Australian Government
Department of Infrastructure, Transport,
Regional Development, Communications, Sport and the Arts

BUREAU OF COMMUNICATIONS, ARTS AND REGIONAL RESEARCH

Frequently Asked Questions: International Trade in Australian Cultural and Creative Goods and Services, 2015–16 to 2024–25 (Experimental Estimates)

November 2026

Overview

What is the purpose of this report?

This paper presents experimental estimates of Australia's international trade — imports and exports — in cultural and creative goods and services from 2015–16 to 2024–25.

It extends the framework set out in BCARR's statistical working paper *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh)* to the international trade dimension. It applies the same 15 cultural and creative domains, covering goods such as jewellery, printed materials and musical instruments, and services such as software publishing, advertising, film and performing arts.

Together, these estimates provide a picture of how Australia engages globally with the cultural and creative economy, both as a supplier and as a market for internationally-produced cultural and creative goods and services.

How does this paper relate to BCARR's cultural and creative research?

Phase 1 of BCARR's cultural and creative research quantified the direct economic contribution of cultural and creative activity in Australia. This work is set out in *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh)*.

Phase 2 extends this work by examining the workforce and international engagement behind that activity. It includes BCARR's interim report on Australia's cultural and creative workforce and this paper on Australia's international trade position in cultural and creative goods and services. The methodology and scope used in this paper are fully aligned with the Phase 1 approach, applying the same product classifications to the trade dimension.

Why are the estimates in this report described as 'experimental'?

This report presents the first experimental estimates of Australia's international trade in cultural and creative goods and services. It extends the methodology developed in BCARR's 2024 Cultural and Creative Activity in Australia methodology refresh and applies it to international trade. The estimates are grounded in ABS national accounts data, including Input-Output and Supply-Use tables. However, measuring cultural and creative trade also requires additional sources, including international trade in services statistics and other datasets where official ABS estimates are unavailable. In some cases, indirect estimation techniques were used to produce trade measures that are consistent with the national accounts framework.

The estimates are considered experimental because important data and measurement challenges remain. Some cultural and creative activities, particularly digital games development, do not have dedicated product classifications in Australian national accounts data. These activities therefore require the use of external benchmarks and proxy measures. Additional adjustments were also needed for internet publishing and broadcasting services because of changes in ABS digital services statistics. Exports of digital games development were estimated indirectly because no official trade data are available. As a result, estimates for these domains are subject to greater uncertainty than those for other cultural and creative activities.

Further uncertainty arises from ongoing revisions to ABS digital services trade statistics and the inherent difficulty of measuring trade in services, particularly intangible and digitally-delivered products. The estimates should therefore be viewed as indicative of broad trends and magnitudes rather than precise measures. Future iterations will be refined as data sources, classifications and statistical standards evolve, including updates associated with the *Manual on Statistics of International Trade in Services 2026* (MSITS 2026), *International Merchandise Trade Statistics 2026* (IMTS 2026) and any new data designed to better capture cultural and creative trade.

What does this paper cover?

The paper presents annual estimates of cultural and creative imports, exports and net exports (the trade balance) from 2015–16 to 2024–25, including:

- total cultural and creative trade, and its breakdown between goods and services
- cultural and creative trade as a share of Australia's total trade
- trade estimates for each of the 15 cultural and creative domains
- export performance by domain, with domains grouped according to their performance over the period analysed.

Methodology questions

What is included in the scope of cultural and creative trade?

The scope of cultural and creative trade is fully aligned with the Phase 1 methodology and scope. It uses the Australian Bureau of Statistics (ABS) *Australian National Accounts: Input-Output Tables (Product Details)* and *Australian National Accounts: Supply Use Tables* as the primary data sources.

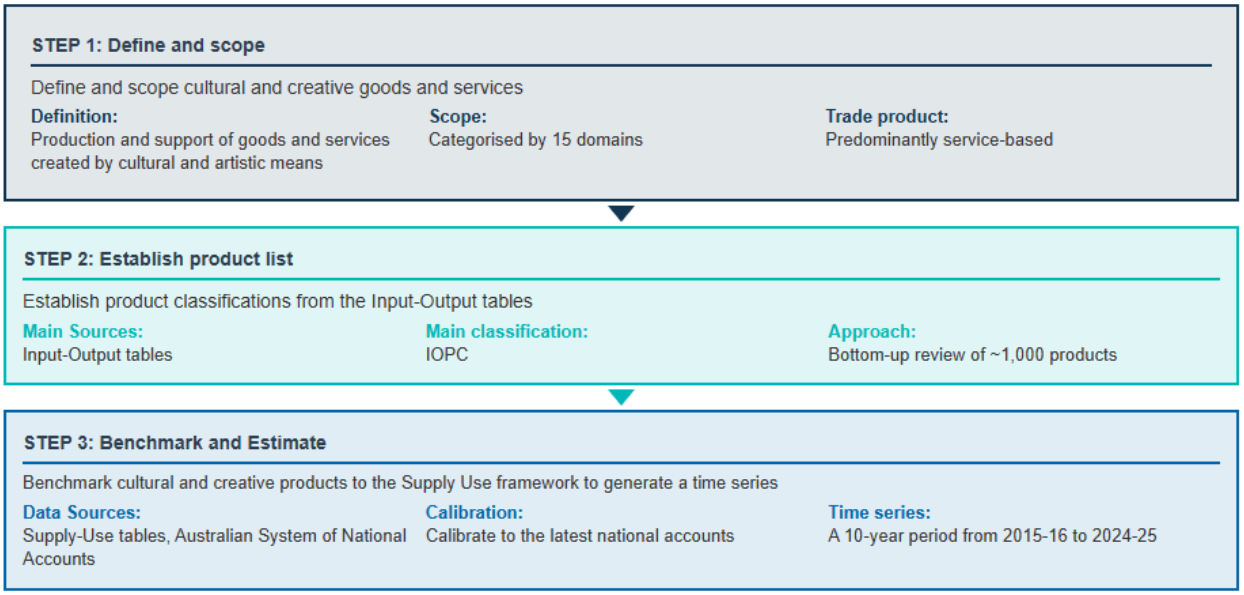
Because Australia's cultural and creative sector is predominantly service based, the scope of cultural and creative trade is broadly consistent with the framework set out in the United Nations *Manual on Statistics of International Trade in Services 2010* (MSITS 2010), which groups a broad range of culturally significant cross-border transactions under 'cultural transactions', including performing rights, royalties, licences to reproduce or distribute cultural products, and architectural and advertising services.

What approach and data sources are used to estimate cultural and creative trade?

The estimation process uses the same three-step approach developed for Phase 1:

- **Step 1: Define and scope** cultural and creative goods and services using the 15 domains established in the Phase 1 methodology.
- **Step 2: Establish product classifications** from the Input-Output tables. This uses a 'bottom-up' approach to review the full list of Input-Output Product Classifications (IOPCs) and identify products that are in scope.
- **Step 3: Benchmark to the Supply Use framework** to generate a consistent annual time series from 2015–16 to 2024–25. Where the Supply Use tables have been revised, the cultural and creative time series is also revised to maintain consistency with the broader national accounts framework.

Figure 1. Estimation process to quantify the international trade of cultural and creative goods and services



Source: BCARR.

How are digital services trade estimates derived where data gaps exist?

Two domains required additional methodological refinement beyond the standard benchmarking approach: internet publishing and broadcasting, and digital games development.

For **internet publishing and broadcasting**, imports were backcast using the growth index of audiovisual services (not included elsewhere) imports published by the ABS *Balance of Payments and International Investment Position*, to align the historical series with a materially-updated import share introduced in the 2022–23 Input-Output tables.

For **digital games development**, there is no dedicated product classification in the national accounts. Export estimates were constructed using an indirect benchmarking approach, anchored to a 2008 Department of Foreign Affairs and Trade (DFAT) estimate of digital games export activity and calibrated against Interactive Games and Entertainment Association (IGEA) industry evidence. Because the benchmark is now nearly two decades old and no official ABS trade data exist for this domain, these estimates are subject to greater uncertainty than other domains and should be interpreted with particular caution.

What are the main limitations and caveats of these estimates?

International trade estimates for the cultural and creative sector measure imports and exports of cultural and creative goods and services that fall within the defined scope of the 15 domains. They do not capture all international activity that may be economically-associated with cultural and creative activity. For example, a

gallery exhibition, festival, or other major event may attract international visitors to Australia. Visitor spending on accommodation, food and transport in Australia is recorded as an export of travel services. While this spending may be attributable to cultural and creative activity, it falls outside the cultural and creative domain scope used in this paper and is therefore not included in the cultural and creative trade estimates.

Trade balances presented in this report are descriptive and should not be interpreted as indicators of sectoral performance, competitiveness or export readiness. Trade deficits may reflect structural characteristics of global markets, consumption patterns or Australia's position in international value chains, rather than underlying export capability or demand for Australian cultural and creative products.

Similarly, export-positive outcomes do not necessarily imply untapped growth capacity or readiness for rapid scale-up. Any implications for policy focus or investment should therefore be interpreted alongside complementary evidence on industry structure, capability, and market conditions.

Apparent spikes in the cultural and creative share of Australia's total services trade during 2020–21 and 2021–22 mainly reflect the sharp contraction in Australia's overall services trade during the pandemic, rather than growth in cultural and creative trade itself.

Why do BCARR's exports estimates differ from other published estimates for some domains?

BCARR measures international trade in cultural and creative goods and services using the Australian National Accounts framework and the Input-Output Product Classification (IOPC), with scope aligned to international standards for trade in services statistics. Other publications measure related but different concepts, use different classifications, or define domains differently. Their estimates are therefore not directly comparable with BCARR's, and both may be valid for their respective purposes.

Differences are most pronounced in two domains.

1) **Film and television activities**

BCARR's export estimates for the Film and Television Activities domain differ from some published screen sector export estimates, including those in *Screen Currency 2026*,[1] because they measure different aspects of sector activity. BCARR and *Screen Currency 2026* use different statistical frameworks, classifications and valuation methods, so their estimates are not directly comparable.

Both approaches provide useful insights, but they address different policy and analytical questions. *Screen Currency 2026* estimates total screen sector exports of $1.3 billion in 2023–24, expressed in 2024–25 dollars. By comparison, BCARR estimates film and television activities' exports at $586 million in 2023–24, in current prices. Screen Currency's screen scope also includes internet broadcasting, while BCARR reports internet broadcasting as a separate domain; on a comparable scope, BCARR's estimate is $606 million. The difference mainly reflects three methodological factors.

- **Treatment of international drama expenditure.** The main difference is how foreign-financed productions filmed in Australia are treated. *Screen Currency 2026* includes $852.3 million in expenditure associated with international productions. It states that 85% of this expenditure occurred through corporate structures, such as special purpose vehicles (SPVs), which are treated by the Australian Taxation Office as standard Australian companies. As a result, sales to these foreign-owned SPVs are recorded as domestic transactions rather than exports. Screen Currency 2026 includes this expenditure in its estimate of screen exports. This conceptual difference accounts for most of the discrepancy between the estimates. Excluding international drama expenditure, BCARR's estimate is broadly aligned with the comparable *Screen Currency 2026* figure.
- **Classification used for measurement.** BCARR uses product-based estimates from Input-Output data benchmarked to the Supply-Use framework. *Screen Currency 2026* uses a business-based approach, drawing on administrative data classified by each business's primary industry. These approaches can

---

[1] Screen Australia 2026, *Screen Currency 2026: Economic Insights*, Screen Australia, Sydney, p. 47.

allocate the same economic activity differently. Under an industry-based framework, a business is assigned to one industry, even if it supplies a range of products. Under a product-based framework, activity is allocated according to the goods and services produced. As a result, the same underlying activity may be classified differently in the two datasets, and the relative size of individual sectors can differ substantially between the two datasets.

- **Price basis**. The estimates are reported using different price bases. BCARR presents exports in current prices, while *Screen Currency 2026* reports values in 2024–25 dollars. This widens the numerical gap, although it is less significant than the conceptual and classification differences.

Both estimates are valid for their intended purposes. BCARR's estimates measure international trade in a way that is consistent with the Australian National Accounts and supports comparison across the 15 cultural and creative domains. *Screen Currency 2026* measures revenue from international sources flowing to Australian screen businesses, including activity that is treated as domestic production under national accounts concepts. The two estimates should therefore be understood as different measures designed for different analytical purposes, rather than as directly competing estimates.

2) Music production and distribution

Published music sector estimates often use a broader scope than BCARR's Music production and distribution domain. They may include music retail, which is outside this paper's scope, as well as activities that BCARR assigns to other domains. For example, composition, songwriting and live performance are included in Literature, creative and performing arts, while music education is included in Arts education. When limited to activities aligned with BCARR's Music domain — music recording, production, label services and distribution — the estimates are closely aligned.

Key findings

How large is Australia's cultural and creative trade?

In 2024–25, Australia's imports of cultural and creative goods and services totalled $42.7 billion, while exports totalled $17.1 billion. Both increased strongly in nominal terms over the decade. Imports more than doubled from $19.8 billion in 2015–16, while exports nearly doubled from $8.8 billion.

Is Australia a net importer or exporter of cultural and creative goods and services?

Australia was a net importer of cultural and creative goods and services throughout the decade. The trade deficit widened from $11.0 billion in 2015–16 to $25.5 billion in 2024–25, an increase of $14.5 billion. Imports grew faster than exports across the period, with the widening most pronounced from 2021–22 onwards. This was driven by strong growth in imports of internet publishing and broadcasting, print media and publishing (excl. internet), and advertising and promotion.

Is cultural and creative trade dominated by goods or services?

Cultural and creative trade is overwhelmingly service led. Services accounted for around 74–84% of total cultural and creative imports and 84–92% of total cultural and creative exports throughout the decade, reflecting the intangible and IP-driven character of the sector.

Goods trade is concentrated almost entirely in visual arts and crafts (principally jewellery and leather goods), which accounted for around 90% of all cultural and creative goods trade.

Which domains have the largest shares of Australia's cultural and creative imports and exports?

In 2024–25, print media and publishing (excl. internet) was the largest domain for both imports ($15.7 billion) and exports ($8.8 billion), with both sides driven overwhelmingly by software publishing services.

Advertising and promotion was the second-largest domain for imports ($12.6 billion) and exports ($4.4 billion), driven primarily by management services. Visual arts and crafts was the third-largest import domain ($6.4 billion), largely reflecting jewellery and leather manufacturing. Exports in this domain were valued at $1.3 billion.

What impact did COVID-19 have on cultural and creative trade?

Total cultural and creative exports fell in 2020–21 as international activity contracted sharply. By contrast, imports of cultural and creative services were more resilient, declining only modestly compared with the steep fall in Australia's total service imports.

The apparent increase in the cultural and creative share of Australia's total services trade during 2020–21 and 2021–22 mainly reflected declines in overall service imports and exports, rather than growth in cultural and creative activity.

How do exports differ across domains?

Cultural and creative domains vary widely in their export performance. Domains differ in the scale of imports and exports, trade balance outcomes, export intensity, and how these measures have changed over time. This paper groups domains into four broad categories, based on observed patterns in export performance and trade balance over the period analysed.

- **Category 1: Domains with strong and growing exports** — print media and publishing (excl. internet), film and television activities, music production and distribution, and digital games development are either already export-positive or have recorded export growth that consistently outpaced import growth over the decade. These trends have narrowed or reversed the trade balance and increased the export share of Australian production.
- **Category 2: Domains with increasing export intensity** — literature, creative and performing arts, and museums and galleries have either moved from trade deficit to surplus or recorded rising export intensity, though on a smaller scale than the domains in Category 1.
- **Category 3: Domains with small-scale exports but consistently positive net exports** — radio broadcasting, libraries and archives, architecture services, and arts education have recorded positive net exports for all or most of the period analysed, but with comparatively small-scale exports relative to the domains in Category 1.
- **Category 4: Net importing domains** — internet publishing and broadcasting, advertising and promotion, visual arts and crafts, design and fashion, and events (arts) have recorded imports that consistently and substantially exceeded exports for all or most of the period analysed.

A more detailed domain-level analysis of these trade patterns is provided in the full working paper.