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## Production Infrastructure and Capacity Analysis (PICA) pinpoints four key workforce challenges in the Australian screen industry

**Wednesday 8 April 2026:** Olsberg•SPI's Production Infrastructure and Capacity Analysis (PICA) 2026 study has recognised Australia as a world-class, globally trusted hub for high production value content, while also identifying challenges that could inhibit long-term workforce capacity across screen production, PDV and animation, and digital games.

The study, commissioned by Screen Australia and released today, highlights four clear pressure points that could constrain the local sector's future growth and impact competitiveness in the global market – lack of business scalability, skills gaps, limited career progression and infrastructure constraints.

Screen Australia Chief Operating Officer **Grainne Brunsdon** said, "This study not only reaffirms Australia as a world leader in high value production, it also provides specific guidance on how the sector can navigate a dynamic, ever-changing landscape. I'd encourage screen and games leaders to view these findings as a springboard to tackle the challenges of today and seize the opportunities of tomorrow."

"For those working in production, PDV, animation and digital games, there is strong potential here to recalibrate capacity readiness and sharpen your competitive edge in a fierce global market. The PICA study equips you with the necessary insights to collaborate, act and build a more flourishing economically sustainable industry."

To ensure **economically sustainable business growth** for local companies that are often small and project based, the findings suggest the development of key capabilities that improve scalability and support. Introducing targeted training programs for business development, strengthening the links between academia and industry, forging stronger international partnerships (particularly in the Asia-Pacific region) and stimulating private investment in locally owned content were identified as key improvements to be made.

The study emphasises **training optimisation** to address critical skills shortages and align programs with current industry needs. Increasing interstate initiatives, bridging the gap between industry and education programs, micro-credentials, continuous upskilling and innovative approaches to training programs were recommended to strengthen Australia's competitiveness in the area.

When it came to workforce weaknesses, the study found unclear **career progression and seniority gaps** arose from high rates of attrition and key cohorts aging out of the workforce. To create clearer progression structures and improve work conditions, emphasis was placed on enabling Australian talent to embed in companies internationally, introducing a national grading system for physical production and PDV/animation, improving data collection and analysis, improving job-matching infrastructure and increasing structured mentoring.

Finally, to address **infrastructure challenges**, strengthening inter-organisational coordination, preserving essential industrial areas and supporting new shared workspaces would address limitations in physical facilities. Coordinating sound stage development and capacity planning, preserving access to industrial land for screen-related storage and re-establishing dedicated collaborative workspace for digital games were identified as the key opportunities to address this.

Australian Film Television and Radio School (AFTRS) Chief Executive Officer Nell Greenwood advised on the development of the PICA study and said, "This audit delivers essential, evidence-based insight into our screen industry's capacity and the kind of comprehensive data critical for the industry and training providers to understand and address emerging skills needs and workforce development. As Australia's national screen school, we look forward to working with partners across the sector to implement the recommendations and advance a coordinated national approach to industry training."

Screen Australia commissioned the PICA study in alignment with the *Empower* pillar of the agency's new Corporate Plan, which focuses on equipping industry with valuable insights and research. Later this year, the agency will also release the landmark Screen Currency report measuring the economic, social and cultural value of Australian screen and games production.

Key study findings for physical screen production:

- For below-the-line (BTL) crew, the top five roles identified by hirers as having the greatest capacity concern were Line Producer, Location Manager, Production Accountant, Production Coordinator and Production Manager.

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- Half of the physical production respondents reported a tenure of over 20 years (47%), speaking to the longevity of the industry.
- 77% of surveyed practitioners worked in film, with 59% working in broadcast and 59% in streaming/VOD.
- Nearly two thirds (65%) of professionals work on narrative feature films.
- Most physical production professionals (59%) work primarily in capital cities.

Key study findings for PDV and animation:

- The top five roles identified by hirers as having the greatest capacity concern were VFX Supervisor, Technical Director, Editor, Art Director and VFX Editor.
- Over a quarter (27%) of PDV and animation professionals surveyed had an Australian industry tenure of more than 20 years, with more than half (52%) having worked in the industry between six and 20 years.
- Respondents worked on an average of six international productions in the last three years, twice the average of physical production professionals.
- Almost two thirds (65%) of surveyed practitioners are employed in post-production. A similar proportion of practitioners worked across digital/animation (44%) and VFX (43%).

Key study findings for digital games:

- The top five roles identified by hirers as having the greatest capacity concern were Artist, Programmer, Designer, Producer and Engineer.
- 90% of gamemakers surveyed created PC games, ahead of consoles (68%) and mobile (46%).
- The vast majority of respondents work within indie studios (82%), with only 16% working in AAA studios.
- The largest proportion of digital games makers live in Melbourne, however, 6% less people live in the capital than work there, suggesting that gamemakers travel in from regional Victoria for work, or work remotely for Victoria-based companies.

Read the full PICA study [here](#).

**ENDS**

**About Screen Australia**

Screen Australia is the Australian Federal Government agency charged with supporting the development, production and promotion of Australian narrative, documentary and children's content, across television, feature films, online and games. Screen Australia also administers Australia's Official Co-production program, in addition to the Producer Offset incentive. The agency provides a broad range of resources and opportunities to the industry including access to research, market intelligence and special initiatives. For more information visit [www.screenaustralia.gov.au](http://www.screenaustralia.gov.au).