Audiences Speak

It's Time We Listen

Opportunities at the Australian Box Office

By Nick Hayes

Australia Speaks Many Languages. Our Cinemas Should Too.

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, 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.

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 **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	4 390
New Zealand	95.3	132.4	128.7	118.5	110	585
United Kingdom	1 076	1 453	1 634	1 512	1 640	7 315
United States	6 795	8 896	9 260	8 970	9 450	43 371

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.

Release Summary By Distributor Class and Order

Class	Order	No of Dist	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	64	477	$ 239,134,166	15,190,938	$ 15.74
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	6	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 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 continues to come 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 / Country	'21 Census Share	GBO %	GBO Presence	Distribution Mode	Growth Potential
Mandarin / Cantonese	3.9%	0.74%	Very low	Festival & Event	Major gap
Arabic	1.4%	0.02%	None	Sporadic	Gap
Vietnamese	1.3%	0.03%	Minimal	Single-event	Emerging
All Indian Lan.	4.2%	3.86%	Strong	Regular theatrical	Established
Greek / Italian	1.8%	0.09%	Moderate (festival)	Event & cultural	Stable niche
Filipino / Tagalog	0.9%	0.04%	Negligible	Sporadic	Gap
Spanish	0.7%	0.14%	Event (festival)	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.

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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

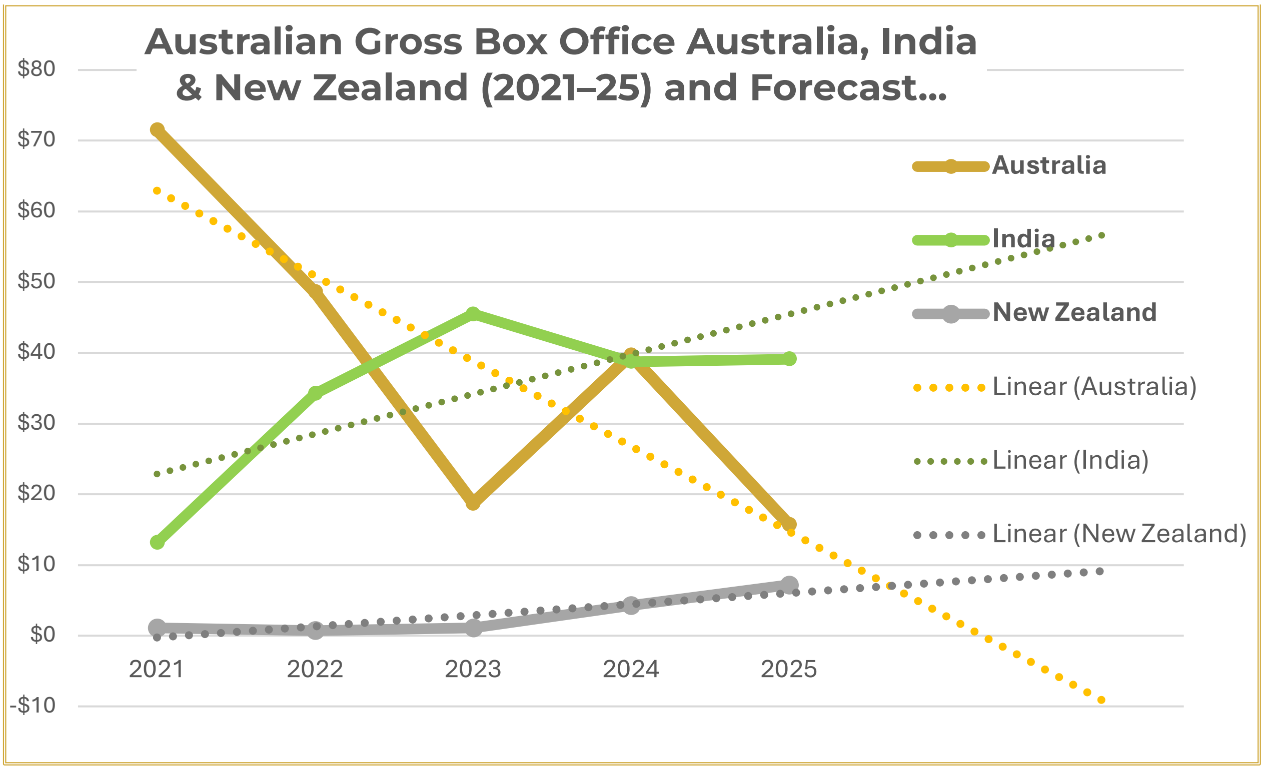
The data reveal an astonishing reversal in performance

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

Furthermore the positions for 2025 are not settled, there is a very real chance that China and France will join India above Australia without even having active full time distributor specialising in that space and

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 have 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 and China 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 local share:** Australian films typically hold a domestic market share in the single-digit to low-teens range, so steady Indian supply can 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 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–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.

Regional Alignment and ASEAN Opportunities

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.

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

Metric	🇦🇺 Australia	🇳🇿 New Zealand
Home-Market GBO (A$)	**$ 188,946,536**	**$ 12,001,067**
Titles Released at Home	242	41
Market Share	4.62%	2.05%
Ave GBO per Title (A$)	$781k	$292K
Titles Released in Other Market (% of toal avail)	**26 Kiwi** films (63.4%)	**36 Aussies** films (14.9%)
Other-Market GBO (A$) (Total Market Share)	**$ 6,524,155** (0.39%)	**$ 2,289,533** (0.16%)
Average GBO per Title in Other Market (A$)	$ 251,698 Kiwi film in AU	$ 63,598 Aussie film in NZ
Indigenous Language Films	7 titles ($1.5 M)	11 titles ($5.2 M)
Cross-Market Share	19% of NZ titles screened in AU	65% of AU titles screened in NZ

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.

NZ "local films on screen" reflects annual programming of NZ features across commercial and festival circuits; session-weighted in some sources.

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.

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.

Top Ranked Countries by FFEI:

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

Language / Region	2021 Census Share	Box Office (A$M)	BO Share %	FFEI Score	Distribution Mode	Market Status	Growth Potential
All Indian Languages	4.2%	$157.7	3.86%	**94**	Regular theatrical	Established	Sustained growth; model for diaspora success
Mandarin / Cantonese (China)	3.9%	$302	0.74%	**80**	Festival event	Expanding	Major gap in mainstream exhibition
Filipino / Tagalog (Philippines)	0.9%	$15	0.04%	**47**	Sporadic	Emerging	Rapid community growth; no dedicated supply line
Vietnamese	1.3%	$1.3	0.03%	**45**	Single event	Emerging	Diaspora market forming; needs access investment
Greek / Italian (Southern Europe)	1.8%	$3.8	0.09%	**40**	Event cultural	Mature niche	Stable but limited to heritage circuits
Arabic / Turkish (Middle East)	1.4%		$0.8	**40**	Festival & community	Emerging	Potential via targeted diaspora circuits
Spanish (Latin America / Europe)	0.7%	$5.7	0.14%	**39**	Event	Niche	Cultural festival driven; minimal commercial titles
Nepali / Korean / Indonesian / Thai (Asia Cluster)	0.6% avg	$8.9	0.22%	**38**	Sporadic	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.

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 Mind Blowing 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

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.

End Credits

With thanks to **Simon Burton at Numero** for the beautiful dataset, and to the **Australian Bureau of Statistics** for helping shape the tables and anticipating the chairs.

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.

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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:

FFEI = 100 × (0.40 × Diaspora + 0.40 × Access + 0.20 × 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: ≈ 8.6 % of total Australian box office

Foreign Film Engagement Index (FFEI)

Country	Film Prod / Year	Releases in Study	GBO	Est. Residents in Au	Dispora %	Ave Annual Releases	Diapora Potential	Access Score	BO Score	FFEI	Comment
India	2000	1,015	157,748,228	673,357	2.65%	218	0.96	0.90	1.00	94	Established Market
China	900	128	30,263,733	701,958	2.76%	27	1.00	0.90	0.19	80	Expanding Market
Philippines	120	16	1,594,956	293,902	1.16%	3	0.42	0.75	0.01	47	Potential Market
Vietnam	90	15	990,916	258,000	1.01%	3	0.37	0.75	0.01	45	Potential Market
Italy	150	53	3,825,187	163,321	0.64%	11	0.23	0.75	0.02	40	Potential Market
Nepal	30	26	2,152,873	122,487	0.48%	6	0.17	0.80	0.01	39	Potential Market
France	300	151	38,080,777	36,023	0.14%	32	0.05	0.80	0.24	39	Potential Market
Japan	600	94	32,070,885	45,267	0.18%	20	0.06	0.80	0.20	39	Potential Market
South Korea	200	78	5,699,507	100,147	0.39%	17	0.14	0.80	0.04	38	Potential Market
Hong Kong	60	29	3,979,461	101,323	0.40%	6	0.14	0.80	0.03	38	Potential Market
Germany	200	28	16,197,819	128,669	0.51%	6	0.18	0.70	0.10	37	Potential Market
Thailand	100	10	967,781	83,771	0.33%	2	0.12	0.65	0.01	31	Potential Market
Greece	40	4	1,168,472	92,310	0.36%	1	0.13	0.60	0.01	29	Nascent / Limited Access
Pakistan	90	8	720,728	89,633	0.35%	2	0.13	0.55	0.00	27	Nascent / Limited Access
Brazil	150	3	903,330	46,734	0.18%	1	0.07	0.45	0.01	21	Nascent / Limited Access
Mexico	110	5	566,196	6,843	0.03%	1	0.01	0.40	0.00	17	Nascent / Limited Access
Argentina	90	3	252,894	17,979	0.07%	1	0.03	0.45	0.00	19	Nascent / Limited Access
Chile	4	3	1,287,655	29,853	0.12%	1	0.04	0.70	0.01	30	Nascent / Limited Access
Turkey	100	11	228,479	38,561	0.15%	2	0.05	0.45	0.00	20	Nascent / Limited Access
Egypt	90	15	846,132	43,188	0.17%	3	0.06	0.35	0.01	17	Nascent / Limited Access
Iran	120	8	604,418	70,905	0.28%	2	0.10	0.40	0.00	20	Nascent / Limited Access
Nigeria	1000	1	5,599	12,865	0.05%	0	0.02	0.20	0.00	9	Nascent / Limited Access

FFEI Weightings

Diaspora Score	Access Score	Box Office Score
0.40	0.40	0.20

Survery Period GBO	4,090,199,363
Australian Pop	25,422,793

Geographical Regions / Groupings

South Asia	
Northeast Asia	
Southeast Asia	
Europe	
Latin America	
Middle East & North Africa	
Sub-Saharan Africa	

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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%	CNC 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%	ANCINE
Philippines	120	16	3	2.9%	FDCP, UNESCO
Spain	120	16	3	2.9%	ICAA, UNESCO
Iran	120	8	2	1.4%	Farabi Cinema Foundation
Russia	110	7	2	1.4%	Russian Ministry of Culture, UNESCO UIS, EFARN
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%	NFVF (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, EFARN
Hong Kong	60	29	6	10.4%	HK Film Development Council
Venezuela	60	0	0	0.0%	CNAC 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	New Zealand	United Kingdom	United States	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-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* [2.]Members 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. [7.]The 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.

Data coverage: Verified against Numero Australia / New Zealand GBO reports and publicly available exhibition listings (Event, Hoyts, Village, Rialto, 2021–2025).

Scope note: Percentages reflect theatrical market share, not production volume.