Games Production Fund
February 2025 – Trends Report

Prepared by the Screen Australia Games Department

Background

The Games Production Fund was conceived to offer flexible support to Australian independent gamemakers. This fund is the successor to the Games: Expansion Pack grant, which required that a project's final milestone be a public-facing release of the game. The Games Production Fund instead allows applicants to self-define a significant milestone of development and submit an application centred around that.

Common milestones include release, Early Access release, vertical slice, and playable demo. Milestones may be focused on either a commercial or a cultural outcome (e.g. festival and/or award submissions).

Data

Screen Australia received 61 eligible applications for the February 2025 round of Games Production Fund, alongside 143 eligible applications for the simultaneous round of the Emerging Gamemakers Fund, totalling to 204 applications in the February 2025 rounds. This is an increase from 173 in the previous round (September 2024) and almost equals the record high number of applications (206 in November 2023, the first round of both the Emerging Gamemakers Fund and the Games Production Fund).

Below is a chart comparison of the three most recent Games Production Fund rounds, breaking down eligible applications submitted per round, categorised by state.
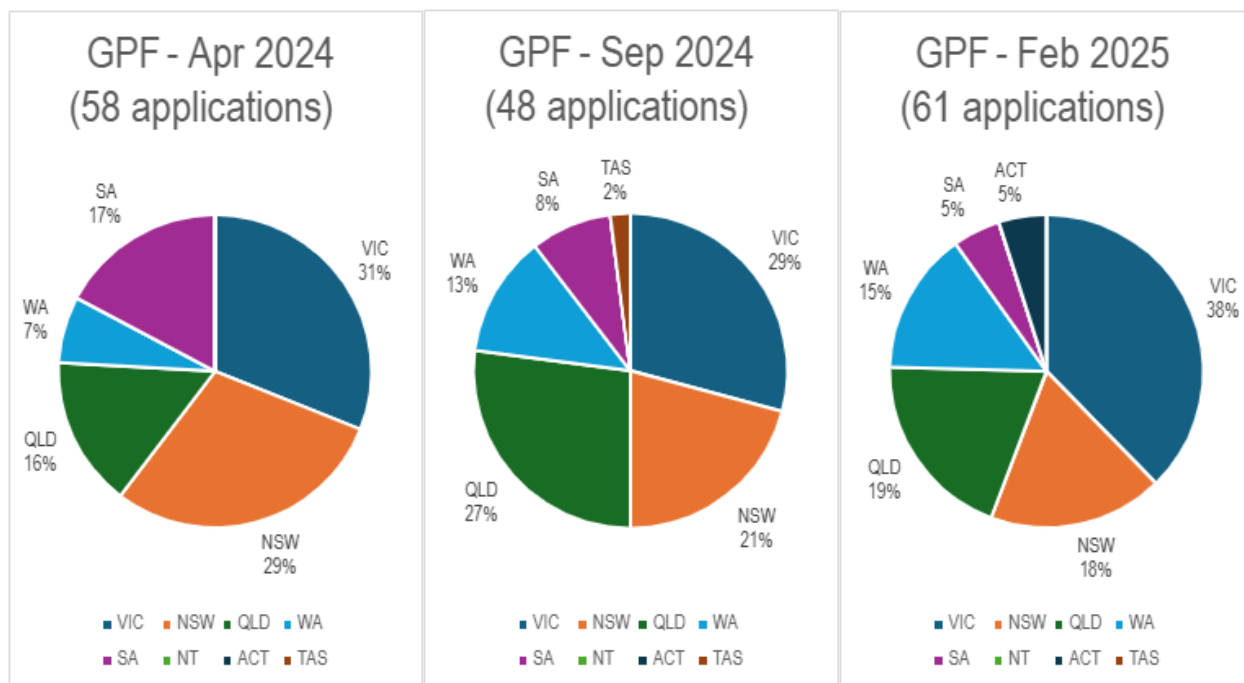
Figure 1. Breakdown of eligible applications submitted by state. April 2024 (left) had 58 applications, September 2024 (middle) had 48 applications, and the latest round, February 2025 (right), had 61 applications.

This round saw an increase in the number of applications to the Games Production Fund, reversing the slight decline we observed over previous rounds. This trend can be partially explained by the presence of projects successfully funded in earlier rounds of the Emerging Gamemakers Fund concluding their grant and seeking production funding.

In addition to an increased volume of applications, the February 2025 round saw the highest quality level of applications so far—continuing the grant's upwards trend of competitiveness.

With the currently available budget, the approval rate for this round was 18%, which is slightly lower than the September 2024 approval rate of 21%. The Games Production Fund approval rate continues to fall below the average Games: Expansion Pack approval rate, which was 24%.

In short, the fund continues to be competitive, and applications need to be exceptional to receive funding.

Observations & Takeaways

Below are observations and takeaways noted by the Screen Australia Games Department that may be beneficial for future applicants when preparing their applications for the Games Production Fund.

Key observations:

- The quality of applications, game ideas, prototypes, and diversity in teams have all increased this round. The projects being submitted are more resolved and have a clearer sense of identity and market positioning.

- This round saw the second batch of projects applying after having received the Emerging Gamemakers Fund, with more than twice as many projects seeking production funding. There is a noticeable level of quality across these applications; the impact of the Emerging Gamemakers Fund is tangible.

- Bespoke, smaller, well curated and prepared prototypes were more effective than prototypes that were simply the latest work-in-progress build of a game.

- Most applications received were premium, single-player titles targeting a Steam release. While console (21%), VR (11%), and Mobile (18%) were still represented (and were most often included where a project was targeting more than one platform), nearly 90% of all applications included PC (Steam) as a target platform. This is representative of both broader industry conditions and also of the scale and size of studio that the Games Production Fund can meaningfully support.

- Many applications were positioned around vertical slice, demo, or Early Access release as their significant milestone (approximately 53% of applications). This seems to continue to validate the change from 'release funding' to 'milestones determined by the applicant' has improved the flexibility and relevance of the grant. While less common, projects targeting a Full Release made up approximately 35% of total applications.

- Some projects targeting an Early Access release did not articulate their project's suitability for this type of release. Some genres of game are better suited to Early Access than others, and more competitive applications include clear explanation of how and why this milestone was chosen.

- We saw an improvement in the number of applications appropriately budgeting for their intended localisation plans. Localisation continues to be an important consideration—particularly considering the high density of projects that self-identify as

Story-driven—and appropriate resourcing is required for this to be viable and competitive.

- We saw several notable shifts in the self-identified genres across this round. Arcade and Roguelike are a smaller percentage of applications when compared to the previous round. We saw a significant rise in applications selecting Action, Adventure, Creature Collector, Wholesome, and Story-driven. The number of games that self-identify as 'experimental' remains lower in Games Production Fund than in Emerging Gamemakers Fund but still represents 5% of total applications. The third-most popular genre tag (after Action and Adventure) this round is Story-Driven at 43% of all applications (up from 23% the previous round), demonstrating the keen desire for Australian gamemakers to tell authentic Australian stories.

- While the most and least popular genre tags still differ significantly between Emerging Gamemakers Fund and Games Production Fund, this divide is narrowing. The presence of more applications from successfully completed Emerging Gamemakers Fund projects only partially explains this change.

- Games Production Fund receives comparatively fewer projects that use Australia as a setting than in Emerging Gamemakers Fund. Despite this, the proportion of projects that use animal or anthropomorphic animals in lieu of human characters remains quite high.

- Many applications indicated accessibility measures that the project would implement but did not substantiate or provide a plan or documentation for this work to be carried out (e.g. in the budget, timeline, and/or production plan).

- Equity, Diversity, Inclusion, and Accessibility is one of four criteria upon which all applications are assessed and are priority areas for Screen Australia. 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 had relatively large team sizes without providing evidence of fair compensation at industry standards. While acknowledging that sweat equity and in-kind work may be prevalent in the industry, particularly at an informal stage of development, Screen Australia funding requires that any contractors involved in a project are compensated fairly. See the Screen Australia Terms of Trade for details.

- The median and most common team size for applications this round was 3 people, slightly reduced from last round, which saw a median and most common team size of 4 people. Almost 90% of applications had between 1 and 6 team members.

- A higher volume of re-applications was noted this round (approximately 38%, up from 26% last round). Of these re-applications, the more competitive ones were those that took on feedback from the Trends Reports, improved on the necessary areas of their application and/or project, and provided clear evidence of these changes in their application—for example, by providing a changelog detailing the updated areas of their application, or by providing stronger, clearer, and more targeted supplementary materials.

- We noted a significant proportion of projects this round (approximately 38%) applied with confirmed funding from other screen agencies. This further reinforces the fact that the Games Production Fund is a highly competitive grant with many projects already proven to be of quality. Additionally, this speaks to the high calibre of gamemakers Australia-wide working on creative and culturally relevant projects.

- We noted a continued trend of teams moving away from proprietary software towards open-source solutions, presumably due to perceived business and reputational risks of using proprietary software.

- We noted a large volume of applications that indicated they were using older versions of gamemaking tools while also targeting console releases. There may be difficulties in porting to or developing for specific platforms while using older versions of these tools.

- The reputation of the applicant alone cannot carry an application. The grant writing quality and the strength of the project and support material must be strong, regardless of an applicant's level of industry experience. Government assessing protocols require detailed, quality information.

- A small number of applications featured language that appeared to be written by generative AI tools. While Screen Australia does not have an explicit policy on the use of generative AI, guiding principles can now be found on the Screen Australia website. Applicants are encouraged to read and adhere to these principles. Applicants are encouraged to consider that, as assessors see hundreds of applications each round, it is evident when generative AI has been used. Due to generative AI's inability to conceive original creative thought, it may not be an appropriate tool in crafting a competitive application for cultural funding.

- A small 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 are the exception, rather than the rule.

- Some applications dealt with sensitive topics that would require subject matter experts either on the team or to be consulted. We encourage future applicants to conduct or

have plans for conducting consultations and/or sensitivity reading, and to include these plans within the application. Budgeting both time and money for these consultations—and the implementation of any changes—also makes these applications more competitive.

- It is generally very difficult to make a last-minute application competitive. Applicants who gave themselves adequate time to proofread and polish their submissions were generally able to submit a more viable and competitive application.

The most competitive applications:

- Used the current templates provided and responded to the guidelines.

- Articulated a clearer sense of the shape of the project, its goals, and how it fits into the applicant's practise.

- Were both concise and comprehensive with the details provided. Competitive applications stuck to the page number restrictions and provided brief contextualising information to ensure assessors could clearly follow the project proposal.

- Had clear alignment in all elements of the application. For example, ensuring that team members were present in both the application and the budget, or ensuring that the project timeline was consistent throughout all documents.

- 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.

- Had others streams of income indicated in their Finance Plan & Budget spreadsheet. This could be pending or confirmed, cash contribution or in-kind. Where sources of finance were mentioned in the application, they were also reflected in the Finance Plan & Budget spreadsheet.

- Had strong and clear visual identity that set it apart from other games in the market. Standing out visually does not exclusively imply photorealism, high fidelity, or polish.

- Had a well-balanced and thought-out video pitch. These videos not only hit all the vital points of a pitch (e.g. who is your team, what is the game, why is your team working on this project, and how will this grant help you), but were also well-planned and prepared, and addressed the assessment criteria. These videos typically spent a minute or less talking about the game itself. Cutting to screenshots or video were also useful to see in video pitches.

- Had a diverse team and their projects reflected this diversity.

- Were able to articulate the importance and timeliness of their project both in terms of their own professional creative practice and the current state of the industry and marketplace.

- Had a strong understanding of the importance of marketing, promotion, and discoverability, and could demonstrate a clear marketing plan for the project and/or identify the marketing expertise and experience within the team. These applications indicated a strategy early in the development process, and prioritised building momentum and audience early.

- Had included a marketing plan that covered a competitor analysis, target audience, and/or player psychographic profiles.

- Knew who their audiences were and could demonstrate their ability to reach them. An audience does not have to be big (i.e. '9–to-99-year-olds who play games' is not the best target audience) and can be a niche underserved audience.

- Provided letters of support from peers, clients, and industry leaders.

- Provided letters of confirmation from team members, collaborators, and stakeholders regarding their commitment to the project.

- Provided thorough and detailed risk analysis and mitigation plans.

- Ensured adequate payment to all workers involved in the project, meeting minimum industry rates or higher.

- Provided bespoke, relevant, succinct, and easily navigated support material.

- Provided realistic milestone dates with adequate buffer time.

The least competitive applications:

- Deviated significantly from the provided templates and/or did not provide detailed responses to all the questions asked. These applications sometimes seemed to rely on favourable assumptions or interpretations by assessors, rather than providing comprehensive explanations that remove doubt.

- Tend to be highly derivative of existing released games. They commonly feature design intentions centred on the single dimension of enjoying and/or wanting to iterate on a perceived problem with the design of an existing released game.

- Spent disproportionate time and effort explaining or focusing on some particular details of the project while ignoring other elements of the application.

- 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 the projects in question had prototypes, but were commonly not representative of the game experience, visually or mechanically.

- The application materials did not provide clarity on what the game would be or how it would play beyond the scope of the submitted prototype.

- Did not have all their submission materials in order (e.g. out of date or wrongly addressed documents) or had missing submission materials and/or broken URLs.

- Had budgets where the allocated Screen Australia expenditure did not match the total Screen Australia ask.

- Did not consider accessibility or diversity at all. Equity, Diversity, Inclusion, and Accessibility is one of the four assessment criteria and should be an important factor of each application.

- Had video pitches that were not well planned, rehearsed, or produced. Uncompetitive pitch videos spent the majority of time speculating about design intentions or possibilities, or specific game mechanics.

- Were too ambitious without strong backing of their ambitions, and without a solid plan with contingencies and risk mitigation.

- Did not include or identify all creative team members in their application, or had missing or inconsistent information about the creative team.

- Did not acknowledge outstanding obligations in their application. If you have received Screen Australia funding and have not completed/acquitted your grant, you must indicate this in your application.

- Did not have a marketing, promotion, and/or discoverability strategy, plan, or expertise to back up their marketing expenditure (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 in detail). These elements are particularly important for projects with commercial ambitions.

- Included a long list of release platforms without demonstrating 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.