



DRAFT Sunshine Coast Region Labour Market Profile

Screen and Digital Games



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Introduction

The Queensland screen and digital games sectors have enormous potential to grow their international reputation and market share. Content created for film, television and digital games educates and entertains a worldwide population with ever changing and diverse tastes, accessible across a variety of platforms. This consumer-driven demand provides ongoing opportunity for Queensland professionals to reinvent and innovate.

Contributing \$493 million (local expenditure) to the Queensland economy during 2023-2024,¹ the sectors helped drive the Queensland economy forward through a broader value chain including:



The Sunshine Coast's screen and digital games ecosystem has demonstrated its ability to continually upskill, evolve and create globally competitive jobs for the future. Through creativity, innovation and intellectual property (IP) creation, essential international relationships are being established to support growing export opportunities and attract international investment to Queensland and the Sunshine Coast.

Locally, there are several individuals making social media content and corporate videos to sustain their income while developing the necessary skills, experience and networks to support a transition to television and/or scripted content. The digital games sector, while largely comprised of indie and sole developers, provides great opportunity for growth if professional networks are encouraged and opportunities to showcase skills and products are provided through events such as a locally hosted Games Jam.

This Sunshine Coast Labour Market Profile has been written to coincide with 'Season of the Dev', hosted by Screen Queensland (funded by Jobs Queensland) and provides a snapshot and in time

picture of the region as of 21 February 2025. The report includes key indicators such as workforce composition, employment and unemployment, business figures, and education and training pathways.

Focusing on the Sunshine Coast Statistical Area Level 4 (SA4), this report provides insights into current supply and demand challenges, helping inform future planning discussions with an aim to create clear direction on how to develop career pathways and opportunities for individuals to gain the skills needed to thrive on the international stage, and to build business capability for local businesses to grow in an increasingly global market.

Much of the information stems from the most recent Australian Bureau of Statistics (ABS) Census of Population and Housing data (2021), however, to provide the most up-to-date statistics and data, where available, data has been obtained from other sources including the Queensland Government Statistician's Office (QGSO). It is important to note that this document should not be read in isolation. Rather it should be read in conjunction with other

¹ Screen Queensland. (2024). *2023-24 Annual Review*. Brisbane: Queensland Government. https://screenqueensland.com.au/app/uploads/2024/10/ScreenQueensland_2023%E2%80%9324_FinancialYearOverview_web.pdf

economic research and data provided by the Sunshine Coast Council, Noosa Council and local Universities which undertake regular research relating to these sectors.

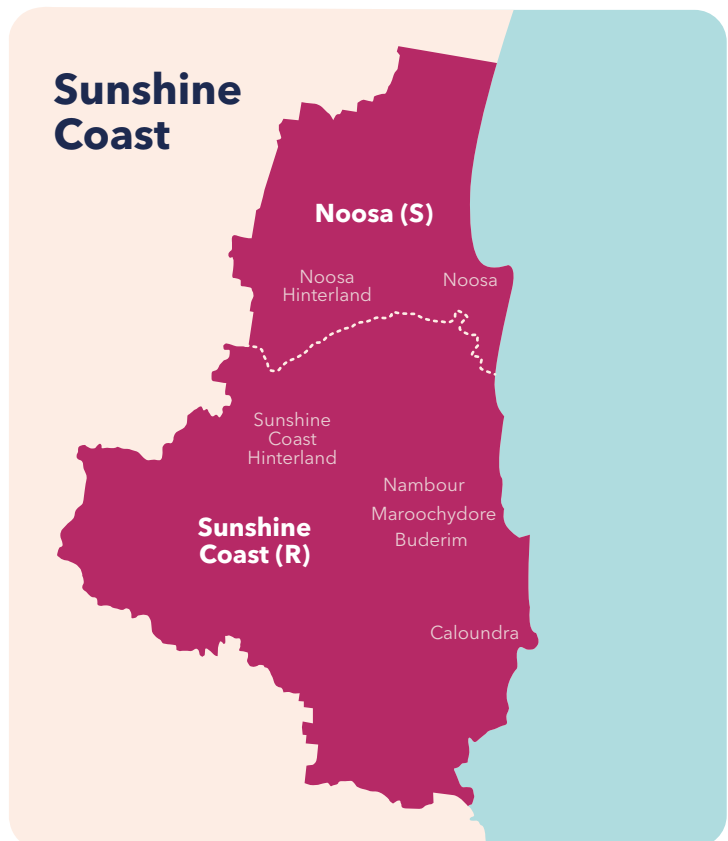
This report also contains an overview of the region’s anticipated growth industries that will drive future jobs demand and skills needs locally.

Key observations and potential future opportunities have emerged from in-region consultation and data within this report. These align to three common themes:



Your region

The Sunshine Coast SA4 has a total land area of 3085.9 km² and is comprised of the seven SA3s of Buderim, Caloundra, Maroochy, Nambour, Noosa, Noosa Hinterland and Sunshine Coast Hinterland.



Source: Queensland Government Statistician’s Office, Queensland Statistical Areas, Level 4 (SA4), 2021 – Sunshine Coast SA4 - <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

Your region's snapshot

SA4 POPULATION DEMOGRAPHICS²



| Estimated total population



| Median age



| Aboriginal peoples or Torres Strait Islander peoples residing in the region



| Born overseas



| Reported requiring assistance with core activities



| Projected population growth

SA4 WORKFORCE AND LABOUR MARKET COMPOSITION³



| Employed persons
January 2025



| Total unemployment rate
January 2025



| Total youth unemployment rate
November 2024

JOBS HELD BY SEX NOVEMBER 2024⁴



| Total female workers



| Total male workers

² Queensland Government Statistician's Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

³ Australian Bureau of Statistics. (2024). *Employed persons by industry division of main job (ANZSIC), labour market region (ASGS) and sex, annual averages of the preceding four quarters, year to August 1999 onwards*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release#data-downloads>

Queensland Government Statistician's Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

⁴ Australian Bureau of Statistics. (2024). *Employed persons by industry division of main job (ANZSIC), labour market region (ASGS) and sex, annual averages of the preceding four quarters, year to August 1999 onwards*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release#data-downloads>



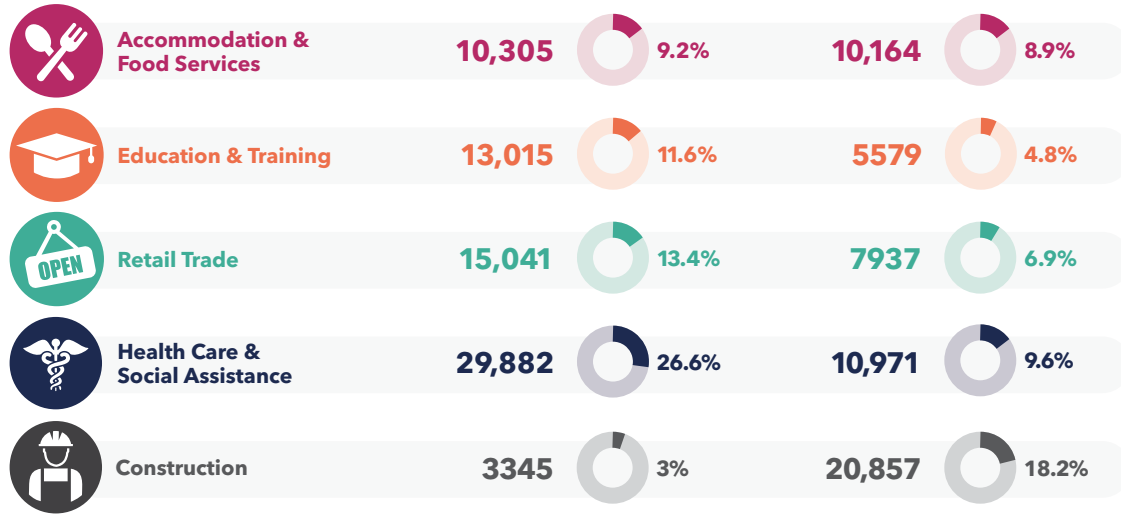
Top five employing industries



Female⁵



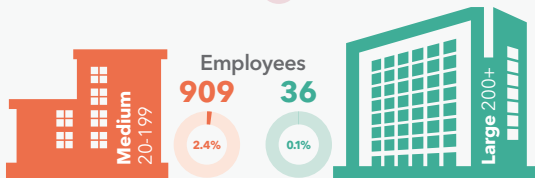
Male⁶



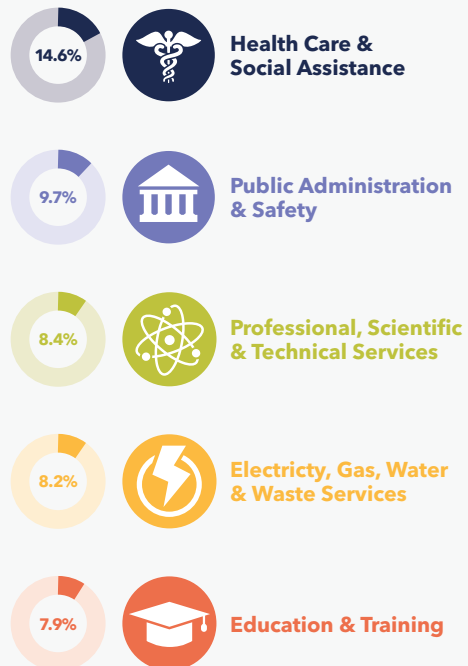
New jobs by 2027-2028⁷



Total registered businesses⁹ **38,138** 30 June 2024



Top five growth industries⁸



⁵ Australian Bureau of Statistics. (2024). *Employed persons by industry division of main job (ANZSIC), labour market region (ASGS) and sex, annual averages of the preceding four quarters, year to August 1999 onwards*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release#data-downloads>

⁶ Australian Bureau of Statistics. (2024). *Employed persons by industry division of main job (ANZSIC), labour market region (ASGS) and sex, annual averages of the preceding four quarters, year to August 1999 onwards*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release#data-downloads>

⁷ Jobs Queensland. (2024). *Anticipating Future Skills Series 5*. Time period between 2023-24 and 2027-28. Ipswich: Queensland Government. <https://jobsqueensland.qld.gov.au/anticipating-future-skills/portal>

⁸ Jobs Queensland. (2024). *Anticipating Future Skills Series 5*. Time period between 2023-24 and 2027-28. Ipswich: Queensland Government. <https://jobsqueensland.qld.gov.au/anticipating-future-skills/portal>

⁹ Queensland Government Statistician's Office. (2024). *Queensland Regional Profiles* (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>. The sum of components may not add to 100% due to confidentiality.

Sectors of interest

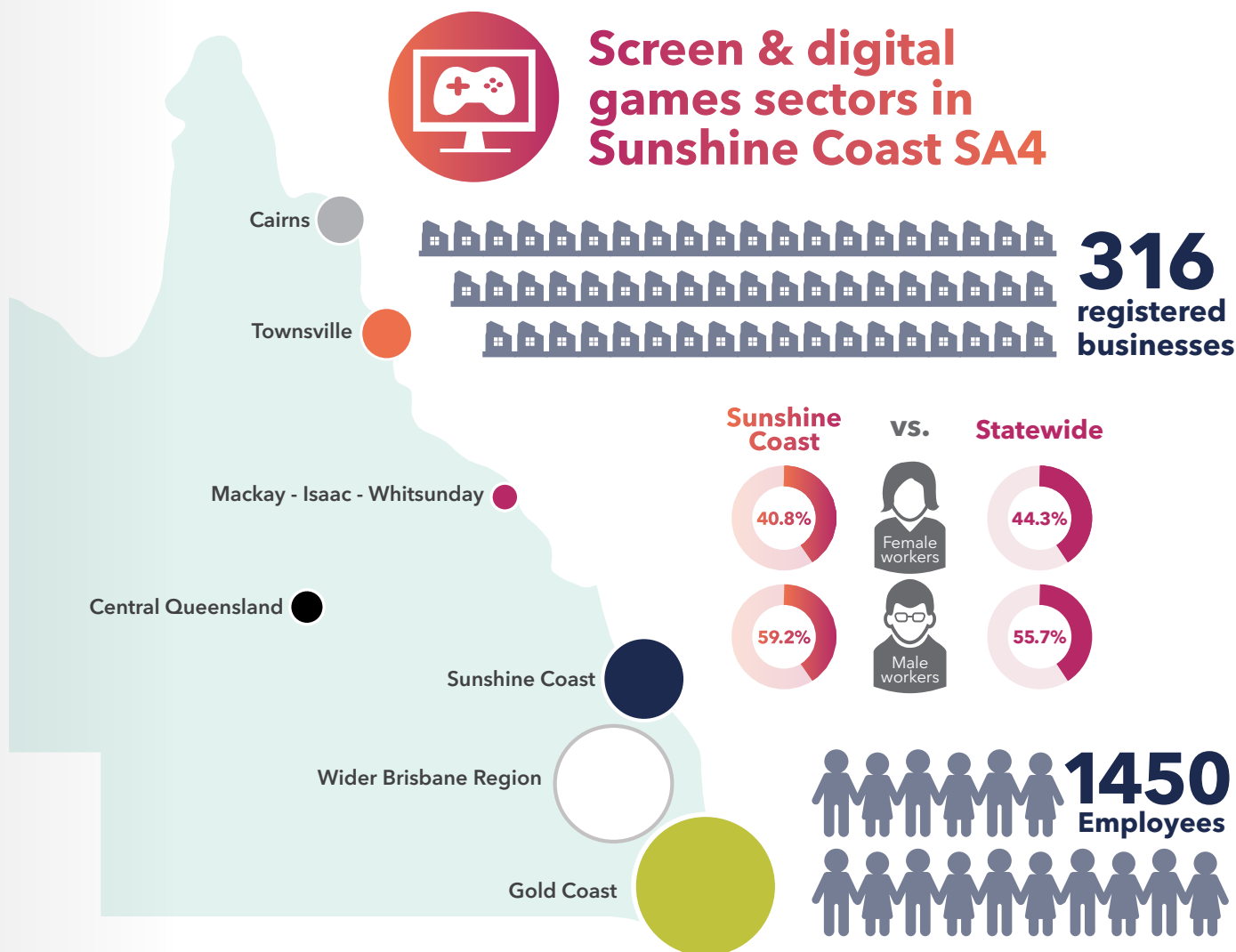
The screen and digital games sectors are global, drawing fierce international competition for talent. Retaining a talented local workforce can be challenging in the absence of international investment opportunities occurring locally to grow the sectors. Within the screen sector, Queensland talent can be drawn to the bright lights of Hollywood or London for broader audience exposure, while digital games developers can be attracted to larger AAA firms in Canada and the United States in search of skills and experience.

Through Queensland's active, passionate and highly skilled workforce, the state is able to attract national and international productions. The map

below visually represents the Queensland screen and digital games workforce highlighting the largest proportion of the Queensland workforce is located within the south-east corner (Gold Coast and Brisbane), where the largest production studios are located.¹⁰

The Sunshine Coast, with its amazing locations, highly trained professionals and industry-led networks is well positioned to provide an economic base for the regions future.

For this labour market profile, the industry of focus is the screen and digital games sector (Industry definition in Appendix A) within the Sunshine Coast SA4.



Source: Australian Bureau of Statistics (2024), *Labour Force Survey, detailed*. Canberra: Australian Government.
 Australian Bureau of Statistics (2024), *Counts of Australian Businesses, including entries and exits*. Canberra: Australian Government

¹⁰ Includes Brisbane, Toowoomba, Ipswich, Beaudesert, Wide Bay, Moreton Bay

¹¹ Jobs Queensland. (2024). *Anticipating Future Skills Series 5*. Ipswich: Queensland Government.
<https://jobsqueensland.qld.gov.au/anticipating-future-skills/portal>

Your region's labour market¹²

- In January 2025, the total labour force in the Sunshine Coast SA4 was 233,200 persons. This was an increase of 1.3 per cent (3100 persons) over the year.
- The unemployment rate increased to 3.5 per cent, an increase of 0.3 per cent from the previous year.
- Youth unemployment in the Sunshine Coast SA4 in November 2024 was 7.4 per cent, an increase of 0.1 per cent since November 2023.
- The number of employed persons has increased by 3.3 per cent over the year.
- The participation rate in the Sunshine Coast SA4 in November 2024 was 64.8 per cent, an increase of 0.6 per cent over the year.

This data highlights positive trends in employment and participation in the region, with an opportunity to tap into potential younger workers.

Table 1 below provides a breakdown of the labour force by age group across key labour market indicators as at January 2025.

Table 1: Labour force status by age, Sunshine Coast SA4 region

January 2025	Age group (years)					
	15-24	25-34	35-44	45-54	55-64	65+
Employed Total ('000)	38.5	46.3	49.1	45.8	34.4	11.7
Employed full-time ('000)	11.6	33.1	35.2	32.9	20.4	4.1
Employed part-time ('000)	23.9	13.2	13.9	12.9	14	7.5
Unemployment rate (%)	6.4	2.1	3	2.1	2	4.8
Labour force total ('000)	41.1	47.3	50.6	46.8	35.1	12.2
Not in the labour force (NILF) ('000)	11.5	4.6	6	8.9	15.9	94.8
Participation rate (%)	76.7	92.9	88.3	89.5	69.8	12.4

Source: ABS, Labour force status by age, labour market regions (ASGS) and sex, October 1998 onwards (pivot table) - RM1

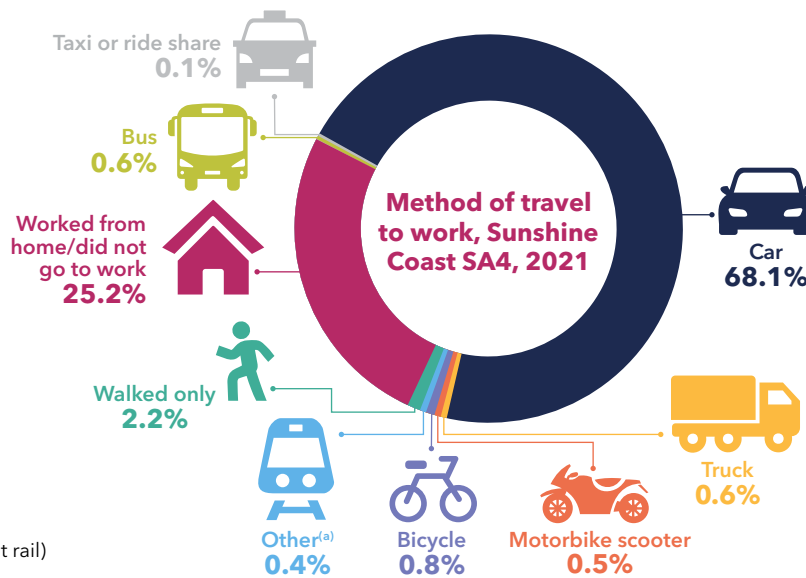
Note: Rounding can result in slightly higher or lower figures than totals reported elsewhere.

¹² Queensland Government Statistician's Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

Travel to work¹³

During the 2021 Census, 68.1 per cent of workers within the Sunshine Coast SA4 reported travelling by car as their only form of transport to work in comparison to 64.4 per cent of Queensland. This figure highlights the Sunshine Coast region's decentralised population and limited public transport options to cover the larger geographical footprint. It is worth noting that 25.2 per cent of the population reported that they worked from home or did not go to work (please refer to infographic below).

People choose various modes of transportation for commuting to work due to factors such as access to cost-effective and reliable public transport, the number of vehicles available within their household and the distance to their workplace. Shorter commutes, for instance, may enable walking or cycling as viable options. Exploring local public transport infrastructure, alongside the composition of the workforce and industries in the area, could help identify potential barriers or factors affecting workforce participation, particularly for disadvantaged or underutilised job seekers.



Source: Australian Bureau of Statistics, Census of Population and Housing, 2021, Working Population Profile - W22

Data on methods of travel to work should be analysed alongside workers' places of residence. This approach offers a more comprehensive understanding of where individuals commute from to work within the Sunshine Coast SA4 region.

Out of the 184,539 people employed in the Sunshine Coast SA4 region (2021 Census), 35,681 commute to work outside the region. The top three

destinations for these commuters are Brisbane (8081 people), Moreton Bay (4907 people), and Wide Bay (1831 people).

Meanwhile, of the 159,186 individuals working within the Sunshine Coast SA4, 10,318 commute into the region for work. This includes 4282 people traveling from Moreton Bay, 2062 from Wide Bay, and 1846 from Brisbane.

Table 2: Top six usual resident SA3s within the Sunshine Coast SA4, 2021

SA3	Number	Percentage
Caloundra	34,903	21.9
Maroochy	24,995	15.7
Buderim	23,513	14.8
Sunshine Coast Hinterland	20,668	13
Nambour	19,470	12.2
Other ^(a)	35,644	22.4

(a) Includes other SA3s within Australia as well as inadequately described and not stated responses. The sum of components may not add to total due to confidentiality.

¹³ Queensland Government Statistician's Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

While the screen sector is traditionally highly mobile, with professionals traveling globally to film locations, the digital games sector benefits from a more localised and flexible workforce, with many workers preferring to work remotely to develop their content.

Supported by Local Government initiatives, **the digital games sector is fostering a strong local ecosystem, making it more likely to retain talent within the region.**

Advances in technology, particularly high-speed internet infrastructure, enable game developers to take full advantage of remote work opportunities. This allows professionals to collaborate with international teams while remaining based on the Sunshine Coast, reinforcing the region's reputation as an emerging digital hub.

The workforce in the digital games sector requires a mix of creative, technical and business skills. Educational institutions, such as the University of

the Sunshine Coast (UniSC), play a crucial role in preparing students for careers in the sector. Programs focused on game design, software development and digital media equip graduates with sector-relevant skills and increase employment opportunities within the region.

Government support is essential in ensuring sustainable workforce growth. Initiatives such as Screen Queensland's Digital Games Incentive and the Games Residency Program provide funding, mentorship and networking opportunities for new and established developers. Local councils also contribute by fostering business-friendly environments that attract and retain creative professionals.

Challenges remain in ensuring adequate infrastructure, attracting investment, and maintaining talent pipelines. However, with ongoing sector collaboration and support from education and government sectors, the Sunshine Coast is well-positioned to strengthen its role in Australia's screen and digital games sectors.



Vacancies

The Internet Vacancy Index, developed by Jobs and Skills Australia (JSA), measures monthly job vacancies based on new online postings from platforms like SEEK, CareerOne and Australian JobSearch. To deliver insights on job openings across the nation, JSA employs unique regional groupings distinct from those used by the Australian Bureau of Statistics.

The region's highest number of online vacancies in November 2024 was seen in Professionals (743) followed by Technicians and Trades Workers (584), Community and Personal Service Workers (544), Clerical and Administrative Workers (449) and Sales Workers (384).

These figures highlight the region's pressing workforce needs, demonstrating the ongoing demand for expertise across key professions and essential services.

Table 3: Top five online vacancies by occupation as at November 2024, Sunshine Coast SA4

	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers
November 2023	755	591	553	438	347
December 2023	669	526	468	383	284
January 2024	668	512	456	411	285
February 2024	644	495	435	403	290
March 2024	692	534	475	449	333
April 2024	669	480	456	425	329
May 2024	683	475	451	438	346
June 2024	685	448	442	439	338
July 2024	710	461	441	448	341
August 2024	736	495	485	453	343
September 2024	751	551	527	462	385
October 2024	759	596	563	457	400
November 2024	743	584	544	449	384

Source: Jobs and Skills Australia, Internet Vacancy Index, November 2024 data released on 11 December 2024

This vacancy data suggests the Sunshine Coast SA4 is advertising a higher proportion of skilled roles comparatively to other occupations advertised locally.

While Anticipating Future Skills data highlights this trend is likely to continue in the coming years, it is important to note that the screen sector regularly employs through their own established networks and use of crew directories rather than advertising for skilled labour, which is not captured in the vacancies data above.

Your future workforce

The Anticipating Future Skills Series from Jobs Queensland delivers employment forecasts up to 2027-2028, covering the state's industries, regions (SA4 level), occupations and qualifications. Explore deeper insights and access interactive data tools at www.jobsqueensland.qld.gov.au/afs.

The Sunshine Coast SA4 region is predicted to grow by

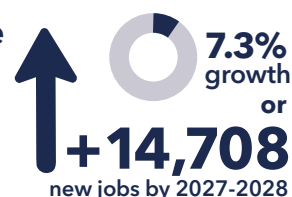


Table 4: Sunshine Coast SA4 and Queensland Industry Growth 2023-2024 to 2027-2028

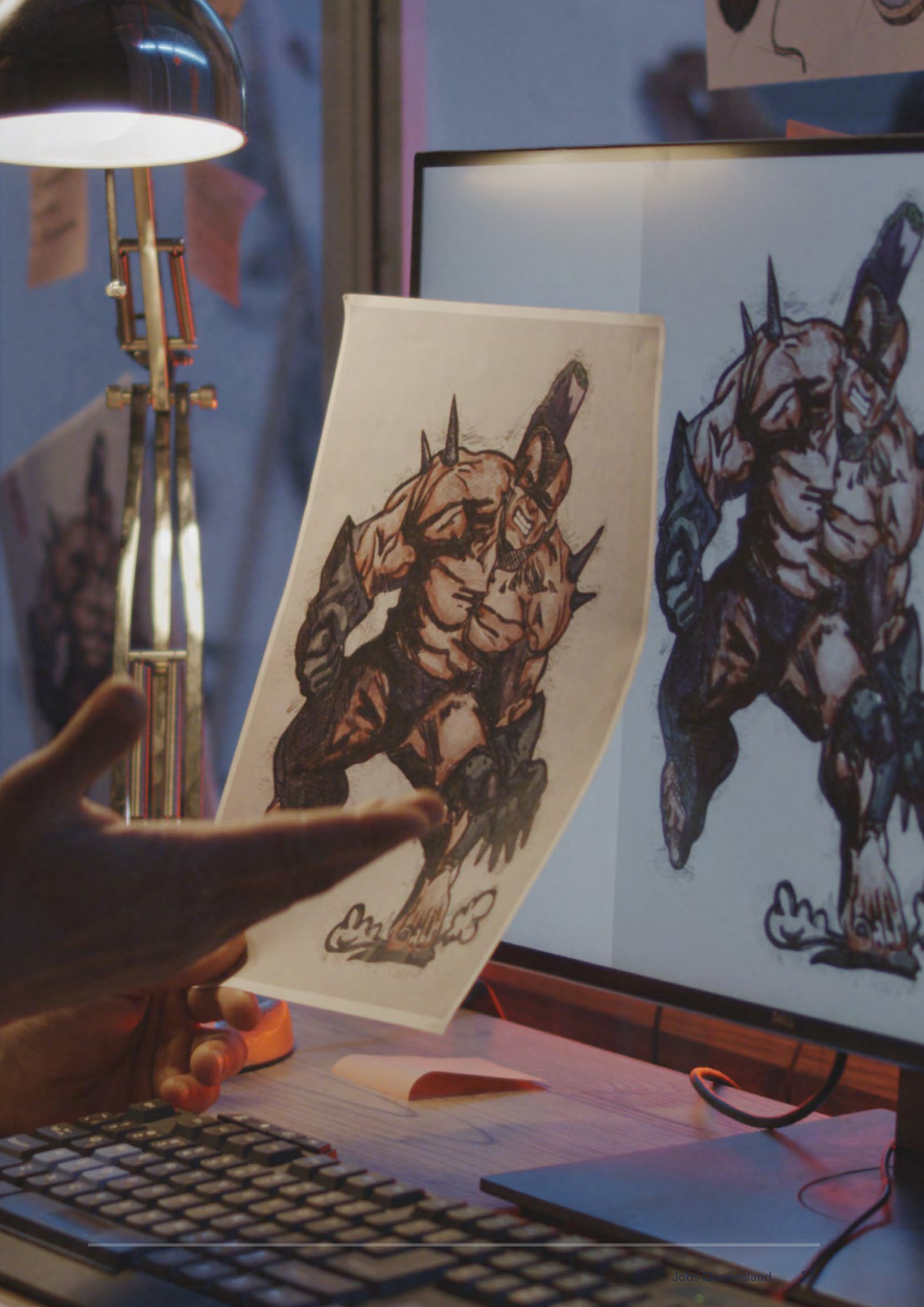
	Sunshine Coast SA4			Queensland		
	2023-2024	2027-2028	Change %	2023-2024	2027-2028	Change %
Health Care and Social Assistance	40,059	45,915	14.6	465,591	522,446	12.5
Retail Trade	21,301	22,576	6	280,647	289,839	3.3
Accommodation and Food Services	21,071	22,346	6.1	204,810	212,484	3.7
Construction	20,844	21,406	2.7	272,151	280,258	3
Education and Training	17,445	18,816	7.9	249,636	266,972	6.9
Professional, Scientific and Technical Services	14,923	16,184	8.4	228,090	246,699	8.2
Manufacturing	9882	9878	0	183,070	182,241	-0.5
Other Services	9152	9607	5	113,939	116,235	2
Public Administration and Safety	7825	8585	9.7	200,201	216,574	8.2
Administrative and Support Services	7708	8091	5	94,129	96,960	3
Transport, Postal and Warehousing	6457	6866	6.3	156,561	162,645	3.9
Financial and Insurance Services	5892	6211	5.4	73,748	75,566	2.5
Arts and Recreation Services	4697	4946	5.3	45,594	47,679	4.6
Rental, Hiring and Real Estate Services	3576	3810	6.5	48,685	50,737	4.2
Agriculture, Forestry and Fishing	3450	3450	0	68,368	67,331	-1.5
Wholesale Trade	3204	3256	1.6	71,326	74,069	3.8
Electricity, Gas, Water and Waste Services	1841	1991	8.2	37,951	39,738	4.7
Mining	1466	1535	4.7	72,410	72,958	0.8
Information Media and Telecommunications	1318	1350	2.4	27,773	28,487	2.6

Source: Jobs Queensland (2024), *Anticipating Future Skills Series 5*.

Currently, the largest proportion of the screen and digital games workers are captured within the Information Media and Telecommunications division shown above.

However, supporting local workers to move between industries while utilising their skills is an

attribute of a healthy workforce. Skills mobility is increasingly common within the screen and digital games sectors, where individuals support a broad number of industries, ultimately strengthening the local labour market and regions economy. Examples of skills mobility in action is provided later in this profile.



Your training pathways

Schooling and non-school qualifications¹⁴

At the time of the 2021 Census, 64.1 per cent of persons within the Sunshine Coast SA4 had year 11 or 12 as their highest level of schooling, which is slightly higher than the state average of 63.6 per cent.

Table 5 below provides a breakdown of other school level attainments for the Sunshine Coast SA4 compared to Queensland.

Table 5: Highest level of schooling completed, Sunshine Coast SA4 and Queensland 2021

	Did not go to school or Year 8 or below (%)	Year 9 or 10 or equivalent (%)	Year 11 or 12 or equivalent (%)
Sunshine Coast SA4	3.2	26.2	64.1
Queensland	4.4	24.6	63.6

Table 6 below provides a breakdown of the largest non-school qualification by level of education for the Sunshine Coast SA4 compared to Queensland.

Table 6: Non-school qualifications by level of education, Sunshine Coast SA4 and Queensland 2021

	Bachelor degree or higher (%)	Advance diploma or diploma (%)	Certificate (%)	Persons with a qualification (%)
Sunshine Coast SA4	21.7	11	23.9	65.1
Queensland	21.9	9.4	22.1	62.5

The largest non-school qualification field of study in the Sunshine Coast SA4 at the time of the 2021 Census was management and commerce at 17 per cent. This is lower than the Queensland average for the same field, which was 18.4 per cent.

Table 7, over page, provides a broad breakdown of the highest non-school qualifications for the region. These fields continue to represent the most common areas of study for non-school qualifications in the Sunshine Coast SA4, reflecting the region’s evolving health, engineering and professional landscape.

¹⁴ Queensland Government Statistician’s Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

Table 7: Non-school qualifications by field of study, Sunshine Coast SA4 and Queensland, 2021

	Sunshine Coast SA4		Queensland	
	Number	Per cent	Number	Per cent
Natural and physical sciences	4683	2.2	63,861	2.4
Information technology	3312	1.5	64,750	2.5
Engineering and related technologies	28,363	13.2	380,136	14.5
Architecture and building	16,079	7.5	151,067	5.8
Agriculture environmental and related studies	4830	2.2	49,434	1.9
Health	27,199	12.6	285,611	10.9
Education	19,982	9.3	205,309	7.8
Management and commerce	36,683	17	480,526	18.4
Society and culture	24,878	11.5	309,683	11.8
Creative arts	7810	3.6	86,519	3.3
Food hospitality and personal services	13,217	6.1	146,167	5.6
Mixed field programmes	312	0.1	4427	0.2
Total	215,644	100	2,618,666	100

Gateway to Industry Schools Program

The Screen and Media Gateway to Industry Schools program is a partnership between Essential Screen Skills and the Queensland Government. This program provides opportunities for students and teachers to participate in valuable experiences, broaden knowledge and attend industry-led events. It promotes understanding of the screen and media industry and provides key information about pathways to further education, training and employment in the sector. In partnership with key industry stakeholders, the project provides real world opportunities for students, teachers and schools to access:

- panels and workshops
- teaching resources and professional development
- careers and pathway guides to future work
- work placements and industry work experience
- Gateway schools will be able to actively engage and connect with key industry stakeholders to create strong connections and pathways for their students.

There is currently one school within the Sunshine Coast region participating in this program, highlighting the opportunity for additional schools to become involved and strengthen their connection with these sectors.

Stakeholders suggested that strengthening industry input into curriculum and increasing links with education providers to include more experiential learning for students and industry currency for teachers and lecturers may result in improved outcomes that align with industry requirements.

Vocational education

Technological shifts such as metadata analysis, VFX, VR, AR, animation, streaming, app-based skills, digital collaboration and animation are impacting the future skills needs of the workforce and driving the need to training and package reviews to enhance training outcomes and employability for students nation-wide.

For the year 2023 there was a total of 44,745 program enrolments in the Sunshine Coast SA4 region.

The tables below represent the top five enrolments, completions, and completions by level of qualification for the same time period.

Table 8: Top five VET program enrolments (program name), 2023, Sunshine Coast SA4

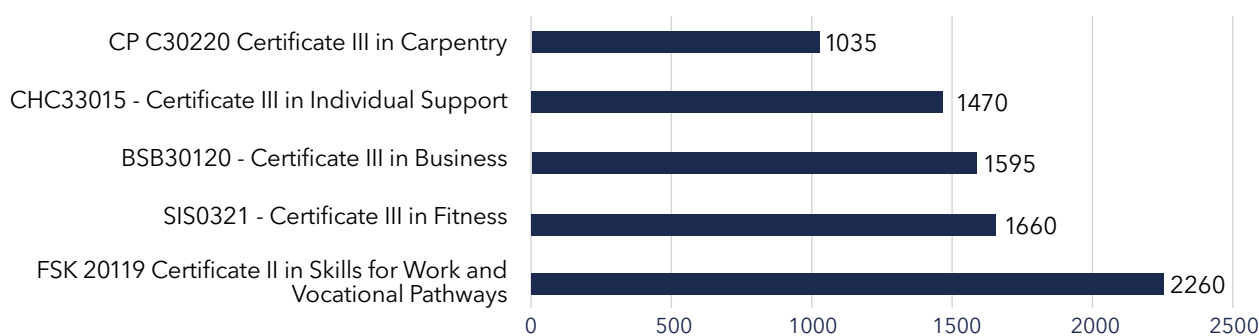


Table 9: Top five VET program completions (parent training package), 2023, Sunshine Coast SA4

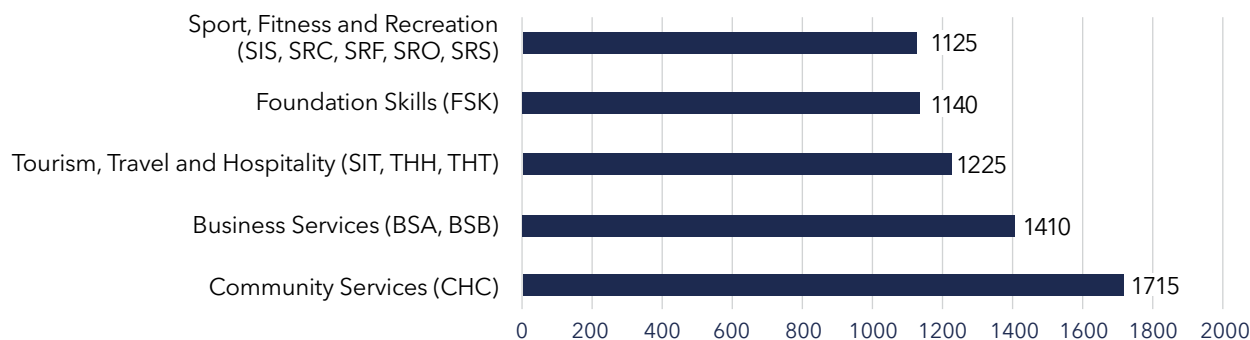
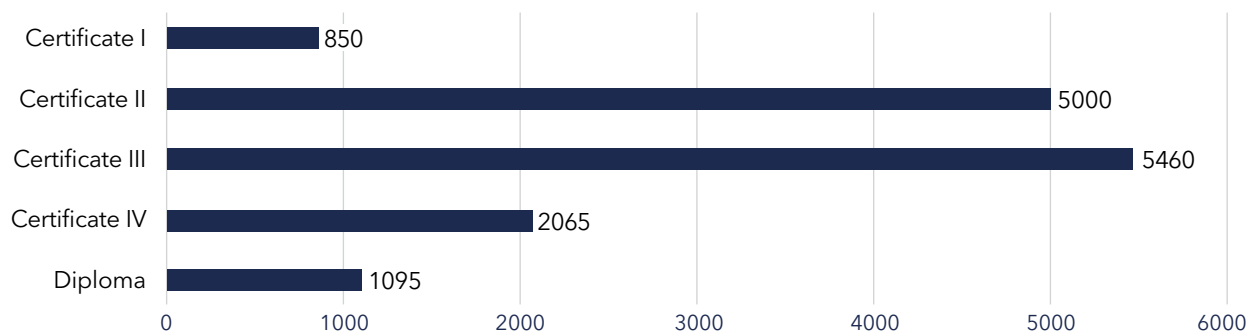


Table 10: Top five program completions, level of qualification, 2023, Sunshine Coast SA4



Sunshine Coast training summary¹⁵

The Department of Trade, Employment and Training (DTET) divides the state into seven training regions (see map). The North Coast region comprises the Sunshine Coast SA4.

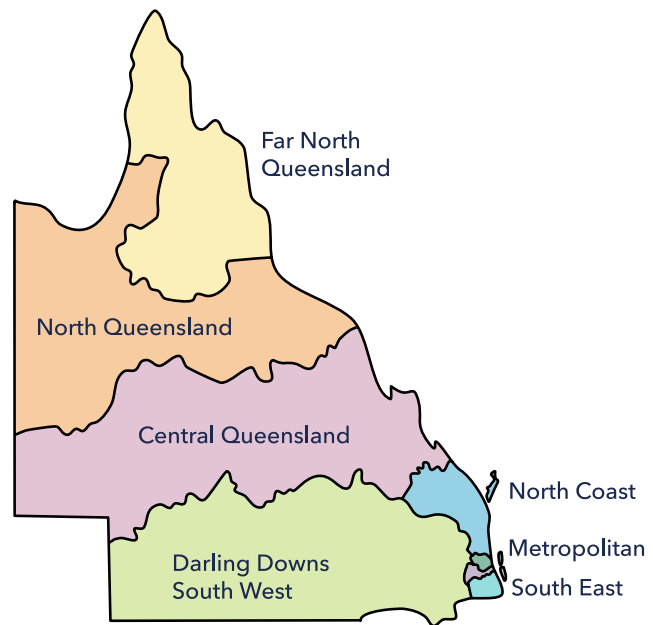


Table 11: Government funded VET outcomes, DTET North Coast, 2021-2022 to 2022-2023

	North Coast		
	2021-2022	2022-2023	Change %
Certificate I and II	1915	1942	1.41
Certificate III	3098	2662	-14.07
Certificate IV	706	643	-8.92
Diploma and higher	948	925	-2.42
Completed qualifications	6667	6172	-7.42
15-19 year-old students	2116	2245	6.1
Indigenous students	270	314	16.3
Students with disability	507	557	9.86

Table 12: Sunshine Coast SA4 VET program completions 2021-2023

	2021	2022	2023	Total
SCREEN SECTOR				
Certificate II in Creative Industries	65	50	40	155
Certificate III in Screen and Media	25	25	35	85
Certificate III in Live Production and Services	5	5	-	10
Certificate III in Live Production and Technical Services	-	-	5	5
Certificate III in Make-Up	15	10	5	30
Diploma of Screen and Media	30	35	15	80
DIGITAL GAMES SECTOR				
Certificate I in Information, Digital Media and Technology	65	-	-	65
Certificate II in Information, Digital Media and Technology	105	-	-	105
Certificate II in Applied Digital Technologies	-	25	45	70
Certificate III in Information, Digital Media and Technology	60	-	-	60

Source: National Centre for Vocational Education Research. (2023). *VOCSTATS database, Total VET students and courses 2023*. Adelaide: National Centre for Vocational Education Research.
<https://www.ncver.edu.au/research-and-statistics/publications/all-publications/total-vet-students-and-courses-2023>

¹⁵ Department of Trade, Employment and Training. (2025). *VET and Apprentice and Trainee participation statistics as at January 2025*, Department of Trade, Employment and Training, data slicers, publicly available. Brisbane: Queensland Government.
<https://desbt.qld.gov.au/training/docs-data/statistics/apprentices-trainees>

Apprenticeships and traineeships¹⁶

In 2023, apprenticeship and traineeship commencements for the Sunshine Coast SA4 totalled 3060. This was a 37.9 per cent decrease from 2022, where there were 4935 commencements in the region.

Completions of apprenticeships and traineeships for 2023 were 1940, an 11.8 per cent increase from the previous 12 months where there were 1735 completions.

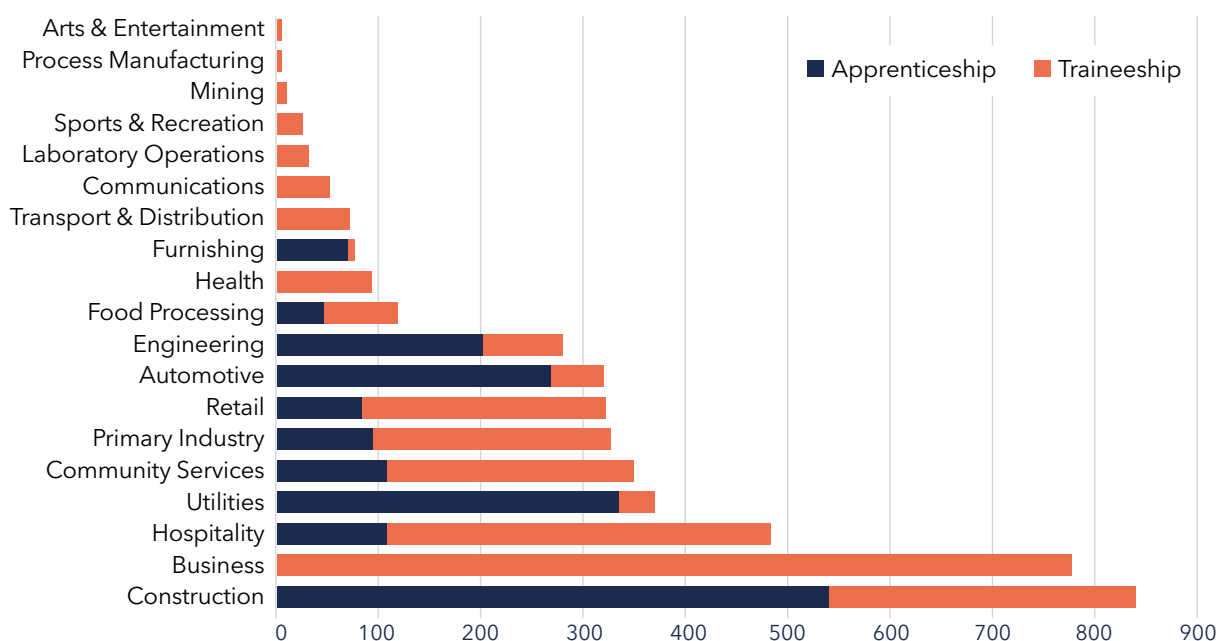
The top five industries for apprenticeship and traineeship commencements for 2023 are pictured below.



The top five training commencements by occupation in 2023 were Technicians and Trades Workers (1485), Community and Personal Service Workers (745), Clerical and Administrative Workers (315), Machinery Operators and Drivers (200) and Sales Workers (115).

The top five training completions by occupation were Technicians and Trades Workers (790), Clerical and Administrative Workers (365), Community and Personal Service Workers (295), Machinery Operators and Drivers (185) and Labourers (140).

Table 13: Apprenticeship and traineeship completions by industry, Sunshine Coast SA4, 2022-2023¹⁷



¹⁶ National Centre for Vocational Education Research. (2023). *VOCSTATS database, Total VET students and courses 2023*. Adelaide: National Centre for Vocational Education Research. <https://www.ncver.edu.au/research-and-statistics/publications/all-publications/total-vet-students-and-courses-2023>

¹⁷ Department of Trade, Employment and Training. (2025). *VET and Apprentice and Trainee participation statistics as at January 2025*, Department of Trade, Employment and Training, data slicers, publicly available. Brisbane: Queensland Government. <https://desbt.qld.gov.au/training/docs-data/statistics/apprentices-trainees>

The apprenticeship and traineeship system is not utilised to its full advantage by either the screen or digital games sectors. Despite completion rates across the two sectors on the Sunshine Coast being low over the past five years, it is important to maintain a high standard of sector-endorsed

training outcomes leading into sustainable employment as often as possible.

Increasing promotion of the traineeship system, may improve these low figures and provide a pathway for new entrants to gain valuable hands-on sector experience.

Table 14: Apprenticeship and traineeship completions by qualification, Sunshine Coast SA4, 2020-2025, 12 months ending as at 31 March¹⁸

Qualification	2020	2021	2022	2023	2024
Certificate III in Screen and Media	5	5	5	5	5
Certificate III in Information, Digital Media and Technology	5	10	10	-	-

Tertiary pathways

The Sunshine Coast offers several university pathways for individuals looking to pursue careers in the screen and digital games industries. Local higher education providers offer a range of programs tailored to developing skills in game design, screen media and interactive content creation. Degree programs allow students to

specialise in Game Design or Screen Media, equipping them with both creative and technical expertise to thrive in the evolving digital sector. Additionally, there are Undergraduate Certificates in Game Design and Interactive Media, providing foundational skills that can serve as standalone qualifications or pathways into further study.



¹⁸ National Centre for Vocational Education Research. (2023). *VOCSTATS database, Total VET students and courses 2023*. Adelaide: National Centre for Vocational Education Research. <https://www.ncver.edu.au/research-and-statistics/publications/all-publications/total-vet-students-and-courses-2023>

Your businesses

The screen and digital games sectors on the Sunshine Coast are a growing and dynamic sector, contributing significantly to the region's creative and digital economy. With a mix of innovative local businesses and advanced digital infrastructure, the region is positioning itself as a hub for creativity and technological innovation. There are currently 316 registered businesses in the information media and telecommunications industry in the Sunshine Coast SA4, with 717 full-time employees.¹⁹ These businesses benefit from cutting-edge infrastructure, including the Sunshine Coast International Broadband Network and the SC1 Edge Data Centre, which enable global connectivity and collaboration.

Local studios and agencies specialise in game development, animation and digital storytelling, creating a range of content, from entertainment media to gamified learning tools and immersive virtual reality experiences. It is acknowledged that the screen and digital games sectors have an even larger impact on the economy through an extended value chain that engages with other industries, particularly in regional areas.

A key contributor to the sector's development is Screen Queensland, which provides vital funding, mentorship programs and opportunities for local talent to access national and international markets. Through its regional programs, Screen Queensland actively encourages production in areas like the Sunshine Coast, fostering the development of local projects and attracting external productions that boost the region's creative economy. Its initiatives include grants for emerging creatives, workshops and connections to global networks, helping to elevate the profile of local talent and businesses.

The region's supportive ecosystem also includes initiatives like the Sunshine Coast Screen Collective and partnerships with the University of the Sunshine Coast (UniSC). UniSC's Innovation Centre and industry-aligned programs cultivate local talent pipelines, further bolstering the sector. Local businesses collaborate with sectors such as tourism, education and health to create innovative tools and experiences that drive engagement



and development. This collaboration extends to producing screen content that showcases the Sunshine Coast as an ideal destination for tourism and investment, leveraging the region's natural beauty and strong digital capabilities.

While the sector faces challenges, such as competition from larger creative hubs and limited funding, the Sunshine Coast's unique lifestyle, commitment to sustainability and strategic support make it an attractive location for screen and game development.

With backing from organisations like Screen Queensland and local councils, the sector is well-positioned to grow and diversify. As the sector continues to expand, it is poised to become a significant driver of innovation, cultural expression and economic growth in the region.

¹⁹ Queensland Government Statistician's Office. (2024). Queensland Regional Profiles (Various reports). Brisbane: Queensland Government. <https://statistics.qgso.qld.gov.au/qld-regional-profiles>

Challenges and opportunities

As global trends and local dynamics influence various industries, the Sunshine Coast region is focused on preparing its workforce with the skills necessary to navigate these shifts. Through a proactive approach, by engaging with local employers and stakeholders, the region is identifying opportunities to address workforce challenges and drive innovation.

This approach aims to ensure that the Sunshine Coast remains competitive, fostering sustainable economic growth and job creation while aligning with global and regional changes.

Megatrends²⁰

CLIMATE CHANGE



The Sunshine Coast's stunning natural landscapes, including beaches, rainforests and hinterland areas, are a major draw for tourism, lifestyle and creative industries. However, climate change is increasingly affecting the region, with rising sea levels, coastal erosion and extreme weather events threatening infrastructure, ecosystems and key industries such as tourism and agriculture. Severe weather events, including flooding and king tides, can disrupt business operations and affect the availability of locations for outdoor productions.²¹

Impact on the screen and digital games sectors:

- Filming locations at risk: rising temperatures and extreme weather events can make outdoor filming more unpredictable, increasing costs and risks for productions. Coastal locations, which are commonly used for filming, may become less accessible due to erosion or storm damage.²²
- Sustainability pressures: there is growing pressure on production companies to adopt green filmmaking techniques, such as using virtual production, reducing travel emissions and embracing digital effects instead of physical sets.²³
- Content shifts: climate change is influencing storytelling, with more productions featuring environmental themes. Gaming studios are also integrating climate-conscious narratives into interactive experiences, reflecting global trends in sustainability awareness.²⁴
- Resilience through technology: the sector is adapting by increasing the use of virtual sets and CGI, which reduces the reliance on outdoor locations, allowing productions to be completed with fewer disruptions due to weather.²⁵

²⁰ For more detailed information on Global Mega Trends: <https://www.csiro.au/en/research/technology-space/data/Our-Future-World>

²¹ Sunshine Coast Council. (2025). *Sustainability and climate change*. Sunshine Coast: Sunshine Coast Council. <https://www.sunshinecoast.qld.gov.au/environment/sustainability-and-climate-change/>

²² Screen Daily. (2020). *How the global climate crisis is threatening the film locations business*. Worldwide: Media Business Insight Limited. <https://www.screendaily.com/features/how-the-global-climate-crisis-is-threatening-the-film-locations-business/5151027.article>

²³ FilmInk. (2023). *Sustainable Screens Australia announces industry partnerships*. Lilydale: FilmInk <https://www.filmink.com.au/public-notice/sustainable-screens-australia-announces-industry-partnerships/>

²⁴ Commonwealth Scientific and Industrial Research Organisation. (2024). *Embedding climate and behavioural science into entertainment*. Canberra: Australian Government. <https://www.csiro.au/en/news/All/Articles/2024/October/impact-production-climate-change>

²⁵ Screen Daily. (2020). *How the global climate crisis is threatening the film locations business*. Worldwide: Media Business Insight Limited. <https://www.screendaily.com/features/how-the-global-climate-crisis-is-threatening-the-film-locations-business/5151027.article>



The Sunshine Coast is positioning itself as a leader in sustainable development, ethical business practices and community-driven initiatives. With a strong focus on green infrastructure, eco-tourism and ethical investment, local businesses are increasingly required to meet Environmental and Social Governance (ESG) standards to secure funding, attract investment and build consumer trust. The region's commitment to sustainability is also influencing business operations across various industries, from construction to digital innovation.²⁶

Impact on the screen and digital games sectors:

- Sustainable production expectations: funding bodies and investors are prioritising projects with low-carbon production methods, leading to increased adoption of sustainable filmmaking techniques.²⁷
- Diversity and inclusion in storytelling: there is a strong push for more inclusive and ethical storytelling, with screen content and games increasingly reflecting diverse perspectives and responsible narratives.²⁸
- Attracting responsible investment: local screen and gaming studios that align with ESG values are more likely to attract funding, as sustainability and ethical business practices become a key factor in securing financial support.²⁹



The Sunshine Coast is rapidly emerging as a technology-driven economy, with major investments in digital infrastructure, such as the international subsea cable that provides high-speed internet access. The region's tech and innovation hubs, including the Peregian Beach Digital Hub, are fostering a growing ecosystem for startups, entrepreneurs and digital creatives. These advancements are attracting highly skilled workers and positioning the Sunshine Coast as a regional leader in digital transformation.³⁰

Impact on the screen and digital games sectors

- Virtual production on the rise: advances in real-time rendering, AI-driven content creation and extended reality (XR) are reducing the need for expensive on-location shoots, allowing more productions to be completed digitally.
- Increased global collaboration: the high-speed internet connectivity provided by the Sunshine Coast's digital infrastructure enables local game developers and screen professionals to work seamlessly with international teams.³¹
- Growing demand for digital skills: the adoption of AI, automation and virtual reality is reshaping job roles, requiring upskilling in areas such as motion capture, 3D animation and virtual world-building.

²⁶ Sunshine Coast Council. (2025). *Growing sustainability*. Sunshine Coast: Sunshine Coast Regional Council. <https://www.sunshinecoast.qld.gov.au/development/planning-documents/new-sunshine-coast-planning-scheme/growing-sustainably>

²⁷ Sustainable Screens Australia. (2025). *Putting our planet in the picture*. Australia: Sustainable Screens Australia. <https://www.sustainablescreens.au/>

²⁸ Screen NSW. (2024). *NSW Screen and Digital Games Strategy*. Sydney: New South Wales Government. <https://content.screen.nsw.gov.au/assets/Uploads/nsw-screen-and-digital-games-strategy.pdf>

²⁹ Queensland Treasury. (2024). *Queensland Sustainability Report*. Brisbane: Queensland Government. <https://www.treasury.qld.gov.au/programs-and-policies/queensland-sustainability-report/>

³⁰ Peregian Digital Hub. (2025). *A Wonderland for AI Nerds*. Peregian Beach: Noosa Council. <https://www.peregianhub.com.au/>

³¹ Invest Sunshine Coast Australia. (2025). *Webinar highlights Sunshine Coast as subsea cable hub*. Sunshine Coast: Sunshine Coast Council. <https://invest.sunshinecoast.qld.gov.au/news/investment-stories/webinar-highlights-sunshine-coast-as-subsea-cable-hub/>

GEOPOLITICAL IMPACTS



Global trade disruptions, changing international relations and supply chain issues are affecting industries across the Sunshine Coast, including tourism, agribusiness and advanced manufacturing. With shifts in international markets, the region is focusing on diversification and self-reliance, particularly in technology-driven industries that are less reliant on physical supply chains. The region's strong domestic market and investment in digital industries provide some insulation against global instability.

Impact on the screen and digital games sectors:

- Changes in international productions: global economic shifts and visa policies can impact the number of international film and TV productions choosing the Sunshine Coast as a location.³²
- Digital trade restrictions: data privacy laws and content regulations in global markets can affect the ability of Sunshine Coast game developers to distribute their products internationally.³³
- Opportunities in domestic content: the uncertainty in global markets may encourage greater investment in local screen and gaming projects, boosting the domestic sector and encouraging Australian-made content.³⁴

RISING CARE ECONOMY



The Sunshine Coast has a rapidly growing aging population, driving demand for healthcare, aged care and disability support services. The region is investing in health infrastructure, workforce training and innovation in health service delivery, positioning itself as a leader in the care economy. The increasing focus on telehealth and digital health solutions presents opportunities for digital industries to contribute to health and wellness initiatives.

Impact on the screen and digital games sectors:

- Growing market for 'serious games': as aged care and disability support expand, there is increasing demand for interactive experiences that support health, therapy and cognitive training.³⁵
- VR and AR in healthcare: digital creatives can contribute to the development of VR and AR applications for aged care, rehabilitation and mental health support.
- Health and wellness storytelling: the screen sector is seeing rising demand for content related to health, aging and disability, creating opportunities for documentaries, educational videos and health-related storytelling.
- Collaboration with the healthcare sector: game developers and screen professionals can partner with hospitals, aged care providers and research institutions to create immersive training programs, simulation tools and digital therapeutic applications.

³² The Guardian. (2024). *Investment in film and TV made in Australia plummets by almost 30%, report finds*. Australia: Guardian News & Media Limited.

<https://www.theguardian.com/media/2024/dec/17/investment-in-film-and-tv-made-in-australia-plummets-by-almost-30-report-finds>

³³ Department of Foreign Affairs and Trade. (2022). *The booming Australian digital games industry*. Canberra: Australian Government. <https://www.dfat.gov.au/about-us/publications/trade-investment/business-envoy/business-envoy-february-2022/booming-australian-digital-games-industry>

³⁴ AFR Intelligence. (2023). *Financial Review Data*. Australia: The Australian Financial Review. <https://data.afr.com/2023/afrintelligence/AEX001-AFRIntelligence-Youtube-8.pdf>


³⁵ Frontiers. (2025). *Application of Serious Games in Health Care: Scoping Review and Bibliometric Analysis*. Switzerland: Frontiers Media. <https://www.frontiersin.org/journals/public-health/articles/10.3389/fpubh.2022.896974/full>

Skills mobility

Domestic demand for workforce skills within the screen and digital games sectors comes from a variety of other industries. Production of high-value content can stretch beyond commercials, films, TV series, documentaries and digital games. Skills mobility is becoming increasingly common as screen and digital games professionals support other industries and source sustainable income streams through this diversification.


Game development relies on a range of critical skills, including programming, art, design, audio and project management—all with strong cross-industry potential drawing attention from banking, AI, cybersecurity, e-commerce, defense, simulation, training software, education and advertising sectors.

Through retention of these skills within Queensland and locally, the benefit is amplified across industries and the broader economy:




Education

Brisbane-based company Khemistry created an Australian first multiplatform series *Sally & Possum*. Created to improve literacy and numeracy in deaf and hearing-impaired children aged 4–6, the series includes 30 television episodes, a unique website and school resources pack, complemented by the world's first app developed exclusively in Australian Sign Language (Auslan).³⁶




Health

In an Australian paediatric first, Queensland's Children's Hospital implemented a 360-degree virtual reality tour to prepare children and their families for hospitalisation and outpatient clinic visitation.³⁷ Dementia simulation training is providing health professionals with insight into what it is like to live with the condition, improving empathy and understanding and addressing nursing standards and how they relate to cognitive impairments.³⁸




Property industry

Expanding beyond traditional photography, real estate agencies are now using drones for aerial shots, creating mini-commercials for social media and using data analytics. No longer needing to interpret 2D plans, developers are using 3D headsets for potential buyers to 'see' the virtual fit-out of interiors.



Emergency services

Virtual reality has been embraced by the Queensland Police Service. Integrated into the Westgate Complex in Wacol, a \$46.7 million counter-terrorism training facility will include a 'scenario village' and virtual reality suite to train first responders in a variety of scenarios, day or night, reducing infrastructure requirements and potential risk while providing a more flexible, just-in-time training option.³⁹



Transport industry

Brisbane tech company Real Serious Games' UAE arm Karsta Middle East began providing innovative training technology across the Middle East during 2019 using a gaming interface to create a unique training environment. Combining engineering, virtual reality and software development, the organisation now delivers effective workforce training options for the transport industry.⁴⁰

³⁶ Khemistry. (2020). *Sally & Possum*. Brisbane: Khemistry. <https://khemistry.com.au/sally-possum>

³⁷ Children's Health Queensland. (2023). *Hospital map and finding your way around*. Brisbane: Queensland Government. <https://www.childrens.health.qld.gov.au/going-to-hospital/hospital-map-and-finding-your-way-around>

³⁸ Darling Downs Health. (2019). *Cognitive Impairment Dementia Simulation Training*. Brisbane: Queensland Government. <https://clinicalexcellence.qld.gov.au/showcase/events/showcase-2019/unreal-innovations/cognitive-impairment.html>

³⁹ Minister for Police and Minister for Corrective Services and Acting Minister for State Development, Manufacturing, Infrastructure and Planning. (2018, 16 January). *Counter Terrorism and Community Safety Centre now underway*. Brisbane: Queensland Government. <http://statements.qld.gov.au/Statement/2018/1/16/counter-terrorism-and-community-safety-centre-now-underway>

⁴⁰ Real Serious Games. (2025). *About us*. Brisbane: Real Serious Games. <https://realseriousgames.com/about>



Your region's screen and digital games ecosystem

International productions are an important driver for skills attainment and the financial sustainability of Queensland's screen sector. However, the benefits generated by blockbusters often overshadow the essential role domestic productions have in providing consistent employment opportunities and the retention of a locally based workforce. The Sunshine Coast's game development ecosystem is growing, supported by established service providers such as XGameDev and Lightmare Studios, along with dedicated game design programs at the local university.

Offering a desirable coastal lifestyle, high-speed internet and greater affordability than major cities, the region attracts remote-working game developers, including digital nomads. Additionally, a thriving indie development scene is emerging, featuring both solo creators and small teams working on innovative projects.

Through comprehensive research, Jobs Queensland has discovered that a strong sense of community and family is highly valued

by Queenslanders. A deep connection to a community or region often serves as a key motivator for individuals to remain and work locally. When people, particularly families, are well-established with access to local services and have partners employed nearby, they are typically reluctant to move to a different area.⁴¹ As part of the region's broader economic vision, placemaking plays a crucial role in creating vibrant and inclusive communities that support locals in living and working on the Sunshine Coast. Placemaking initiatives aim to enhance quality of life by developing spaces that foster a sense of belonging while providing access to affordable housing, community areas and a variety of work opportunities.

By offering locals the opportunity to engage in meaningful employment and access services within the region, the Sunshine Coast is promoting long-term sustainability. These efforts are key to retaining talent, reducing out-migration and ensuring that residents can thrive while staying connected to their community.

Showdown

Pluggas, a renowned storytelling and filmmaking team based on the Sunshine Coast, initiated a capacity-building project called Showdown to empower local filmmakers. This initiative was designed to provide Sunshine Coast filmmakers with practical opportunities to create films, moving beyond discussions to actual production.

The Showdown project emerged from the recognition of limited growth opportunities within the local screen industry. By facilitating hands-on film production experiences, Pluggas aimed to address this gap and foster a more active filmmaking community in the region.

One notable outcome of this initiative is the short film titled 'Showdown' (2020), directed by Sabrina Dervis and written by Tonia Stangerlin. Through the Showdown project, Pluggas has significantly contributed to the development of the Sunshine Coast's screen industry by providing filmmakers with essential resources and platforms to bring their creative visions to life.

⁴¹ Jobs Queensland. (2023). *Supporting individuals in the transition to future work framework*. Ipswich: Queensland Government. https://jobsqueensland.qld.gov.au/_resources/files/pdf/supporting-individual-transition.pdf

Peregian Beach Digital Hub

The Peregian Beach Digital Hub is a key innovation hub on the Sunshine Coast, supporting the region's growing screen and digital games industry. Established in 2018 by the Noosa Shire Council with contributions from the Queensland Government, the Hub provides a state-of-the-art workspace designed to foster creativity, collaboration and technological innovation.

The Digital Hub offers:

- cutting-edge facilities, including an AI lab, content creation studios, video booths, workspaces to accommodate up to 120 professionals across private offices, full-time desk pods and flexible co-working spaces and an 80-seat auditorium with advanced audio-visual capabilities
- collaborative working environments for a diverse mix of professionals, including digital marketers, screen industry specialists, game developers, technologists and investors.

The screen and digital games sector is a rapidly growing part of the Sunshine Coast's creative economy. The Hub plays a significant role in supporting industry expansion by:



Attracting and nurturing talent

The hub provides an ideal environment for start-ups, freelancers and established businesses in the digital games and screen sectors.



Providing access to advanced technology

The newly established AI Lab enables creatives and developers to work with cutting edge tools to enhance storytelling, animation and immersive experiences.



Facilitating industry connections

Hosting events, workshops and networking sessions fosters collaboration between professionals, industry leaders and investors.



Supporting international competitiveness

As visual effects and digital gaming experiences become increasingly sophisticated, the Hub helps local professionals stay ahead of technological advancements, enhancing global marketability.

Sunshine Coast Screen Collective

The Sunshine Coast Screen Collective (SCSC) is a dynamic industry group that fosters collaboration, skills development and business opportunities for screen professionals in the region. Established to support the local screen and digital games industry, SCSC provides a platform for filmmakers, content creators and digital media specialists to connect, share resources and advance their careers.

SCSC plays a crucial role in growing the Sunshine Coast's screen sector by advocating for local productions, attracting investment and supporting emerging talent. Through networking events, workshops and industry meetups, the collective helps bridge the gap between local creators and national and international markets. It also facilitates knowledge-sharing across film, television and digital games, ensuring that industry professionals stay ahead of technological advancements and creative trends.

SCSC has established partnerships with universities, training institutions and government initiatives to develop skills pipelines for the industry. Collaborations with TAFE Queensland and the University of the Sunshine Coast provide training and education programs tailored to the needs of the local screen sector, ensuring that emerging talent is industry-ready. Additionally, SCSC works with regional councils and industry bodies to advocate for funding opportunities and infrastructure development, strengthening the region's capacity to host larger productions.

The screen industry is increasingly recognised as a driver of economic growth on the Sunshine Coast. SCSC's efforts have contributed to a growing number of local productions, bringing investment and job opportunities to the region. By positioning the Sunshine Coast as an attractive location for both local and international productions, the collective helps stimulate economic activity in related sectors such as tourism, hospitality and technology.

Looking ahead, SCSC is focused on positioning the Sunshine Coast as a key hub for virtual production, digital content creation and immersive media experiences. The rise of digital games development and emerging screen technologies presents new growth opportunities for the region. By advocating for investment in infrastructure and innovation, SCSC aims to ensure that local creatives and businesses can compete on a national and global scale.



Digital Games Summit

The inaugural Digital Games Summit, held on November 15, 2024, at the University of the Sunshine Coast, marked a significant milestone for the Sunshine Coast's digital games industry. This event provided a platform for key industry discussions and showcased the region's potential as a growing hub for game development.

The Digital Games Summit brought together over 80 participants, including local game developers, educators, industry representatives and government officials. The event aimed to foster collaboration, highlight funding opportunities and explore strategies for strengthening the local gaming industry.

Key discussions included:

- the current state of the digital games industry on the Sunshine Coast
- strategies to attract and retain skilled talent
- funding opportunities and business incentives
- collaboration between education providers and industry leaders.

The summit emphasised the importance of educational institutions in preparing students for careers in the gaming sector. It also highlighted government initiatives such as:

- Screen Queensland's Digital Games Incentive: financial support for local game developers
- Games Residency Program: providing mentorship and networking opportunities to early-stage gaming companies
- Investment and Grants: programs designed to attract gaming businesses to the region.

The summit recognised challenges such as talent retention, infrastructure needs and the necessity for greater visibility of Sunshine Coast-based gaming companies. However, with continued investment and collaborative efforts, the region is poised to become a competitive player in Australia's digital games industry.

The Sunshine Coast SA4 region represents a dynamic local ecosystem, characterised by diverse industries, a growing population and a strong emphasis on sustainability and innovation. While tourism, agriculture and retail remain key sectors, the region is emerging as a hub for high-tech industries, including digital health, IT services and green technology. This ecosystem is supported by essential infrastructure, such as the Sunshine Coast International Broadband Network, which enhances connectivity and supports businesses in both urban and rural areas.

Additionally, the region benefits from a thriving education sector, with institutions like the University of the Sunshine Coast driving research and development in fields such as environmental sustainability, health sciences and digital innovation. This contributes to a highly skilled workforce with a strong focus on upskilling and lifelong learning.

As the Sunshine Coast continues to develop and evolve, the region's commitment to sustainability, innovation and placemaking will be key in shaping its future.

With a strategic focus on fostering a diverse and resilient economy, attracting high-value employment and supporting a vibrant local community, the region is well-positioned to thrive in the years ahead.

By leveraging its unique strengths, such as digital connectivity, a skilled workforce and a focus on circular economy principles, the Sunshine Coast is creating a dynamic environment where both businesses and residents can grow, collaborate and succeed. As it moves towards its long-term goals, the region's continued emphasis on inclusivity, sustainability and local opportunity will ensure that it remains a desirable place to live, work and invest.

Future opportunities for the Sunshine Coast region

The Queensland screen and digital games industry is poised for growth through strategic investment, skill development, and targeted attraction efforts. By fostering the Sunshine Coasts ecosystem through investing in opportunities that build future assets, including bespoke creative business mentoring to enhance market-ready skills in creative entrepreneurship, a strong pipeline of skilled craft workers and thriving local businesses can be realised.

Future opportunities for the Sunshine Coast screen and digital games sectors align with three common themes:



Attracting investment



Leveraging local



Aligning training



Attracting investment

Attracting investment locally leverages Queensland's unique advantages to secure greater benefits from the screen and games sectors, extending opportunities beyond South East Queensland. This includes positioning Queensland as a premier destination for high-value foreign and domestic investment, ensuring lasting industry benefits and fostering collaboration across government agencies such as Tourism and Events Queensland, Trade and Investment Queensland, and Jobs Queensland to achieve the best creative industry outcomes.

Encouraging skills development

By focusing on place-based skills development activities and removing barriers to local production of short-form content, TV series, documentaries and feature films, regions are best placed to entice future investment and attract, build and retain a skilled workforce locally. Through partnerships with key agencies, Screen Queensland can support digital games organisations, particularly VR and AR professionals, which aim to expand their horizons into new markets to increase market share where supply chains could benefit from this technology.

Local government and key agency collaboration

Local Governments participate in the 'Film-Friendly' program. Beyond taking the initial administrative steps to register as supportive of the industry, the local region would also benefit from:

- encouraging local screen and digital games professionals to register on the Screen Queensland Crew Directory to advertise availability of skills in the region
- advocacy for Screen Qld to expand and include digital games within the 'film-friendly' definition and promoting the inclusion
- using regionally based location scouts to increase the image portfolio currently available on Screen Queensland and council websites to enhance investor interest and need for a regionally based workforce
- supporting development of a statewide and consistent permit process for location filming to reduce barriers to producing content in Queensland

- establishing a regular venue for meetings, professional development and networking events
- hosting networking events and encouraging collaboration and professional development activities within the region
- developing regional newsletters that promote diversity and collaboration and share industry relevant information
- promoting local training opportunities to industry stakeholders to develop a formal lifelong learning culture
- advocating with training providers for additional training offerings in the local area
- targeted promotion of existing funding grants available to support the Game developers eco-system on the Sunshine Coast.

Through partnerships with key agencies, Screen Queensland can support digital games organisations, particularly VR and AR professionals, which aim to expand their horizons into new markets to increase market share where supply chains could benefit from this technology.

Sector attraction, events and activities

Hosting of sector-specific festivals and events, investors and skilled workers are attracted to Queensland. V-Fest and Screen Forever will draw international attention and provide future opportunity for the state's workforce through increased networks and promotional activities. Attracting relevant digital games festivals is equally important and needs to be considered in the short to medium term to build a sustainable ecosystem locally.

Priority	Future opportunities	Existing resources
High	<ul style="list-style-type: none"> ○ SQ advocate as a connector between industry and key organisations 	<ul style="list-style-type: none"> ○ Defence Jobs Queensland ○ Defence Industry Hubs ○ Department of State Development ○ Queensland Health - HIRO
Medium	<ul style="list-style-type: none"> ○ Attract industry events to Queensland specific to the Screen industry (e.g. Screen Forever) ○ Attract industry events to Queensland specific to digital games sector (e.g. PAX Australia) 	
High	<ul style="list-style-type: none"> ○ Targeted promotion of existing funding grants available to support the Game developers eco-system on the Sunshine Coast 	<ul style="list-style-type: none"> ○ Screen Queensland Games Grants ○ Screen Australia's Games Expansion Pack ○ Digital Games Incentive ○ Federal Digital Games Tax Offset



Leveraging local

Leveraging local content creators, infrastructure and support networks including Local Government will amplify future opportunities for the region. Through targeted initiatives and support for existing activities and opportunities that have been largely self-driven, the sectors' future state can be achieved.

Promote skills mobility

The opportunity to accelerate application of skills within and across both screen and digital games sectors, and more broadly across the region's economy, is high. By promoting skills mobility between the sectors and supporting other industries (e.g. health, Mining Equipment, Technology and Services (METS), defence), businesses can broaden their customer base and increase local retention rates and local workers remaining in the Sunshine Coast SA4 region.

Individuals within the screen sector at times work across a variety of occupations to remain within the sector. Digital games professionals can use similar skills (for which they usually have a qualification) across a multitude of industries. To obtain the greatest benefit from this mobility, encouraging collaboration and networking across the two sectors is required. Animators' skills bridge film and digital games, as do those of many postproduction, VR/AR and games development individuals. Through promotion of these flexible skills sets, employment opportunities across the sectors are further highlighted.

Expand 'Film-Friendly'⁴²

Each state and territory has its own screen production agency competing both globally and with other states and territories to attract national funding, productions and investment into their jurisdiction. To support the regions, Screen Queensland established the Film-Friendly Councils initiative, providing a mechanism for councils to work with Screen Queensland to make filming in their region easier for production houses, filmmakers and crews.

Currently both the Noosa Shire Council and Sunshine Coast Council participate in the initiative to support investment in the region, though not all local content creators are listed on the site, reducing opportunities across the ecosystem as potential investors use the site to investigate availability of a locally available skilled workforce. Encouraging all content creators to be listed, would showcase the depth of the talent available within the region.

There is currently no adjacent mechanism to support digital games developers, providing an opportunity for this to be established within the Sunshine Coast SA4 region as a pilot region before expanding statewide. Local Government can play an active advocacy role, requesting for the expansion of the 'Crew Directory' to include games developers to support networking and investment opportunities within the region.

Monitor skills shortages

Through monitoring and tracking of skills shortages, Screen Queensland, in collaboration with Local Government, can advocate on behalf of the sectors for increased training investment to address the region's future skills needs, and create a sufficient future pipeline of workers to maximise incoming investment opportunities and creation of local, regular content.

Support local content creation

For regions to capitalise on future economic opportunities, quality skills development for individuals is critical.⁴² Supporting underrepresented groups such as Indigenous professionals, and local workforce skills development activities (such as the case studies shown earlier) through funding initiatives, increases 'credit' attainment across the state, while the introduction of a local content quota to all funded film festivals improves exhibition of locally made content.

⁴² Jobs Queensland. 2019. *Future Work, future jobs. Preparing Queensland for the evolution of work.* Ipswich. <https://jobsqueensland.qld.gov.au/projects/futurework/>.

Digital games developers will benefit from continued professional networking events to enhance collaboration and build local networks. The Sunshine Coast has previously hosted Games Jams including the 'Season of the Dev' to support the local ecosystem to build their skills, capability and networks.

Through the establishment of a regional fund offered by Screen Queensland, that captures the Sunshine Coast region and is made available to production companies based on the Sunshine Coast, more opportunities can be offered in future to support the broader industry and showcase what the region and sectors have to offer.

Priority	Future opportunities	Existing resources
Medium	<ul style="list-style-type: none"> Promote flexible skills working across the sectors 	<ul style="list-style-type: none"> Screen Queensland social media platforms
High	<ul style="list-style-type: none"> Support local talent to register their details on the Screen Queensland website to showcase the depth of talent available in the region Local Government to advocate for expansion of the 'Crew Directory' to include games developers to support networking and investment opportunities 	<ul style="list-style-type: none"> Local Government
Low	<ul style="list-style-type: none"> Track skills shortages <ul style="list-style-type: none"> Track the skills needs of the industry to support a sufficient future pipeline of workers 	
High	<ul style="list-style-type: none"> Support local content development by: <ul style="list-style-type: none"> Supporting Indigenous professionals across both sectors to produce local content and increase career opportunities Creating a local workforce development initiatives fund to gain 'credit' Local support for digital games professional networking events to enhance collaboration A Regional Fund offered by Screen Queensland, that captures the Sunshine Coast region and is made available to production companies based on the Sunshine Coast 	<ul style="list-style-type: none"> Continued and increased funding of the Sunny Coast Showdown, through the Sunshine Coast Screen Collective



Aligning training

By promoting upskilling and training opportunities for existing and aspiring screen and games producers, the industry is encouraged to increase collaboration efforts, professional development and networking initiatives that strengthen the entire ecosystem.

Key local industry outcomes include increased productions, projects and games with commercial market pathways; expanded skills development and employment opportunities for Queenslanders; enhanced business activity for Queensland-based companies, including IP ownership; and the growth of Queensland-based storytelling, preserving authenticity by filming in real locations. Additionally, long-term talent development initiatives will ensure the future workforce is equipped with skills such as creative entrepreneurship, strengthening Queensland's position as a creative industry leader.

Support content protection

The economic contribution of the sectors continues to be impacted by internet piracy. While the Commonwealth Government has taken steps to reduce piracy by ordering internet service providers to block Australian consumer access to over 59 pirate websites,⁴³ the laws can be difficult to enforce, and consumers often find new sites and download content before they are blocked. With support from all levels of Government, content developers can navigate protecting their own IP and reducing the risk of content theft and increasing financial viability of their business.

Furthermore, increasing broader business and professional capability is required to remain globally competitive. Stakeholders previously identified a suite of content to build their skills and capability including, taxation, legal advice, visas and customs.

Strengthen training pathways

Credit is key to success within the screen sector. Having proven experience via professional credit and networking is more important than a qualification. In contrast, within the digital games sector, a qualification and experience are considered more essential.

There is limited independent information outlining the available entry pathways into the screen and digital games sectors. In recognition of this, the

Queensland Government established the Screen and Media Gateway to Industry Schools program to provide teachers with professional development opportunities and students access to industry-led events and valuable experiences. There is currently only one secondary school participating in this program on the Sunshine Coast, providing opportunity for other schools to also participate, collectively share networks, knowledge and reduce costs and streamline processes for both education and industry alike.

Build a mentor network

Introduction of 'How to mentor' training for experienced professionals may increase the pool of suitable mentors and the provision of consistent and relevant advice to new entrants, as well as increase retention rates within under-represented groups. Entrepreneurs within the digital games sector have stated they are in need of professional expertise to address barriers to start-up and ongoing sustainability.

Increase awareness and uptake of the traineeship system

The apprenticeship and traineeship system is used sparingly within the screen sector. Through targeted promotion of traineeships that deliver industry-endorsed quality outcomes, the sector can use the system to strengthen the pipeline of new talent and gain access to financial incentives to improve retention rates.

Increasing promotion of the traineeship system, including use of sector-specific imagery, information relating to incentives, training and employment hours requirements may improve these low figures and provide a pathway for new entrants to gain valuable hands-on sector experience.

Enhance shadowing opportunities

By offering paid job shadow opportunities for practitioners in above-the-line and below-the-line roles on high end productions, networks and skills are enhanced locally driving further opportunities for individuals and the larger ecosystem due to skills uplift. By working together and supporting each other, the region's screen and digital games sectors can thrive.

⁴³ IBISWorld. (2023). *Motion Picture and Video Production in Australia*. Melbourne: IBISWorld. <https://my.ibisworld.com/au/en/industry/j5511/about>

Priority	Future opportunities	Existing resources
Medium	Provide a central hub for industry to seek support for: <ul style="list-style-type: none"> ○ taxation advice ○ legal advice (employment law, legal contracts) ○ IP rights ○ censorship ○ visa and customs requirements 	<ul style="list-style-type: none"> ○ National Tax Clinic ○ Arts Law Centre of Australia ○ Trade and Investment Queensland ○ Innovate Queensland ○ Department of Home Affairs
High	Promote pathways by: <ul style="list-style-type: none"> ○ Strengthening local pathway programs <ul style="list-style-type: none"> - Encourage additional local schools to participate in GISP ○ Enhancing teachers professional development 	<ul style="list-style-type: none"> ○ Gateway to Industry Schools Program (GISP) ○ Department of Trade, Employment and Training
Medium	Increase mentorships by: <ul style="list-style-type: none"> ○ Offer mentor training to experienced professionals with a particular focus on regional areas and diverse groups ○ Offer mentor training for small business operators to increase mentor pool 	<ul style="list-style-type: none"> ○ Screen Queensland mentorships program ○ Office of the Queensland Chief Entrepreneur ○ Mentoring for Growth Program ○ Innovate Queensland
Low	<ul style="list-style-type: none"> ○ Support the traineeship and apprenticeship system through: <ul style="list-style-type: none"> - Develop sector specific promotional material to increase the uptake of trainees and apprentices 	<ul style="list-style-type: none"> ○ DTET Apprenticeship and Traineeship system
Low	<ul style="list-style-type: none"> ○ Offer paid shadow opportunities for practitioners in above-the-line and below-the-line roles on high end productions 	

Appendix A:

Industry-endorsed definition of Screen & Digital Games

Industry code and name	ANZSIC group	Includes primary activities (but not limited to)
Film and television sector		
J Information Media and Telecommunications	5511 Motion Picture and Video Production	<ul style="list-style-type: none"> ○ Motion picture production ○ Television commercial production ○ Television program production ○ Video production
J Information Media and Telecommunications	5514 Post-production Services and Other Motion Picture and Video Activities	<ul style="list-style-type: none"> ○ Computer graphic, animation and special effect post-production service ○ Developing and printing motion picture film ○ Film or tape closed captioning ○ Film or video transfer service ○ Motion picture film reproducing ○ Motion picture or video editing service ○ Motion picture production, special effects ○ Post-production facility, motion picture or video ○ Post synchronisation sound dubbing ○ Sound dubbing service, motion picture ○ Subtitling of motion picture, film or video ○ Teleproduction service ○ Titling of motion picture film or video ○ Video conversion service (between audio and visual media formats)
J Information Media and Telecommunications	5512 Motion Picture and Video Distribution	<ul style="list-style-type: none"> ○ Film distribution ○ Motion picture and video distribution ○ Motion picture leasing ○ Motion picture library operation (stock footage) ○ Television program distribution
J Information Media and Telecommunications	5513 Motion Picture Exhibition	<ul style="list-style-type: none"> ○ Cinema operation ○ Drive-in theatre operation ○ Festival operation (exhibition of motion pictures) ○ Motion picture screening ○ Motion picture theatre operation
J Information Media and Telecommunications	5621 Free-to-Air Television Broadcasting	<ul style="list-style-type: none"> ○ Free-to-air television service ○ Television broadcasting network operation ○ Television broadcasting station operation
J Information Media and Telecommunications	5622 Cable and Other Subscription Broadcasting	<ul style="list-style-type: none"> ○ Cable broadcasting network operation ○ Cable broadcasting station operation ○ Pay television, broadcasting network operation ○ Pay television, broadcasting service ○ Pay television, broadcasting station operation ○ Satellite broadcasting network operation ○ Satellite broadcasting station operation ○ Subscription television broadcasting service

Industry code and name	ANZSIC group	Includes primary activities (but not limited to)
Digital games sector		
J Information Media and Telecommunications	5420 Software Publishing	<ul style="list-style-type: none"> ○ Software publishing (non-customised)
J Information Media and Telecommunications	5921 Data Processing and Web Hosting Services	<ul style="list-style-type: none"> ○ Application hosting ○ Application service provision ○ Audio and visual media streaming service ○ Automated data processing service ○ Computer input preparation service ○ Computer time leasing or renting ○ Computer time sharing service ○ Data capture imaging service ○ Data entry service (electronic) ○ Data processing computer service ○ Disk and diskette conversion and recertification service ○ Electronic data processing service ○ Microfiche or microfilm recording and imaging service ○ Optical scanning service ○ Web hosting
C Manufacturing	2421 Computer and Electronic Office Equipment Manufacturing	<ul style="list-style-type: none"> ○ Calculator manufacturing ○ Cash register manufacturing ○ Computer manufacturing ○ Computer monitor manufacturing ○ Computer peripheral manufacturing ○ Computer printer manufacturing ○ Joystick manufacturing ○ Keyboard manufacturing ○ Laptop manufacturing ○ Office machine (electronic) manufacturing ○ Photocopying machine manufacturing ○ Typewriter (electronic) manufacturing

