

**UNLOCKING THE POTENTIAL**



**DIGITAL CONTENT INDUSTRY  
ACTION AGENDA**

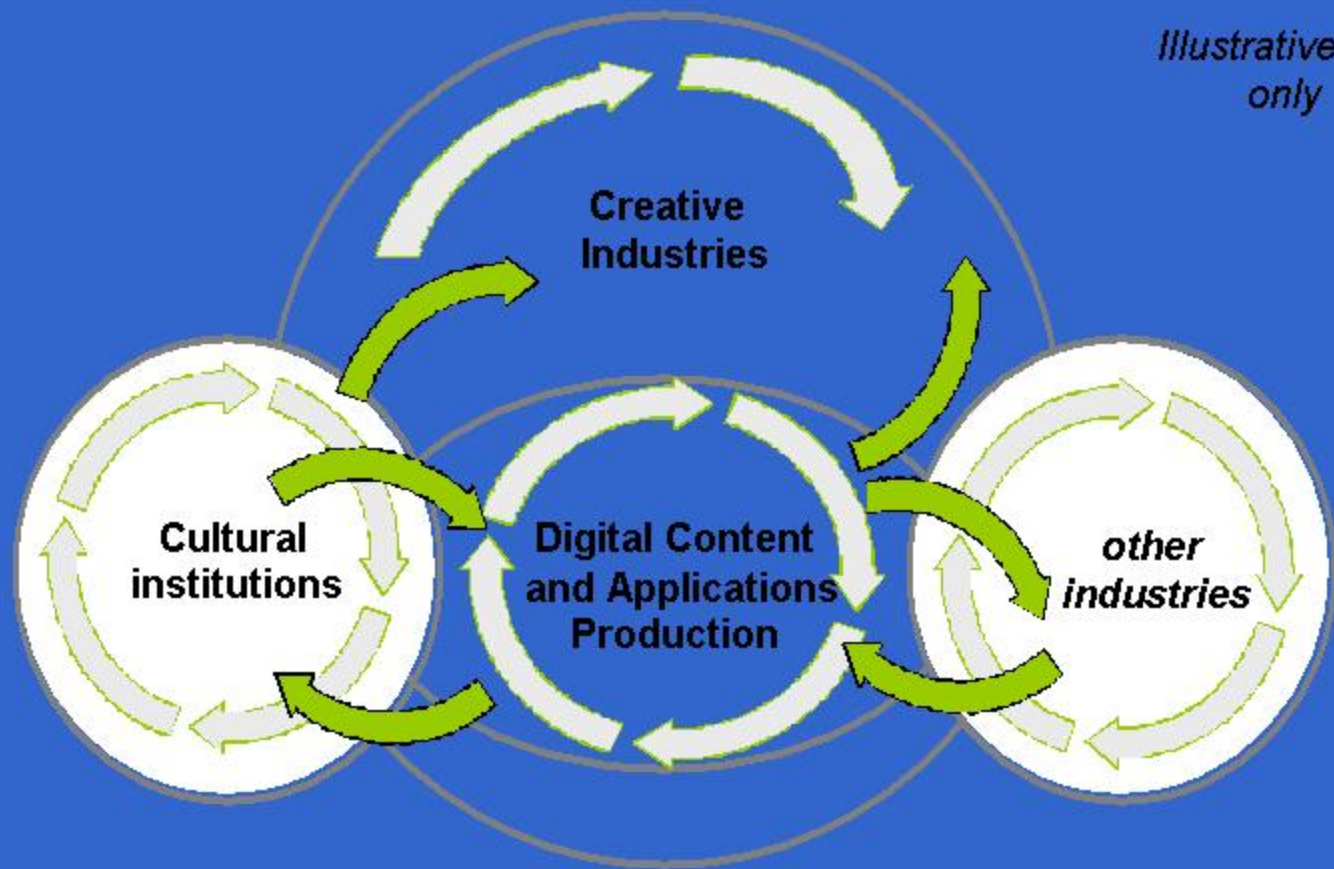
# What is an Action Agenda?

- Key element of Australian Government industry policy
- Focus on actions that industry itself can take
- Substantial potential and industry commitment necessary

# Digital Content Industry Action Agenda Timeline

- 2001–04 Creative Industries  
Cluster Study
- 2004 IT election policy:  
Digital Content  
Strategy
- 2004 SILG appointed
- 2006 Release of Action Agenda  
report

# What is the Digital Content Industry?



# What is the Digital Content Industry?

- Film and television programs in form of digital and interactive TV
- Online games
- Re-usable electronic education content
- Holdings of museums, galleries, archives and libraries in digital form
- Internet-based publishing of music, text, films and games
- Software, games and online services that create digital media and visual effects

# The Digital Content Industry's economic contribution

- \$21b output / 3.5% of GDP
- Employs 300,000 people
- Has economic multiplier effect to other important industries

# Economic Multiplier Effect

Industry	Average Gross Value Added Multiplier
Agriculture	1.28
Mining	1.28
Manufacturing	1.29
Property and Business Services	1.42
Education	1.97
Creative Digital Industry (est.)	1.58

**Source: Derived from ABS Input Output Multipliers.**

The extent of other economic flow on effects is established using two factors adopted by the Australian Bureau of Statistics:  
1 the Gross Value Added Multiplier; 2 the Full Time Employment (FTE) multiplier.

# Projections for the Digital Content Industry

- Forecast to grow globally at 6.6% annually
- Forecast to grow nationally at 3.8% annually

# Why is the Digital Content Industry important?

- High levels of economic growth
- Robust export capacity
- Highly skilled workforce
- Key driver for growth across the whole economy

# The Key Issues

1. Investment
2. International competition
3. Analogue / Digital distinction
4. General purpose technology
5. Filling skills gaps
6. Industry's fragmented base

# Report Main Recommendations

1. Boost investment
2. Build exports
3. Extend industry-based training
4. Link industry to research and development priorities

# Implementation Phase

- Senior industry leaders' implementation group
- Key stakeholders, including AIMIA, GDAA and AEEMA
- Implementation plan

# Report Main Recommendations

## 1. Investment

- Establish Investment Scoping Forum
- Update regulatory and investment frameworks

# Investment Implementation Actions

- AIMIA's Investment Scoping Forum

# Report Main Recommendations

## 2. Exports

- Prepare strategic trade framework
- Establish market intelligence network
- Examine current and future co-production agreements

# Exports Implementation Actions

- Delegations/Conferences/Expos
- mEga|SA
- Mobile Content Export Navigator Project

# Report Main Recommendations

## 3. Skills and training

- Achieve greater recognition and accreditation of industry-based training
- Improve linkages between industry, education sectors and training providers

# Skills and Training Implementation Actions

- GDAA's Careers Pathway Information
- AIMIA's Digital Skills Forum

# Report Main Recommendations

## 4. Research and Development

- Industry input into priority setting
- Place researchers in industry
- Improve awareness of and access to funding programs

# Research and Development Implementation Actions

- AIMIA's Mobile Phone Lifestyle Index
- Smart Internet tools and applications
- Trend data on Australia's creative and digital content industries
- 60Sox project

# The Digital Content Industry Vision

To achieve a sustainable and internationally competitive Digital Content Industry which doubles in value to \$42 billion by 2015

HappyFeet trailer