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International Trade in Australian Cultural and Creative Goods and Services, 2015–16 to 2024–25, Experimental Estimates

Statistical Working Paper

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The Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts acknowledges the Traditional Custodians of Country throughout Australia and their continuing connection to land, sea and community. We pay our respects to them, their cultures and to their Elders, past, present and emerging.

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Executive summary

This paper presents experimental estimates of Australia's international trade in cultural and creative goods and services for the decade from 2015–16 to 2024–25. The methodology and scope are fully aligned with BCARR's companion working paper, *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh)*, and cover 15 domains spanning goods and services ranging from literature, creative and performing arts, advertising and promotion, to design and fashion, and digital games development.

Australia's cultural and creative trade expanded strongly in nominal terms over the decade, but the gap between imports and exports has widened considerably. Imports more than doubled, rising from $19.8 billion in 2015–16 to $42.7 billion in 2024–25, while exports grew from $8.8 billion to $17.1 billion over the same period. As a result, the trade deficit widened from $11.0 billion to $25.5 billion.

The sector is overwhelmingly service led. Services account for around 74% to 84% of total imports and 84% to 92% of total exports. Growth has been concentrated in digital and intellectual property (IP)-intensive activities—particularly print media and publishing (excluding internet-based media), advertising and promotion, and internet publishing and broadcasting—reflecting Australia's deep integration into global digital content markets. However, the trade in goods for the sector, dominated by visual arts and crafts (principally jewellery and leather goods), is comparatively small and has grown only modestly.

The COVID-19 pandemic caused a sharp but temporary contraction in trade during 2020–21, particularly in literature, creative and performing arts, museums and galleries, and film and television activities. Recovery was rapid, with most domains rebounding strongly from 2021–22, and exports in several areas reaching new highs by 2023–24. However, the fastest post-pandemic widening in the trade deficit was import-led, driven by surging demand for advertising and promotion, print media and publishing (excl. internet), and visual arts and crafts.

Australia's cultural and creative trade shares show a diverging trend. Cultural and creative imports rose from 5.5% in 2015–16 to 6.8% of total Australian imports in 2024–25, while exports remained stable at 2.7% of total exports over the same period—reflecting faster growth in Australia's cultural and creative import base, particularly in products related to digital services.

Figures in this paper are in current prices (nominal terms) and are presented in a format that can be updated each year.

Limitation and caveats

This paper presents the first release of experimental estimates of Australia's international trade in cultural and creative goods and services. It builds on the BCARR's 2024 working paper *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh)*, which refreshed the scope and methodology for Australia's cultural and creative thematic account.

Extending this framework to international trade introduces additional complexity. Although the same ABS national accounts data sources used for production estimates—such as Input-Output tables and Supply-Use tables—provide the foundation for this analysis, measuring trade in cultural and creative products also relies on supplementary sources. These include international trade in services statistics and, in some cases, non-ABS datasets where no official estimates exist.

This paper draws on these sources as the best available evidence and, where necessary, applies indirect estimation methods to derive trade measures aligned with the national accounts framework. The resulting estimates serve as a proof of concept, illustrating the type of insights that a dedicated cultural and creative trade account could deliver.

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. Expenditure by these visitors on accommodation, food and transport in Australia is recorded as an export of travel services. While this expenditure may be attributable to cultural and creative activity, it falls outside the cultural and creative domain scope applied in this paper and is therefore not included in the cultural and creative trade estimates.

While the methodology is robust and broadly aligned with approaches used by other international statistical agencies and research bodies, the estimates are classified as experimental for several reasons. First, there are no dedicated product classifications in the Australian national accounts for some cultural and creative activities, most notably digital games development. As a result, the analysis relies on external benchmarks and indirect proxies, which introduce uncertainty into the time series.

In some cases, further methodological adjustments were required to address specific data gaps. For the domains of internet publishing and broadcasting, and digital games development, these adjustments go beyond the standard benchmarking approach. Imports of internet publishing and broadcasting services were backcast using an external proxy series to bridge a structural break introduced by the December 2024 ABS digital services revision.[1] For digital games development, export estimates were derived through indirect benchmarking against external data sources, as no official trade data are available. Given these constraints, trade estimates for these two domains are subject to greater uncertainty than those for other domains in the report and should be interpreted with particular caution.

Second, ongoing changes in ABS digital services trade statistics, including the December 2024 revision to international trade in services, mean that historical estimates for digitally-delivered cultural and creative services may be revised as classification and measurement standards evolve. Third, following BCARR's 2024 methodology update, the scope of cultural and creative activity is more narrowly defined and more concentrated in services. Measuring services trade, which does not benefit from the direct observation available for goods, involves inherent estimation uncertainty, particularly for intangible and digitally-delivered products.

These experimental estimates will be refined as data and methods improve. In particular, future iterations will benefit from any expansion of ABS product classifications for digital services, updates to the Input-Output and Supply Use frameworks flowing from the *Manual on Statistics of International Trade in Services 2026* (MSITS 2026)[2] and *International Merchandise Trade Statistics 2026* (IMTS 2026)[3] standards updates and revisions, and any new data specifically designed to capture trade in cultural and creative products. Until such improvements are available, these estimates should be interpreted as indicative of

the broad patterns and orders of magnitude of Australia's cultural and creative trade, rather than as definitive measures.

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 within international value chains, rather than underlying export capability or product demand. Likewise, 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.

Key findings (Preliminary)

Australia's cultural and creative sector is deeply integrated into global markets and is increasingly shaped by digital trade. In 2024–25, Australia's cultural and creative goods and services imports totalled $42.7 billion and exports totalled $17.1 billion.

International trade in Australian cultural and creative sector is service dominated

- Services accounted for 74–84% of total cultural and creative imports and 84–92% of total cultural and creative exports over the decade, reflecting the intangible, IP-driven character of the sector.
- Goods trade is heavily concentrated in visual arts and crafts (principally jewellery and leather goods), which represent around 94% of all cultural and creative goods imports and most goods exports. Other goods categories (such as music instruments manufacturing, printing products) are minor.
- Many domains—including film and television activities, digital games development, design and fashion, internet publishing and broadcasting, architecture services, and advertising and promotion—record no goods trade at all, underscoring the sector's shift toward intangible, digitally-delivered products.

Australia is a persistent net importer, and the trade deficit has widened

- The cultural and creative trade deficit widened from $11.0 billion in 2015–16 to $25.5 billion in 2024–25.
- Imports grew at a faster rate than exports, and the widening deficit was most acute from 2021–22 onward, driven by surging imports of software publishing services, management services, internet publishing, and advertising—coinciding with rapid growth in global digital consumption post-pandemic

Several domains demonstrate Australia's export strengths and growing global engagement

- Film and television activities exports grew by 71.5% to $574 million in 2024–25, underpinned by strong growth in post-production services, and the share of production exported rose from 1.9% to 3.1%.
- Radio broadcasting in Australia has no imports and remains export-positive, with exports accounting for 12.8% of production in 2024–25.
- Literature, creative and performing arts shifted from a persistent trade deficit to a surplus from 2020–21 onward, with exports reaching $367 million in 2024–25 and representing a growing share at 6.1% of total Australian production in this domain.
- Preliminary estimates of digital games development in Australia indicate that this domain has been a highly export-oriented sector, with exports increased from $224 million in 2015–16 to $389 million in 2024–25.

Print media and publishing, advertising, and visual arts dominate both imports and exports

- In 2024–25, print media and publishing (excl. internet) was the largest import domain ($15.7 billion) and the largest export domain ($8.8 billion), with both sides overwhelmingly driven by software publishing services.
- Advertising and promotion was the second-largest import domain ($12.6 billion) and second-largest export domain ($4.4 billion), driven primarily by management services.

- While services account for most cultural and creative imports and exports, visual arts and crafts is the third-largest import domain ($6.4 billion), with import values in this domain largely driven by goods associated with jewellery and leather manufacturing. Exports in this domain were valued at $1.3 billion in 2024–25.

COVID-19 caused a temporary contraction, but digital trade accelerated strongly post-pandemic

- Total cultural and creative exports fell in 2020–21 as international activity in cultural and creative trade contracted sharply. Imports of cultural and creative services proved more resilient, declining only modestly in 2020–21 compared with the steep fall in total Australian service imports.
- The noticeable increases in the cultural and creative proportion of Australia's overall service trade during 2020–21 and 2021–22 resulted largely from declines in total service imports and exports, rather than a rise in cultural and creative activity.
- From 2021–22, imports of digital cultural services accelerated strongly, with internet publishing and broadcasting, software publishing, and management services all recording step-changes in growth. This reflects Australia's increasing integration into global digital content markets and the rapid uptake of subscription-based platforms.

Introduction

This paper builds on the framework set out in the Bureau of Communications, Arts and Regional Research's (BCARR) 2024 statistical working paper: *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh)*. The statistical working paper marked an important step in re-examining how Australia's cultural and creative activity is measured under *Revive: a place for every story, a story for every place—Australia's cultural policy for the next five years*.

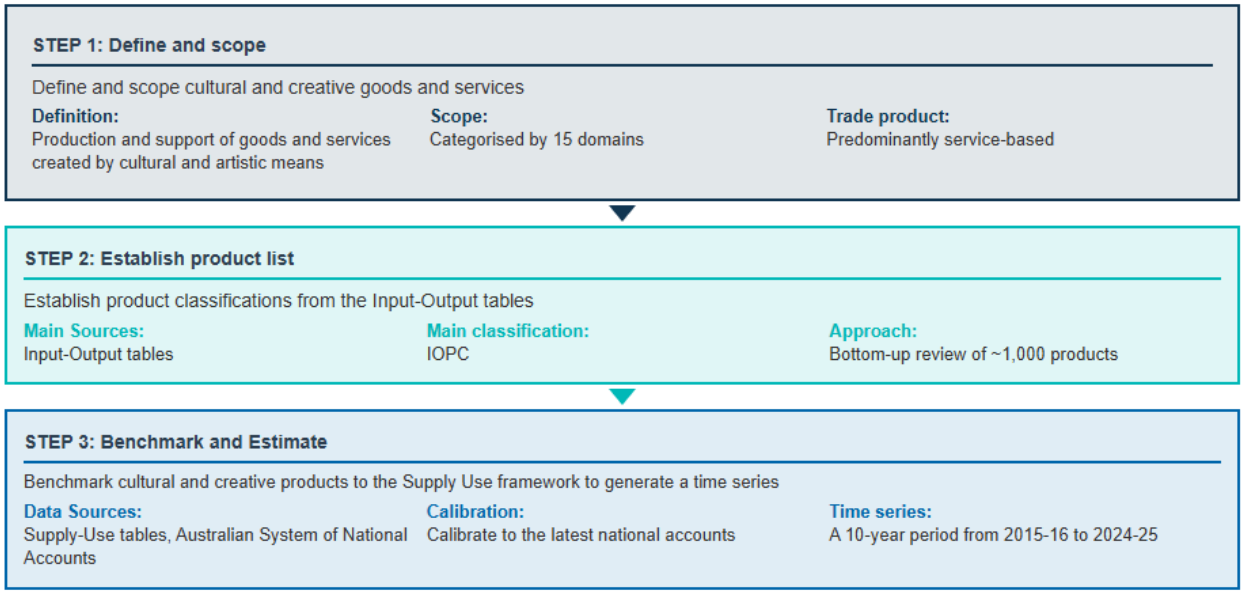
Extending that work, this current paper analyses Australia's international trade position in cultural and creative sectors. It presents annual estimates for the decade from 2015–16 to 2024–25, covering 15 cultural and creative domains that span both goods (such as jewellery, printed materials, and musical instruments) and services (such as software publishing, advertising services, film activities, and performing arts). Together, these estimates provide a comprehensive picture of how Australia engages globally with the cultural and creative economy—as both a supplier and a market for internationally-produced cultural and creative goods and services.

The paper is structured as follows. The first section describes the methodology and scope of the estimates, including the data sources and classification framework used. It then presents overall import and export trends and examines the cultural and creative sector's share of Australia's total trade. Detailed trade estimates are then provided for each of the 15 cultural and creative domains. The appendices contain the full list of Input-Output Product Classifications (IOPCs) in scope.

Methodology and scope

The methodology and scope for quantifying cultural and creative goods and services for international trade are fully **aligned with** the methodology and scope addressed in BCARR's 2024 working paper. The same approach used to measure domestic cultural and creative production is applied here to the international trade dimension, using 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.

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



Source: BCARR.

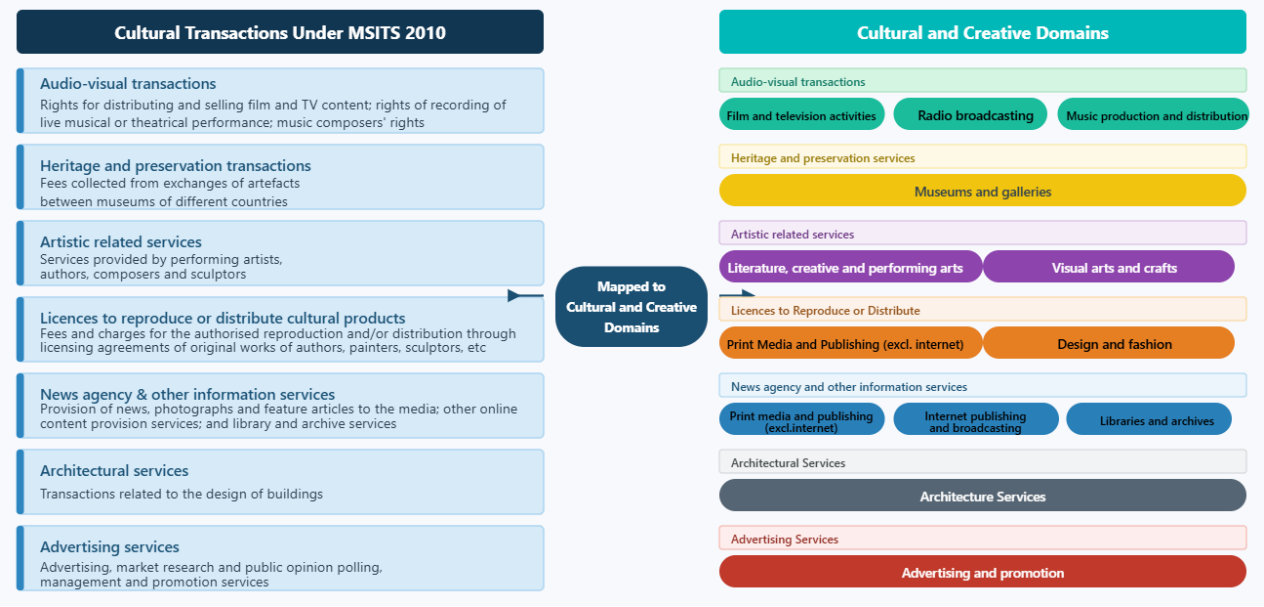
Step 1: Define and scope cultural and creative goods and services

The first step establishes the conceptual boundaries of cultural and creative goods and services to measure international trade. This paper uses the definition set out in BCARR's 2024 methodology, which defines cultural and creative activity as economic activity generated from the production and support of goods and services created by cultural and artistic means. Using this definition, cultural and creative activity is grouped into 15 domains, ranging from literature, creative and performing arts to architecture services and digital games development.

Scope of cultural and creative services

Given that Australia's cultural and creative sector is predominantly service based, the scope of cultural and creative trade is largely consistent with the framework set out in the United Nations *Manual on Statistics of International Trade in Services 2010* (MSITS 2010).[i] Under MSITS 2010, cultural transactions include audio-visual services and a broad range of culturally significant cross-border exchanges of goods and services. These include performing rights for live musical and theatrical productions, rights associated with performances staged abroad, composers' royalties, fees for theatrical releases, and heritage- and preservation-related transactions, such as payments arising from the international exchange of artefacts between museums.[4]

Figure 2. Mapping between MSITS 2010 cultural transactions and Australian cultural and creative domains



Source: United Nations MSITS 2010; BCARR.

The MSITS 2010 cultural transactions grouping also covers artistic services; licences to reproduce or distribute cultural products; news agency and other information services (excluding database services); architectural services; and advertising services included within advertising, market research and public opinion polling.

[i] Note that since this paper was prepared, updated international standards have been released. MSITS 2026 has been published and retains the complementary groupings for cultural transactions from MSITS 2010, with one new addition: '*Cultural, recreational and other personal services included in Travel (presentation of travel by product)*'. IMTS 2026 has also been released and now includes a dedicated sub-chapter on cultural and creative industry goods (Chapter 14, Section E), as well as discussion of the impact of digitalisation on trade in cultural and creative goods and services. Both manuals reference updated frameworks from UNESCO and UNCTAD for the scope of cultural and creative products. These developments will be considered in future updates to this paper.

The 15 domains applied in this paper correspond closely to these internationally-recognised classifications. It provides a consistent approach to measuring Australia's cultural and creative trade with international statistical standards.

Step 2: Establish product classifications from the Input-Output tables

The Input-Output (I-O) tables present detailed supply and use information for approximately 1,000 products in the ABS release *Australian National Accounts: Input-Output Tables (Product Details)*. These product classifications originate from the ANZSIC industry classification and provide the most disaggregated product classification level within the Australian National Accounts System. The I-O tables provide rich information about the supply and use of products in the Australian economy and the structure of, and inter-relationships between, Australian industries. I-O tables are a necessary tool for identifying and estimating cultural and creative activity at both product and industry levels.

A 'bottom-up' approach was applied during this step, reviewing the entire list of IOPCs to identify cultural and creative goods and services. Where a product was considered partially in scope but primarily related to cultural and creative activity, it was included in full. Where a product spanned both cultural and creative and non-cultural activity, a partial allocation was applied based on supplementary data sources.

The full list of Input-Output Product Classifications (IOPCs) considered in scope for cultural and creative international trade is detailed in Appendix A.

Step 3: Benchmark to the Supply Use framework to generate a time series

After identifying cultural and creative goods and services from the I-O tables, these products are benchmarked to the Supply Use framework to generate a consistent time series for the analysis period. This benchmarking step is necessary because the I-O tables are published only as a point-in-time snapshot and are not revised once finalised. By contrast, the Supply Use tables provide an annual time series from 1994–95 to the year preceding the most recently completed financial year and are frequently revised.

The benchmarking process uses the cultural and creative product shares identified from the I-O tables as weights, which are then applied to the corresponding Supply Use table aggregates to produce annual estimates. Where the Supply Use tables have been revised, the cultural and creative time series is revised accordingly, ensuring consistency with the broader national accounts framework.

For this paper, imports are defined as the value of goods imported and amounts payable to non-residents for the provision of services to residents, and exports are defined as the value of goods exported and amounts receivable from non-residents for the provision of services by residents, consistent with ABS national accounts definitions.[5] All estimates are expressed in current prices (nominal terms) and presented in Australian dollars.

Further adjustment on digital services of trade in cultural and creative sector

For two domains—internet publishing and broadcasting, and digital games development—the standard benchmarking approach outlined in this step requires additional methodological refinement. Supplementary data sources are used to address known limitations in the ABS's current product classifications applicable to these activities. The specific adjustments are detailed below.

Internet publishing and broadcasting

In December 2024, the ABS introduced new estimates of digital services within Australia's International Trade in Services statistics.[6] The new digital services estimates are allocated to existing Extended Balance of Payments Services (EBOPS 2010) categories, including audiovisual services not included elsewhere

(n.i.e)[ii] (EBOPS 11.1.2). The 2022–23 Input-Output tables incorporated a materially-updated import share for internet publishing and broadcasting services (IOPC 57000010), reflecting the updated ABS methodology for measuring cross-border purchases of online and streaming services.

To align the historical series with the revised Input-Output benchmark, imports of internet publishing and broadcasting were backcast using the growth index of audiovisual services n.i.e imports (EBOPS 11.1.2) published by the ABS.

Let M_t^{IPB} denote imports of internet publishing and broadcasting in year t, and let g_t denote the year-on-year growth index of audiovisual n.i.e (A_t) imports:

$$g_t = \frac{A_t}{A_{t-1}}, t = 2017, \dots, 2023$$

Starting from the 2022–23 benchmark, earlier years' estimates were derived recursively by applying the backward growth indices from the audiovisual n.i.e series.

$$M_{t-1}^{IPB} = \frac{M_t^{IPB}}{g_t}, t = 2023, \dots, 2017$$

This approach ensures that the internet publishing and broadcasting at the input-output level incorporates the revised supply use series within the national accounts system.

Digital games development

There is no dedicated IOPC product category or ANZSIC industry class for digital games development. According to the ABS *Film, Television and Digital Games Survey*, most activity in this domain is captured within ANZSIC class 7000 (Computer System Design and Related Services).[7] For this reason, the ABS survey was used as an additional data source to quantify digital games development output and GVA separately from the broader computer services category.

Drawing on historical and industry data, including the 2008 Department of Foreign Affairs and Trade (DFAT) report on Australian digital game design exports[8] and recent Interactive Games and Entertainment Association (IGEA) estimates,[9] digital games development in Australia has been a highly export-oriented sector for nearly two decades. However, the ABS *Film, Television and Digital Games Survey* does not publish trade data for this domain. As a result, export estimates are constructed using an indirect benchmarking approach, based on external sources to reflect the sector's international engagement.

The preliminary estimate of digital games development exports is imputed based on the 2008 DFAT publication.[iii] This estimate was used to match to the 2006–07 Input-Output (I-O) tables to derive the implied export share within Input–Output Product Group (IOIG) *7001 Computer System Design and Related Services*. That share was then benchmarked to the corresponding Supply Use Product Group (SUPG) 7001 in the latest published supply use tables[10] for period 2006–07.

$$X_{2007}^{SU} = \frac{X_{2007}^{DFAT}}{S_{2007}^{IO}} \cdot S_{2007}^{SU}$$

where:

- X_{2007}^{SU} is the benchmarked estimate of 2006–07 digital games development exports within the supply use framework
- X_{2007}^{DFAT} is the 2006–07 export estimate for digital games development reported by DFAT
- S_{2007}^{IO} denotes total exports of IOIG 7001 Computer System Design and Related Services from the 2006–07 Input-Output tables[11]

[ii] Based on the correspondence between *EBOPS 2010 and the Central Product Classification (CPC, Version 2)* published by the United Nations Statistics Division, this service category includes online audio and video content as well as online books.
[iii] According to the 2008 DFAT publication, Australian digital game design exports were estimated at $108.3 million in 2007.

- S_{2007}^{SU} denotes total exports of SUPG 7001 Computer System Design and Related Services from the latest supply use tables (with period covered from 1994–95 to 2023–24)

Exports for subsequent years are calculated by applying the growth index g_t of the broader product group (SUPG 7001) S_t, where:

$$g_t = \frac{S_t}{S_{t-1}}$$

Thus, export values for digital games development after 2006–07 are calculated as:

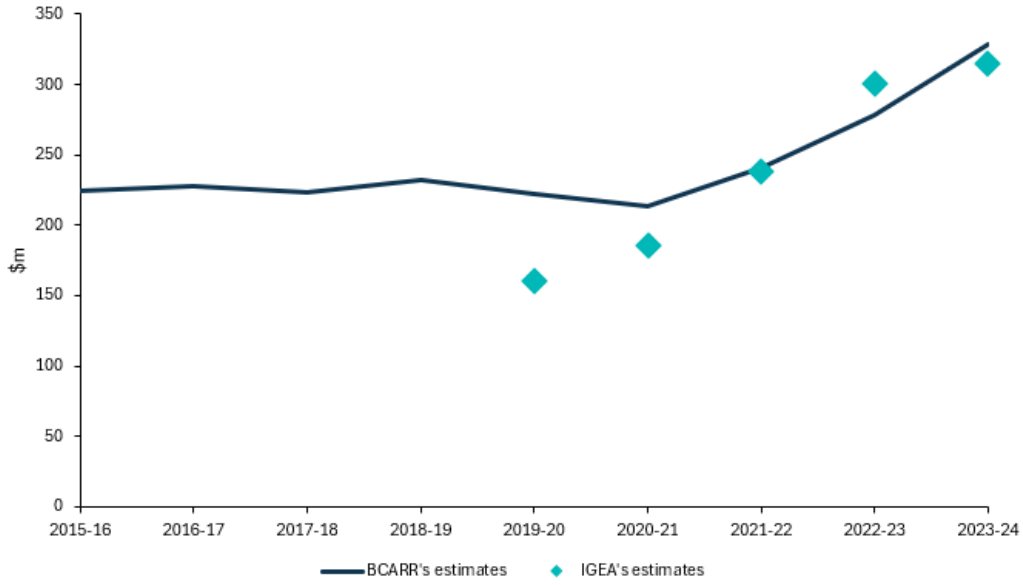
$$X_t^{SU} = X_{t-1}^{SU} \times g_t, \text{for } t \geq 2008$$

This procedure preserves the DFAT-calibrated benchmark level while ensuring that the digital games development export series evolves proportionally to movements in total computer systems design exports within the national accounts framework.

Validation and caveats

The resulting estimates of digital games development exports are broadly consistent with available industry data sources, particularly with figures reported by the Interactive Games and Entertainment Association (IGEA).

Figure 3. Estimates of digital games development exports, comparison between BCARR and IGEA



Source: ABS, IGEA, BCARR estimates.

The implied export share of output in 2015–16 (93.8%)—the starting year of the analysis period—is also broadly consistent with sector assessments, including IGEA estimates (which range from 82% to 93% between 2019–20 and 2023–24) and DFAT's earlier assessment of 92.6% in 2007.

However, in phase 1, estimates of Australian production (output) and gross value added (GVA) in digital games development are imputed using data from the ABS *Film, Television and Digital Games Survey* and subsequently calibrated to the national accounts. These data show rapid growth in both GVA and output over the decade, with output increasing from around $239 million in 2015–16 to $782 million in 2021–22.

Table 1. Comparison of digital games development data reported by the ABS, BCARR and IGEA

Data report	2015–16 ($m)	2021–22 ($m)	Growth Rate (%)
Business Income/ Domestic Output			
ABS *Film, Television and Digital Games Survey* - Businesses Total Income	111	459	313.4
BCARR estimates - Output	239	782	227.2
IGEA estimates - Income generated by Australian Game Development Studios	115	284	147.7
Industry Value Added (IVA)/ Gross Value Added (GVA)			
ABS ***Film, Television and Digital Games Survey*** – IVA	94	290	209.5
BCARR estimates – GVA	108	285	163.9

Source: ABS, IGEA and BCARR estimates.

Given this strong growth in measured production, the implied export-to-output ratio declines materially over time. This mechanical result may reflect measurement constraints in digital trade statistics, classification boundaries within IOPC 70000010, or broader national accounts treatment of cross-border digital transactions, rather than a structural reduction in the sector's export share.

To address this inconsistency, BCARR has implemented an output revision to bring the implied export share into line with IGEA industry evidence. Specifically, output and total intermediate use (TIU) for digital games development are scaled downward each year by a factor k, defined as:

$$k = \frac{X_{dg}}{w_{IGEA}}$$

where:

- X_{dg} represents digital games development exports; and
- w_{IGEA} denotes the export share of digital games development production, drawn from IGEA Annual Reports for each year (ranging from 0.81 in 2015–16 to 0.93 in 2023–24, with the latest estimate carried forward for 2024–25).

Gross value added (GVA) for digital games development is held constant throughout this revision. As GVA is defined as output minus total intermediate use (TIU), TIU is recalculated residually following the output revision, thereby preserving the core national accounts identity. This approach maintains the integrity of the value-added series consistent with *Film, Television and Digital Games Survey*'s IVA growth, while adjusting domestic production measures to better reflect export shares that are plausible considering industry evidence.

The revision affects only the output and TIU estimates and leaves the GVA series unchanged. As a result, the implied export-to-output ratios fall within the ranges reported by IGEA across the entire analysis period.

Notwithstanding this adjustment, domain-level estimates for digital games development should be interpreted with caution. The DFAT-anchored export benchmark is now nearly two decades old, and no official ABS trade data exist for this domain. In addition, the IGEA export share estimates used to calibrate the output adjustment are derived from voluntary industry surveys with variable coverage.

Accordingly, these estimates should be regarded as experimental. They will be refined as more robust trade and production data become available—particularly if the ABS expands the *Film, Television and Digital Games* Survey to incorporate international trade, or establishes a dedicated product classification for digital games within the national accounts framework.

Detailed estimates

Australia's cultural and creative trade has expanded strongly over the decade, but the gap between imports and exports has widened.

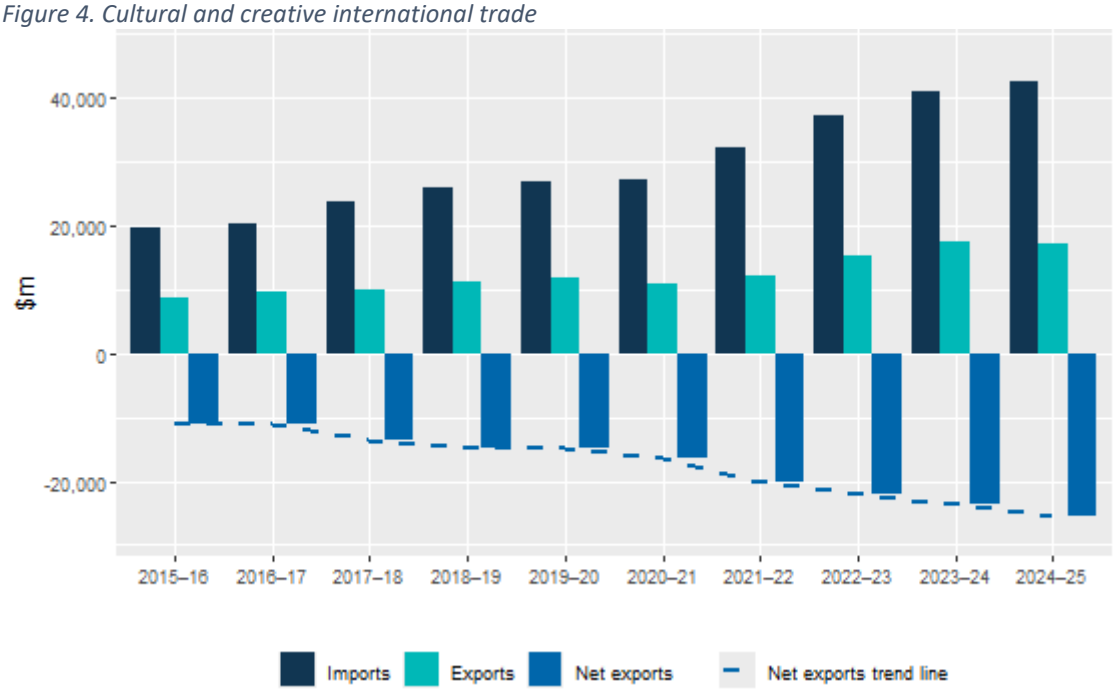
Table 2. Total cultural and creative international trade, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	19,791	8,784	-11,007
2016–17	20,412	9,533	-10,880
2017–18	23,639	9,958	-13,680
2018–19	26,048	11,205	-14,843
2019–20	26,892	11,948	-14,945
2020–21	27,238	10,785	-16,453
2021–22	32,254	12,146	-20,107
2022–23	37,401	15,378	-22,024
2023–24	40,894	17,440	-23,454
2024–25	42,654	17,139	-25,515

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports increased from $19.8 billion in 2015–16 to a new peak of $42.7 billion in 2024–25, while exports rose from $8.8 billion to $17.1 billion over the same period. As a result, net exports (exports less imports) remained negative throughout and the deficit widened from $11.0 billion in 2015–16 to $25.5 billion in 2024–25—an absolute deterioration of $14.5 billion over the period.

Figure 4. Cultural and creative international trade



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

A growth index shows steady gains in exports before the pandemic, a temporary drop in exports in 2020–21, and then a strong rebound through 2022–23 and 2023–24 before easing slightly in 2024–25. Import

growth, by contrast, increased sharply from 2021–22 onward, outpacing export growth and driving the fastest widening of the deficit between 2021–22 and 2024–25.

Figure 5. Cultural and creative imports and exports growth index, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

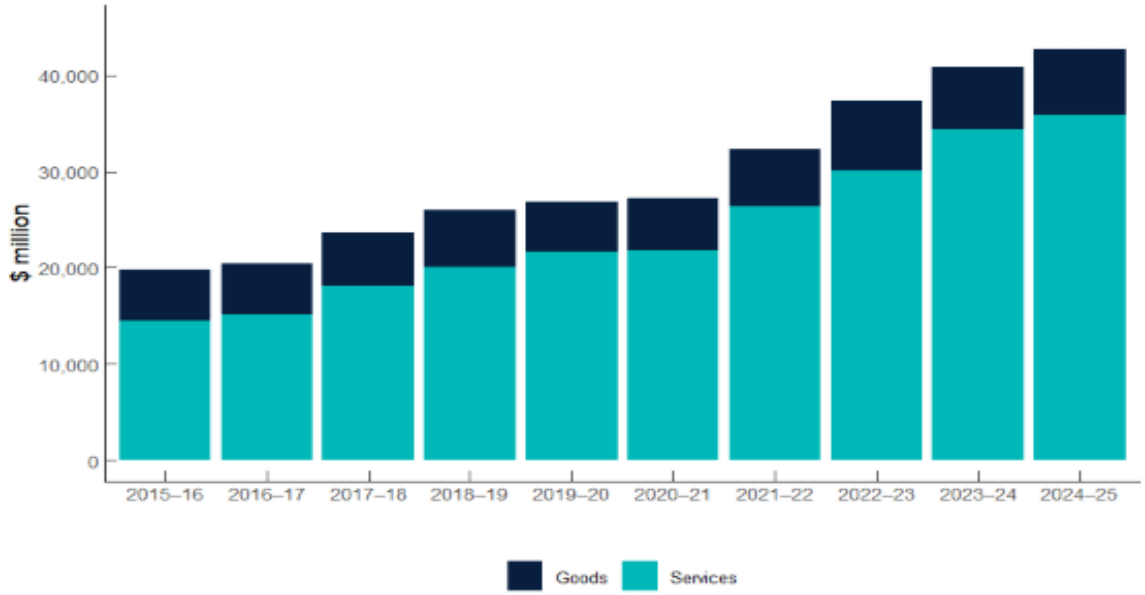
Overall, Australia has consistently been a net importer of cultural and creative goods and services, with the sector maintaining a persistent trade deficit.

Imports

Total cultural and creative imports, 2015–16 to 2024–25

Australia's cultural and creative imports grew steadily between 2015–16 and 2024–25, increasing from $19.8 billion to $42.7 billion. This growth was driven overwhelmingly by services, which represented 74–84% of total imports across the period. The growth of cultural and creative imports accelerated from 2021–22 – mainly driven by software publishing and advertising, which both experienced substantial increases in digital services of imports.

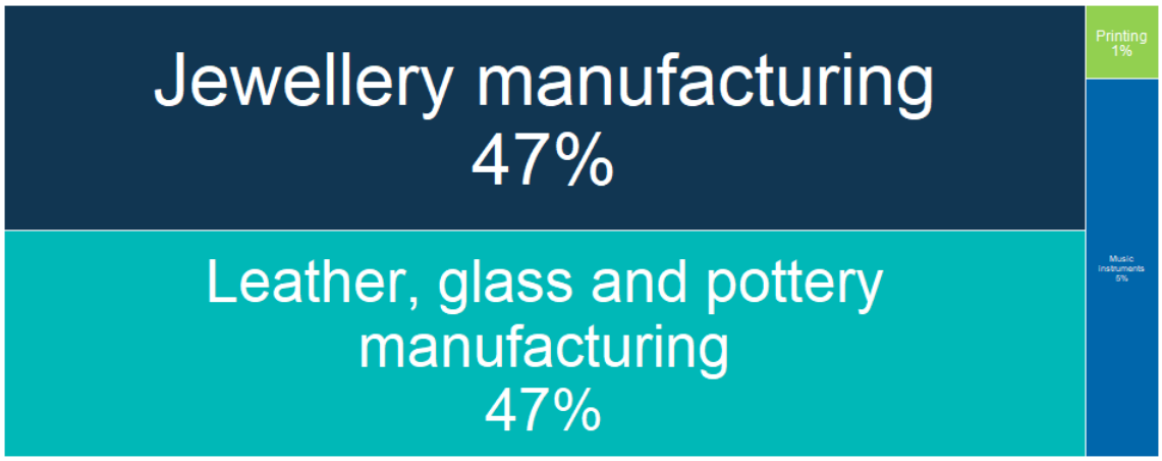
Figure 6. Total cultural and creative imports by goods and services, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Goods imports remained comparatively stable and much smaller in scale, rising modestly from $5.2 billion to $6.7 billion over the decade. Most goods imports of cultural and creative products were concentrated in a small number of domains—primarily visual arts and crafts, including jewellery, leather and glass manufacturing, which consistently represented about 90% of all cultural and creative goods. Goods related to music production, such as musical instrument manufacturing, and print media and publishing made up the remainder, but these contributions were minor and relatively consistent over time.

Figure 7. Cultural and creative imports by main contributors of goods, 2024–25

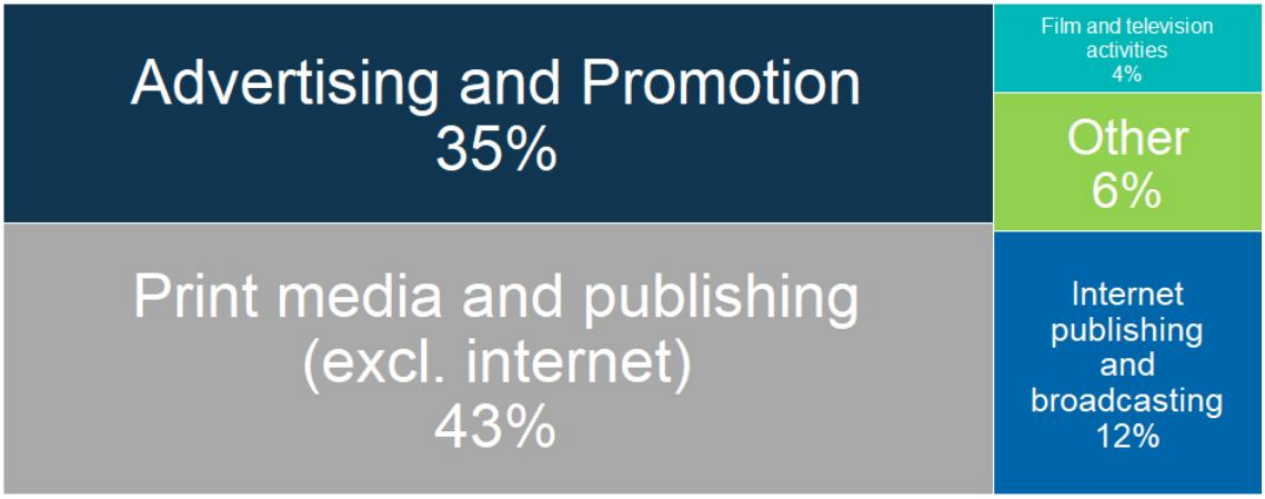


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Notably, many domains—including film and television activities, digital games development, design and fashion, architecture services, and advertising and promotion—registered no goods imports, illustrating that Australia's cultural and creative import profile is dominated by intangible or service-based products rather than physical cultural and creative goods.

Service imports of cultural and creative products increased from $14.5 billion in 2015–16 to $35.9 billion in 2024–25. Most of these imports were concentrated in print media and publishing (excluding internet), advertising and promotion, and internet publishing and broadcasting—areas characterised by increasingly digital, intellectual property–based, and technology-enabled creative offerings.

Figure 8. Cultural and creative imports by main contributors of services, 2024–25



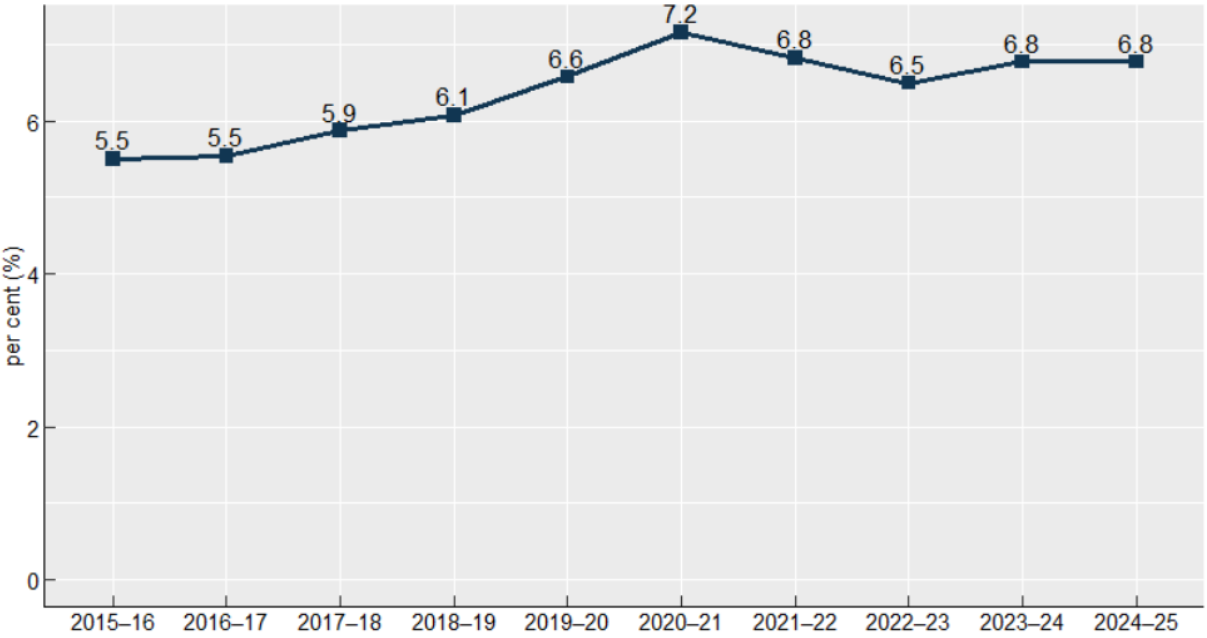
Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Overall, the estimates indicate a structural shift towards service-based cultural and creative imports. Strong growth since 2021 has been driven by rising demand for internationally-produced digital content, creative intellectual property and specialised professional services. This expansion is service imports has been the main contributor to the widening cultural and creative trade deficit over the period.

Comparison with overall Australian imports

As a share of Australia's total imports, cultural and creative imports increased from 5.5% in 2015–16 to 6.8% in 2024–25, with the ratio rising notably through the pandemic years despite a temporary contraction in overall imports. The share stepped up from 6.6% (2019–20) to 7.2% (2020–21) and held at 6.8% in 2023–24 and 2024–25, indicating that cultural and creative trade grew faster than aggregate imports over the decade.

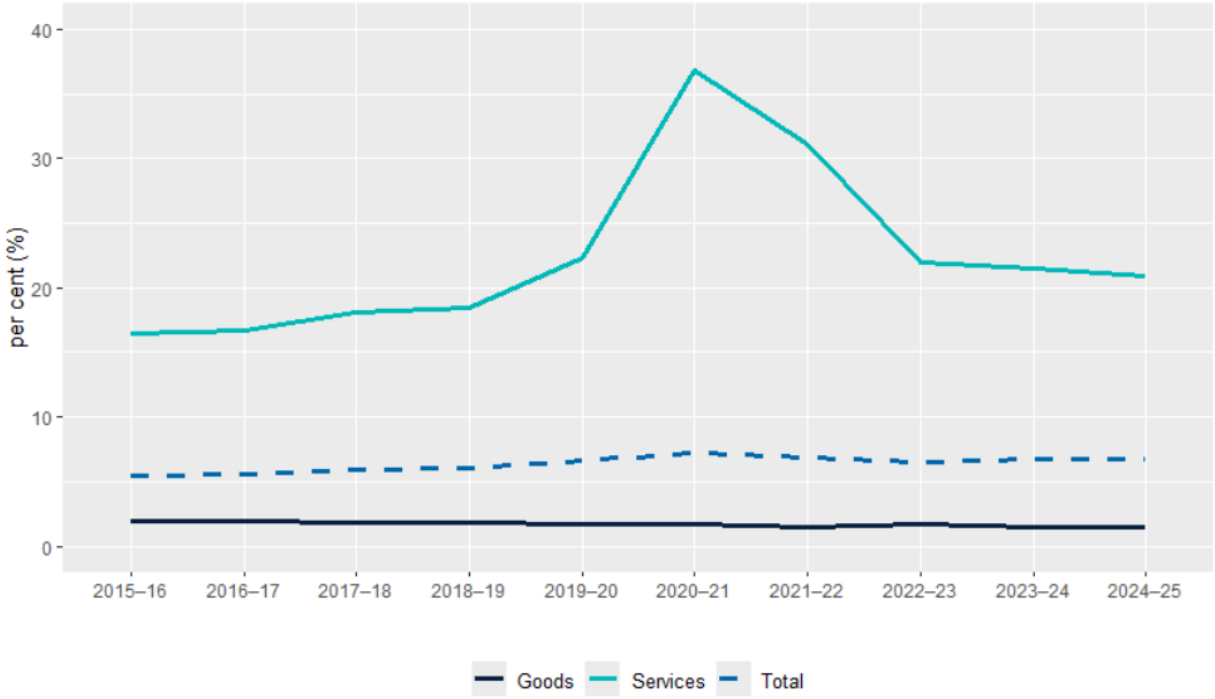
Figure 9. Cultural and creative imports as a share of total imports



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of total imports, the goods component of cultural and creative imports remained a small and declining share of total imports—falling from 1.9% of total goods imports in 2015–16 easing to 1.5% by 2024–25. By contrast, the growth in the overall share of cultural and creative imports was driven by rising services imports.

Figure 10. Cultural and creative goods and services as a share of total imports



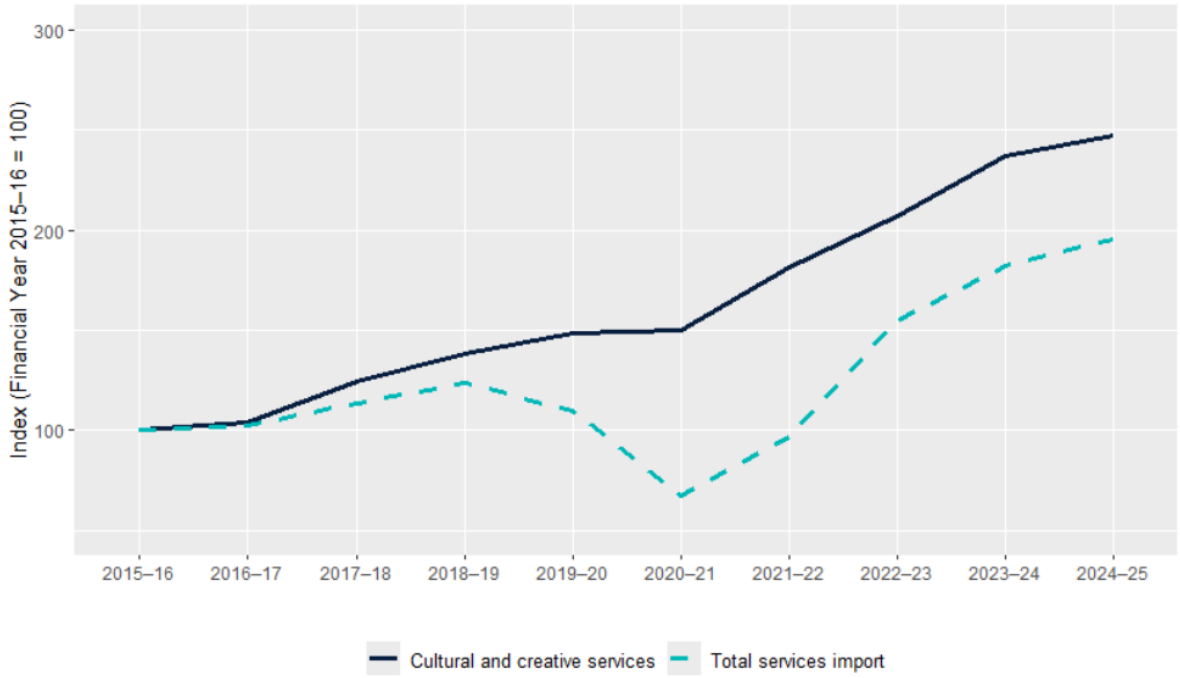
Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of total services imports, the cultural and creative sector increased from 16.5% in 2015–16 to 20.9% in 2024–25. The temporary rise to 36.9% in 2020–21 did not signal an expansion of cultural and creative service imports. Rather, this spike was driven by a sharp contraction in Australia's total service imports, which fell from $96.9 billion in 2019–20 to $59.1 billion in 2020–21. Over the same period,

cultural and creative service imports remained relatively stable—from $21.6 billion to $21.8 billion—meaning the sector contracted far less than the broader import base. As a result, the cultural and creative share of service imports rose because overall services imports contracted much more sharply than cultural and creative service imports.

Growth-index comparisons further illustrate this dynamic. In 2020–21, cultural and creative service imports decreased slightly, while total Australian service imports fell more sharply. The milder contraction in cultural and creative services relative to the steep decline in overall services amplified the sector's share of total imports, but was not the result of increased cultural and creative import activity.

Figure 11. Growth index of cultural and creative services compared to the overall service imports



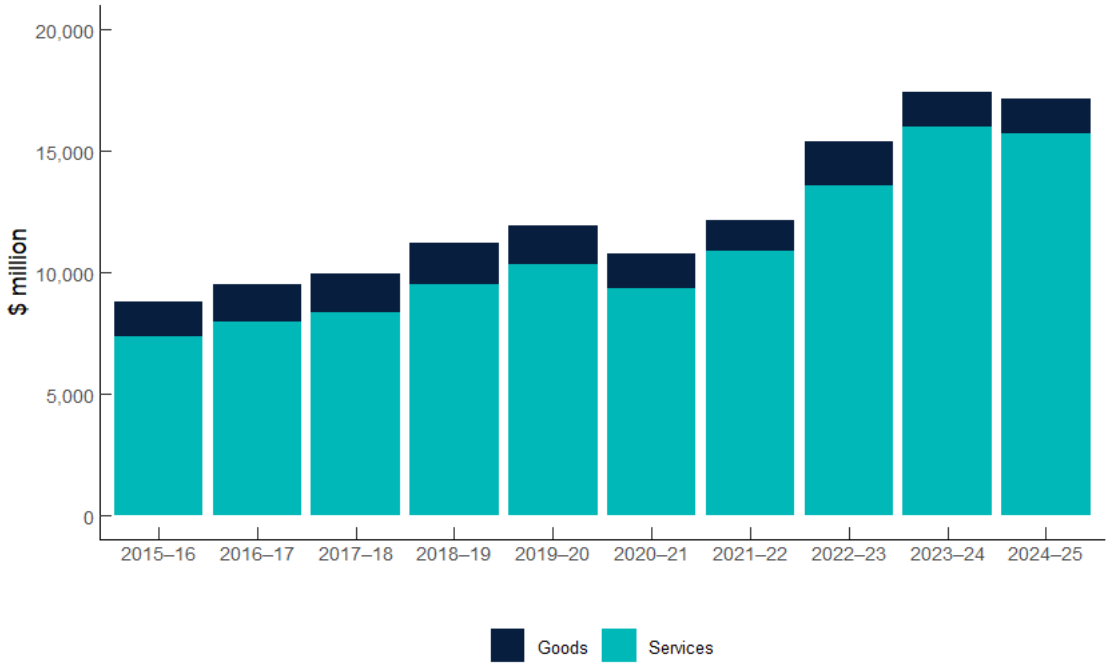
Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports

Total cultural and creative exports, 2015–16 to 2024–25

Australia's cultural and creative exports increased from $8.8 billion in 2015–16 to $17.1 billion in 2024–25, with growth driven overwhelmingly by services. Goods exports remained comparatively small and stable over the decade, while services exports expanded strongly—particularly from 2021–22 onwards—reflecting increasing global demand for creative IP, digital content, and knowledge-intensive cultural services.

Figure 12. Total cultural and creative exports by goods and services, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Cultural and creative goods exports were highly concentrated in a small number of product categories. Visual arts and crafts accounted for almost 90% of goods exports in 2024–25, driven primarily by jewellery manufacturing (69%) and leather, glass and pottery manufacturing (20%). Music production and distribution contributed a further 8%, while all other domains made only a minor contribution. This concentration highlights the limited role of goods in Australia's cultural and creative export profile.

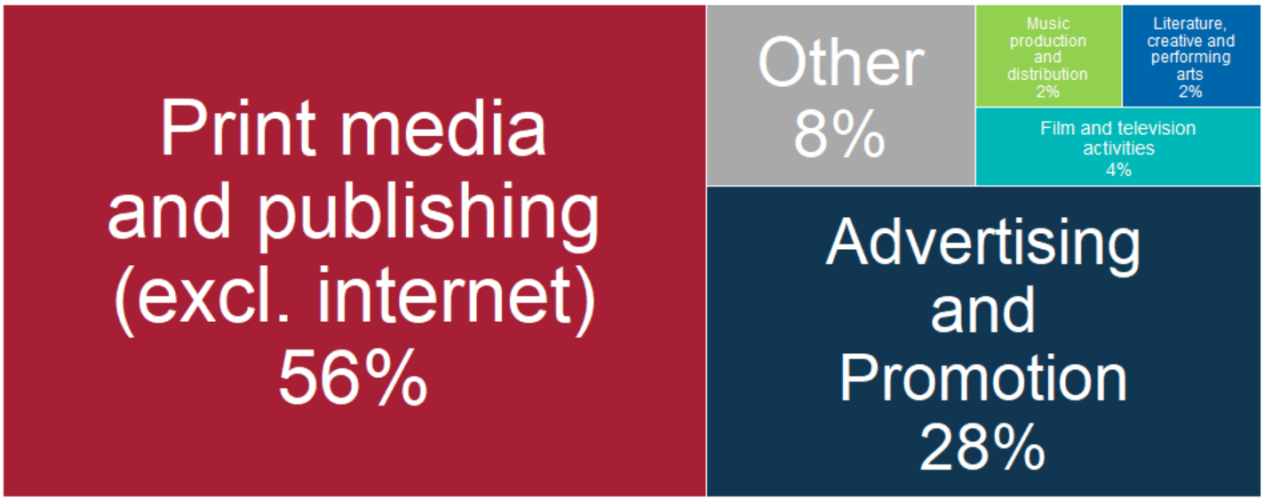
Figure 13. Cultural and creative exports by main contributors of goods, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

In contrast, cultural and creative service exports were broad-based across most domains. Print media and publishing (excluding internet) and advertising and promotion were the largest contributors, accounting for the majority of services exports and export growth over the decade. Film and television activities, music production and distribution, and literature, creative and performing arts also recorded substantial exports, while smaller domains such as design and fashion, libraries and archives, and digital games development contributed steady growth. The strength and diversity of services exports reinforce the sector's increasing reliance on intellectual property, digital content and other knowledge-intensive activities. Services exports showed resilience during the pandemic years, rebounding rapidly as digital consumption and global creative service demand increased.

Figure 14. Cultural and creative exports by main contributors of services, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

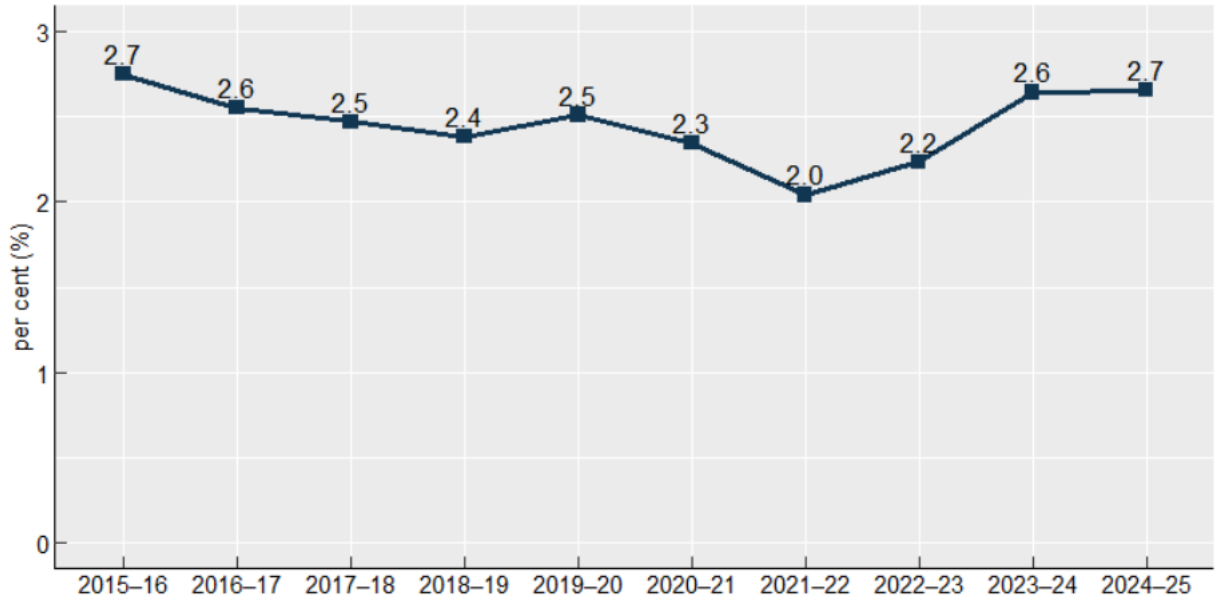
Overall, Australia's cultural and creative export profile is highly service-led, with cultural and creative services accounting for 84% to 92% of total cultural and creative exports over the decade. Expansion in software-related publishing, advertising, screen production services and other IP-rich activities underpins the sector's increasing role in Australia's outward-facing cultural and creative economy.

Comparison with overall Australian exports

Although cultural and creative exports grew in absolute terms, for much of the period they expanded more slowly than Australia's overall export base, before rebounding in the last two years. Cultural and

creative exports accounted for 2.7% of Australia's total exports in both 2015–16 and 2024–25. However, their share fell to a low of 2.0% in 2021–22 as overall exports grew more rapidly, before returning to 2.7% by 2024–25.

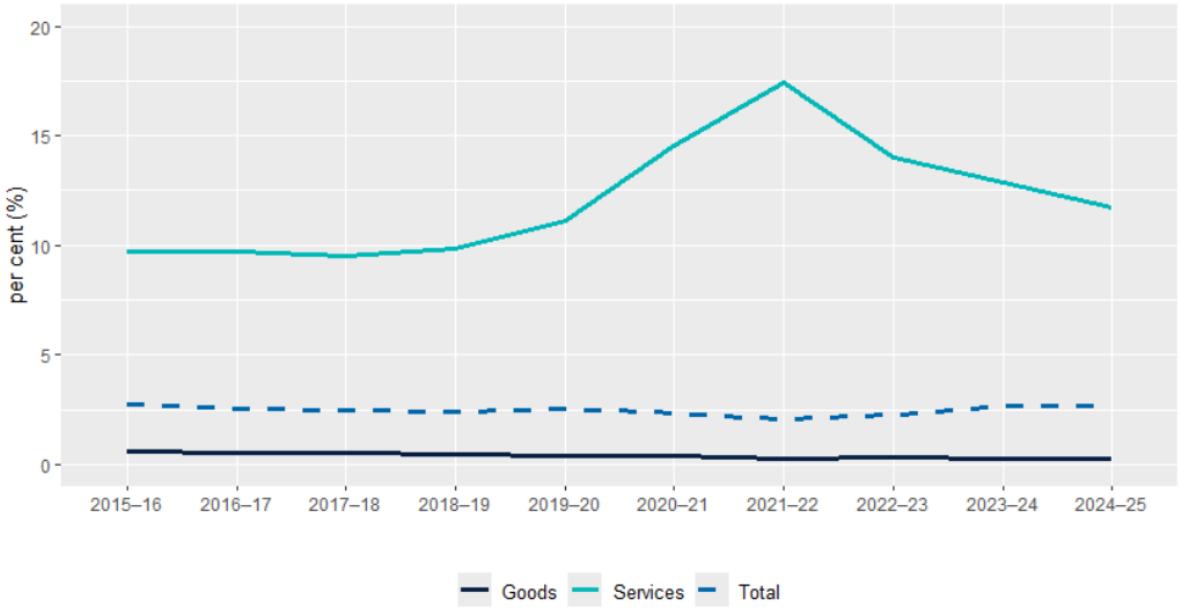
Figure 15. Cultural and creative goods and services as a share of total exports



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Australia's cultural and creative exports continued to be dominated by services, with goods accounting for only a very small share of total exports throughout the decade. Cultural and creative goods exports declined slightly as a proportion of total exports—from 0.6% in 2015–16 to 0.3% in 2024–25—illustrating the sector's limited reliance on physical cultural products in global markets, as well as Australia's role as a major, export-driven commodity economy.

Figure 16. Cultural and creative goods and services as a share of total exports

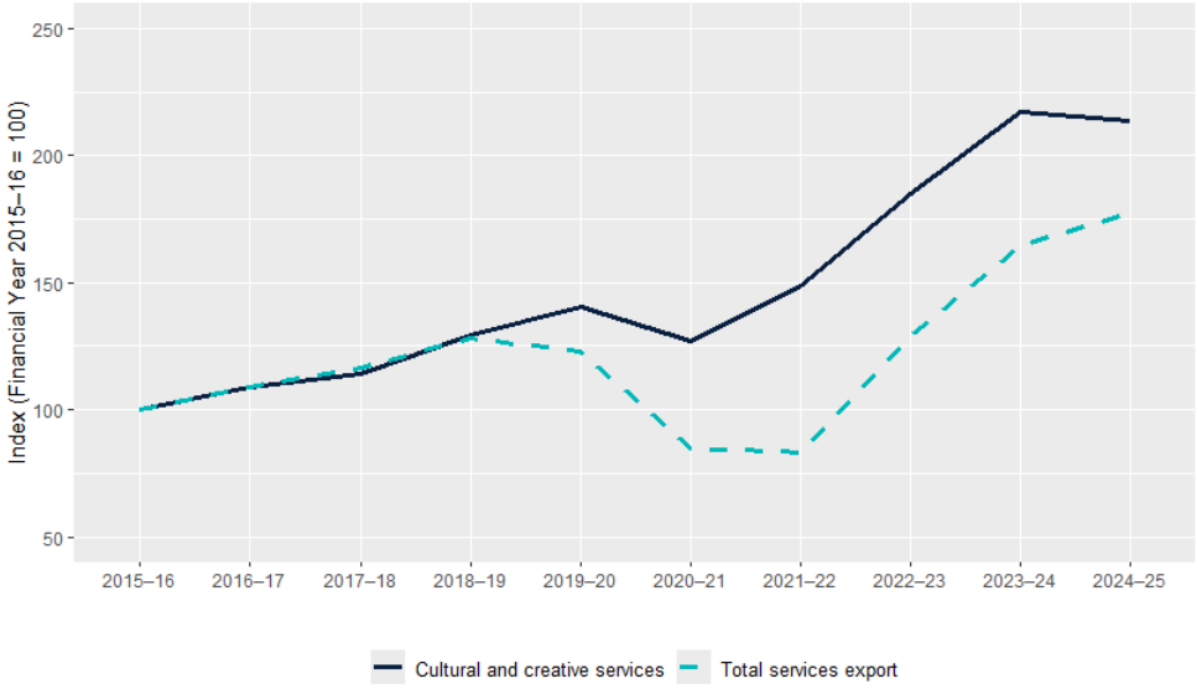


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

By contrast, services exports continued to dominate Australia's cultural and creative export profile throughout the period, accounting for between 9.7% and 11.7% of total services exports from 2015–16 to 2024–25, with sharp rises to 14.6% in 2020–21 and 17.4% in 2021–22.

Like imports, these sharp rises did not reflect rapid growth in cultural and creative service exports themselves but were largely the result of the significant contraction in Australia's total services exports during the pandemic, which fell from $93.1 billion in 2019–20 to $64.1 billion in 2020–21. Over the same period, cultural and creative service exports also declined, but by a much smaller magnitude—from $10.3 billion to $9.3 billion. As a result, the share of cultural and creative service exports rose not because the sector expanded, but because total services exports dropped more steeply.

Figure 17. Growth index of cultural and creative services compared to the overall service exports



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Once global conditions stabilised, cultural and creative service exports rebounded strongly, peaking at $16.0 billion in 2023–24 before easing slightly in 2024–25. Their share of total services exports accordingly normalised, settling at 11.7% in 2024–25, broadly in line with pre-pandemic trends.

Overall, the data shows that Australia's cultural and creative exports are increasingly driven by services rather than physical goods. Digital content, software publishing, film and TV production services, and advertising have been growing much faster than goods-based exports. The sharp rise in export shares during the pandemic was not because cultural and creative services suddenly expanded—it happened mainly because total Australian service exports fell sharply, making the cultural and creative share appear comparatively large.

Export review by domain

The domain-level analysis presented in this paper highlights considerable variation in international trade activity across Australia's cultural and creative sector. Domains differ in the scale of exports and imports, trade balance outcomes, export intensity, and how these measures have changed over time.

As noted earlier, the estimates should be interpreted as a measure of trade in cultural and creative goods and services within the defined domain scope, rather than as a complete measure of all international economic activity linked to the sector. This means some related activity, such as visitor expenditure associated with cultural events, is captured elsewhere in the trade statistics and not included in the cultural and creative trade estimates.

Based on the estimates presented in this paper, the domains are classified into four broad categories that summarise observed patterns in exports and trade balance over the period analysed.

Category 1: Domains with strong and growing exports

This category includes domains that are export-positive or where export growth has outpaced import growth over the past decade, resulting in a higher export share of production and a strengthening trade balance.

Domain	Details
Print media and publishing (excl. internet)	This is the largest and fastest-growing export domain, valued at $8.8 billion in 2024–25, with software publishing accounting for 77% of exports. Software publishing includes businesses mainly engaged in producing and distributing ready-made (non-customised) computer software. Over the past decade, exports of this domain more than tripled, rising from $2.7 billion in 2015–16 to $8.8 billion in 2024–25, and have exceeded imports since 2015–16. The export share of Australian production increased from 14.4% to 22.1%.
Film and television activities	Exports in this domain increased by 71.5% to $574 million in 2024–25, while imports declined from $1.9 billion in 2015–16 to $1.4 billion in 2024–25. Since 2017–18, export growth has consistently outpaced imports, lifting the export share of Australian production from 1.9% to 3.1%. As a result, the trade deficit has narrowed markedly, driven by the expansion of export-oriented post-production and broadcasting services and a contraction in import-intensive cinema activity since 2020.
Music production and distribution	Exports grew faster than imports from a lower base of $268 million in 2015–16, to $495 million in 2024–25. The domain remains a net importer, but the deficit has narrowed in recent years. Since 2015–16, exports in music production and distribution have shifted away from sheet music/publishing toward copyright and studio services, with a notable step-up from 2020–21 onward as production and licensing activity normalised and international demand for recorded content and rights intensified.
Digital games development	A highly export-oriented sector: preliminary estimates indicate exports rose from $224 million in 2015–16 to $389 million in 2024–25.

Category 2: Domains with increasing export intensity

This category includes domains which have moved from a trade deficit to a trade surplus, or where exports account for a growing share of production, though on a smaller scale than Category 1.

Domain	Details
Literature, creative and performing arts	This domain moved from a persistent trade deficit to a surplus in 2020–21 and has remained in surplus for the past three years. Exports reached $367 million in 2024–25 and the export share of production grew from 4.4% to 6.1%. The post-pandemic recovery was faster on the export side, indicating growing international demand for Australian performing arts.
Museums and galleries	Exports grew from $22 million in 2015–16 to $111 million in 2024–25 and the domain moved into consistent surplus for the past three years. The export share of production rose from 1.8% to 5.1% between 2015–16 and 2024–25.

Category 3: Domains with small-scale exports but consistently positive net exports

This category includes domains that have recorded positive net exports throughout, or for most of, the period analysed, although export values remain relatively small.

Domain	Details
Radio broadcasting	The only domain with no recorded imports and a 100% export-positive record across all years analysed. Exports grew from $84 million to $182 million between 2016–17 and 2024–25, and the export share of production more than doubled (6.1% to 12.8%).
Libraries and archives	Consistently export-positive, with exports growing from $94 million in 2015–16 to $121 million in 2024–25, and imports declining sharply from $33 million to $13 million over the same period. The libraries and archives domain has a stable export base and minimal import dependence, keeping it export-positive. However, as a share of its Australian production, libraries and archives exports declined from 6.1% to 5.5% over the period.
Architecture services	Exports in this domain have been consistently positive, increasing from $33 million in 2015–16 to $80 million in 2024–25. The sector largely services the domestic construction market.
Arts education	Export-positive for most of the years analysed. Both imports and exports are very small in absolute terms.

Category 4: Net importing domains

This category includes domains where imports have consistently exceeded exports throughout, or for most of, the period analysed.

Domain	Details
Internet publishing and broadcasting	The most import-intensive domain, with imports rising to $4.1 billion in 2024–25 and exports remaining negligible throughout the period. The deficit reflects Australia's heavy reliance on foreign online platforms and streaming services. The export share of production fell from 0.8% to 0.5%.
Advertising and promotion	A large and widening deficit: imports grew three-fold to $12.6 billion in 2024–25 while exports grew only 34.2% to $4.4 billion, driving a deficit of more than $8 billion.
Visual arts and crafts	The largest goods-based trade domain, driven almost entirely by jewellery and leather goods. Imports grew from $5.0 billion in 2015–16 to $6.4 billion in 2024–25, while exports fell and the trade deficit widened from $3.6 billion to $5.1 billion during the period. Strong import competition from low-cost producers constrains export growth.
Design and fashion	The domain remained in deficit throughout the period, with the gap widening from $43 million in 2015–16 to $258 million in 2024–25 as imports grew faster than exports after 2019-20. The export share of production declined from 1.9% to 1.3% over the period.
Events (arts)	The domain was consistently in deficit throughout the period, with the gap widening from $44 million in 2015–16 to $304 million in 2024–25. Imports rose from $178 million to $464 million, reflecting greater domestic reliance on international event management increased. Exports grew modestly from $134 million to $160 million, and the export share of production fell from 13.2% to 10.3%.

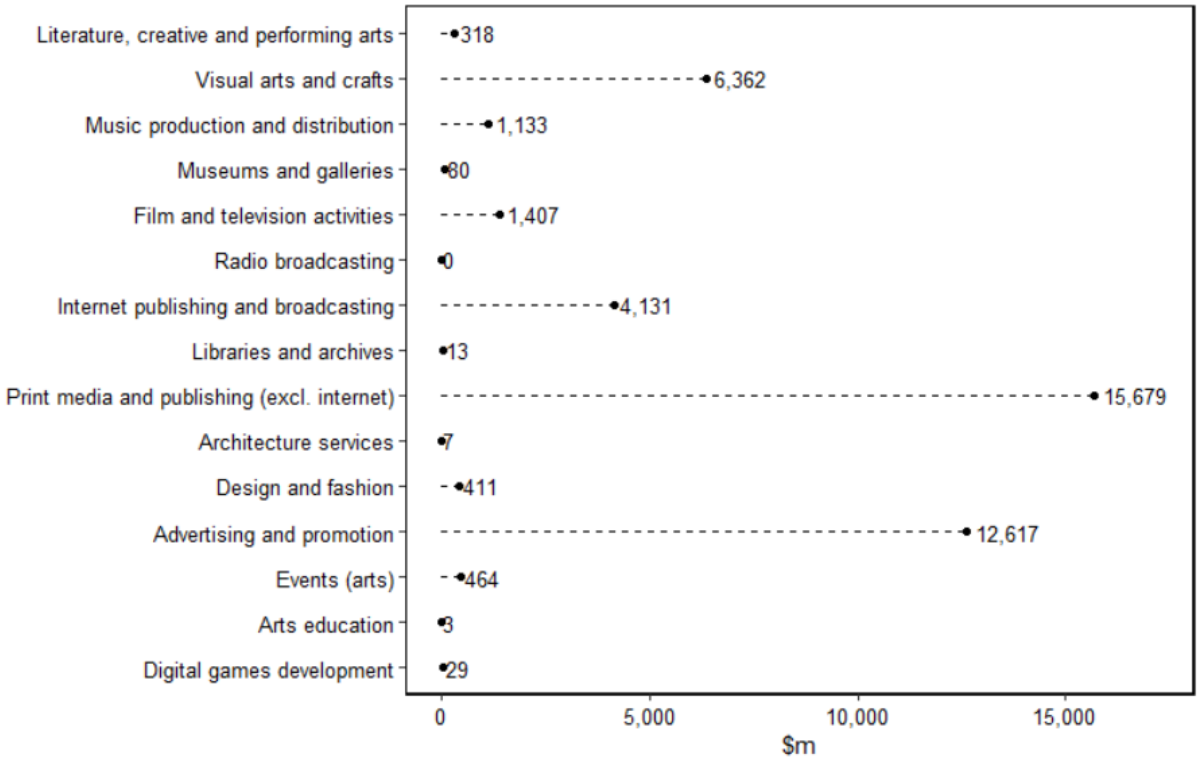
The following section examines international trade across cultural and creative domains in more detail.

International trade by domain

Imports

In 2024–25, the leading domains for imports of cultural and creative products were print media and publishing (excl. internet), advertising and promotion, and visual arts and crafts.

Figure 18. Cultural and creative imports by domain, 2024–25

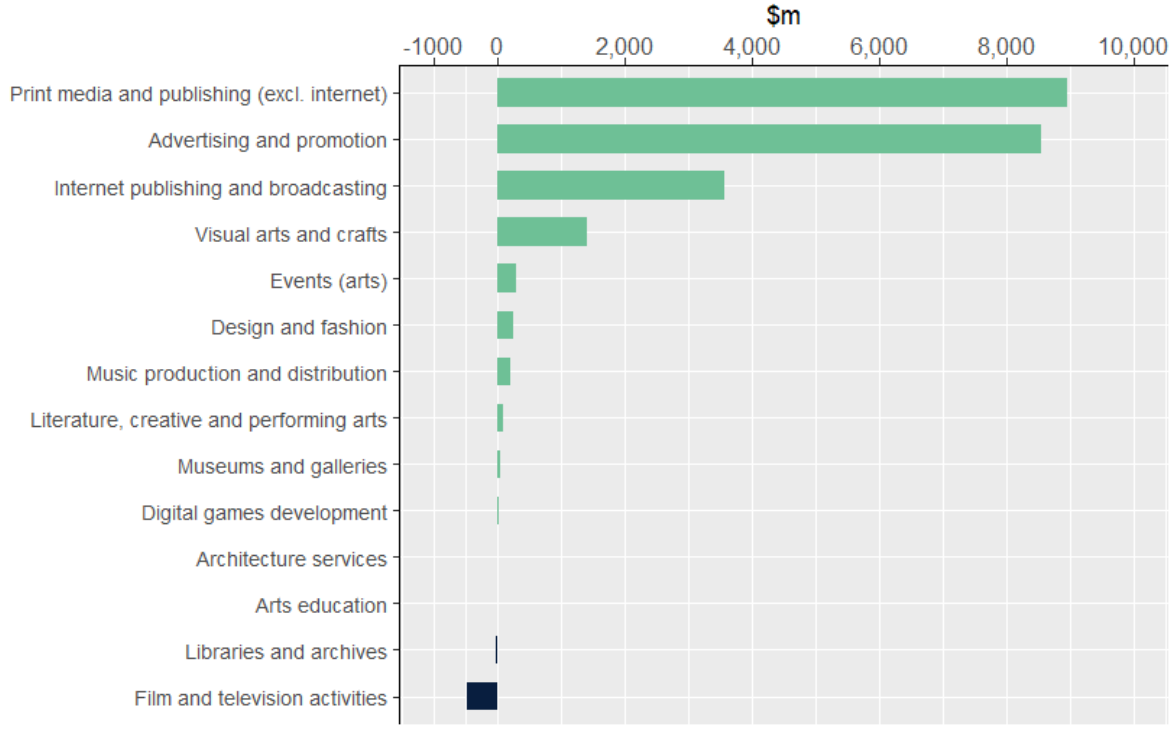


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Print media and publishing (excluding internet) recorded the strongest growth in cultural and creative imports over the period from 2015–16 to 2024–25, rising by $9.0 billion (133.8%), and driven primarily by software publishing services. Advertising and promotion grew by $8.6 billion, followed by internet publishing and broadcasting, which increased by $3.6 billion. Growth across these three domains reflects the substantial rise in Australia's consumption of digital services over the past decade, including audiovisual streaming, advertising, and software-related services.[12]

In contrast, other domains such as film and television activities, libraries and archives, and arts education showed declines. Film and television activities saw the largest decrease, with a reduction of $488 million or 25.7% over the period.

Figure 19. Cultural and creative imports by domain, change between 2015–16 and 2024–25

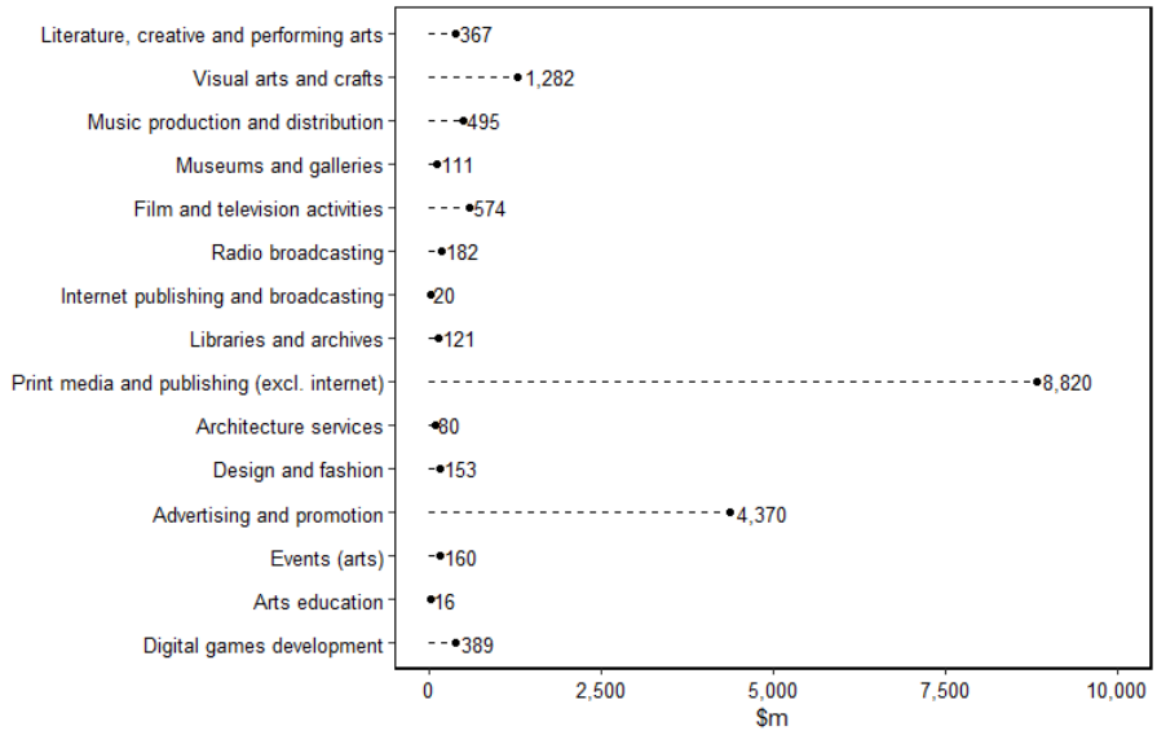


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports

Export performance was similar across domains, with print media and publishing (excluding internet) remaining the largest contributor. Driven largely by software publishing, this domain grew from $2.7 billion in 2015–16 to $8.8 billion in 2024–25.

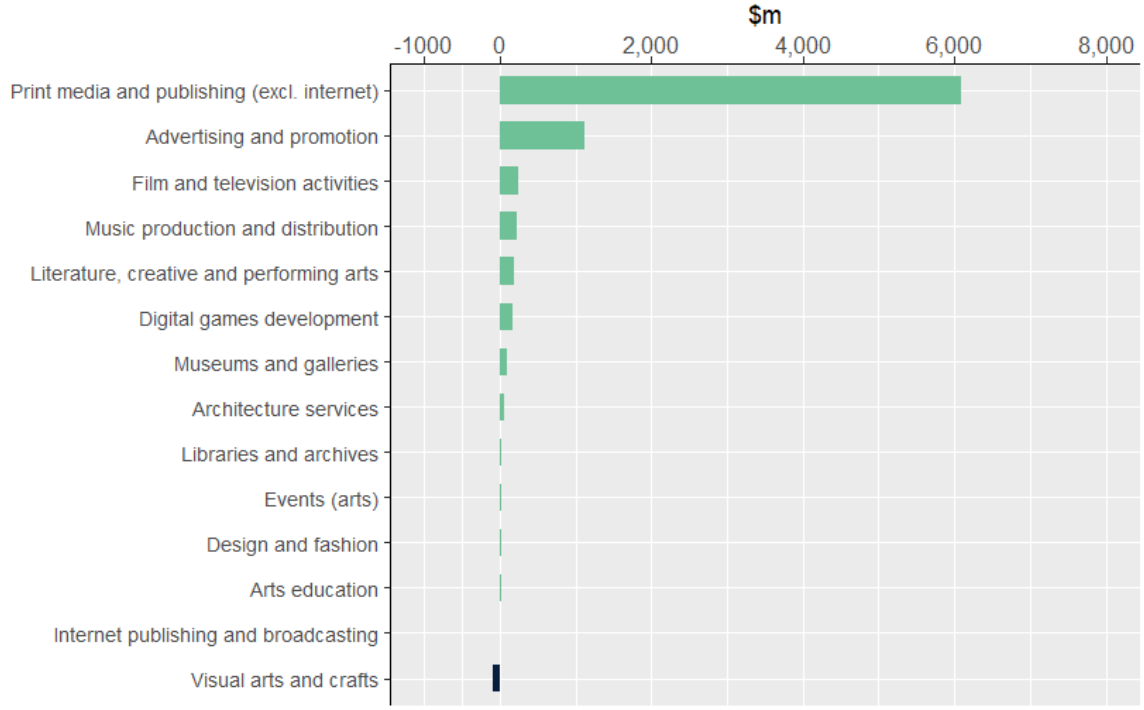
Figure 20. Cultural and creative exports by domain, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Advertising and promotion was also a major and consistent contributor, reaching $4.4 billion in 2024–25. This represents an increase of $1.1 billion, or 34.2%, since 2015–16.

Figure 21. Cultural and creative exports by domain, change between 2015–16 and 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

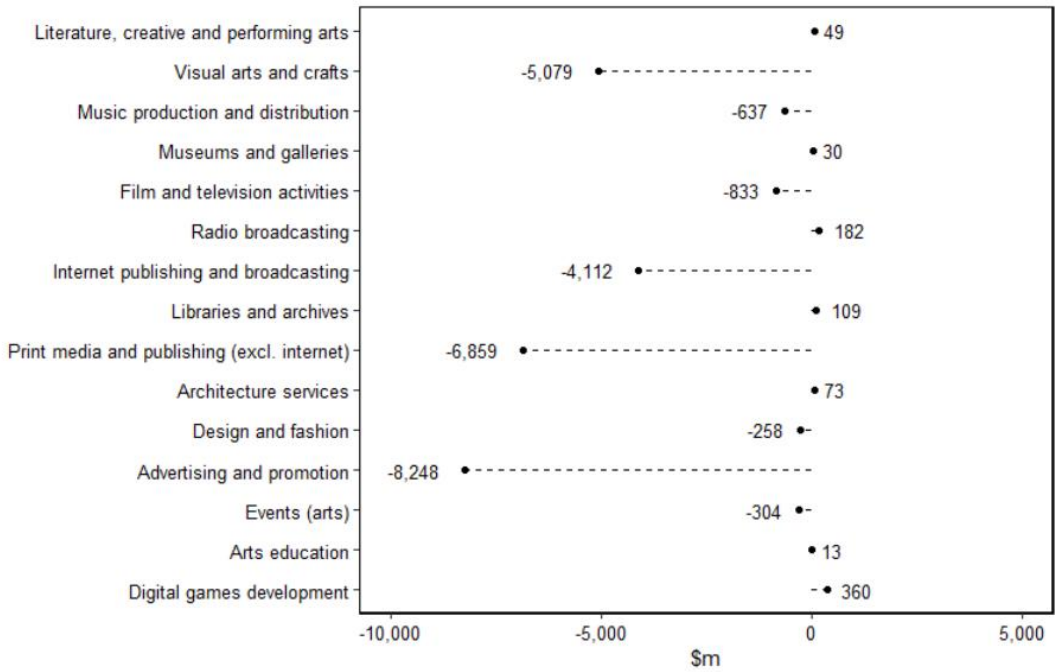
Film and television activities was the third-largest contributor to growth in cultural and creative exports, reaching $574 million in 2024–25—an increase of $239 million or 71.5% since 2015–16. This growth reflects sustained strength of Australian screen content exports.

By contrast, visual arts and crafts experienced the largest reduction, falling by $91 million (6.6%) over the period.

Net exports (exports less imports)

Overall, Australia remained a net importer across most cultural and creative domains over the decade, with the sector's trade deficit widening from $11.0 billion in 2015–16 to $25.5 billion in 2024–25.

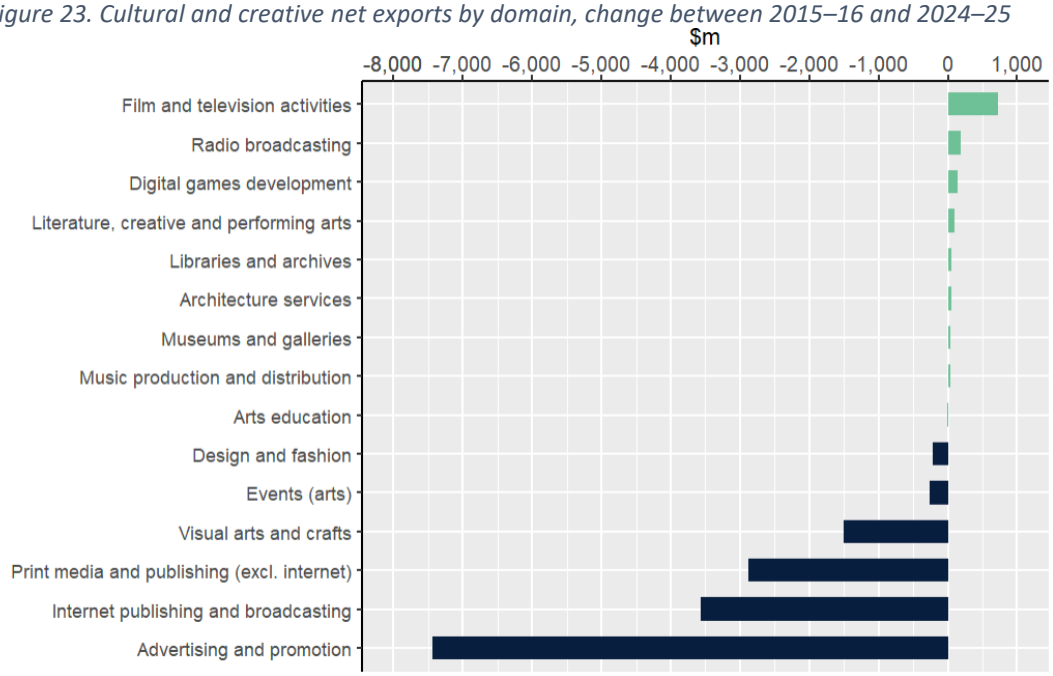
Figure 22. Cultural and creative net exports by domain, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The largest shift towards net exports came from film and television activities—which despite still being a net importer—recorded $727 million to the domain's overall balance during the period. Radio broadcasting followed at $182 million, while digital games development was the third-largest contributor, recording a net export of $144 million over the period.

Figure 23. Cultural and creative net exports by domain, change between 2015–16 and 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

In contrast, the advertising and promotion domain was the largest driver of the change in net imports over the period, recording a deficit of $7.4 billion over the period. Internet publishing and broadcasting followed with a deficit of $3.6 billion, while print media and publishing (excluding internet) recorded the third-largest deficit at $2.9 billion.

1. Literature, creative and performing arts

Literature, creative, and performing arts includes creating and presenting original works, live performances, and running supporting venues, with contributions from both individuals and organisations.

Key products in this domain include performing arts venue operations and related services such as theatre restaurants and circuses, as well as services provided by independent creative artists, writers, and performers. No goods products are included in this domain.

Only a small number of Australian companies operate internationally, although several major dance and opera companies undertake regular overseas tours. Also, many productions staged in Australia are performances of internationally-created plays, musicals, operas and ballets.[13]

Imports in this domain fell sharply during 2020–21 and then rebounded to new highs, while exports recovered even more strongly. Imports rose from $232 million in 2015–16 to $318 million in 2024–25, after plunging to $25 million in 2020–21.

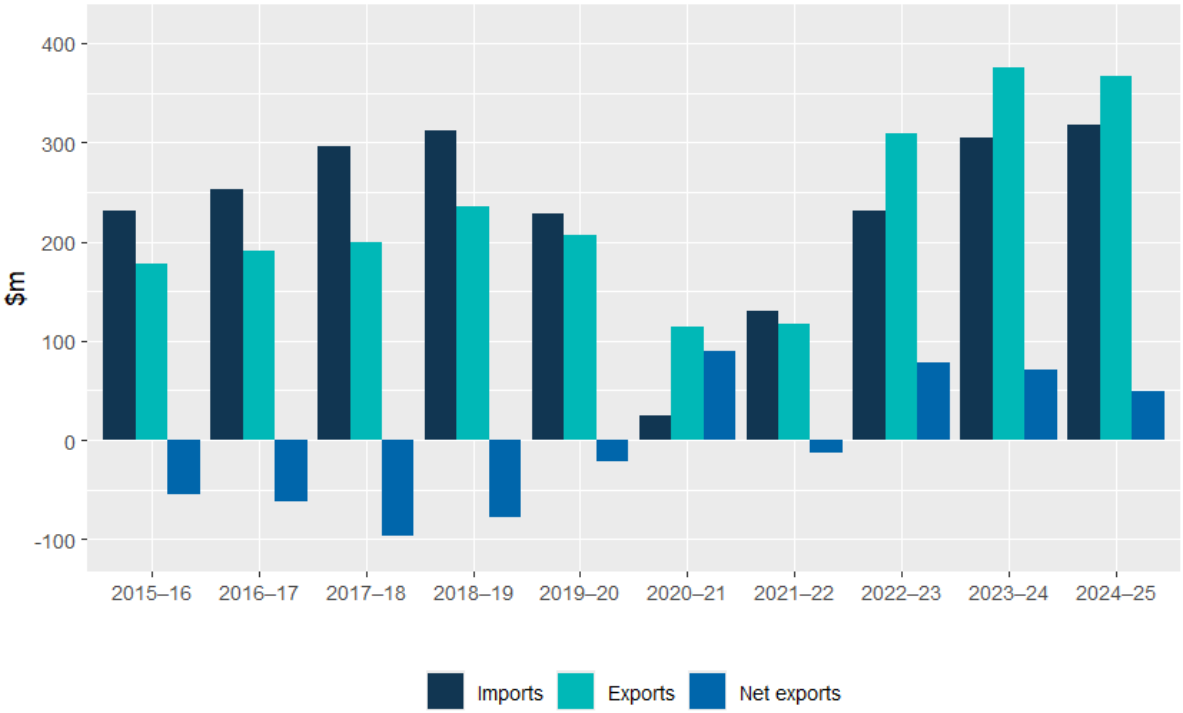
Table 3. International trade of literature, creative and performing arts, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	232	177	-54
2016–17	252	191	-61
2017–18	295	199	-97
2018–19	312	235	-77
2019–20	228	207	-21
2020–21	25	114	89
2021–22	130	117	-13
2022–23	231	309	78
2023–24	305	375	70
2024–25	318	367	49

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports increased from $177 million in 2015–16 to $367 million in 2024–25, with a low of $114 million in 2020–21 followed by a jump to $309 million in 2022–23 and $375 million in 2023–24 before a slight easing.

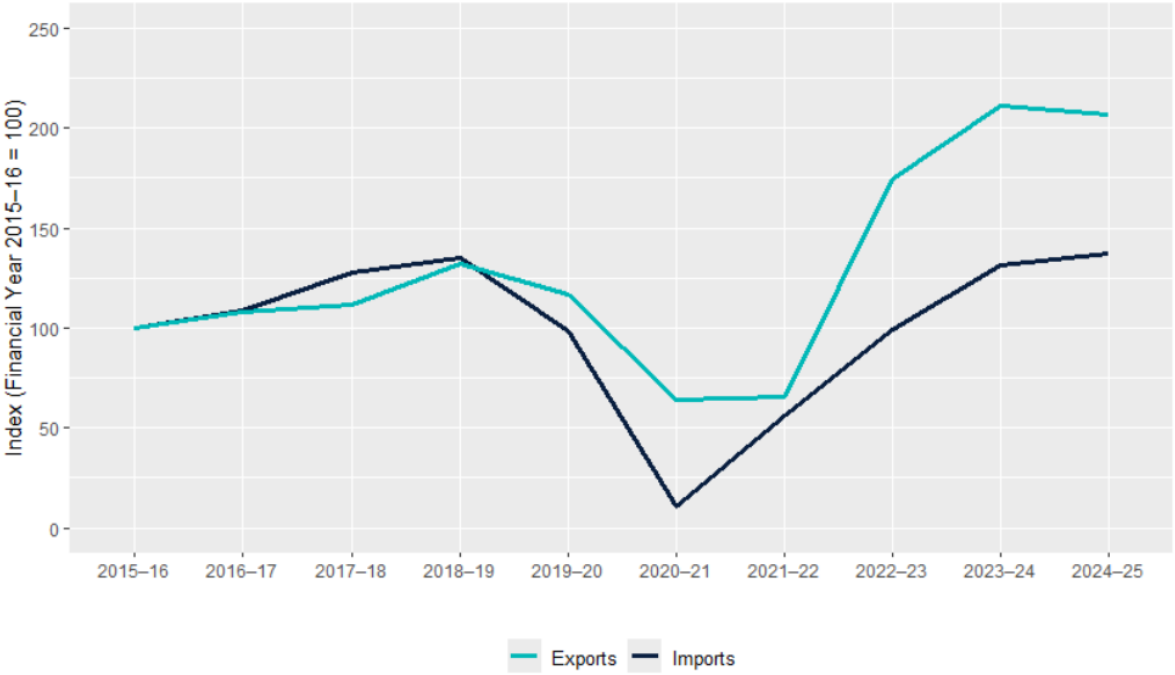
Figure 24. International trade of literature, creative and performing arts, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The trade balance shifted from a deficit until 2019–20 to a surplus in most years after 2020–21, reflecting the faster post-pandemic recovery of export-facing activities in this domain.

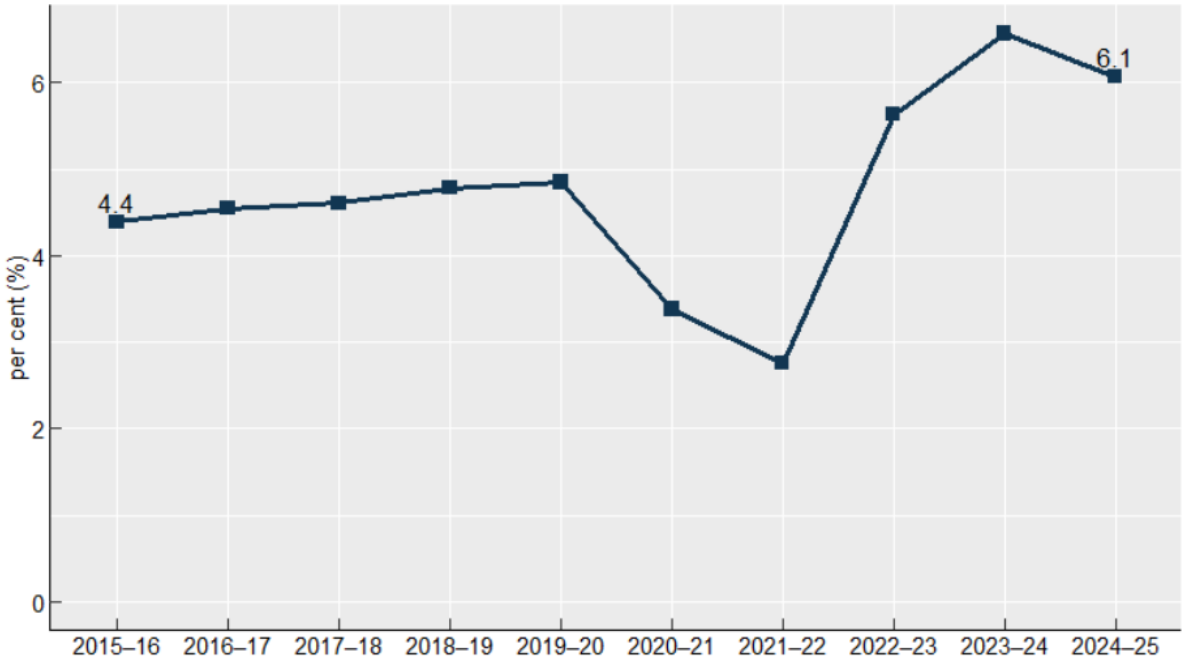
Figure 25. Growth index of literature, creative and performing arts imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Export shares of literature, creative and performing arts increased from 4.4% to 6.1% of its total Australian production over the period. This rise indicates that a growing share of the sector's output is being consumed internationally.

Figure 26. Literature, creative and performing arts, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

2. Visual arts and crafts

Visual arts and crafts goods include manufacturing products of crafts such as tableware, ornamental pottery and domestic ware not elsewhere classified; glass containers, bottles or jars; glass stoppers; glass inners for vacuum vessels; jewellery and silverware; and imitation jewellery (excl incorporating precious metal except as plating or as minor constituents) (excl watch straps); bags of leather or leather substitute.

Visual arts services include activities of independent artists, e.g. sculptors, painters, etc; professional photographic services that are mainly engaged in providing still, video or computer photography services, including the recording of special events such as weddings; and photographic film processing activity such as developing film and/or making photographic slides, prints and enlargements.

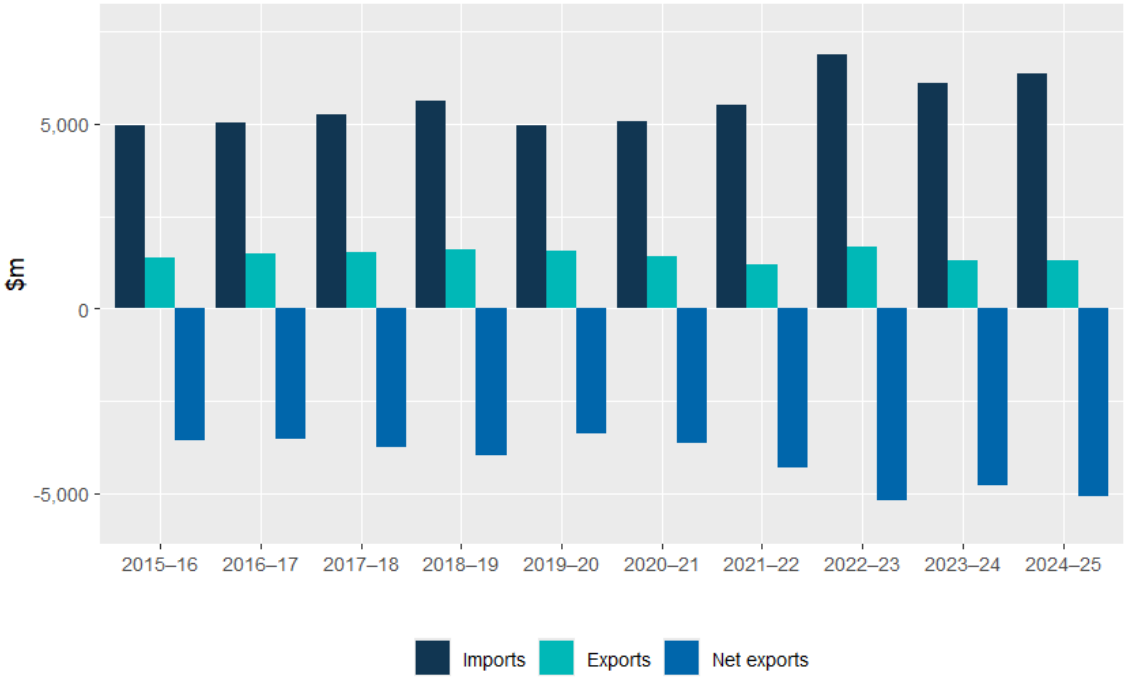
Table 4. International trade of visual arts and crafts, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	4,952	1,373	-3,579
2016–17	5,029	1,473	-3,556
2017–18	5,261	1,504	-3,757
2018–19	5,611	1,614	-3,997
2019–20	4,942	1,552	-3,390
2020–21	5,064	1,414	-3,650
2021–22	5,511	1,180	-4,331
2022–23	6,884	1,687	-5,197
2023–24	6,099	1,310	-4,789
2024–25	6,362	1,282	-5,079

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports in this domain increased by $1.4 billion or 28.5%, from $5.0 billion in 2015–16 to $6.4 billion in 2024–25, with reduced imports during the pandemic period.

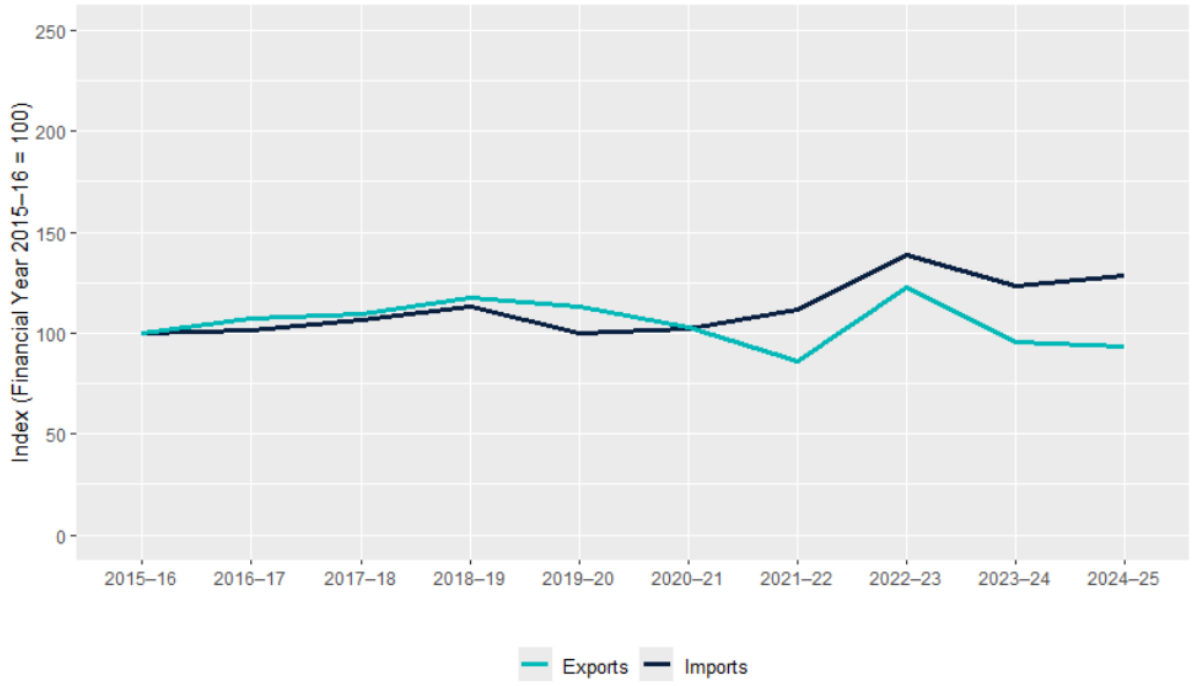
Figure 27. International trade of visual arts and crafts, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

In contrast, exports declined by $91 million or 6.6%, from $1.4 billion in 2015–16 to $1.3 billion in 2024–25. As a result, the trade deficit widened from $3.6 billion to $5.1 billion during the period.

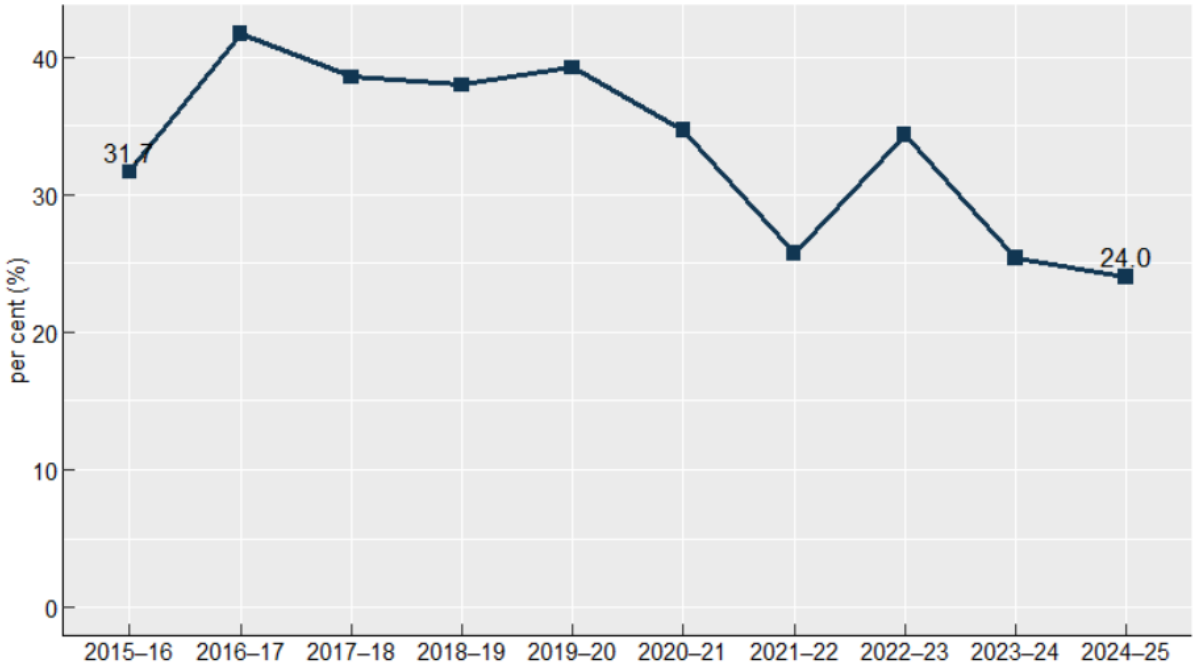
Figure 28. Growth index of visual arts and crafts imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Export shares of visual arts and crafts decreased from 31.7% to 24.0% of its total Australian production over the period.

Figure 29. Visual arts and crafts, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

This domain is overwhelmingly goods-based. In 2024–25, goods made up around 99% of both imports and exports. Visual arts and crafts trade is largely driven by precious metal jewellery and leather goods. Imports have continued to rise, while exports have trended downward since 2018–19, and services remain negligible within this domain.

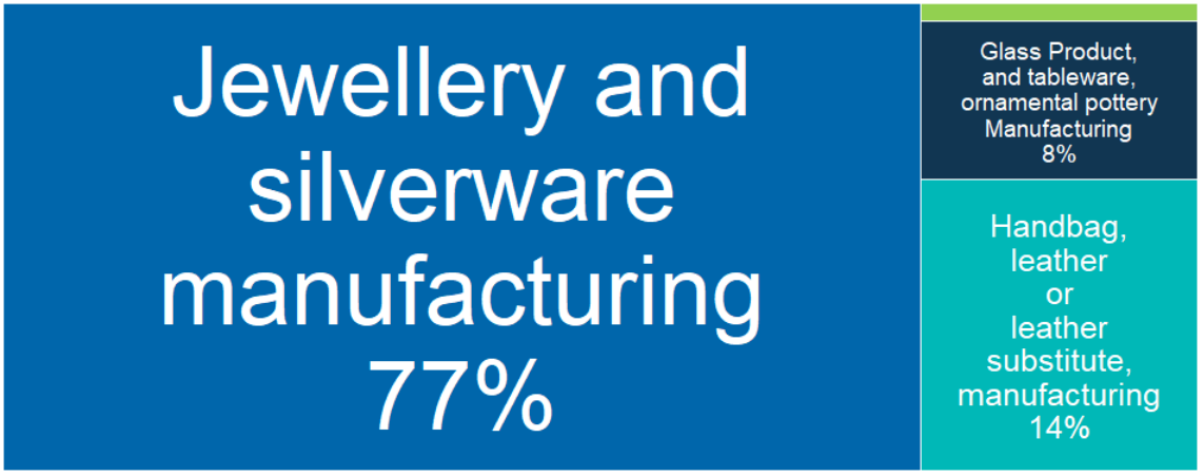
Figure 30. Visual arts and crafts imports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Jewellery manufacturing faces strong import competition from low-cost producers and countries with established reputations for high-quality jewellery. Despite these pressures, Australia's position as a major gold producer allows manufacturers to source raw materials cheaply and remain price-competitive internationally. As a result, exports are dominated by gold jewellery, with high-value cut diamonds and opals also contributing significantly.[14]

Figure 31. Visual arts and crafts exports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

3. Music production and distribution

Music production and distribution includes activities such as manufacturing musical instruments, publishing and licensing copyrighted musical works, and producing, releasing, and distributing original master recordings.

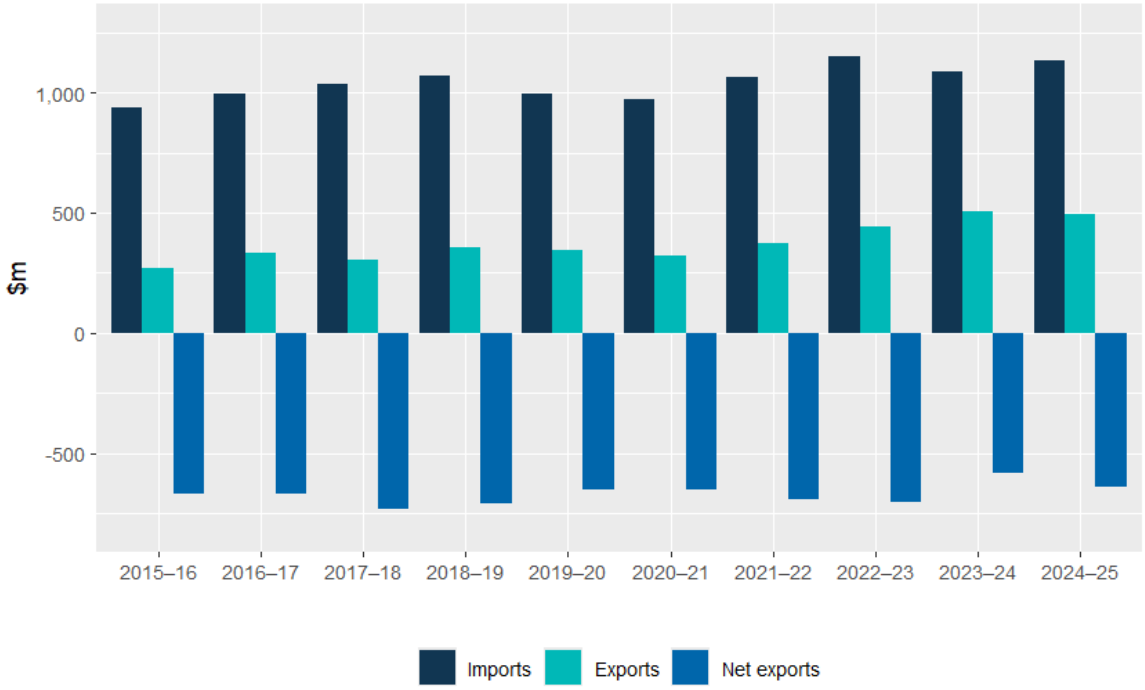
Table 5. International trade of music production and distribution, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	939	268	-671
2016–17	997	331	-667
2017–18	1,036	304	-733
2018–19	1,067	358	-708
2019–20	993	344	-648
2020–21	974	320	-654
2021–22	1,065	372	-693
2022–23	1,149	445	-704
2023–24	1,086	506	-580
2024–25	1,133	495	-637

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports in this domain increased by $193 million or 20.6%, from $939 million in 2015–16 to $1.1 billion in 2024–25.

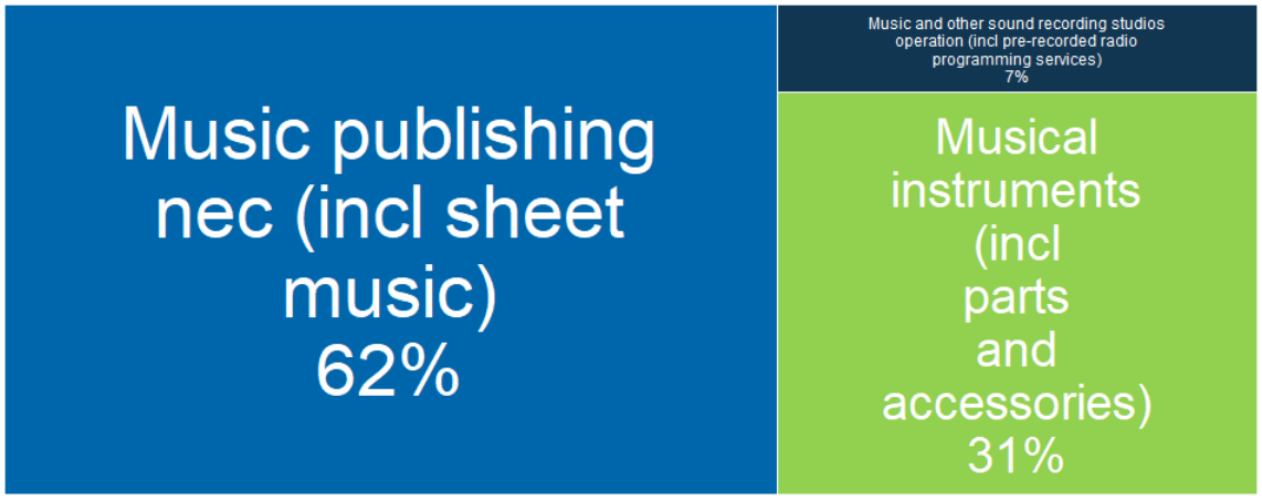
Figure 32. International trade of music production and distribution, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports in this domain are dominated by music publishing, accounting for 62% of total domain imports in 2024–25. Musical instruments accounted for 31%, recording studios operation is a small component at 7% during the same year.

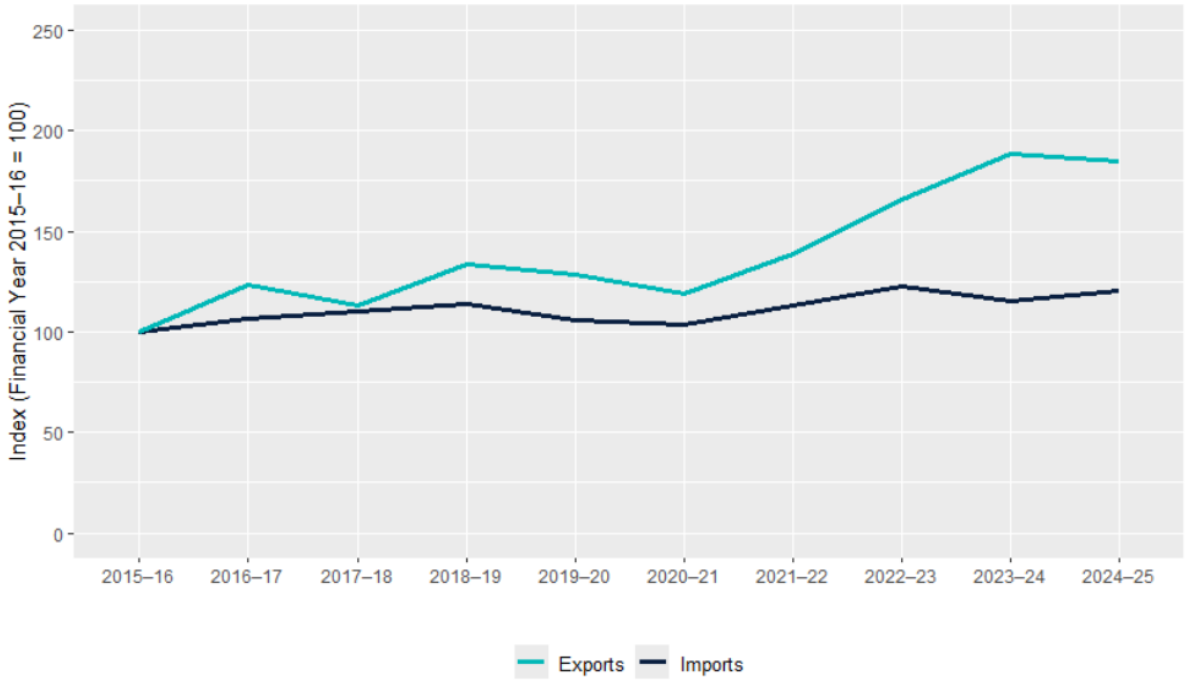
Figure 33. Music production and distribution imports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports grew faster from a lower base of $268 million in 2015–16, to $495 million in 2024–25. Despite that improvement, the trade balance remained in deficit throughout the whole period, with narrowing slightly in the last two years.

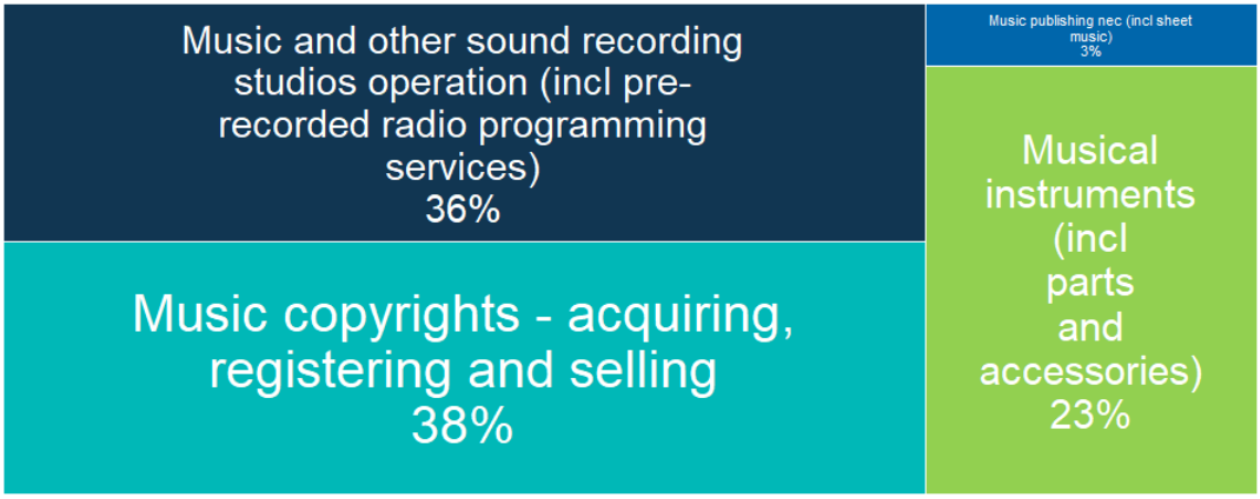
Figure 34. Growth index of music production and distribution imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The composition of exports in this domain is almost the reverse of imports. In 2024–25, music copyrights contributed 38% of exports in this domain, and recording studio operation accounted for 36%, while musical instruments contributed 23% and music publishing accounted for 3%.

Figure 35. Music production and distribution exports by main products, 2024–25

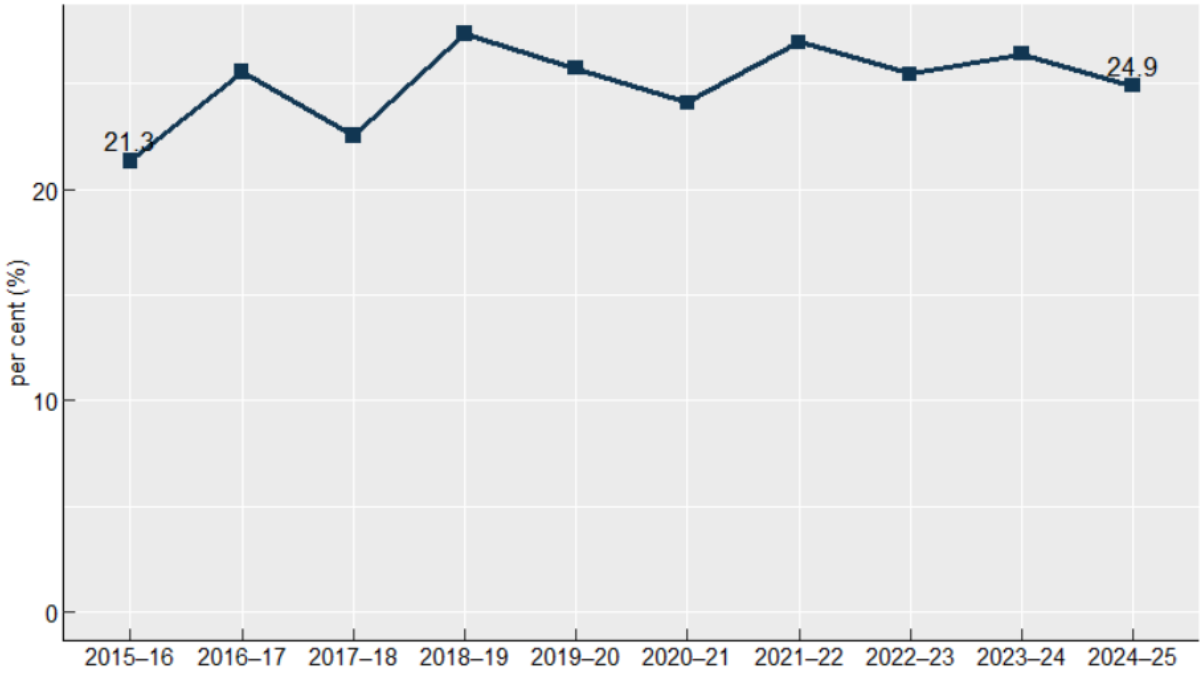


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Since 2015–16, exports in music production and distribution have shifted away from sheet music/publishing toward copyrights and studio services, with a notable step-up from 2020–21 onward as production and licensing activity normalised and international demand for recorded content and rights intensified.

Australia is a net importer in music due to sizeable inflows of publishing and instruments, but export growth is increasingly IP- and studio-led, which is gradually reducing (though not closing) the deficit. Export shares of music production and distribution increased from 21.3% to 24.9% of its total Australian production over the period.

Figure 36. Music production and distribution, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

4. Museums and galleries

Museums and galleries protect and display objects, visual arts, and crafts of cultural, historical, or educational significance, including those at historical sites.

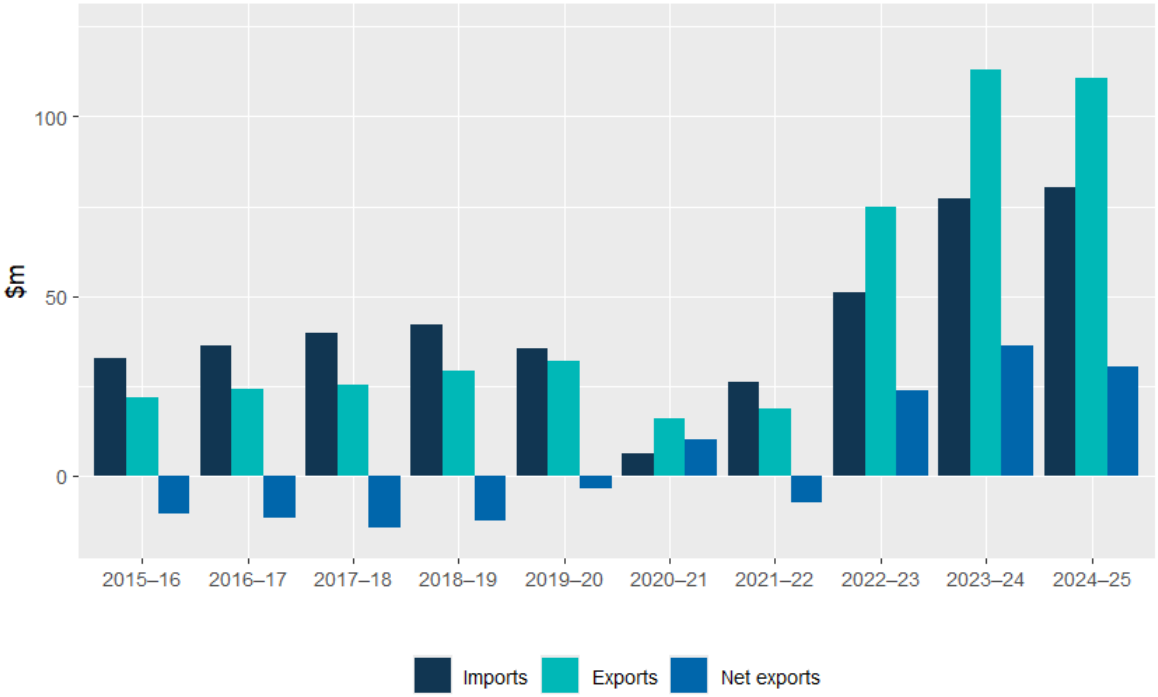
Table 6. International trade of museum and galleries, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	33	22	-11
2016–17	36	24	-12
2017–18	40	25	-15
2018–19	42	29	-13
2019–20	35	32	-3
2020–21	6	16	10
2021–22	26	18	-8
2022–23	51	75	24
2023–24	77	113	36
2024–25	80	111	30

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports in this domain rose steadily over the decade, increasing from $33 million in 2015–16 to $80 million in 2024–25, despite a sharp pandemic-related fall to $6 million in 2020–21.

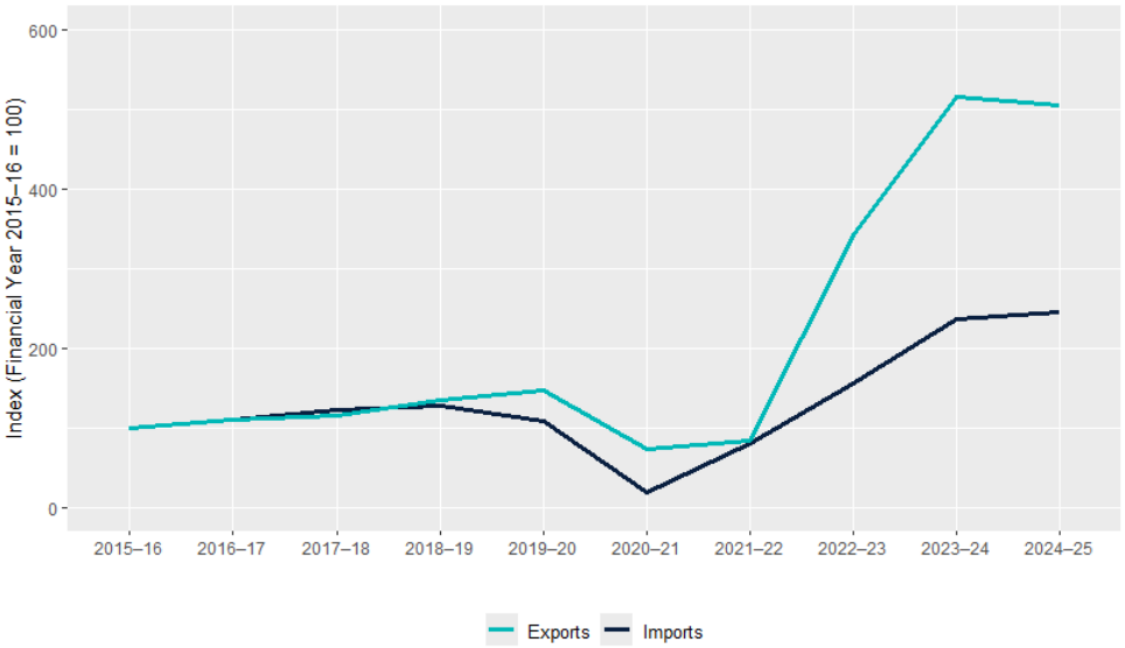
Figure 37. International trade of museum and galleries, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports grew even more strongly, rising from $22 million in 2015–16 to $111 million in 2024–25, dropping to $16 million in 2020–21 before rebounding to $75 million in 2022–23 and $113 million in 2023–24, and easing slightly in 2024–25.

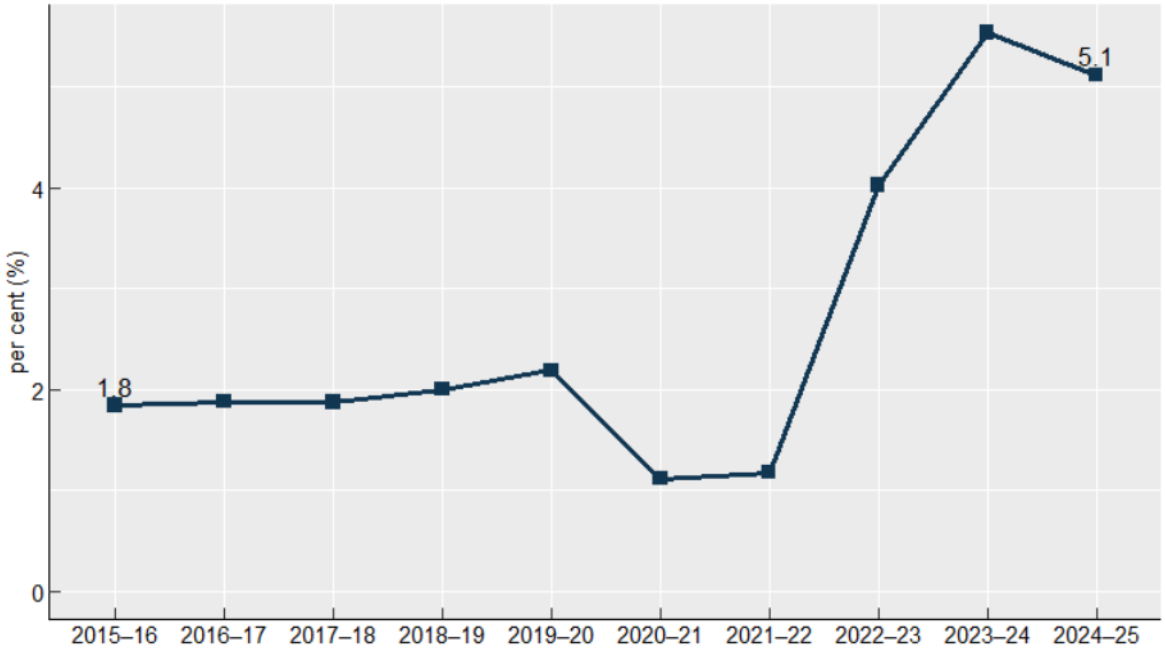
Figure 38. Growth index of museums and galleries imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of total Australian production, museum and gallery exports rose from 1.8% to 5.1% over the period.

Figure 39. Museum and galleries, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a result, the trade position shifted from a small deficit before the pandemic to a surplus from 2022–23 onwards.

5. Film and television activities

Film and television activities includes motion picture and video production, distribution, exhibition, post-production services, as well as free-to-air, cable, and other subscription-based television broadcasting.

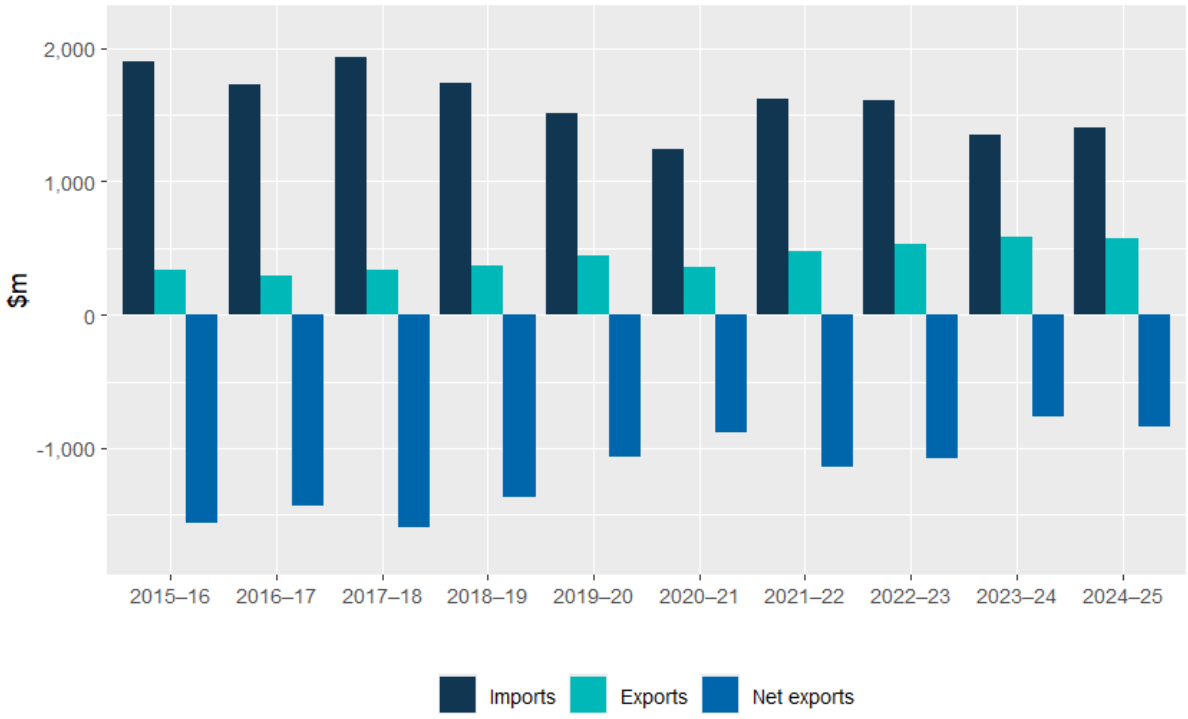
Table 7. International trade of film and television activities, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	1,895	335	-1,560
2016–17	1,722	295	-1,427
2017–18	1,931	336	-1,595
2018–19	1,737	374	-1,363
2019–20	1,507	445	-1,062
2020–21	1,242	363	-879
2021–22	1,617	480	-1,137
2022–23	1,604	532	-1,072
2023–24	1,349	586	-763
2024–25	1,407	574	-833

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports of film and television activities declined by $488 million, from $1.9 billion in 2015–16 to $1.4 billion in 2024–25.

Figure 40. International trade of film and television activities, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The import profile in this domain is dominated by copyright leasing for motion pictures and video, which accounted for 89% of imports in 2024–25.

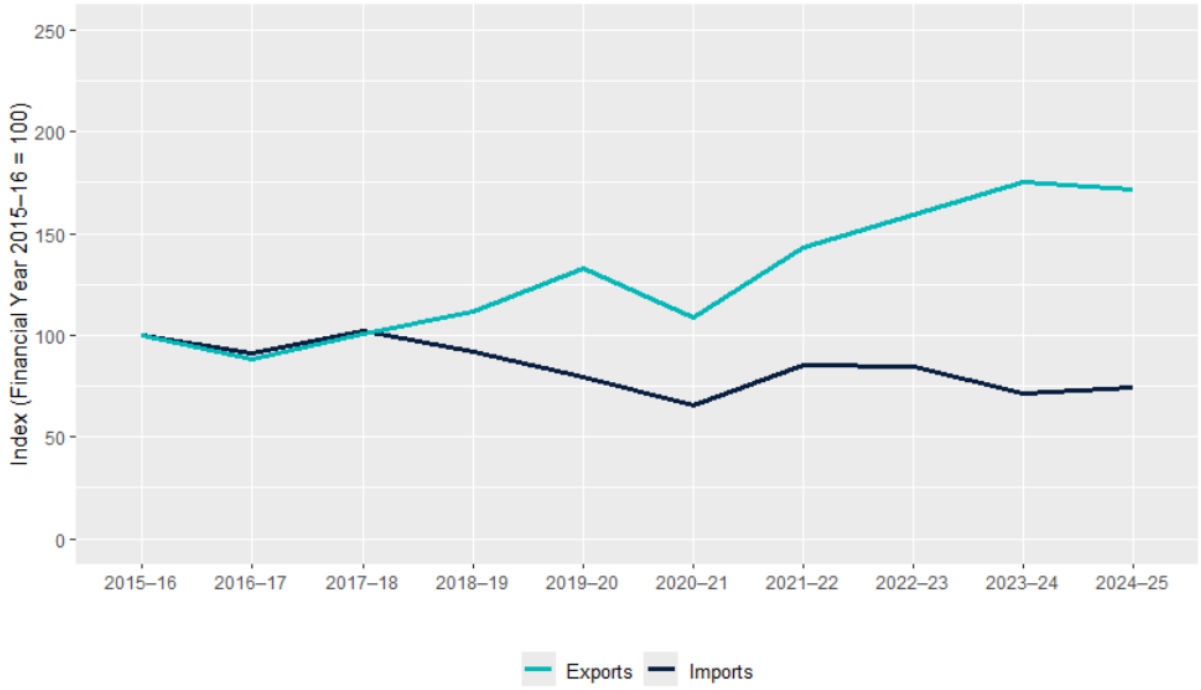
Figure 41. Film and television activities imports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

In contrast, exports of film and television activities increased by $239 million (71.5%), rising from $335 million in 2015–16 to $574 million in 2024–25. Export growth has outpaced import growth in this domain since 2017–18.

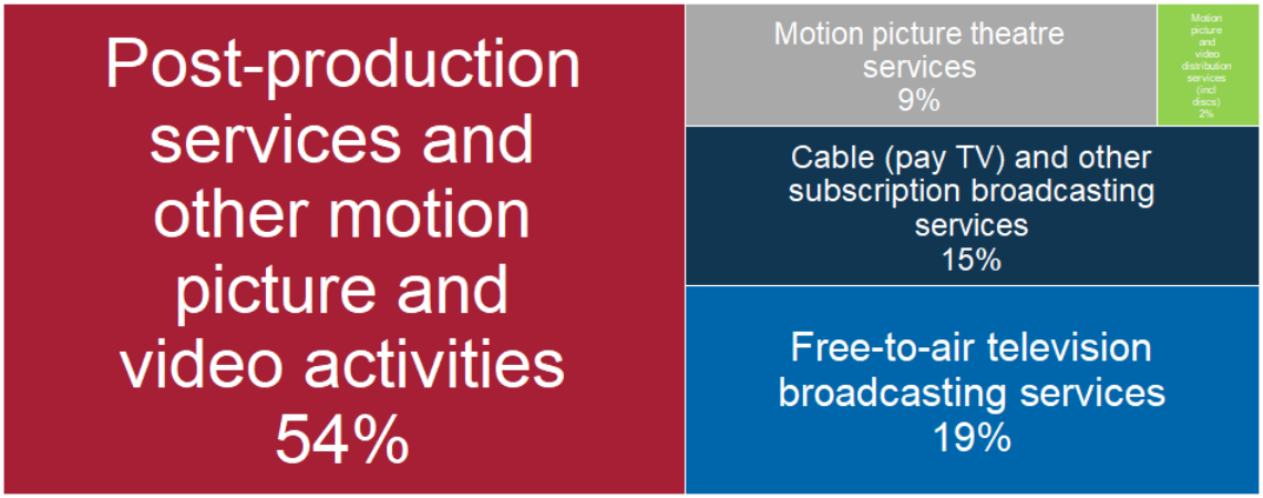
Figure 42. Growth index of film and television activities imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The export mix has pivoted toward post-production and other screen services, which represents more than half of all film and television activities' exports in 2024–25. Broadcasting services – including free-to-air, cable (pay TV) and other subscription broadcasting, contributed another 30%, while theatre services contributed less than 10% and distribution services contributed less than 5%.

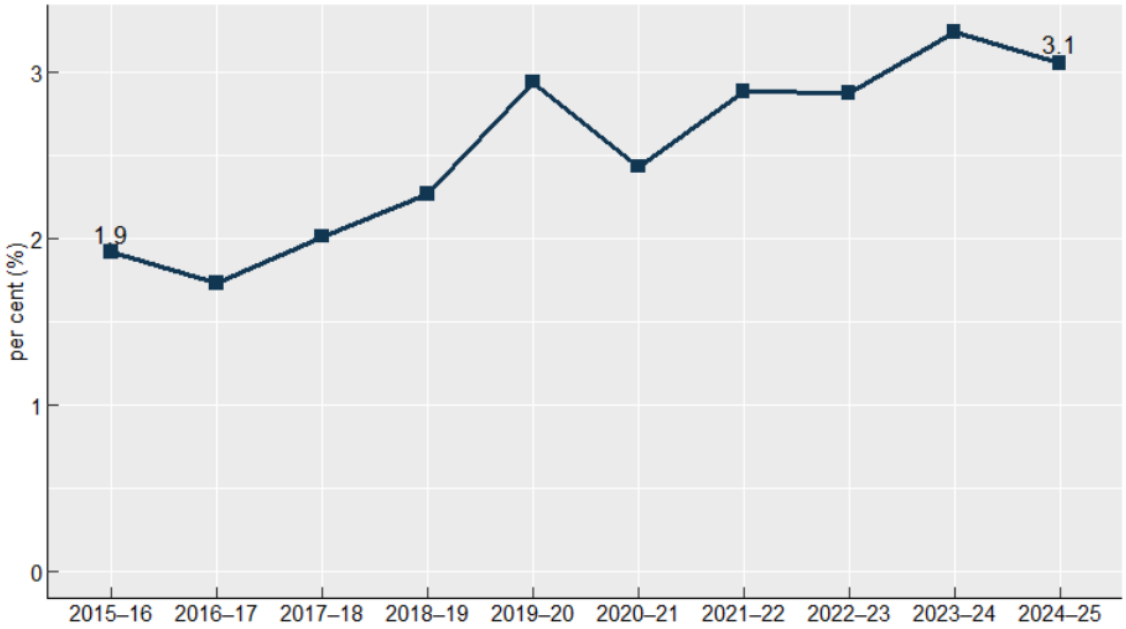
Figure 43. Film and television activities exports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of its Australian production, film and television activities' exports increased from 1.9% to 3.1% over the period.

Figure 44. Film and television activities, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

However, Australia remains a net importer of film and television products, largely due to substantial expenditure on copyright leasing. Even so, the trade gap has narrowed significantly as export-focused post-production and broadcasting services have expanded, and as import-intensive cinema activity has declined since 2020.

6. Radio broadcasting

This domain covers transmitting audio signals for radio programming. There are no radio-broadcasting imports in the series, so the domain is consistently export-positive.

Table 8. International trade of radio broadcasting, 2016–17[iv] to 2024–25

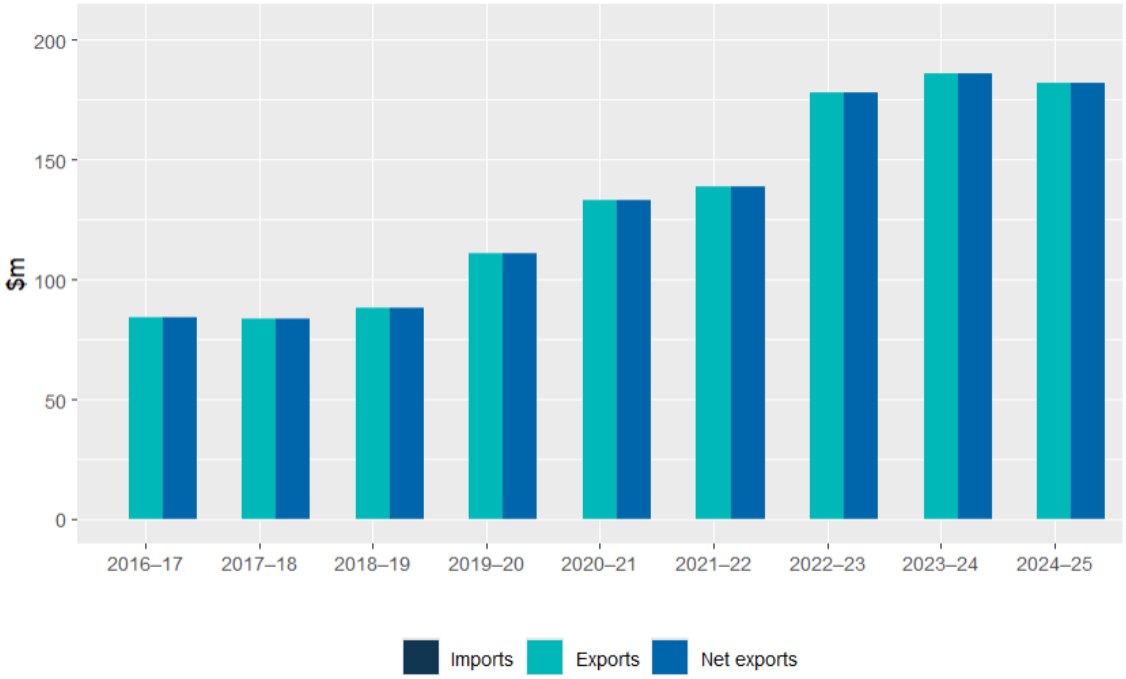
Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2016–17	0	84	84
2017–18	0	83	83
2018–19	0	88	88
2019–20	0	111	111
2020–21	0	133	133
2021–22	0	139	139
2022–23	0	178	178
2023–24	0	186	186
2024–25	0	182	182

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

[iv] No international trade in radio broadcasting was reported in 2015–16.

Exports rose from $84 million in 2016–17 to $182 million in 2024–25. With no recorded imports and a broadening export base, radio broadcasting is a net export contributor across the board. After relatively stable results prior to 2019–20, exports rose strongly and generally trended upward, reaching a peak of $186 million in 2023–24 before easing slightly in 2024–25.

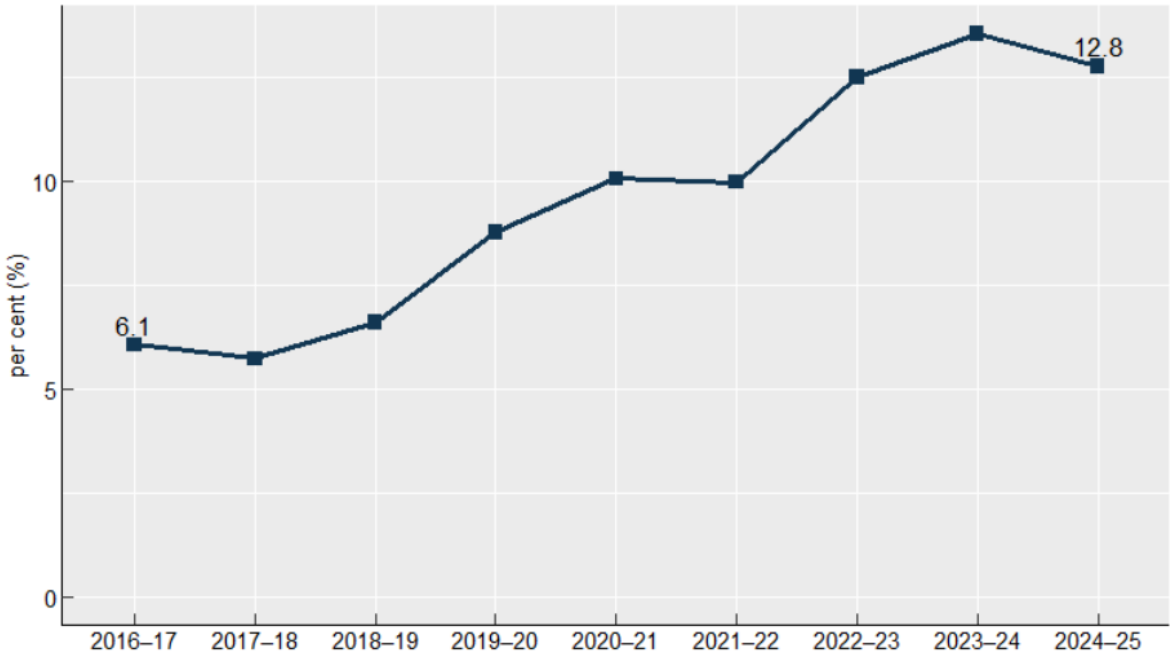
Figure 45. International trade of radio broadcasting, 2016–17 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of its Australian production, the exports of radio broadcasting increased from 6.1% in 2016–17 to 12.8% in 2024–25.

Figure 46. Radio broadcasting, exports as a share of Australian production, 2016–17 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

7. Internet publishing and broadcasting

This domain provides internet publishing and broadcasting services including radio, television, books, newspapers and magazines.

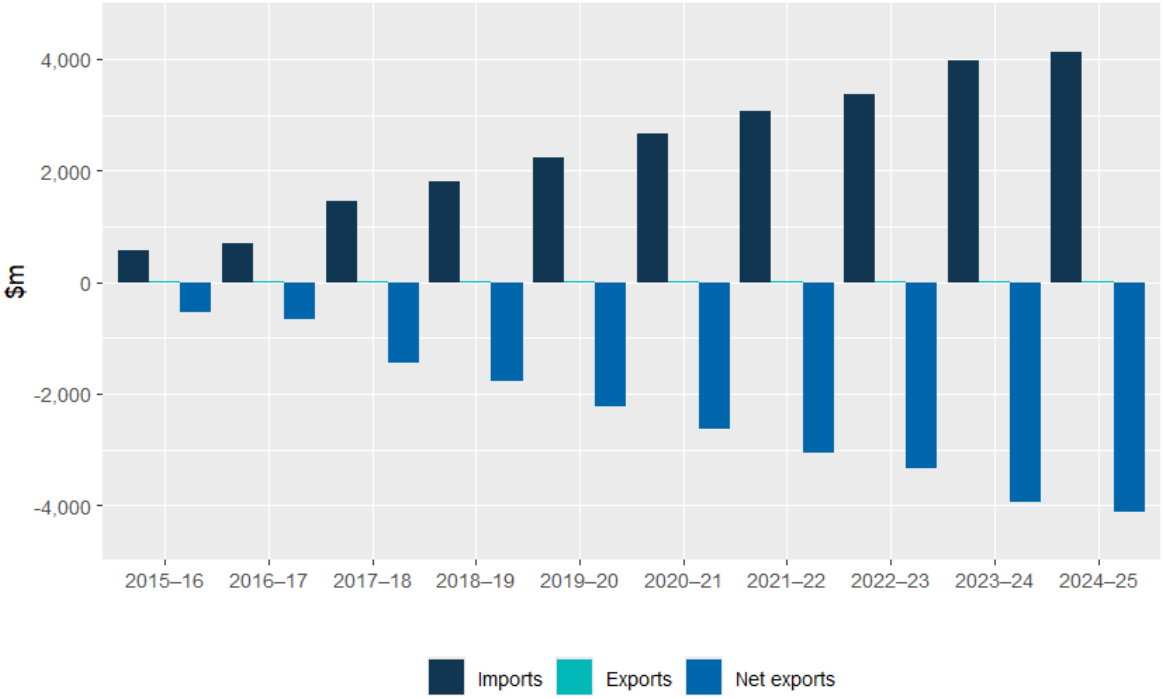
Table 9. International trade of internet publishing and broadcasting, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	566	14	-553
2016–17	691	14	-677
2017–18	1,457	19	-1,439
2018–19	1,794	18	-1,776
2019–20	2,239	18	-2,220
2020–21	2,659	12	-2,646
2021–22	3,070	9	-3,060
2022–23	3,364	16	-3,348
2023–24	3,961	20	-3,941
2024–25	4,131	20	-4,112

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; Balance of Payments and International Investment Position; BCARR calculations.

Imports increased steadily from $566 million in 2015–16 to $4.1 billion in 2024–25. Growth was particularly strong between 2016–17 and 2020–21, and continued thereafter, with imports exceeding $3.0 billion from 2021–22 onwards.

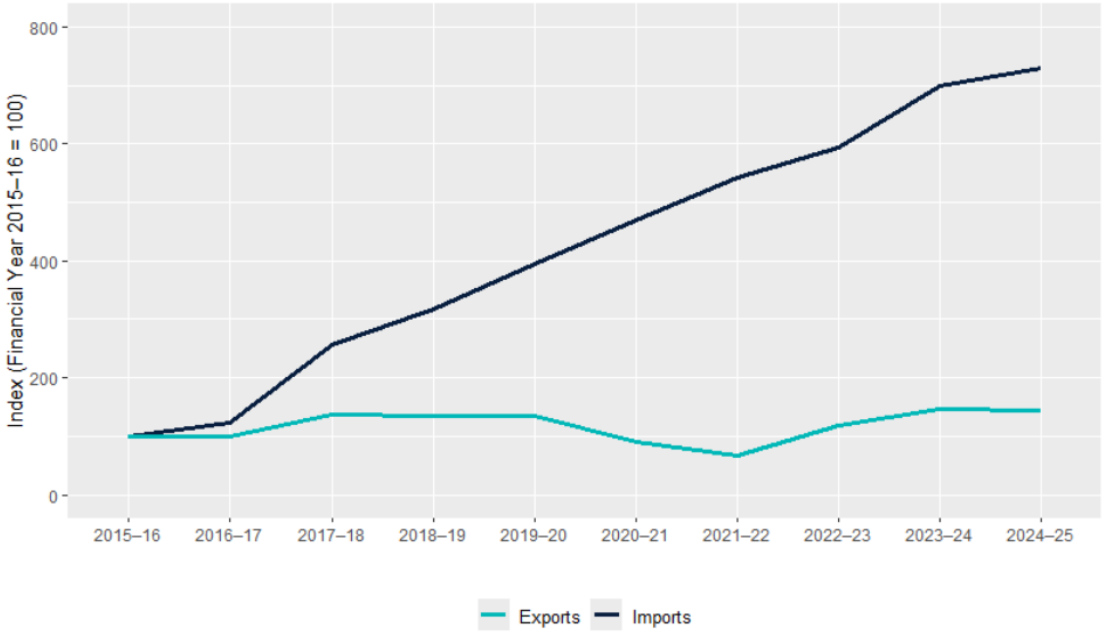
Figure 47. International trade of internet publishing and broadcasting, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; Balance of Payments and International Investment Position; BCARR calculations.

Exports remained small and stable across the series in most years. After declining to $9 million in 2021–22, exports recovered to $20 million by 2023–24 and remained at that level in 2024–25.

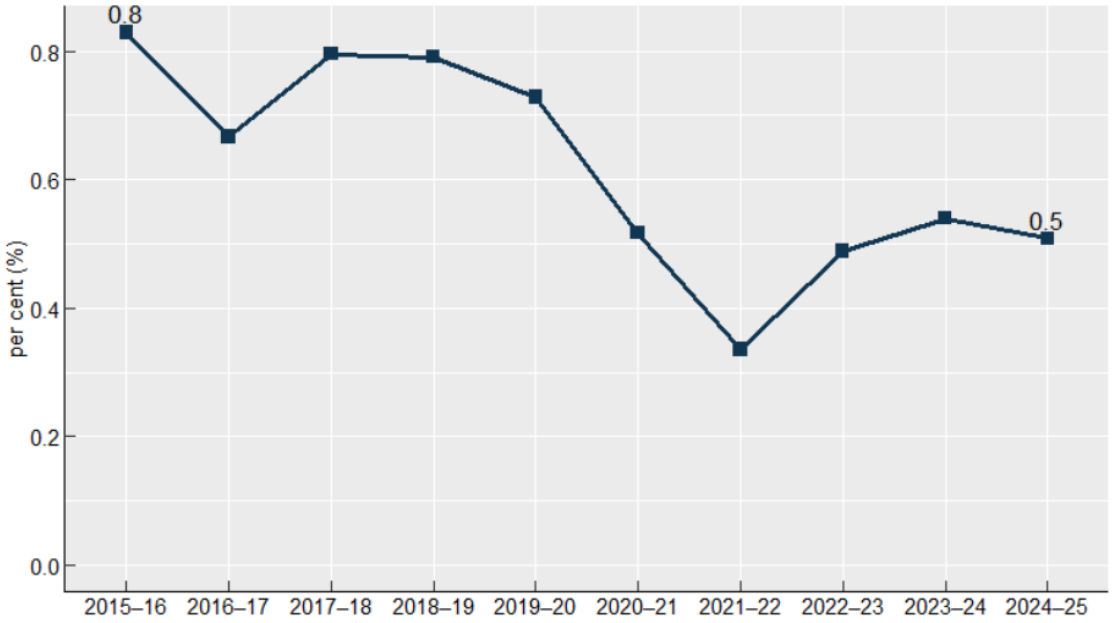
Figure 48. Growth index of internet publishing and broadcasting imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; Balance of Payments and International Investment Position; BCARR calculations.

As a share of Australian production, the exports of internet publishing and broadcasting declined from 0.8% in 2015–16 to 0.5% in 2024–25.

Figure 49. Internet publishing and broadcasting, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; Balance of Payments and International Investment Position; BCARR calculations.

The domain is a persistent net importer, with the deficit widening sharply after 2020–21. Internet publishing and broadcasting is now one of the largest import-heavy categories in the cultural and creative sector, reflecting a sustained increase in cross-border purchases of online publishing/broadcasting services relative to comparatively small export sales in this category.

8. Libraries and archives

Libraries and archives include maintaining collections of documents and facilitating their use. This domain is a consistent net exporter across all years, with sizable surpluses given low import levels.

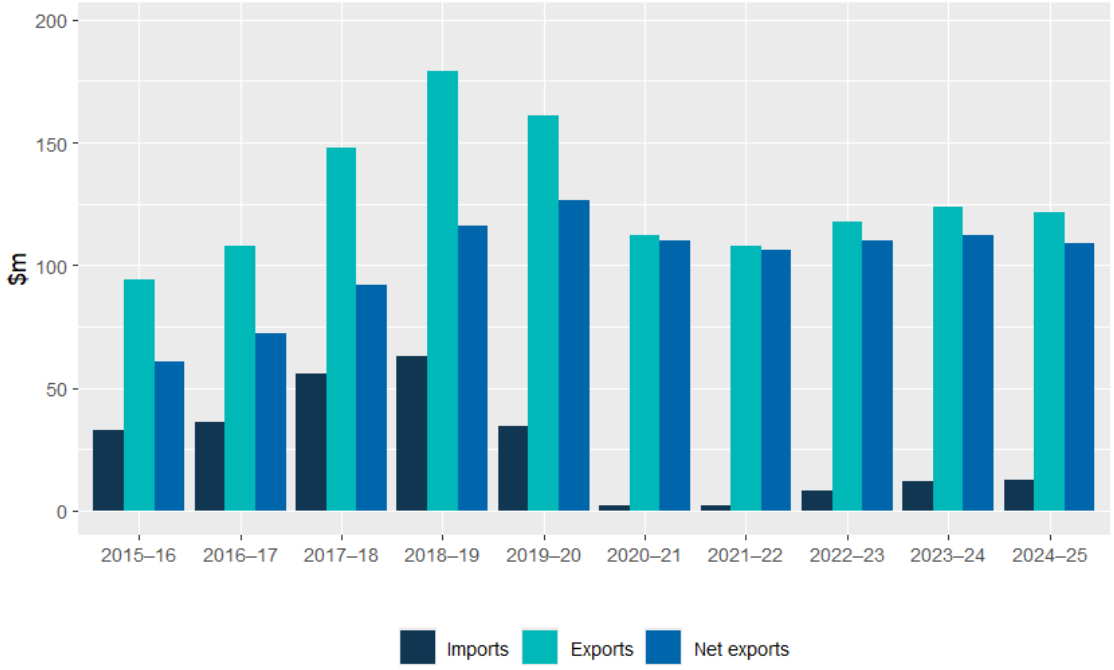
Table 10. International trade of libraries and archives, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	33	94	61
2016–17	36	108	72
2017–18	56	148	92
2018–19	63	179	116
2019–20	35	161	126
2020–21	2	112	110
2021–22	2	108	106
2022–23	8	118	110
2023–24	12	124	112
2024–25	13	121	109

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Libraries and archives' imports declined significantly over the decade, falling from $33 million in 2015–16 to $13 million in 2024–25, following a pandemic low of $2 million in 2020–21 and only a modest recovery thereafter. Historically, this domain has been domestically oriented but highly dependent on overseas suppliers, as a large share of library expenditure goes toward imported materials.[15] The sustained decline in imports points to a gradual shift away from reliance on overseas content—likely driven by increased digital access, evolving collection strategies, tighter procurement budgets, and a broader move away from physical materials.[16]

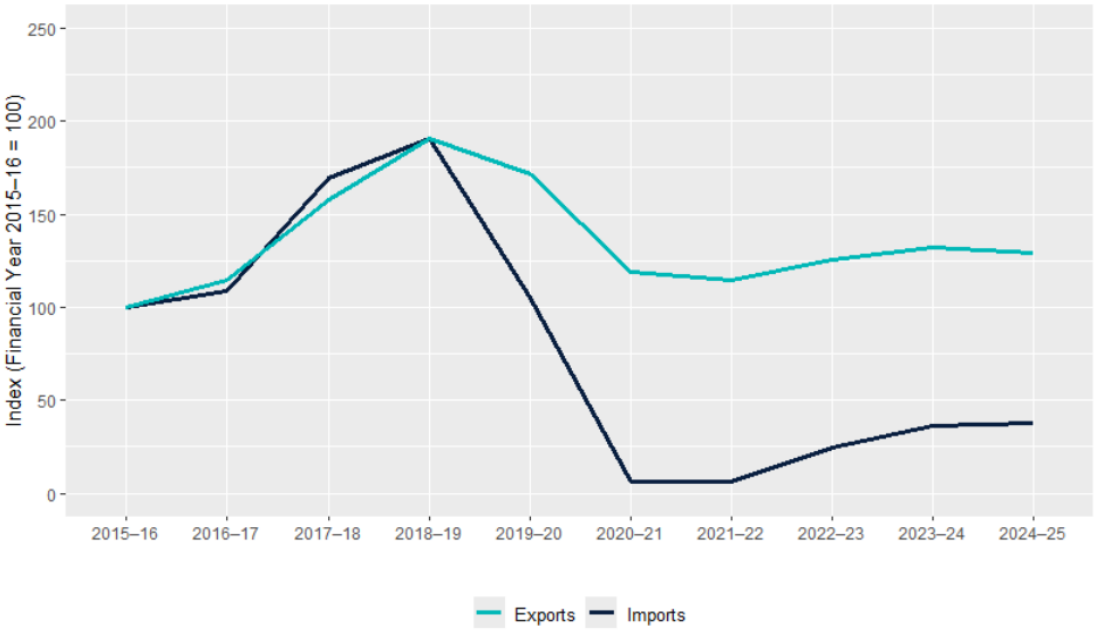
Figure 50. International trade of libraries and archives, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports grew from $94 million in 2015–16 to $121 million in 2024–25, with a decline in 2020–21 and 2021–22.

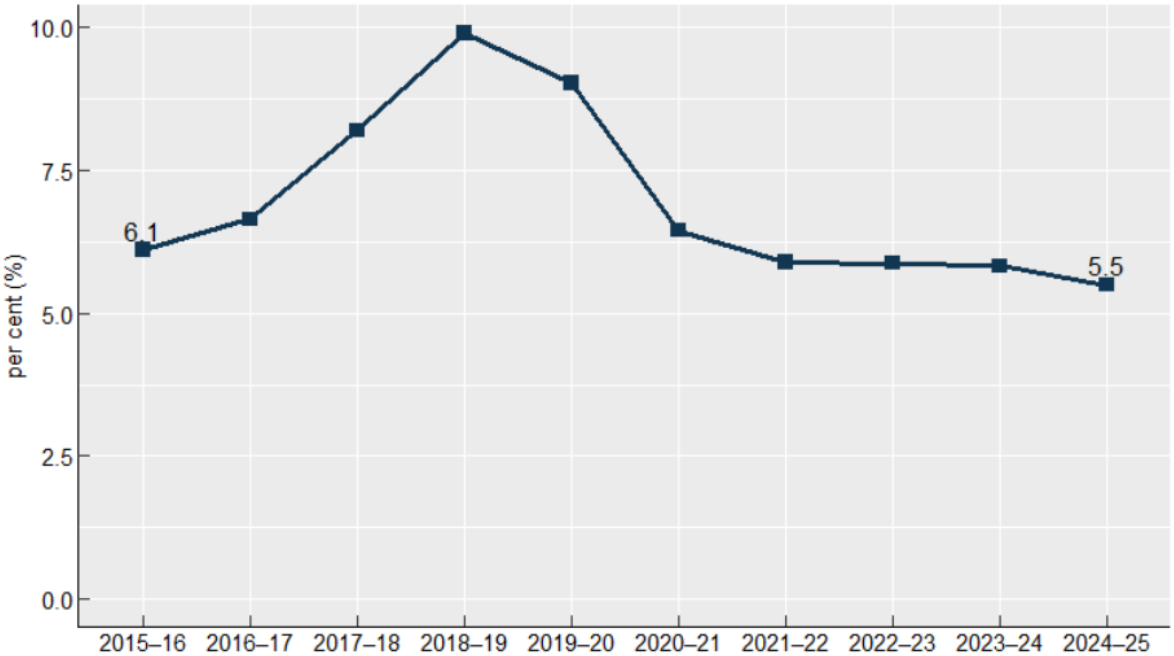
Figure 51. Growth index of libraries and archives imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The libraries and archives domain has a stable export base and minimal import dependence, keeping it export-positive. However, as a share of its Australian production, libraries and archives exports declined from 6.1% to 5.5% over the period.

Figure 52. Libraries and archives, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

9. Print media and publishing (excl. internet)

Print media and publishing (excluding internet-based media) includes products that are printed but not necessarily published, as well as printing support services. This domain also includes newspapers, magazines and other periodicals, books, as well as software, and additional publishing and information services.

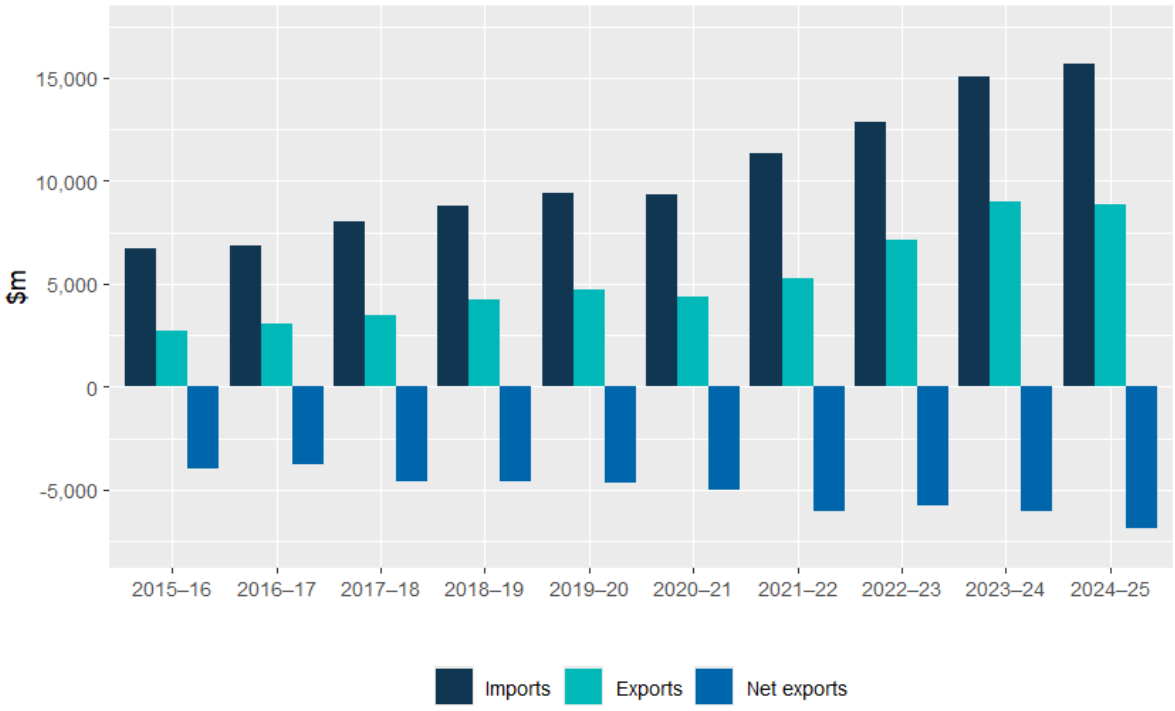
Table 11. International trade of print media and publishing (excl. internet), 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	6,705	2,721	-3,984
2016–17	6,831	3,039	-3,792
2017–18	8,003	3,449	-4,554
2018–19	8,793	4,211	-4,583
2019–20	9,393	4,730	-4,663
2020–21	9,344	4,372	-4,972
2021–22	11,342	5,283	-6,059
2022–23	12,874	7,122	-5,752
2023–24	15,032	9,002	-6,030
2024–25	15,679	8,812	-6,867

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Print media and publishing (excluding internet-based media) is one of the largest, fastest-growing domains. Imports more than doubled from $6.7 billion in 2015–16 to $15.7 billion in 2024–25.

Figure 53. International trade of print media and publishing (excl. internet), 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

The profile of this domain is now overwhelmingly software-led. In 2024–25, software publishing services reached $10.5 billion, accounting for around 67% of imports, and software copyright leasing was

$1.9 billion, or 12%. Traditional products are traded less, with newspaper, magazine, and book publishing accounting for 12%, and the remainder of printing media and publishing products accounting for 8%.

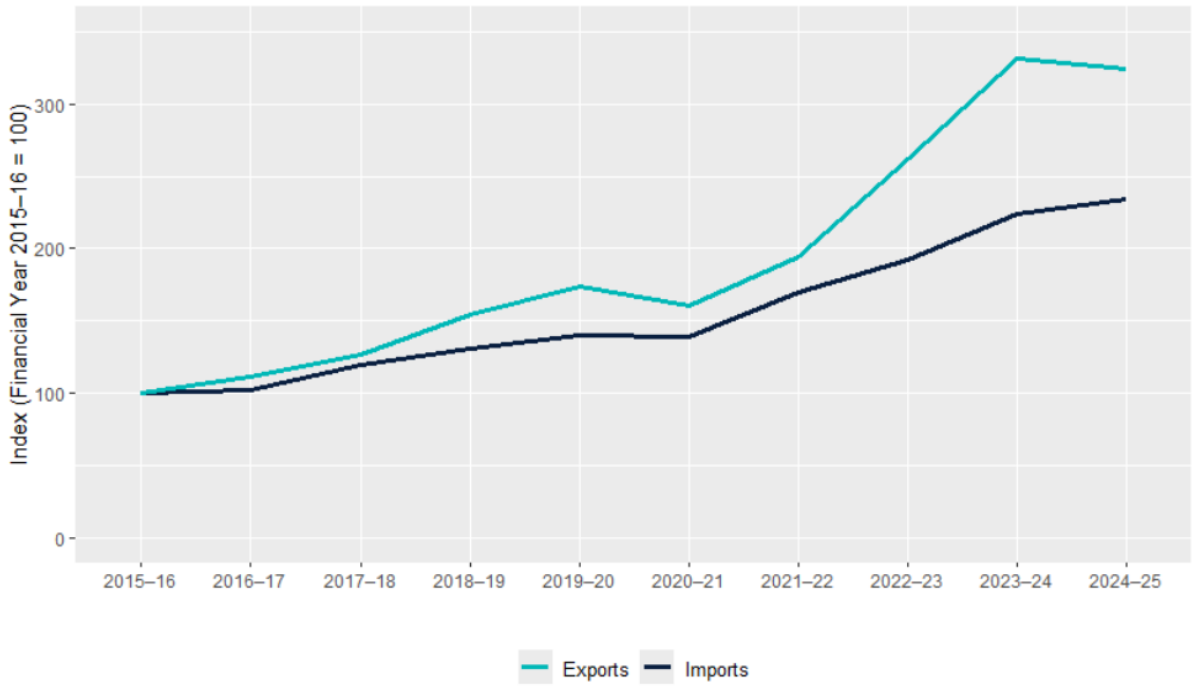
Figure 54. Print media and publishing (excl. internet) imports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports rose even faster—from $2.7 billion to $8.8 billion over the same period. Despite strong export growth, the domain remained a net importer, with the deficit widening from $4.0 billion to $6.9 billion, driven by a step-change from 2021–22 to 2024–25.

Figure 55. Growth index of print media and publishing (excl. internet) imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports show a similar pattern. In 2024–25, software publishing services totalled $6.8 billion or 77% of exports in this domain, while software copyright leasing contributed $951 million, or around 11%. The remaining 12% was spread across traditional book, magazine and periodical publishing, with the related copyright leasing. Overall, exports have grown faster than imports of print media and publishing (excl. internet) since 2015–16.

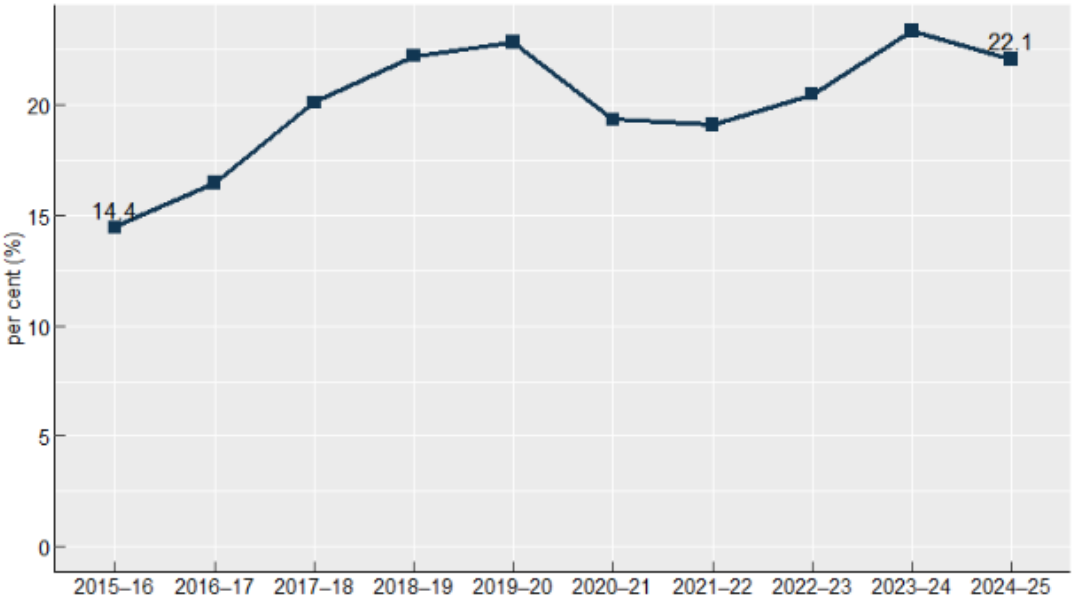
Figure 56. Print media and publishing (excl. internet) exports by main products, 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of total Australian production, the exports in print media and publishing (excl. internet) increased from 14.4% to 22.1% over the period.

Figure 57. Print media and publishing (excl. internet), exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

10. Architecture services

Architecture services includes planning and designing buildings, structures, and land developments. The domain is a consistent net exporter, with surpluses ranging from $27 million in 2015–16 to $73 million in 2024–25.

Table 12. International trade of architecture services, 2015–16 to 2024–25

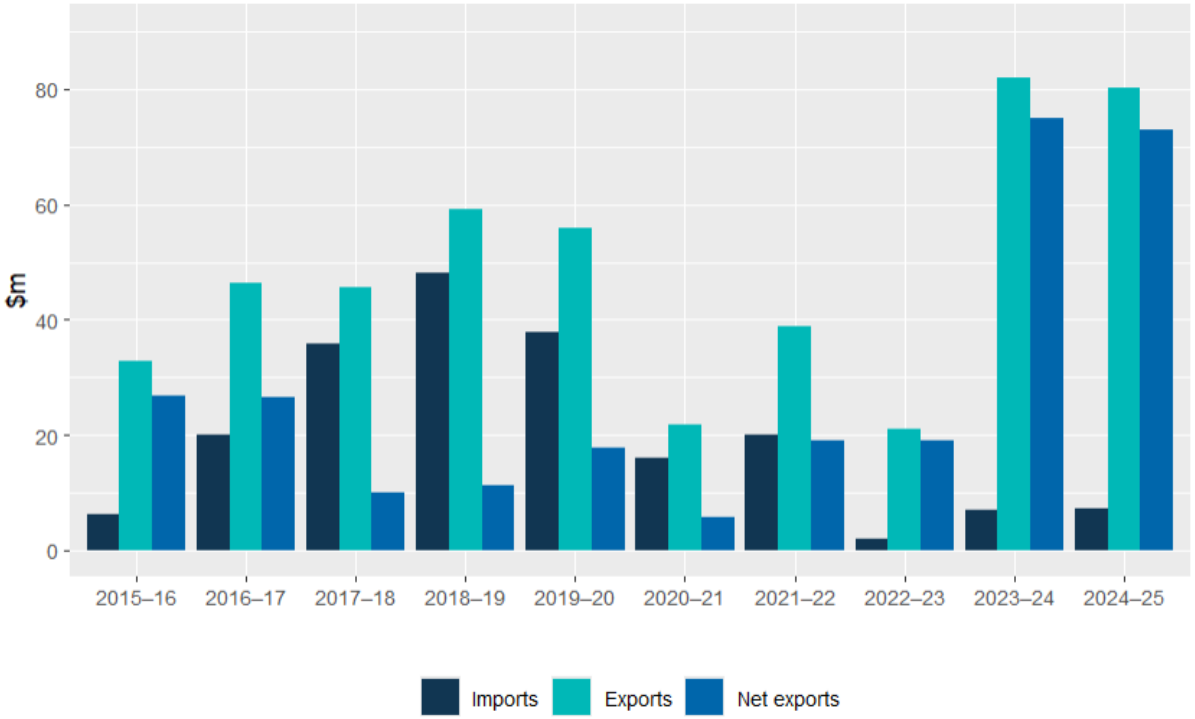
Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	6	33	27
2016–17	20	46	26
2017–18	36	46	10
2018–19	48	59	11
2019–20	38	56	18
2020–21	16	22	6
2021–22	20	39	19
2022–23	2	21	19
2023–24	7	82	75
2024–25	7	80	73

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Architecture services primarily serve the domestic construction market, reflecting an industry dominated by sole proprietors and small firms that lack the scale and brand recognition required to compete for overseas design contracts. International trade in architectural services is therefore limited and largely concentrated among large engineering construction firms.[17]

Imports peaked at $48 million in 2018–19 before collapsing to just $2 million in 2022–23, with import penetration generally confined to major US and UK firms.[18]

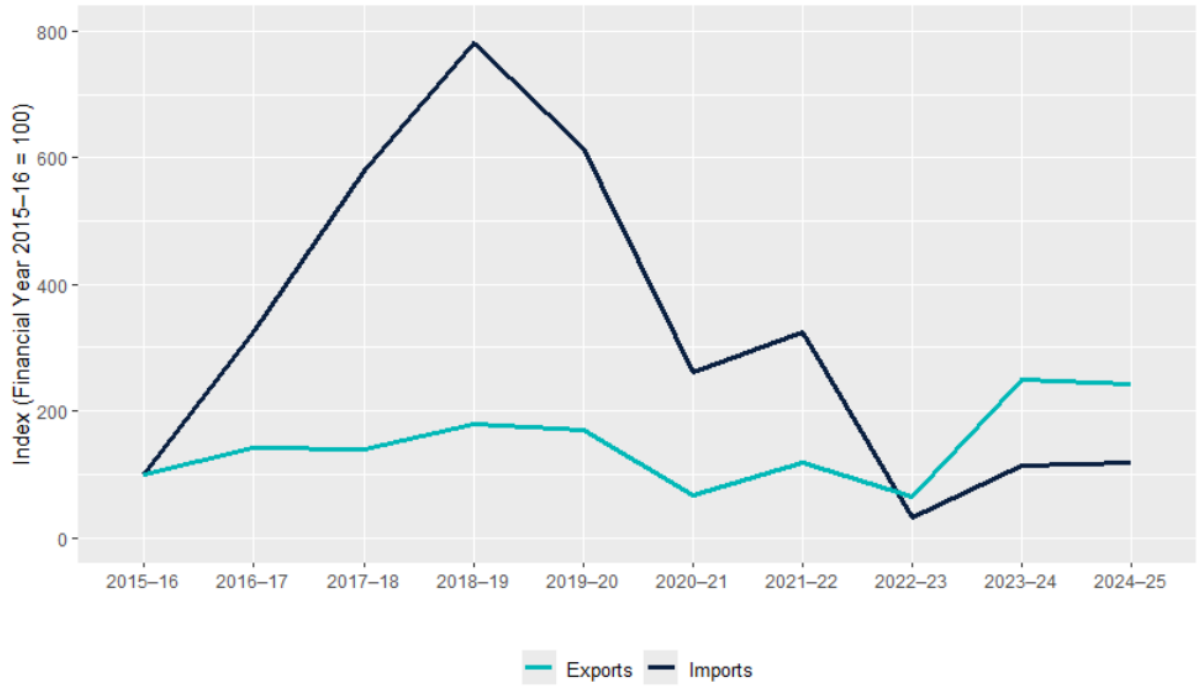
Figure 58. International trade of architecture services, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Architecture services exports increased from $33 million in 2015–16 to $80 million in 2024–25.

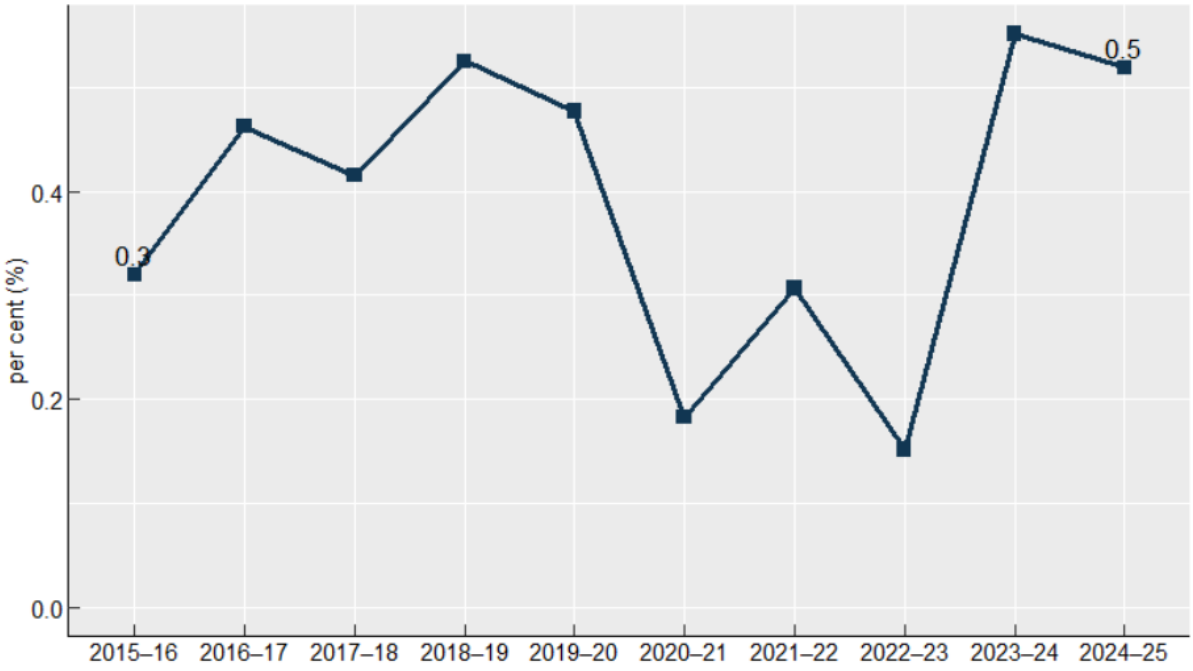
Figure 59. Growth index of architecture services imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.
Note: Growth indices for architecture services should be interpreted with caution as very low base-year import values amplify its percentage movements.

As a share of production, exports of architecture services increased from 0.3% to 0.5%.

Figure 60. Architecture services, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Overall, this domain has remained structurally export-positive over the decade, though at a small scale.

11. Design and fashion

The design and fashion domain covers commercial art, display services, and specialised design (fashion, interior, jewellery). The domain is consistently in trade deficit, although the gap remains moderate relative to most other creative service categories. The deficit widened from $43 million in 2015–16 to $258 million 2024–25 as imports grew faster than exports—driven mainly by increased purchases of specialised design services from abroad.

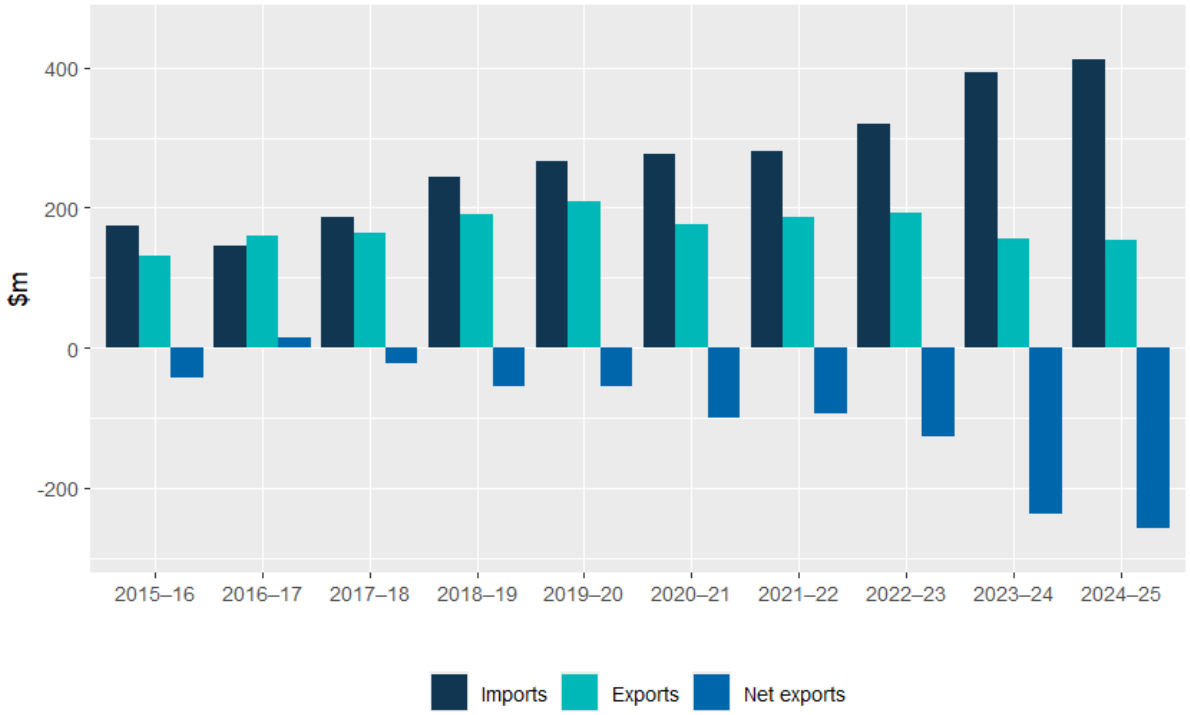
Table 13. International trade of design and fashion, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	174	131	-43
2016–17	146	160	14
2017–18	187	164	-23
2018–19	245	190	-54
2019–20	266	210	-56
2020–21	277	176	-101
2021–22	281	187	-95
2022–23	320	193	-127
2023–24	394	156	-238
2024–25	411	153	-258

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

This domain has a low level of international trade, as most operators provide services primarily within Australia. Many sector participants in design and fashion are non-employing businesses or small firms with fewer than 20 employees, limiting their capacity to engage in overseas markets. Nevertheless, some operators are beginning to establish international links across the Asia–Pacific region, the UK and the Americas.[19]

Figure 61. International trade of design and fashion, 2015–16 to 2024–25

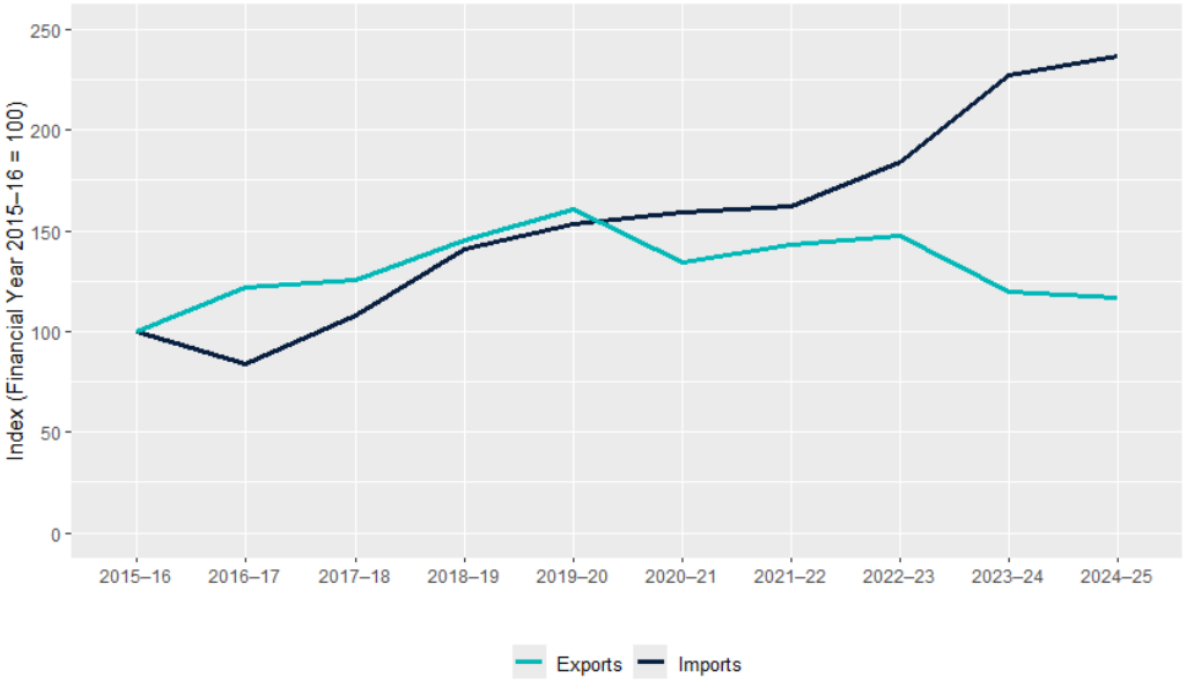


Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports increased steadily over the decade from $174 million in 2015–16 to $411 million in 2024–25. Most of this growth came from specialised design services, while commercial art services stayed minimal.

Exports increased from $131 million in 2015–16 to $153 million in 2024–25. While exports grew faster than imports between 2015–16 and 2019–20, they fell sharply in 2020–21 and remained below their 2019–20 peak thereafter, while imports continued to rise throughout the period.

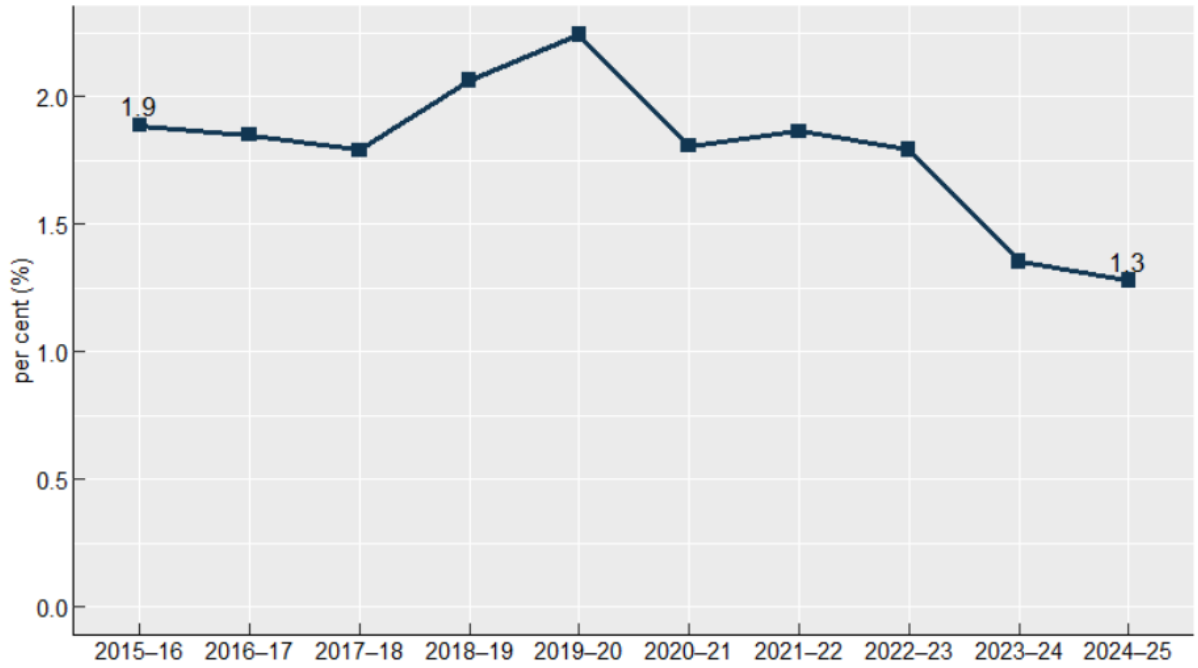
Figure 62. Growth index of design and fashion imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of its Australian production, exports in design and fashion declined from 1.9% in 2015–16 to 1.3% in 2024–25.

Figure 63. Design and fashion, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Overall, the design and fashion domain is service-dominant, with expanding international activity in imports and exports. However, the sustained and widening deficit reflects stronger domestic demand for overseas specialised design inputs than the global demand for Australian design services.

12. Advertising and promotion

Advertising and promotion includes services like campaign creation, media planning/buying, and management for businesses and professionals. The domain is a consistent net importer, with the deficit widening sharply as imports have expanded faster than exports. The gap increased from $811 million in 2015–16 to $8.2 billion in 2024–25, driven by intensifying international competition and rising costs linked to advanced technological infrastructure. These pressures are expected to motivate agencies to scale their global presence and strengthen their capabilities.[20]

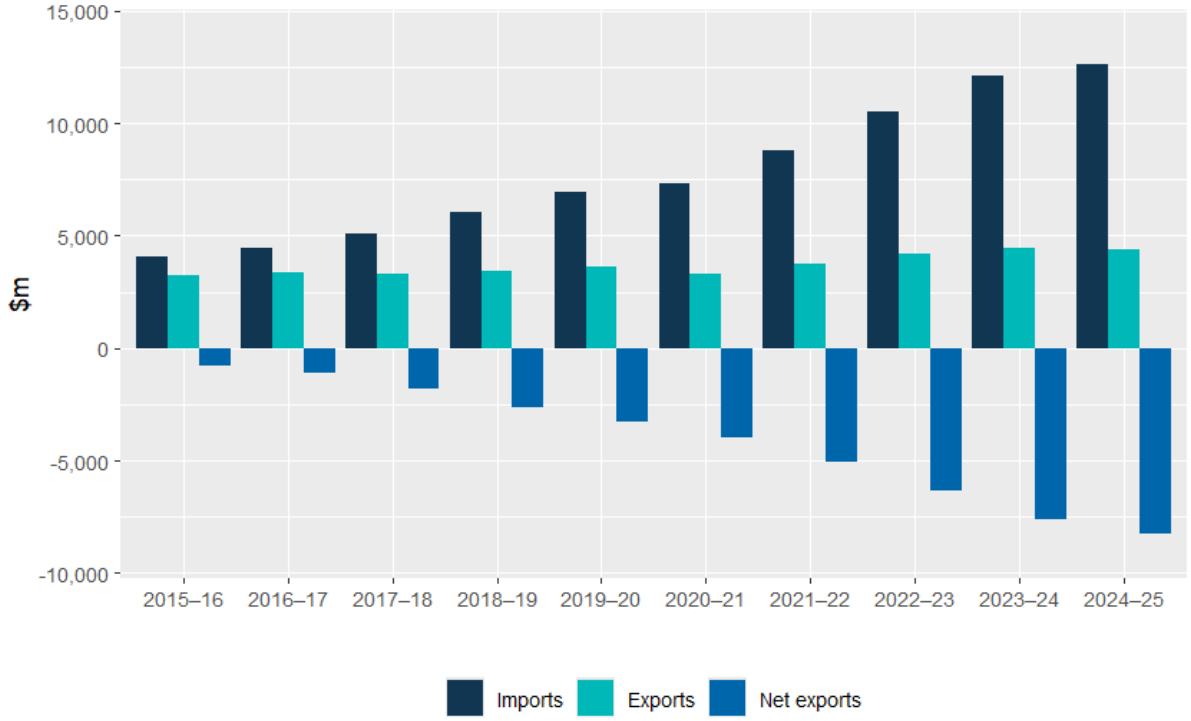
Table 14. International trade of advertising and promotion, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	4,066	3,256	-811
2016–17	4,463	3,389	-1,074
2017–18	5,112	3,280	-1,831
2018–19	6,043	3,412	-2,631
2019–20	6,922	3,637	-3,284
2020–21	7,313	3,327	-3,986
2021–22	8,788	3,738	-5,050
2022–23	10,501	4,186	-6,315
2023–24	12,097	4,464	-7,633
2024–25	12,617	4,370	-8,248

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Advertising and promotion is one of the largest and fastest-growing domains for trading cultural and creative services. Imports rose from $4.1 billion in 2015–16 to $12.6 billion in 2024–25—a three-fold increase. Growth is driven mainly by management services, which include services for business, artists, entertainers and sporting professionals—expanding from $3.5 billion to $10.7 billion. Although these services primarily support the domestic market, the sector is highly globalised.[21] Advertising services also grew steadily from $582 million to $1.9 billion over the same period.

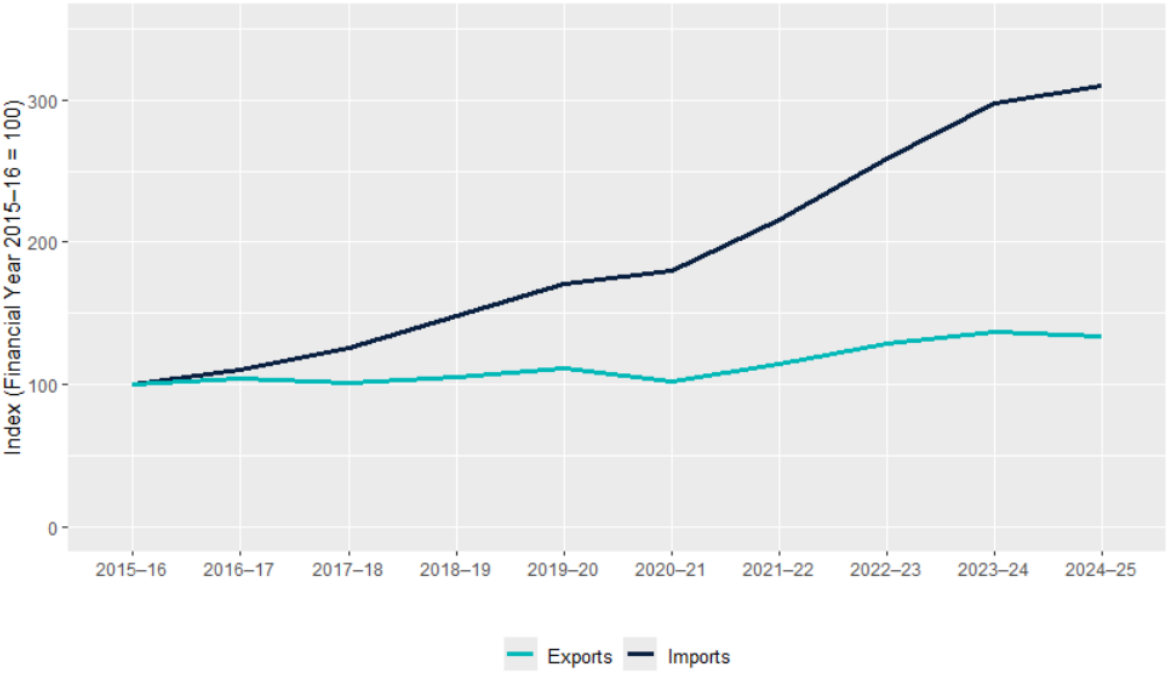
Figure 64. International trade of advertising and promotion, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Exports increased more modestly, from $3.3 billion in 2015–16 to $4.4 billion in 2024–25. Export growth was also led by management services, increasing from $2.4 billion to $4.0 billion, while advertising services declined from $817 million to $391 million.

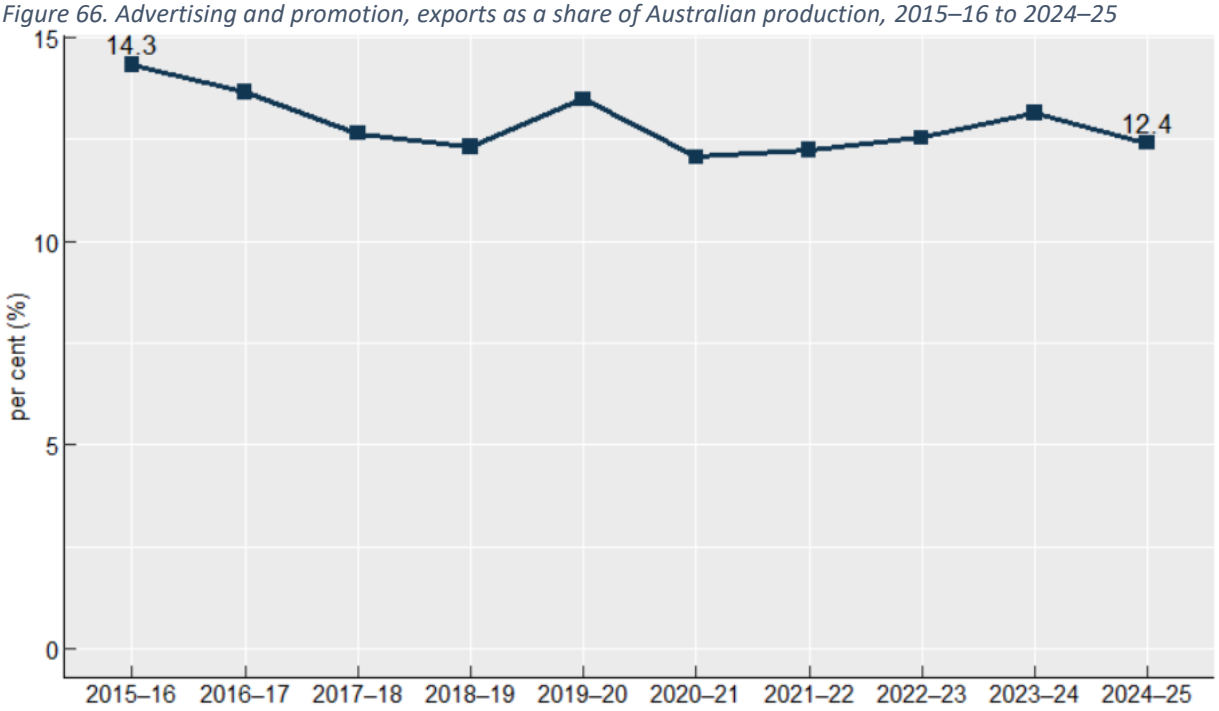
Figure 65. Growth index of advertising and promotion imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of total Australian production, exports in advertising and promotion declined over the decade, from 14.3% in 2015–16 to 12.4% in 2024–25.

Figure 66. Advertising and promotion, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Advertising and promotion is a high-value, high-growth cultural and creative service domain, but one in which Australia has a large and increasing trade deficit. The import-heavy pattern reflects Australia's strong consumption of international management and promotional services, alongside a moderate but steady base for exporting these activities.

13. Events (arts)

Events (arts) includes theatre and concert ticketing, booking services, event management or promotion, and fee-based fundraising or administration services.

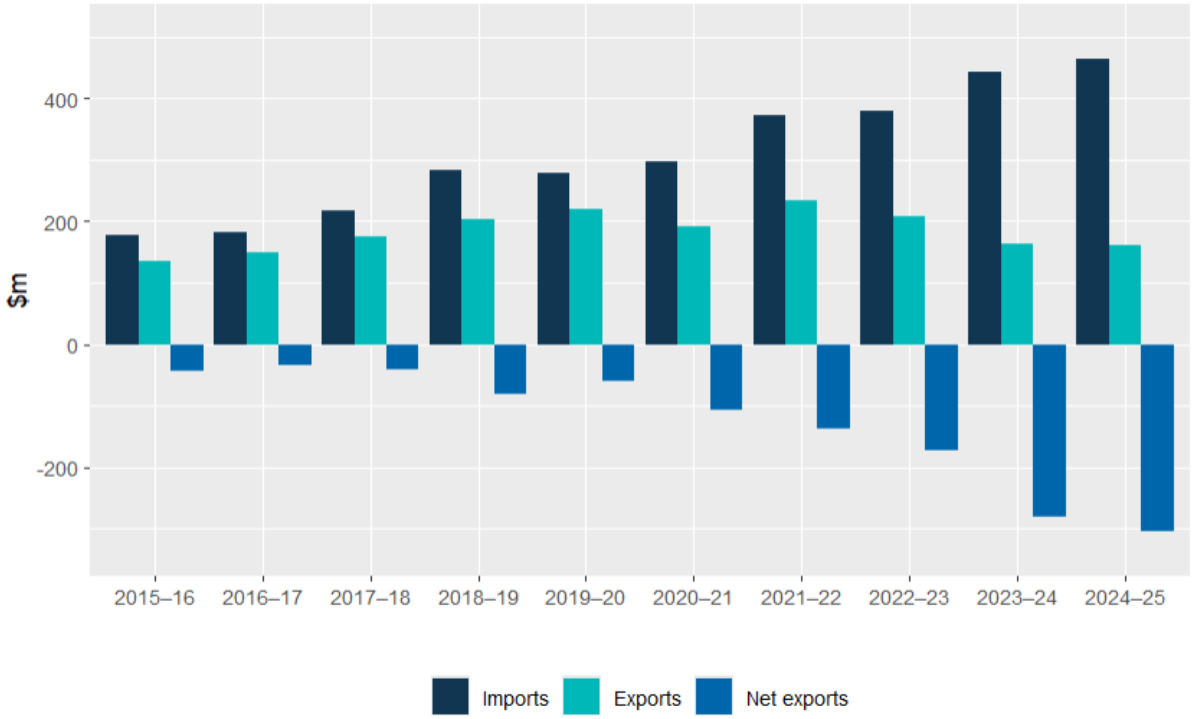
Table 15. International trade of events (arts), 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	178	134	-44
2016–17	182	148	-33
2017–18	217	176	-41
2018–19	283	203	-80
2019–20	279	219	-60
2020–21	298	191	-107
2021–22	372	234	-138
2022–23	379	207	-172
2023–24	444	163	-281
2024–25	464	160	-304

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

This domain has been a consistent net importer, with the trade deficit widening over time, from $44 million in 2015–16 to $304 million in 2024–25. This reflects stronger domestic use of international event management and promotion services compared with the scale of Australian event services sold overseas.

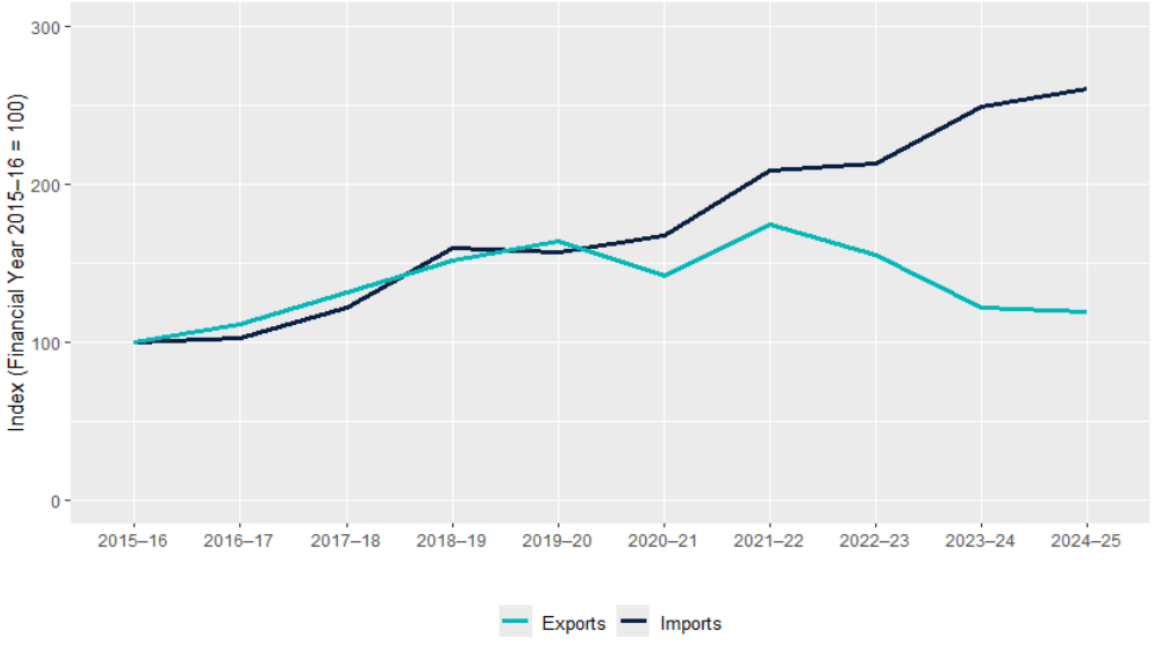
Figure 67. International trade of events (arts), 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Imports increased steadily from $178 million in 2015–16 to $464 million in 2024–25. Exports also expanded, though more moderately from $134 million to $160 million during the same period. Exports peaked in 2021–22 before easing to $160 million in 2024–25.

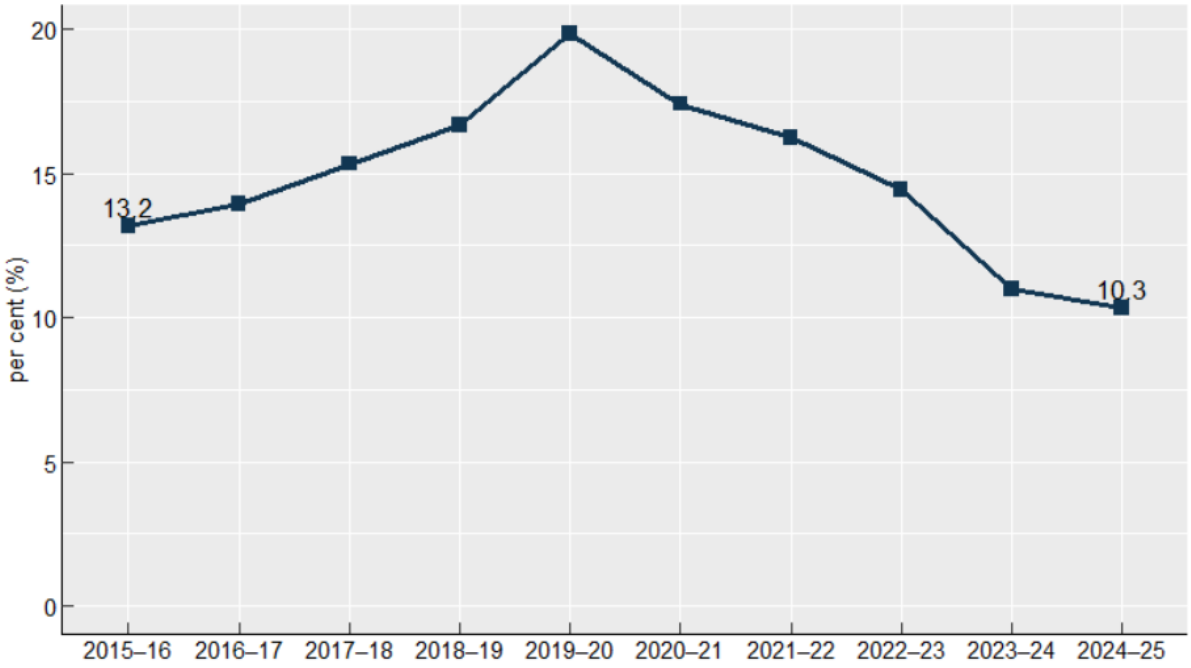
Figure 68. Growth index of events (arts) imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

As a share of Australian production, events (arts) exports declined from 13.2% to 10.3% over the period.

Figure 69. Events (arts), exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Events (arts) is a service-only domain with growing domestic reliance on foreign event management expertise. Exports have increased moderately, but import growth—especially in the post-2020 recovery period—has been faster, driving a widening trade deficit.

14. Arts education

Arts education offers non-vocational training in areas like art, dance, drama, and music. The field is fragmented, with many owner-operators offering lessons in music and the performing arts.[22]

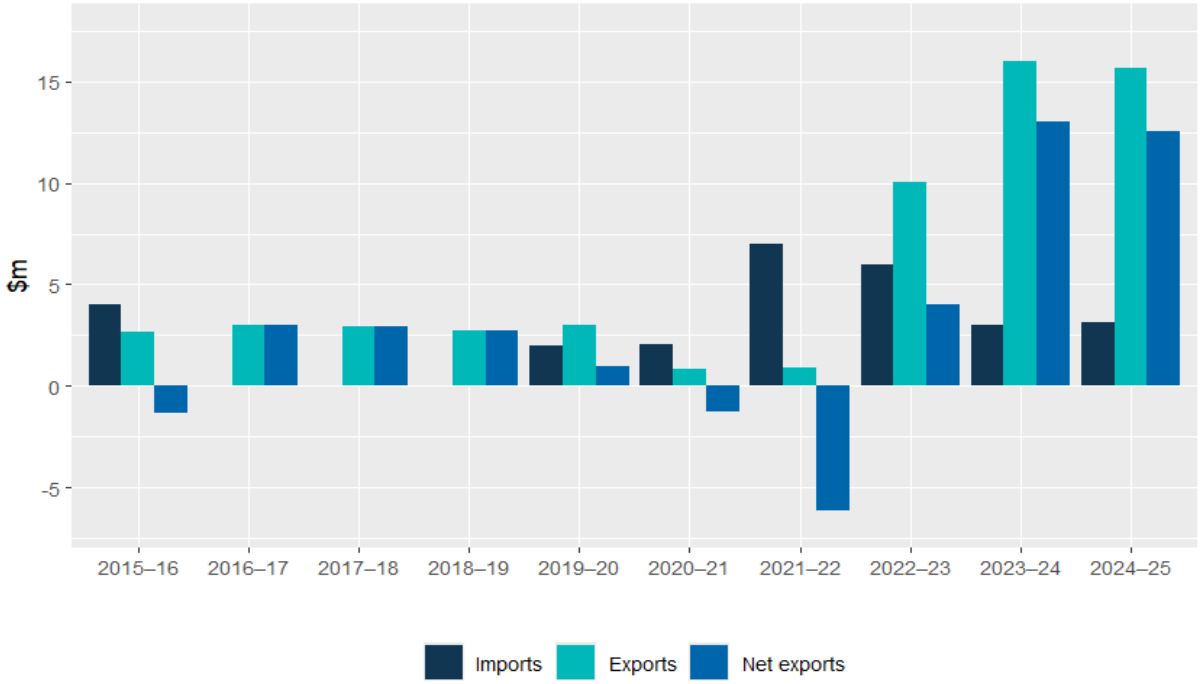
Table 16. International trade of arts education, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	4	3	-1
2016–17	0	3	3
2017–18	0	3	3
2018–19	0	3	3
2019–20	2	3	1
2020–21	2	1	-1
2021–22	7	1	-6
2022–23	6	10	4
2023–24	3	16	13
2024–25	3	16	13

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

This domain is export-positive for most of the years analysed, although the magnitude is very small relative to all other cultural and creative categories.

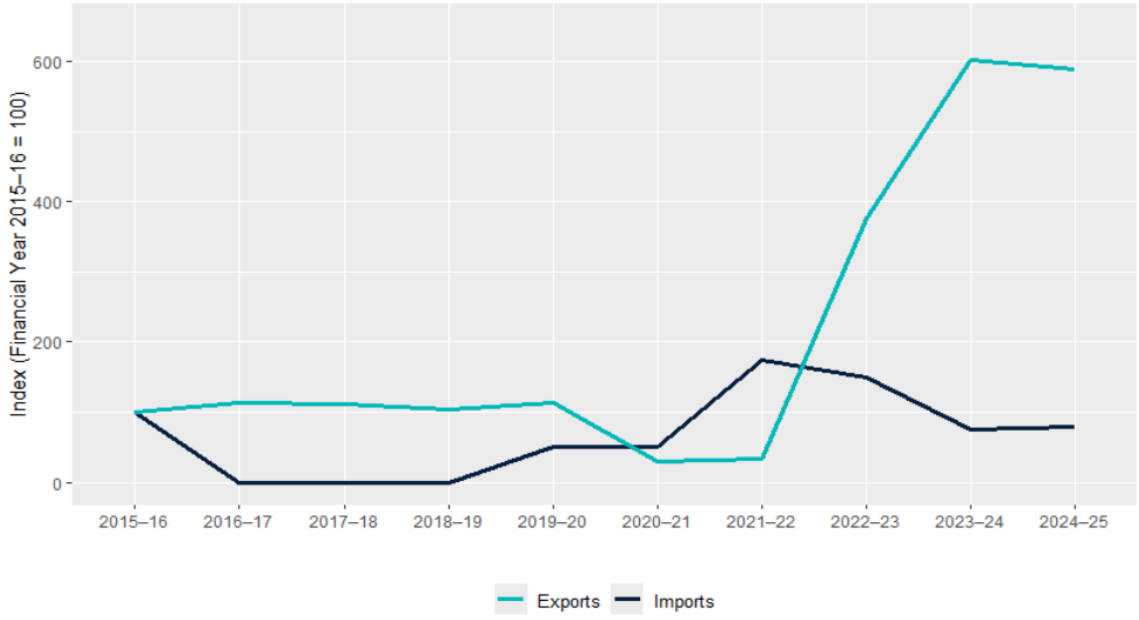
Figure 70. International trade of arts education, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

Arts education is a niche, low-volume trade domain, with both imports and exports at very small levels. Export activity remains slightly stronger than imports, but overall, the domain has only a marginal impact on Australia's cultural and creative trade profile. The high variability in the growth index underscores the low trade volumes of this domain.

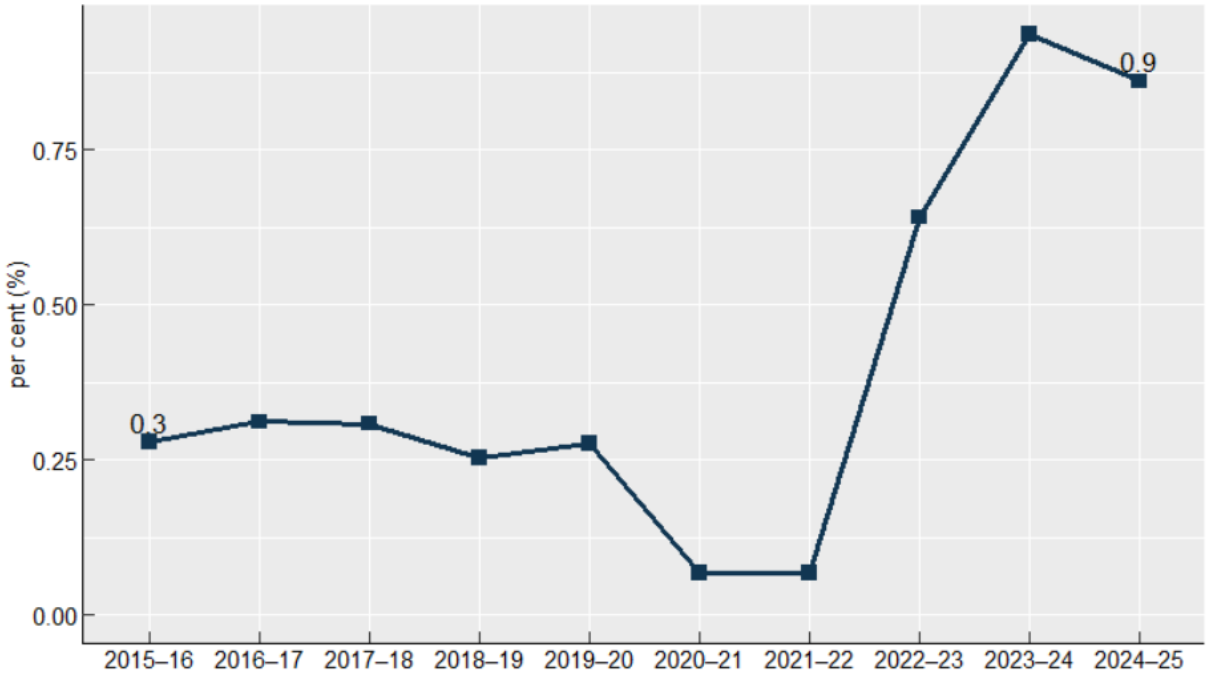
Figure 71. Growth index of arts education imports and exports, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.
Note: Growth indices for arts education should be interpreted with caution as very low base-year export values amplify its percentage movements.

As a share of Australian production, arts education exports increased from 0.3% in 2015–16 to 0.9% in 2024–25.

Figure 72. Arts education, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; BCARR calculations.

15. Digital games development

Digital games development covers the creation and refinement of game concepts, the design and prototyping of game mechanics and interfaces, the development of interactive features, testing and optimisation across platforms, and, where required, oversight of game systems and features.

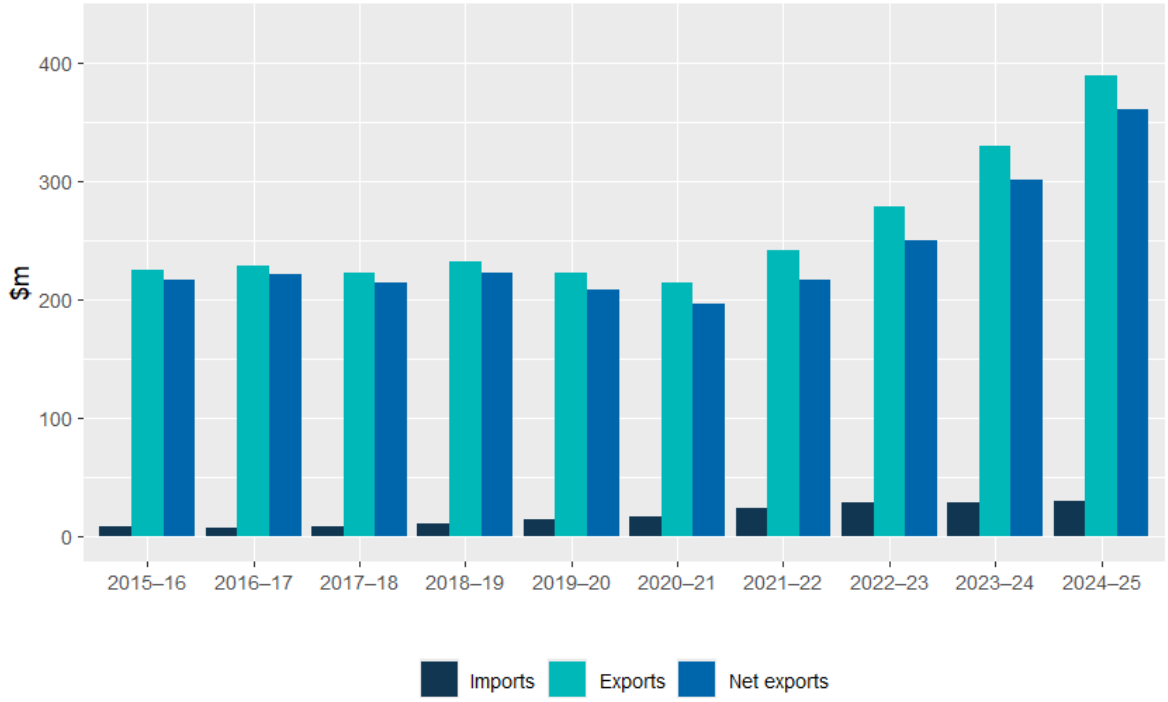
Table 17. International trade of digital games development, 2015–16 to 2024–25

Period	Imports ($m)	Exports ($m)	Net exports (exports less imports) ($m)
2015–16	8	224	216
2016–17	7	228	221
2017–18	9	223	214
2018–19	10	232	222
2019–20	15	223	208
2020–21	17	214	197
2021–22	24	241	217
2022–23	28	278	250
2023–24	28	329	301
2024–25	29	389	360

Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; DFAT; IGEA; BCARR calculations.

Imports of digital games and development increased from $8 million in 2015–16 to $29 million in 2024–25; while exports increased from $224 million to $389 million over the period.

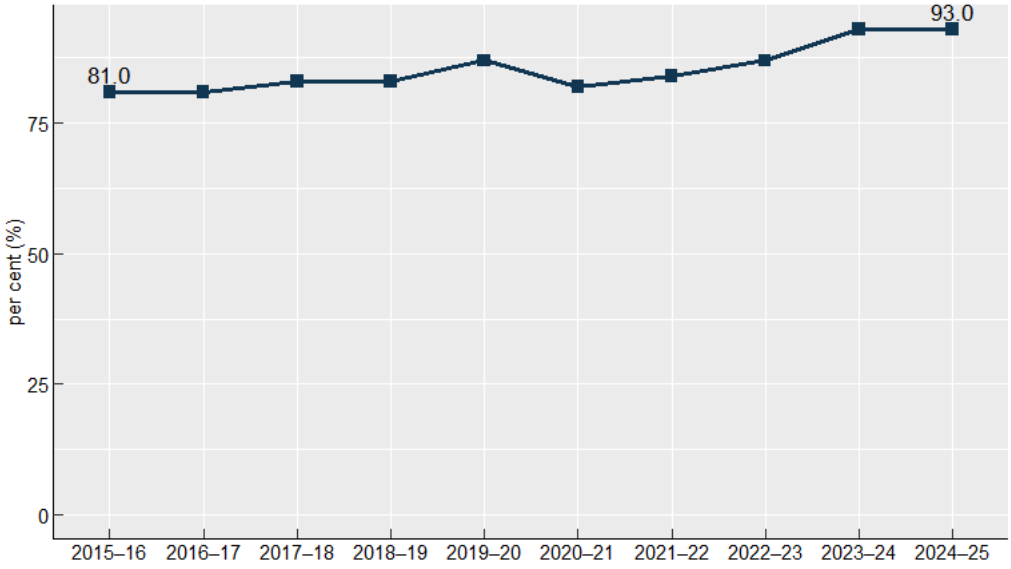
Figure 73. International trade of digital games development, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; DFAT; IGEA; BCARR calculations.

As a share of total Australian production, exports in digital games and development increased from 81.0% in 2015–16 to 93.0% in 2024–25.

Figure 74. Digital games development, exports as a share of Australian production, 2015–16 to 2024–25



Source: ABS Australian System of National Accounts, Australian National Accounts: Input-Output Tables (Product Details); Australian National Accounts: Supply Use Tables; DFAT; IGEA; BCARR calculations.

Appendix A—Product coverage and classifications

IOPC	IOPC description	Domain
13200051	Handbags, suitcases (incl canvas), bags (of leather or leather substitute) (incl toiletry bags, purses, wallets) (excl bags for packaging)	Visual arts and crafts
16110010	Books (incl atlases & touring guides), maps, charts, plans, sheet music printed but not published by this business	Print media and publishing (excl. internet)
16110020	Newspapers, journals and periodicals printed but not published by this business once a week or more	Print media and publishing (excl. internet)
16110030	Newspapers, journals and periodicals printed but not published by this business less than weekly	Print media and publishing (excl. internet)
16110060	Letter and correspondence cards (printed but not published), postcards	Print media and publishing (excl. internet)
16120010	Typesetting and prepared printing plates/cylinders, or other media for use in printing	Print media and publishing (excl. internet)
16120020	Printing trade services nec (excluding desktop publishing)	Print media and publishing (excl. internet)
20100030	Glass containers, bottles or jars; glass stoppers; glass inners for vacuum vessels	Visual arts and crafts
20290040	Tableware, ornamental pottery and domestic ware not elsewhere classified	Visual arts and crafts
25910020	Jewellery and silverware	Visual arts and crafts
25910030	Imitation jewellery (excl incorporating precious metal except as plating or as minor constituents) (excl watch straps)	Visual arts and crafts
25990070	Musical instruments (incl parts and accessories)	Music production and distribution
54110010	Newspaper publishing (incl printed and published by the same business) published once a week or more	Print media and publishing (excl. internet)
54110020	Newspaper publishing (incl printed and published by the same business) published less than weekly	Print media and publishing (excl. internet)
54110040	Copyright leasing - newspapers	Print media and publishing (excl. internet)
54120010	Magazine and other periodical publishing (incl printed and published by the same business)	Print media and publishing (excl. internet)
54120040	Copyright leasing - magazines and other periodicals	Print media and publishing (excl. internet)
54130010	Book publishing (incl textbooks, encyclopedias, travel guides and atlases) (incl printed and published by the same business)	Print media and publishing (excl. internet)
54130040	Copyright leasing - books	Print media and publishing (excl. internet)
54190010	Other publishing not elsewhere classified (incl maps, greeting cards, postcards and calendars) (incl printed and published by the same business)	Print media and publishing (excl. internet)
54190040	Copyright leasing - other	Print media and publishing (excl. internet)
54200010	Software publishing services (non-customised)	Print media and publishing (excl. internet)
54200020	Copyright leasing - software (non-customised)	Print media and publishing (excl. internet)
55110010	Motion picture and video production	Film and television activities
55120010	Motion picture and video distribution services	Film and television activities
55120020	Copyright leasing - motion pictures and videos	Film and television activities
55130010	Motion picture theatre services	Film and television activities

IOPC	IOPC description	Domain
55140010	Post-production services and other motion picture and video activities	Film and television activities
55210010	Music publishing not elsewhere classified (incl sheet music)	Music production and distribution
55210030	Music copyrights (Acquiring, registering and selling)	Music production and distribution
55220010	Music and other sound recording studios operation (incl pre-recorded radio programming services)	Music production and distribution
56100010	Radio broadcasting services	Radio broadcasting
56210010	Free-to-air television broadcasting services	Film and television activities
56220010	Cable (Pay TV) and other subscription broadcasting services	Film and television activities
57000010	Internet publishing and broadcasting services (incl radio, television, books, newspapers and magazines)	Internet publishing and broadcasting
60100010	Library and archive services	Libraries and archives
60200010	Other information services (incl radio and television new collection and telephone based recorded information services)	Print media and publishing (excl. internet)
69000020	Architectural services	Architecture Services
69000060	Commercial art and display services	Design and fashion
69000070	Specialised design services not elsewhere classified (incl fashion, interior and jewellery design)	Design and fashion
69000110	Advertising services	Advertising and promotion
69000150	Management services (incl business, artists, entertainers and sporting professionals)	Advertising and promotion
69000180	Photography services not elsewhere classified (incl Video filming of Weddings etc)	Visual arts and crafts
70000010	Computer systems, hardware and software design and development services (partially captured)	Digital games development[v]
72990020	Theatre, concert and sport ticketing and booking services (partially captured for arts related activity only)	Events (arts)
72990030	Event management or promotion (incl sport, art or similar); fund raising services (fee based) or administration services not elsewhere classified (partially captured for arts related activity only)	Events (arts)
82120010	Arts education services (excl vocational)	Arts education
89100010	Museum and art gallery services	Museums and galleries
90010010	Performing arts operation not elsewhere classified (incl theatre restaurants and circuses)	Literature, creative and performing arts
90020010	Services of independent creative artists, writers and performers	Literature, creative and performing arts; Visual arts and crafts
90020020	Theatre lighting, costume design and set design services	Literature, creative and performing arts
90030010	Performing arts venue operation	Literature, creative and performing arts
95320010	Photographic film processing	Visual arts and crafts

[v] No specific ANZSIC industry or IOPC product class exists for digital games development. The ABS's *Film, Television and Digital Games* was used as an additional data source to estimate this activity. Digital games development was predominantly coded to computer design and related services; however, the gross value added of this activity only accounts for a small ratio of the total industry.

Appendix B—Glossary

This glossary provides a general guide to terms defined by the Australian Bureau of Statistics and used in this report.

ANZSIC: the Australian and New Zealand Standard Industrial Classification (ANZSIC) was developed for the compilation and analysis of industry statistics in Australia and New Zealand.

Australian System of National Accounts (ANSA): the ASNA forms a body of statistics that incorporates a wide range of information about the Australian economy and its components. In addition to the longstanding statistics of national income, expenditure and product, the accounts include the financial accounts, Input-Output tables, balance sheet statistics (including capital stock statistics), multifactor productivity statistics, state accounts, and thematic accounts.

Current prices: estimates are valued at the prices of the period to which the observation relates. For example, estimates for this financial year are valued using this financial year's prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.

Domain: a group of cultural and creative activities. In the refreshed methodology, cultural and creative activity has been grouped into 15 domains.

Exports of goods and services: the value of goods exported and amounts receivable from non-residents for the provision of services by residents. In the supply-use tables exports are valued on a free-on-board (f.o.b.) basis.

Imports of goods and services: the value of goods imported and amounts payable to non-residents for the provision of services to residents. In the Supply-use tables imports are valued on a cost insurance and freight (c.i.f) basis.

Input-Output (I-O) tables: are a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process. These tables can be either in the form of (a) supply and use tables or (b) symmetric input and output tables.

Input-output product classification (IOPC): is the detailed level product classification, organised according to the industry to which each product is primary. I-O tables are compiled at this level of product classification.

National accounts: system of measuring the economic activity of a nation by representing all output, expenditure, and income activities of the economy.

Output: goods and services that are produced by an establishment for use or consumption both within and outside that establishment.

Thematic account: a framework linked to the national accounts, which enables focused attention on a particular aspect of economic or social life (e.g. cultural and creative activity) by combining national accounts estimates with the findings of other surveys and statistics.

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