



Australian Government



Games Production Fund November 2023 - Trends Report

Prepared by the Screen Australia Games team

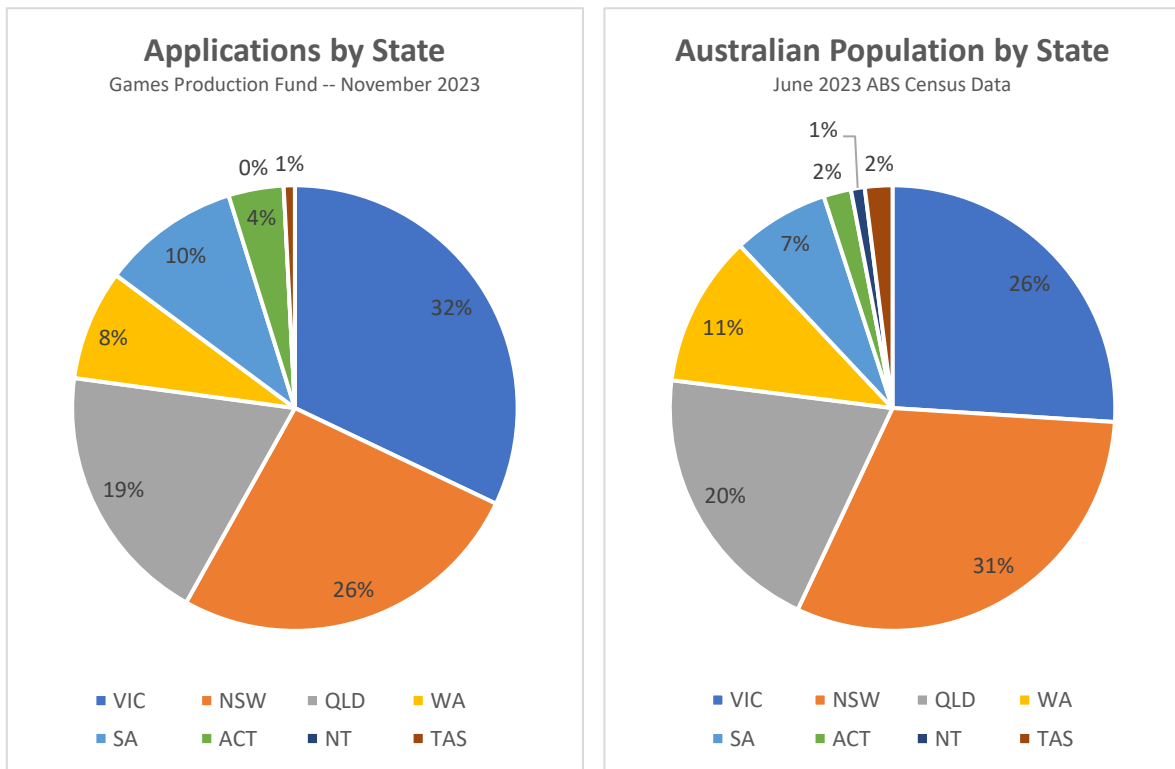
Background

The Games Production Fund was conceived to offer flexible support to Australian gamemakers. This fund is the successor of the Games Expansion Pack, which required that the project’s final milestone was always the public-facing release of the game. The Games Production Fund instead allows gamemakers to self-define a significant milestone of development and submit an application centred around that. Common milestones include early access release, demo, vertical slice, and release.

Data

Screen Australia received 79 eligible applications for the November 2023 round of Games Production Fund, alongside 130 applications for the simultaneous round of the Emerging Gamemakers Fund, making for a total of 209 applications received between both funds this round. This surpasses the number of applications received for both rounds of the Games Expansion Pack (110 in FY 2021/2022 and 186 in FY 2022/2023) and signals a growing awareness of Screen Australia’s games funding across the Australian games sector.

The state split by percentage of applications received is shown in the following graph (left), contrasted with the population split of Australia (right):



While it is excellent to see a high level of demand for games funding, this unprecedented level of demand increases the quality bar of applications that are recommended for funding. With the currently available budget, this allows for an approval rating of around 10-15%, compared to the first round of the Games Expansion Pack, where the approval rate was around 25-30%. In short, the demand for games funding is clearly growing and applications need to be exceptional in order to be competitive enough to receive funding.

Observations

- With the introduction of two new funds to replace the singular games fund (Games Expansion Pack), applicants experienced confusion about their suitability for one fund over the other. Some applications to the Emerging Gamemakers Fund may have been more suitable for the Games Production Fund and vice-versa.
- Uncompetitive applications spent unnecessary time explaining the minutia of common game genres or mechanics (for example, explaining PlayStation as a platform or what an RPG is). Applicants can assume that assessors are fluent in game design and development.
- The general experience of economic recession and job layoffs may have impacted the high volume of applications received.
- A number of applications featured language written by generative AI tools. While Screen Australia does not have a clear policy opposing the use of generative AI, applicants are encouraged to consider that, as assessors see many dozens of applications each round it is always evident when generative AI has been used and due to generative AI's inability to conceive original creative thought, it may not be an appropriate tool in crafting a competitive application for creative cultural funding.
- Many applications were positioned around vertical slice, demo or early access as their significant milestone. This seemed to validate the change from release funding to milestones that can be determined by the applicant and has improved the flexibility and relevance of the available funding.
- Games with **authentic and original voice** continue to stand out amongst the application pool.
- Less competitive applications tend to be highly derivative of existing, released games. They commonly feature design intentions centred on the single-dimension of wanting to iterate on a perceived problem with the design of an existing, released game.
- **Competitive applications were able to demonstrate or articulate what makes their game unique**, in terms of visuals, design, gameplay, gamefeel, story, and mechanics, even if the game sits within an established genre.
- Some uncompetitive applications did not have a strong foundation or premise and could use **more time to develop the concept and vision for the project**. There may be a misunderstanding of expectations around how early it would be appropriate to access funding. All of the projects in question had prototypes, but they were commonly more like a demo of a single feature or gameplay mechanic, rather than a game prototype. It was not yet clear what the game would be through the application materials.
- A number of applications had a history of being learning projects whose scope has evolved to an unviable level. **It is rare for games that first evolved as learning**

projects to be viable in other contexts, especially commercial ones. Those who have succeeded in this space are the exception, rather than the rule.

- The majority of applications received were for premium as their payment model and single-player as the only game mode. Multiplayer games continue to be under-represented in the application pool.
- Many applications with First Nations content were not led by First Nations gamemakers and often lacked adequate collaboration with First Nations people at the time of application.
- The teams behind many of the competitive applications showed **evidence of being embedded in creative community spaces** that enhanced the creative quality and viability of their project. Common examples are those spaces connecting applicants with mentors or senior experts who can advise on projects, or playtesting prototypes early and often, leading to more robust, interesting designs.
- **Accessibility** and inclusivity are priorities for Screen Australia and the application process highlights resources that applicants can use to consider accessibility in their design process. Therefore, **it is generally uncompetitive to forego including accessibility planning in an application.**
- Some applications dealt with **sensitive topics** that would require subject matter experts either on the team or consulted with. We encourage future applicants to conduct or have plans for conducting consultations and/or sensitivity reading.
- **Diversity** of thought in applications tended to come from teams where at least some team members had diverse lived experience.
- **It is generally very difficult to make a last-minute application competitive.** Applicants who gave themselves adequate time to proofread and polish their applications were generally able to submit something more viable and competitive.

Takeaways

Pitch video

- **Exceptional pitch videos typically spent less than one minute talking about what the game is.** They were able to confidently and quickly summarise the game's creative vision. This clarity usually reflects the fact that an idea has been refined to the point of being simple to communicate and typically indicates cohesion and clarity of vision. The remainder of the pitch video is spent talking about the project in bigger terms, addressing questions such as why they are making this project and how it will contribute to their overall career or creative practice goals. Less competitive pitch videos spend the majority of the video speculating about design intentions or game mechanics. Another common mistake was video pitches that were obviously unplanned. This does not mean that applicants need high production values in order to make a competitive pitch video. Rather, they would do well to spend more time thinking about or planning what they are going to use their valuable three minutes to say.
- **Competitive pitch videos tend to talk about their project in terms of how they are relevant to all of the assessment criteria.** Rather than just addressing why their game concept was creatively interesting, competitive applicants spoke about the vision for the game as a project including what they plan to do with the game

and how it will help them grow/learn rather than spending the whole pitch video talking about the design intentions). Competitive pitch videos tended to be well-rehearsed, articulate and easy to follow.

Playable Prototype

- The best prototypes submitted were short and intentional - they showed off something clear and exceptional about the project in a 'quality over quantity' approach.

Production Planning

- Competitive applications had **strong scope across multiple vectors**. There was evidence of research and planning, be that design, games-as-a-product, audience, competitor research etc. They had an awareness of where their project sits in the landscape of released games. Less competitive applications commonly struggled to articulate what their game exactly was envisioned to be or where it would sit amongst the existing games zeitgeist.
- **Localisation** plans were mentioned in many projects that did not include a line-item in the budget for localisation.
- **Producer resources were often not clearly allocated** - either the team had no dedicated producer or it wasn't clear who in the team was doing the production work (negatively impacting against the 'viability' criteria).
- It is **generally uncompetitive to indicate release on a large number of platforms without demonstrating any experience in releasing for them**. While Screen Australia appreciates the ambition behind this intention, unless the applicant is able to demonstrate experience in releasing or porting to these platforms, has a solution in mind to compensate for their lack of knowledge or experience, or notes existing relationships with platform holders, selecting a large number of release platforms works against the applicant in terms of viability.

Strategic Outcomes

- In general, **applications that are able to clearly position their project in the 'big picture' of their ambitions were more competitive**. Uncompetitive applications would typically reduce their ambition to the current project, listing their longer term goals as 'to complete the project' with no context as to why this would be important or impactful for their career or practice. Applicants are encouraged to communicate beyond simply what they are making and also include why they are pursuing their project.
- Regarding **marketing**, a frequent problem was a lack of strategy. Although having marketing and release activities is useful, they are not meaningful unless a clear marketing and release strategy has been defined. A lot of projects presented promotional activities out of context, making it very difficult to understand the worth of such activities.
- Many applications featured games that were confusing in concept and/or execution. This lack of clarity in the project often resulted in a deep or product level problem that the team mistakenly identify as 'marketing challenges'. **A good marketing and release strategy starts with a game product that is well-designed for a clear audience. If the game product is poorly conceived, promoting the product cannot change the deeper problem. A number of applications did not show evidence of this strategy-level work.** If an application includes commercial goals, Screen Australia would expect to see some thought around commercial

'game as a product' strategy and planning in the application. e.g. if the application plans to run an advertising campaign and spend \$10,000 on it, it may be appropriate to provide information about the advertising strategy. This was especially confusing in applications that allocated the majority of Screen Australia funds to marketing activities with no context or strategy as to why such a large portion of funding was allocated to it. While marketing spend can be included in a budget, the Games Production Fund remains primarily a production fund, not a marketing/advertising/promotion fund.