4.4%	11.3	\$16.01	\$2.3
7	StudioCanal	AIDA Member	51	108.5	2.7%	6.9	\$15.81	\$2.1
8	Madman	AIDA Member	174	70.3	1.7%	4.5	\$15.52	\$0.4
9	Mindblowing	Indian Sp	155	53.0	1.3%	3.1	\$17.00	\$0.3
10	Transmission	AIDA Member	37	35.9	0.9%	2.7	\$13.17	\$1.0

5 studios (4 operators) = 81 % of GBO | 150 others = 19 %

KEY INSIGHTS:

Indian-language distributors now drive release volume.

Four of the top six companies by number of releases — Southern Star, Tolly Movies, Mind Blowing Films, and Forum Distribution — are Indian Specialty distributors, together accounting for more than one-third of all theatrical releases in Australia between 2021 and 2025.

Madman leads the independent sector by scale and consistency.

With more than 170 titles and over \$70 million in GBO, Madman Entertainment remains the largest Australian-owned distributor by both output and revenue, anchoring the national independent release framework.

Sony and Universal stand-alone across both volume and revenue rankings.

Among the major studios, Sony Pictures and Universal Pictures are the only two to appear in the Top 10 for both release volume and box-office gross — demonstrating a balance of consistent throughput and strong per-title performance.

Hollywood concentration remains dominant.

The five global studios (Disney, Warner Bros., Universal, Paramount, and Sony) command roughly 85–87% of total Australian box office, despite representing less than 10% of all distributors by number.



Independent and language specialists sustain diversity.

Non-studio distributors including: Madman, Palace, Rialto, Sharmill, Umbrella and the leading Indian-language specialists; deliver the majority of Australian, documentary, and LOTE titles, ensuring cultural and linguistic breadth even with a modest share of GBO.

Mind Blowing Films anchors the Indian-language market.

With more than \$50 million in GBO and an average of \$340,000 per title, Mind Blowing Films is now the top Indian-language distributor in Australia, driving audience growth across Hindi, Tamil, and Telugu cinema.

TOP 10S FILMS


For the Period January 2021 until Aug 2025

🌐 Top 10 Films				
Rank	Title	Distributor	GBO (A\$ M)	
1	<i>Avatar: The Way of Water</i>	Walt Disney	93.8	*
2	<i>Top Gun: Maverick</i>	Paramount	93.5	*
3	<i>Barbie</i>	Warner Bros.	86.5	*
4	<i>Spider-Man: No Way Home</i>	Sony	81.8	*
5	<i>Deadpool & Wolverine</i>	Walt Disney	67.8	
6	<i>Minecraft Movie, A</i>	Warner Bros.	56.3	
7	<i>Inside Out 2</i>	Walt Disney	55.5	
8	<i>Super Mario Bros. Movie, The</i>	Universal	51.8	
9	<i>Moana 2</i>	Walt Disney	51.6	
10	<i>Wicked: Part One</i>	Universal	48.6	


* Have entered the Top Ten off all time

The top ten global studio titles accounted for **17% of all Australian box office** between 2021 and 2025, with four films alone generating more than 7% of total ticket sales. The market remains highly concentrated, dominated by US franchises.



 Top 10 Australian Films			
Rank	Film	Distributor	GBO (A\$) M
1	<i>Elvis</i>	Warner Bros.	33.6
2	<i>Peter Rabbit 2: The Runaway</i>	Sony	22
3	<i>Dry, The</i>	Roadshow	20.8
4	<i>Furiosa: A Mad Max Saga</i>	Warner Bros.	10.2
5	<i>Mortal Kombat</i>	Warner Bros.	9.3
6	<i>Penguin Bloom</i>	Roadshow	7.5
7	<i>Force of Nature: The Dry 2</i>	Roadshow	7.3
8	<i>Runt</i>	StudioCanal	6.1
9	<i>Better Man</i>	Roadshow	5.3
10	<i>John Farnham: Finding the Voice</i>	Sony	4.5

The ten highest-grossing Australian films delivered **67% of all local box office**, underscoring a hit-driven domestic market. Elvis and Peter Rabbit 2 together contributed almost one-third of total Australian revenue.

 Top 10 Indian Films			
Rank	Title	Distributor	GBO (A\$) M
1	<i>Pathaan</i>	Mind Blowing Films	5.1
2	<i>RRR</i>	Sarigama Cinemas / Forum Films	4.9
3	<i>Jawan</i>	Mind Blowing Films	4.8
4	<i>Leo</i>	Southern Star International	4.3
5	<i>Gadar 2</i>	Zee Studios / Mind Blowing Films	3.9
6	<i>KGF Chapter 2</i>	Forum Films	3.7
7	<i>Animal</i>	Mind Blowing Films	3.5
8	<i>Kalki 2898 AD</i>	Southern Star International	3.2
9	<i>Vikram</i>	Southern Star International	2.9
10	<i>Pushpa: The Rise</i>	Sarigama Cinemas	2.8

The leading ten Indian titles grossed **A\$39 million**, representing **69% of Indian-language box office in Australia**. Consistent supply from Mind Blowing Films, Southern Star, and Forum Films has driven record growth in the Hindi, Tamil, and Telugu segments.

The Australian theatrical market remains **highly concentrated**.

The five major studios—Disney, Universal, Warner Bros., Sony and Paramount, generate more than 80 per cent of total box-office revenue, while releasing only a small fraction of total titles. In contrast, independent, language-specialty and culturally aligned distributors account for the majority of releases, ensuring that diverse voices and communities continue to appear on Australian screens.

This balance between global scale and local specialisation defines the character of Australian exhibition: studios drive revenue; independents drive representation and cultural depth.

Nick Hayes – Sydney, 1st November 2025



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APPENDIX A — METHODOLOGY AND FOREIGN FILM ENGAGEMENT INDEX

Methodology

The following section outlines the data sources and index construction used throughout this report. The Foreign Film Engagement Index (FFEI) combines demographic, access, and box-office data into a single comparative measure of how closely Australia’s theatrical market aligns with its multicultural population. Weighting favours diaspora potential (40%), theatrical access (30%), and box-office response (30%) across non-Anglophone markets only.

FOREIGN FILM ENGAGEMENT INDEX (FFEI)

The FFEI uses verified Australian gross box office (GBO) data for January 2021 to August 2025 and ABS 2021 Census population estimates.

Each country’s score draws on three weighted dimensions:

Diaspora potential (40 per cent) – proportion of Australian residents born in or with heritage from that country

Access (40 per cent) – share of that country’s annual film output that received theatrical release in Australia

Box-office response (20 per cent) – that country’s share of Australian GBO across 2021–2025



All variables were normalised to a 0–1 scale, then multiplied by 100 to produce a final score out of 100, where **100 represents full alignment** between audience base, access, and market response:

$$\text{FFEI} = 100 \times (0.40 \times \text{Diaspora} + 0.40 \times \text{Access} + 0.20 \times \text{Box-office})$$

The model focuses on non-Anglophone markets, since approximately **91.4 per cent** of Australian box-office revenue already derives from English-language titles. This isolates the gaps in access, programming, and commercial recognition of multilingual audiences.

Scope

Markets covered: Non-Anglophone only (excluding USA, UK, Australia, New Zealand, Canada, Ireland, South Africa).

Data sources: Reported Australian GBO (2021–Aug 2025) and ABS 2021 Census.

Base total GBO: A\$ 4.09 billion

Non-Anglophone share: $\approx 8.6\%$ of total Australian box office

Foreign Film Engagement Index (FFEI)												
Country	Film Prod / Year	Releases In Study	GBO	Est. Residents In Au	Diaspora %	Ave Annual Releases	Access %	Diapora Potential	Access Score	BO Score	FFEI	Comment
India	2000	1,015	157,748,228	673,357	2.65%	218	10.88%	0.96	0.90	1.00	94	Established Market
China	900	128	30,263,733	701,958	2.76%	27	3.05%	1.00	0.90	0.19	80	Expanding Market
Philippines	120	16	5,720,140	293,902	1.16%	3	2.86%	0.42	0.75	0.04	48	Potential Market
Vietnam	90	15	1,287,655	258,000	1.01%	3	3.57%	0.37	0.75	0.01	45	Potential Market
Italy	150	53	1,594,956	163,321	0.64%	11	7.57%	0.23	0.75	0.01	40	Potential Market
Nepal	30	26	2,720,354	122,487	0.48%	6	18.57%	0.17	0.80	0.02	39	Potential Market
France	300	151	38,080,777	36,023	0.14%	32	10.79%	0.05	0.80	0.24	39	Potential Market
Japan	600	94	32,070,885	45,267	0.18%	20	3.36%	0.06	0.80	0.20	39	Potential Market
South Korea	200	78	10,500,153	100,147	0.39%	17	8.36%	0.14	0.80	0.07	39	Potential Market
Hong Kong	60	29	4,360,302	101,323	0.40%	6	10.36%	0.14	0.80	0.03	38	Potential Market
Germany	200	28	16,197,819	128,669	0.51%	6	3.00%	0.18	0.70	0.10	37	Potential Market
Thailand	100	10	3,979,461	83,771	0.33%	2	2.14%	0.12	0.65	0.03	31	Potential Market
Greece	40	4	1,594,956	92,310	0.36%	1	2.14%	0.13	0.60	0.01	30	Nascent / Limited Access
Pakistan	90	8	190,433	89,633	0.35%	2	1.90%	0.13	0.55	0.00	27	Nascent / Limited Access
Brazil	150	3	931,641	46,734	0.18%	1	0.43%	0.07	0.45	0.01	21	Nascent / Limited Access
Mexico	110	5	66,856	6,843	0.03%	1	0.97%	0.01	0.40	0.00	16	Nascent / Limited Access
Argentina	90	3	967,781	17,979	0.07%	1	0.71%	0.03	0.45	0.01	19	Nascent / Limited Access
Chile	4	3	903,330	29,853	0.12%	1	16.07%	0.04	0.70	0.01	30	Nascent / Limited Access
Turkey	100	11	941,029	38,561	0.15%	2	2.36%	0.05	0.45	0.01	20	Nascent / Limited Access
Egypt	90	15	9,948	43,188	0.17%	3	3.57%	0.06	0.35	0.00	17	Nascent / Limited Access
Iran	120	8	846,132	70,905	0.28%	2	1.43%	0.10	0.40	0.01	20	Nascent / Limited Access
Nigeria	1000	1	5,599	12,865	0.05%	0	0.02%	0.02	0.20	0.00	9	Nascent / Limited Access
Geographical Regions / Groupings				FFEI Weightings								
South Asia				Diaspora Score	Access Score	Box Office Score						
Northeast Asia				0.40	0.40	0.20						
Southeast Asia				Survey Period GBO			4,090,199,363					
Europe												
Latin America				Australian Pop			25,422,793					
Middle East & North Africa												
Sub-Saharan Africa												



Global Production					
Country	Est. Films per Year	Releases in Au	Ave Film / Yr	% Released in Au	Notes
Australia	80	348	75	93.2%	Screen Australia
New Zealand	35	34	7	20.8%	NZFC, UIS
India	2,000	1015	218	10.9%	NFDC, UNESCO
Nigeria	1,000	1	0	0.0%	Nollywood (multiple sectors)
China	900	128	27	3.0%	China Film Administration, UNESCO
USA	800	773	166	20.7%	MPA Theme Report, UNESCO
Japan	600	94	20	3.4%	VIPO, UNESCO
UK	300	264	57	18.9%	BFI, UNESCO
France	300	151	32	10.8%	ONC France
Germany	200	29	6	3.1%	FFA, UNESCO
South Korea	200	78	17	8.4%	KOFIC
Italy	150	54	12	7.7%	MIC (Italy), UNESCO
Brazil	150	3	1	0.4%	ARQINE
Philippines	120	16	3	2.9%	FDCP, UNESCO
Spain	120	16	3	2.9%	ICAA, UNESCO
Iran	120	8	2	1.4%	Farsabi Cinema Foundation
Russia	110	7	2	1.4%	Russian Ministry of Culture, UNESCO UIS, EFARW
Mexico	110	5	1	1.0%	IMCINE, Observatorio Iberoamericano, UNESCO UIS
Thailand	100	10	2	2.1%	Thailand Film Office
Indonesia	100	5	1	1.1%	Indonesian Film Board
Bangladesh	100	8	2	1.7%	BFA, local sources
Turkey	100	11	2	2.4%	Turkish Film Council
Vietnam	90	15	3	3.6%	Vietnam Cinema Dept.
Pakistan	90	8	2	1.9%	PTV + Industry est.
Egypt	90	15	3	3.6%	Egyptian Chamber of Cinema, Ministry of Culture, UNESCO UIS
Argentina	90	3	1	0.7%	INCAA, Observatorio Iberoamericano, UNESCO UIS
South Africa	80	2	0	0.5%	NPVF (SA), UNESCO
Malaysia	80	0	0	0.0%	FINAS
Colombia	80	1	0	0.3%	Proimágenes Colombia
Ukraine	80	1	0	0.3%	Ukrainian State Film Agency, UNESCO UIS, EFARW
Hong Kong	60	29	6	10.4%	HK Film Development Council
Venezuela	60	0	0	0.0%	ONAC Venezuela, Observatorio Iberoamericano, UNESCO UIS
Greece	40	4	1	2.1%	Hellenic Film Commission
Ethiopia/Eritrea	40	0	0	0.0%	Independent/diaspora sector
Myanmar (Burma)	40	0	0	0.0%	UNESCO, recent drops
New Zealand	35	34	7	20.8%	NZFC, UIS
Ireland	35	16	3	9.8%	Screen Ireland
Nepal	30	26	6	18.6%	Nepal Film Development Board
Sri Lanka	25	0	0	0.0%	National Film Corp.
Lebanon	20	2	0	2.1%	Industry est.
Afghanistan	Ltd	0	0	0.0%	Mostly non-commercial or diaspora-led
Fiji	Ltd	0	0	0.0%	Sporadic productions
Tonga/Samoa	Ltd	0	0	0.0%	Very rare (diaspora-driven)
Sudan/S. Sudan	Ltd	0	0	0.0%	Conflict-limited; mostly diaspora/festival



FEEI Report Country or Group	Total Persons
Australia	17,019,823
UK	1,105,530
China	701,958
India	673,357
NZ	530,485
Middle East	319,916
Philippines	293,902
Vietnam	258,000
South Africa	189,210
Malaysia	165,600
Italy	163,321
Pacific	162,027
Sub-Saharan Africa	153,280
Balkans	141,815
Sri Lanka	131,908
Germany & GSR	128,669
Nepal	122,487
Korea	102,086
USA	101,323
Greece	92,310
Pakistan	89,633
Indonesia	87,076
Thailand	83,771
Ireland	80,934
Benelux	73,717
Iran	70,905
Singapore	61,054
Afghanistan	59,795
Bangladesh	51,504
Canada	50,213
Brazil	46,734
Polan	45,893
Japan	45,267
Europe Other	42,521
Myamnnar	39,182
Cambodia	39,042
Turkey	38,561
France	36,023
Malta	35,409
Columbia	35,024
Chile	29,853
Russia	23,859
Argentina	17,979
Spain	17,270
Portugal	17,052
Cyprus	16,739
Hungury	16,654
Romania	15,270
Ukraine	14,063
Nigeria	12,865
Bhutan	11,988
Peru	11,523
Israel	11,035
Laos	10,953
Sweden	10,853
El Salvador	10,130
Uruguay	9,217
Denmark	8,885
Finland	7,826
Czech Republic	7,780
Mexico	6,843
Venezuela	6,643
Mongolia	5,391
Brunei	2,962
Other	1,449,895
Total	25,422,793

Region	Total Persons
Australia	17,019,823
UK & RI	1,186,464
Indian Sub Continent	1,140,672
S.E. Asia	1,041,542
European	891,987
China	701,958
NZ & Pac	692,512
Middle East	440,417
Anglophone	239,423
Sub-Saharan Africa	166,228
North Asia	152,744
LatAm	127,212
USA	101,323
Brazil	46,734
Embargoed	23,859
Other	1,449,895
Total	25,422,793



APPENDIX B — COMPARATIVE MARKET DATA

The following table provides contextual benchmarks for Australia against other English-language and regional markets. It draws on publicly available exhibition and distribution data (2024–2025) and summarises market scale, local-film share, and relative foreign-language performance.

This comparison shows how Australia’s box-office composition sits below peers such as Singapore and Canada in both diversity and non-English engagement.

How Australia Compares to Other English-Language Markets						
Metric	Australia	NZ	UK	USA	Canada*	Sin #
Screens	~2,300	~400	~4,500	~40,000	~3,500	~300
Local films on screen	3–6 %	5–10 %	7–10 %	90–95 %	6–8 %	5–10 %
Foreign-language GBO share	5–10 %	~5 %	8–12 %	3–5 %	7–10 %	15–20 %
Indian film releases	Very high	High	High	Very high	High	Very high
Chinese / Korean films	Moderate	Medium	Low–medium	Moderate	Low	High
European films	Medium	Low	High	Medium–low	Medium	Medium

* Canada data influenced by francophone regions.

Singapore is multilingual, with significant Chinese and Indian heritage populations.



APPENDIX C — LANGUAGE COVERAGE AND DISTRIBUTION CLASSIFICATION FRAMEWORK

This appendix outlines how distributors and titles were classified for analysis and for construction of the Foreign Film Engagement Index (FFEI).

Classification System

Based on reported GBO for January 2021 – August 2025, distribution companies were grouped according to the predominant type of content in their slate.

Order	Event	Indies	Language	Studio
Class	Event screenings ¹ .	AIDA Member ² . Unaligned Indie ³ .	Chinese ⁴ , Filipino, Indian ⁵ , Iranian, Japanese /Anime, Middle Eastern/ Nth Africa/ Turkey ⁶ , Vietnamese.	Hollywood Studio ⁷ .

¹. Limited, one-off or short-run cinema sessions i.e. Taylor Swift's *Eras* and *Andre Ruie Waltz again*
²Members of the Australian Independent Distributors Association (AIDA), incl. Madman, Studio Canal Icon and Umbrella. ³. Major unaligned player is Roadshow, then Maslow, Reset, Mushroom and smaller / part time companies. ⁴. Chinese includes Mandarin Cantonese and films from China, Taiwan and Hong Kong. ⁵. Includes multiple Indian distributors who operate across a broad language base as well as films from other countries on the Indian sub-continent. ⁶. Combines the Middle East North Africa and Turkey due to the low number of companies. ⁷The Hollywood giants of Paramount, Sony, Walt Disney Company, Universal and Warner Bros.{dist. by Uni in Au}).

LANGUAGE GROUPINGS (FOR FFEI ANALYSIS)

Indian specialty – Hindi, Punjabi, Tamil, Telugu, Urdu, Malayalam, etc.; consistent output via distributors such as Zee Studios and White Hill.

Chinese specialty – Mandarin and Cantonese titles from China, Hong Kong and Taiwan.

Vietnamese, Arabic, Filipino / Tagalog, Thai – community or special-event releases.

Greek, Italian, Spanish – European-language films screened through cultural festivals or limited-season programs.

Korean, Nepali, Indonesian – occasional festival or regional distributor releases.

Language at the Box Office		
Language	Films	(%)
1 English	1,521	45.5%
2 Indian Lan.	1,029	30.8%
3 French	161	4.8%
4 Chinese Lan	155	4.6%
5 Japanese	95	2.8%
6 Korean	75	2.2%
7 Italian	54	1.6%
8 German	31	0.9%
9 Spanish	26	0.8%
10 Nepalese	26	0.8%
11 Arabic	18	0.5%
12 Filipino	16	0.5%
13 Vietnamese	15	0.4%
14 Thai	10	0.3%
15 Turkish	10	0.3%
16 Norwegian	9	0.3%
17 Danish	8	0.2%
18 Urdu	8	0.2%
19 Farsi	8	0.2%
20 Swedish	8	0.2%
21 Russian	6	0.2%
22 Finnish	6	0.2%
23 Indonesian	6	0.2%
24 Portuguese	5	0.1%
25 Greek	4	0.1%
26 Icelandic	3	0.1%
27 Maori	3	0.1%
28 Dutch	3	0.1%
29 Serbian	3	0.1%
30 Czech	2	0.1%
31 Lebanese	2	0.1%
32 Polish	2	0.1%
33 Albanian	1	0.0%
34 Slovenian	1	0.0%
35 Uzbek	1	0.0%
36 Macedonian	1	0.0%
37 White Russian	1	0.0%
38 Romanian	1	0.0%
39 Catalan	1	0.0%
40 Hungarian	1	0.0%
41 Hebrew	1	0.0%
42 Slovakian	1	0.0%
43 Croatian	1	0.0%
44 Nigerian	1	0.0%
45 Malay	1	0.0%
46 N/A	2	0.1%
Source: Numero		

Distributors who became Inactive '21-25

Distributor	Last Release Yr.	Typical Titles / Examples	Market Type	Likely Reason for Inactivity
Antidote	2023	<i>Flyways, Watandar – My Countryman</i>	Australian micro-indie / doco	Small-scale self-release model; post-pandemic attrition
Wallis Releasing	2023	<i>Isla's Way</i>	Regional exhibitor label	Refocused on exhibition; ceased national distro
Jetsen Huashi Wangju Cultural Media	2023	<i>Ride On, Home Sweet Home</i>	Chinese specialty	Mainland-import slowdown; exhibition access limits
Vansan Entertainment	2023	<i>Ponniyin Selvan I, Viduthalai Pt 1</i>	Indian specialty (Tamil)	Consolidated under Southern Star / Forum
Orion	2023	<i>Chal Mann Jeetva Jaiye 2, Naadi Dosh</i>	Indian (Gujarati)	Market absorbed by Mind Blowing / Forum
Last Minute Productions	2023	<i>Baipan Bhaari Deva, Me Vasantao</i>	Indian (Marathi)	Sub-regional supplier withdrawn post-COVID
Graft Entertainment	2023	<i>Ziggy Stardust 50th Anniversary</i>	Event / Music doc	Market fatigue; Trafalgar now dominates
National Amusements	2022	<i>The Day the Music Died</i>	US event content	Single import; not renewed
Cinemaplus	2023	<i>Because We Have Each Other, Petrol</i>	Australian arthouse	One-off producer-driven releases
Crunchyroll	2023	<i>Demon Slayer – To the Swordsmith Village</i>	Anime specialty	Folded into Sony Pictures Releasing / Madman Anime
Breathless Films	2023	<i>Lonesome</i>	Australian drama micro-indie	Production company
Bim Bim Films	2023	<i>Slant</i>	Australian indie	Festival release only
The Story Mill	2023	<i>Evicted! A Modern Romance</i>	Small Australian production house	No ongoing distribution arm
Panoramic Pictures	2023	<i>Disconnect Me</i>	Australian doc	Single digital crossover
RC Films	2023	<i>Money Back Guarantee</i>	Pakistani specialty	Low returns; no further output
Rythmic Films	2022	<i>The Spy Who Never Dies</i>	Australian action indie	Company dormant post-release
Sha Pictures	2022	<i>Everything in Between</i>	Australian drama	One-film producer-distributor
Turningpoint AP	2022	<i>Countryman</i>	Australian documentary	Folded into educational distribution
Daricheh Cinema	2022	Iranian festival titles	Foreign-language specialty	Visa/logistics disruption; streaming focus
Ronin	2022	<i>Lake of Scars</i>	Australian documentary	Transitioned to educational sales