da14

Digital Australia

National research prepared by Bond University for
the Interactive Games & Entertainment Association

igea
interactive games &
entertainment association

BOND
UNIVERSITY
FACULTY OF HUMANITIES
& SOCIAL SCIENCES

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Foreword

We began national studies of computer game audiences in 2005 to widen the conversation about games and tackle stereotypes that prevented an understanding in the wider community that computer games were a popular medium that had become not only normalised, but a medium valued by Australians of all ages. Rather than challenge negative stereotypes about games with rhetoric, we provided quantitative empirical data using established social and market research practice – something that had not been available for Australia's journalists and policy-makers who relied on overseas data. Over the five Australian studies since 2005, we documented the ascendency of computer and video games to centre stage in media culture.

Game Play Australia 2005 conveyed the reality that Australia is a nation of game-lovers who enjoy playing games on a sporting field and on the screen.

In 2005:

- 76% of households had a device for playing games and PCs dominated consoles,
- 38% of gamers were female and the average age was 24,
- Less than an hour was the play duration and twice a week was the frequency
- 49% of households had broadband connections,
- 35% played games online,
- 66% of parents played video games,
- 88% said Australia should have an R18+ for games, and
- 68% said classification information was very influential when choosing games for their children.

Interactive Australia 2007 and 2009 illustrated the growing ability of games to foster social interaction. Moreover, games consoles and the Internet had matured and grown in popularity.

By 2009:

- 88% of households had a device for playing games and consoles took the lead from PCs,
- 46% of gamers were female and the average age was 30,
- An hour was the play duration and every other day was the frequency,
- 81% of households had broadband connections,
- 48% played games online,

- 70% of parents played games,
- 60% of households were home to 2 or more players,
- 91% said Australia should have an R18+ for games, and
- 46% said classification information was very influential when choosing games for their children.

Digital Australia 2012 illustrated the rapid maturation of digital media and more avenues for game experiences to anyone who wanted to play.
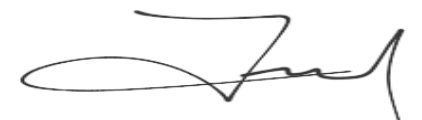
By 2012:

- 92% of households had a device for playing games and consoles lead and phones outflanked handhelds,
- 47% of gamers were female and the average age was 32,
- An hour was the play duration and every other day was the frequency,
- 83% of parents played games,
- 70% of households were home to 2 or more players, and
- 41% said classification information was very influential when choosing games for their children.

Digital Australia 2014 completes this phase of reports on computer games and Australians. The profile of the gamer and the gaming household is nearly synonymous with the profile of the typical Australian and Australian household. It demonstrates that multiple screens and game devices are commonplace and that games have expanded from the lounge-room to the pocket, played frequently and for longer durations. It suggests that the moral panic over established media like music, films, television and games is now moving to social media and the Internet. Adult gamers have formed great memories over the years of family time, characters, story, play and interaction from a medium that has emerged from its adolescence.

As lead author of this series, I hope these reports have served the conversation well.

Jeffrey E. Brand

what Australians think about DIGITAL GAMES

"I have many memories of shared victories with friends from online gaming as well as just memories of having fun times, hanging out with a group of like-minded people...."

Male, 31, Perth, Household of 3

"...memories of bonding with my brother and dad when playing games like Doom, Half Life & bouncing around in zero gravity in Unreal Tournament. Lots of fond memories there."

Female, 21, Sydney, Household of 4

"It's fun to get lost in imaginary worlds with players from around the world."

Male, 27, Regional QLD, Household of 4

"I met my husband playing an online game without it we wouldn't have the two great kids we do."

Female, Parent, 42, Regional SA, Household of 4

"Gaming brings us together. I am fortunate to have grown up with video games and the Internet, so I can relate to my child's need to play and use these things…."

Female, 23, Melbourne, Household of 4

"[Computer games] have improved my son's problem-solving ability, taught him strategy and efficient use of tools (characters). We enjoy them together, enjoy collecting Skylanders, it's a bonding thing."

Male, Parent, 41 Brisbane, Household of 2

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Digital Australia

HOW GAMERS PLAY

40% PLAY TO KEEP THE MIND ACTIVE
Why older adult gamers play

DAILY
TYPICAL GAME PLAY FREQUENCY

1 HOUR
TYPICAL PLAY DURATION

81% OF MUMS PLAY VIDEO GAMES

83% OF DADS PLAY VIDEO GAMES

FAMILIES AND GAMES

THE AVERAGE GAMER IS **32** YEARS OLD

47% OF GAMERS ARE FEMALE

71% OF HOUSEHOLDS have 2 or more gamers

68% OF GAMES WERE CLASSIFIED
Jan-Aug 2013

G **PG**

CLASSIFICATION

19% OF GAMERS are OVER **51**

76% OF GAMERS are OVER **18**

26% HOUSEHOLDS USE A TABLET TO PLAY GAMES

87% GAME HOUSEHOLDS WITH 3 OR MORE SCREENS

98% OF HOMES WITH CHILDREN HAVE COMPUTER GAMES

GAMERS IN AUSTRALIA

85% OF GAMERS SAY GAMES REDUCE **STRESS**

47% USE A MOBILE PHONE TO PLAY GAMES

63% OF HOUSEHOLDS USE A CONSOLE FOR GAMES

$ 8% CAGR AUSTRALIAN Games Spending 2010-2017

BUSINESS

GAMES IN AUSTRALIAN HOMES

GAMES AND BENEFITS

KEY FINDINGS

da14 Digital Australia

Games in Australian Homes

- Mainstream - Computer and video games are everywhere.
- 93% - Households have a device for playing games.
- 98% - Homes with children under the age of 18 that have a device for playing computer games.
- 71% - The proportion of game households with 2 or more gamers.
- 87% - Game households with three or more screens.
- 61% - Game households with three or more game devices.

Gamers In Australia

- 65% of Australians play video games
- 32 years old - The average age of video game players.

- 47% - The proportion of the game population that is female.
- 76% - The proportion of gamers aged 18 years or older.
- 20% - The proportion of gamers 1 to 15 years old.
- 19% - The proportion of gamers 51 or more years old.
- 11 years – The length of time the average adult gamer has been playing.

How Gamers Play

- 24% - The proportion of gamers who play social network games.
- 15% - The proportion of gamers who play online role-playing games.
- Fun – the primary reason PC and console gamers play.
- Pass Time – the main reason mobile gamers play.
- Keep Mind Active – the main reason older adult gamers play.
- Social Interaction – the main reason younger adult gamers play.
- 1 Hour – Typical game play duration.
- Daily – Typical game play frequency.
- Weekends, holidays, evenings – Three top times gamers play.

Families and Games

- 81% - Proportion of mums who play video games.
- 83% - Proportion of dads who play video games.
- 86% - Proportion of gaming parents who play with their children.
- Mums – Play more on PCs and mobiles.
- Dads – Play more on consoles.
- 73% - Talk about games with their children.
- 60% - Proportion of the time an adult always makes the purchase when games are purchased for children.
- 53% - Are familiar with parental controls available in game systems.

Classification and Media Concerns

- 68% - The proportion of games classified G or PG Jan-Aug 2013.
- 63% - The proportion of parents "completely" or "quite" familiar with game classifications.
- 11% - The proportion indicating M and MA 15+ are unclear.
- 7% - The proportion indicating R18+ is unclear.

- 10% - The proportion saying classification has "a lot of influence" on games purchased for them to play.
- 44% - The proportion saying classification has "a lot of influence" on games purchased for children to play.

Games and Benefits

- 91% - The proportion of gamers who say games are mentally stimulating.
- 85% - The proportion of gamers who say games reduce stress.
- 83% - The proportion of gamers who say games are educational.

Game Spending

- 8% - The projected Compound Annual Growth Rate (CAGR) of spending on games from 2010-2017 (NDP Group Australia and PwC Australia).

Methodology

Digital Australia 2014 (DA14) is a study of 1220 Australian households and 3398 individuals of all ages living in those households. These participants were from an online national random sample using the Nielsen Your Voice Panel in June 2012. The research was designed and conducted by Bond University. The margin of error is ±2.8%.

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Contents

About Digital Australia 2014

This report covers one of two studies conducted in Australia and New Zealand in 2013.

Digital Australia 2014 (DA14) is a study of 1220 Australian households and 3398 individuals of all ages living in those households. These participants were from an online national random sample using the Nielsen Your Voice Panel. The survey was conducted in June 2013. The sister study in New Zealand was conducted at the same time. Only Australian data are reported here. The words computer games, video games and digital games are used interchangeably to refer to the broad class of interactive entertainment.

This report provides information about the digital game ecology in Australian households with a focus on computer game behaviours and attitudes. Adult participants responded to 75 questions about themselves and on behalf of all members of their households. The questions were grouped into nine sections:

Section 1: Introduction and qualification.
Section 2: Household demographics.
Section 3: Household media environment.
Section 3: Media purchasing and downloading.
Section 4: Video game play preferences and routines.
Section 5: Social game play.
Section 6: Classification knowledge, influence and attitudes.
Section 7: Attitudes and issues surrounding video games.
Section 8: Parental engagement with video games.
Section 9: Socioeconomics and conclusion.

The Nielsen Company provided Bond University with raw data from the survey for statistical analysis at the University. The data were analysed by the study author using the SPSS Version 20 and NVIVO Version X. The quality and size of the sample was high and no statistical weighting was applied. Statistical procedures included simple descriptive statistics such as frequencies, cross-tabulations, means, correlations, and tests of significance such as Chi-square and One-way ANOVA.

For the purposes of including results for all members of a given household, the Vars-to-Cases procedure was used to create individual records for all persons in a household identified by the participants in the study. Data reduction procedures included reducing the range for some questions to simplify presentation of responses. Some measures were combined into indices where obtaining a frequency or mean across a combination of measures simplified the presentation of findings. Missing values were eliminated from analysis on a per-question basis unless multiple measures were examined conjointly. For these, the case-wise deletion method was applied.

A game household was one that had in it any device for playing a computer game, including smart phones and tablet computers. A gamer was a person who indicated they play computer or video games, simply "yes" or "no" on any device including a PC, console, handheld, social network, mobile phone or tablet computer. The margin of error is ±2.8% for the national sample comparing all households and ±2.2% for all gamers.

Games and
DIGITAL MEDIA
in Australian Households

This year, 93% of Australian households have a device for playing computer games; 98% of households with children under the age of 18 years have a device for playing computer games – a figure that for any medium can be considered full market penetration.

Households with Games

7%

■ Games

■ No Games

93%
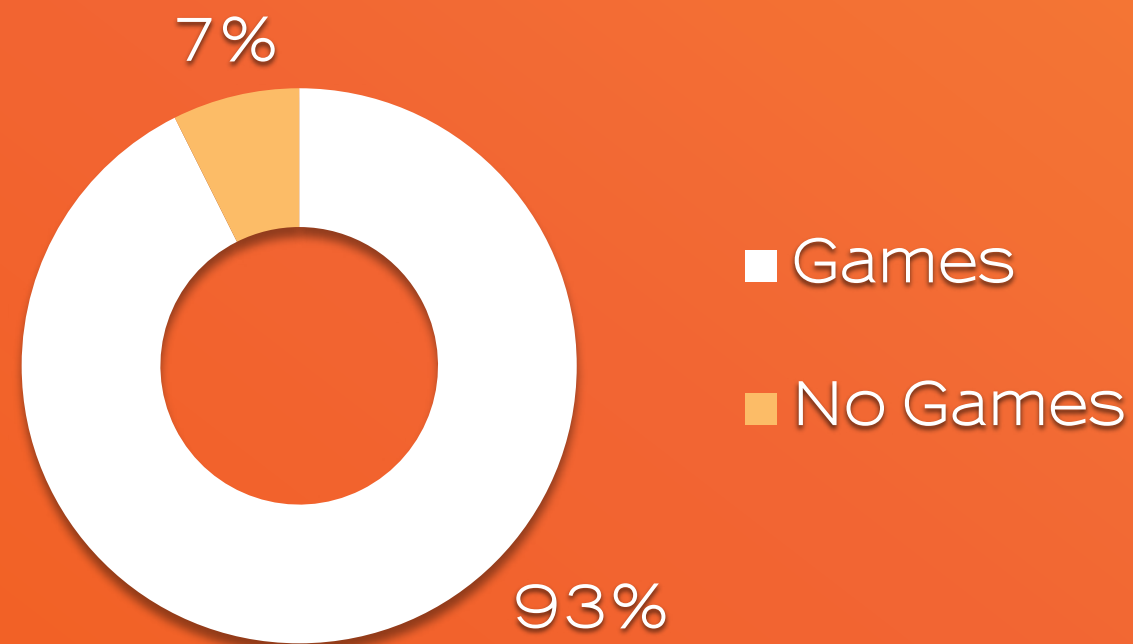
98%
of homes with children under the age of 18 have a device for playing computer games.

Households with Games Over Time
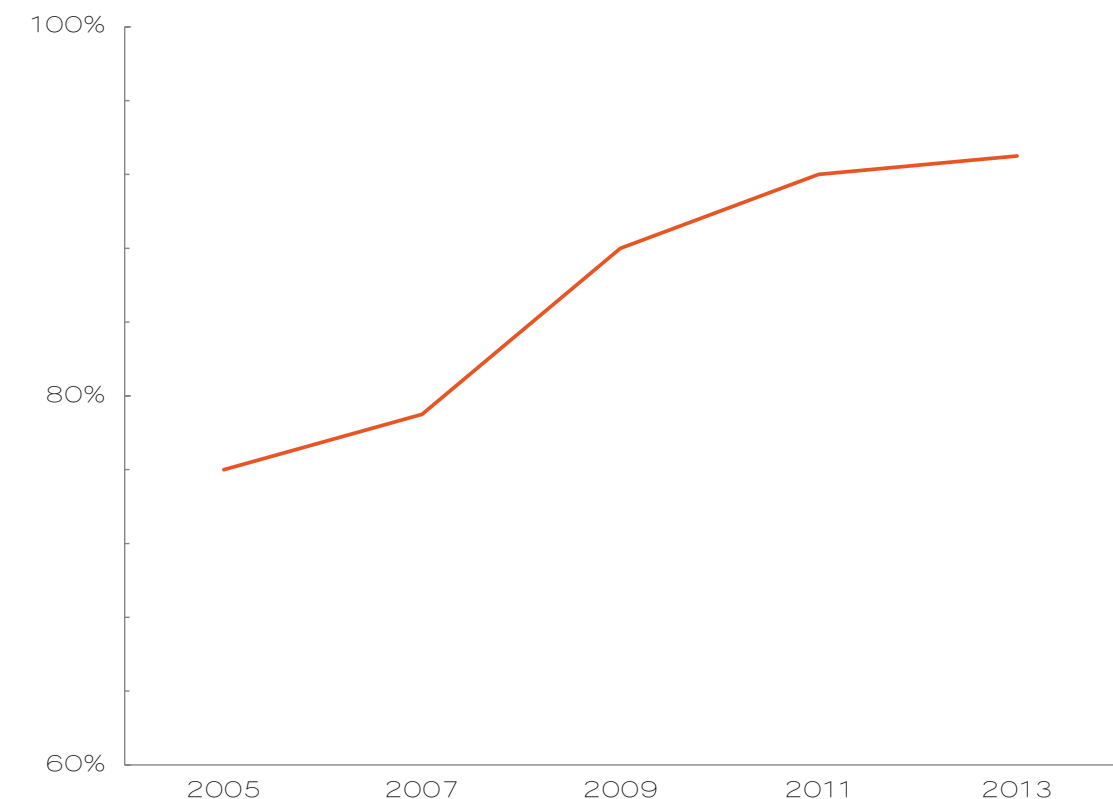
Consoles are in 63% of game households while use of dedicated handheld consoles has increased, now at 22%. According to the Australian Bureau of Statistics (ABS), the number of households is approaching 9 million. The install base of more than 15 million consoles and handhelds from the most recent technology cycle, according to the NPD Group Australia, means that the average household has purchased between one and two game platforms such as the Nintendo DS, Sony PlayStation 3, and Microsoft Xbox 360.

PCs are in 97% of game households with 53% of game households using a PC for games. Compared with previous years, the use of PCs for games appears to be declining modestly. Mobile phones are used increasingly to play games, now at 47% of game households, while tablet computers have shown significant increases, now at 26% of game households.

63%

OF HOUSEHOLDS
USE A CONSOLE
FOR GAMES

87%

GAME HOUSEHOLDS
WITH 3 OR MORE SCREENS
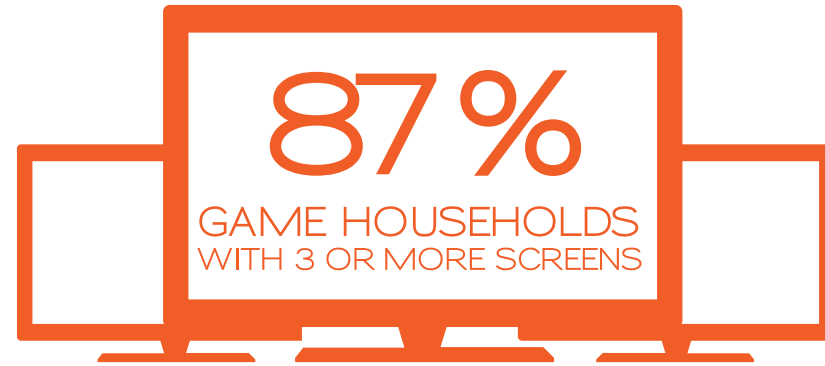
A quarter of Australian game households have four screens.

Three quarters have more than one device for playing computer or video games. The total number of game devices includes consoles, PCs, handhelds, mobile phones, and tablet computers.

MATURE MARKET:

The net effect of more devices and modalities for game play is that more homes than ever before have a device for playing games.

Screens and Game Devices in Australian Households (%)

- Screens
- Game Devices

Game Devices Played in Game Homes (%)

Console	PC	Mobile	Tablet	Handheld
63	53	47	26	22
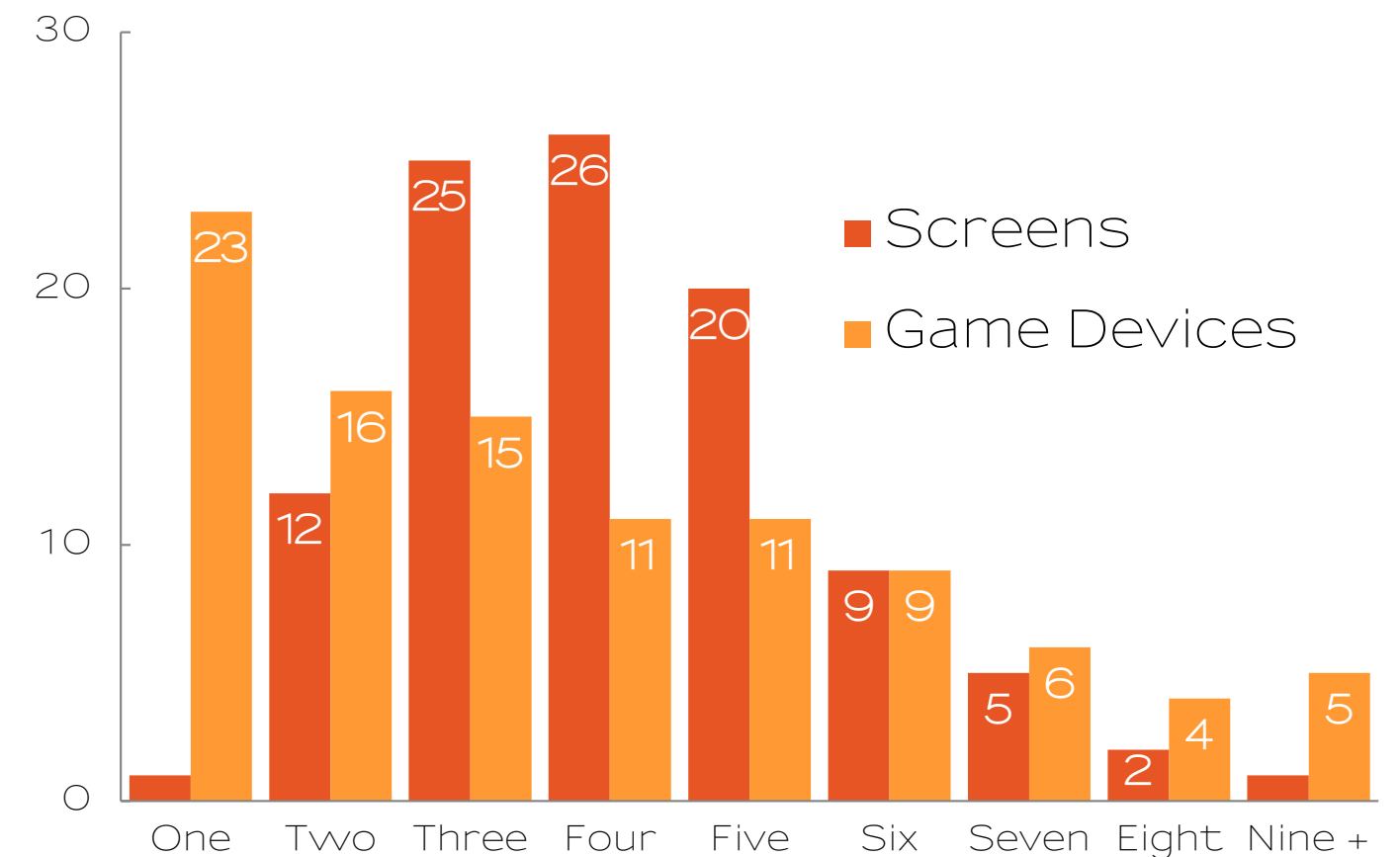
32 YEARS OLD

The average gamer is 32 years. The difference between those who play and those who do not play games is generally related to age. However, adult gamers continue to make up the largest growth market for games.

Average Gamer Age Over Time
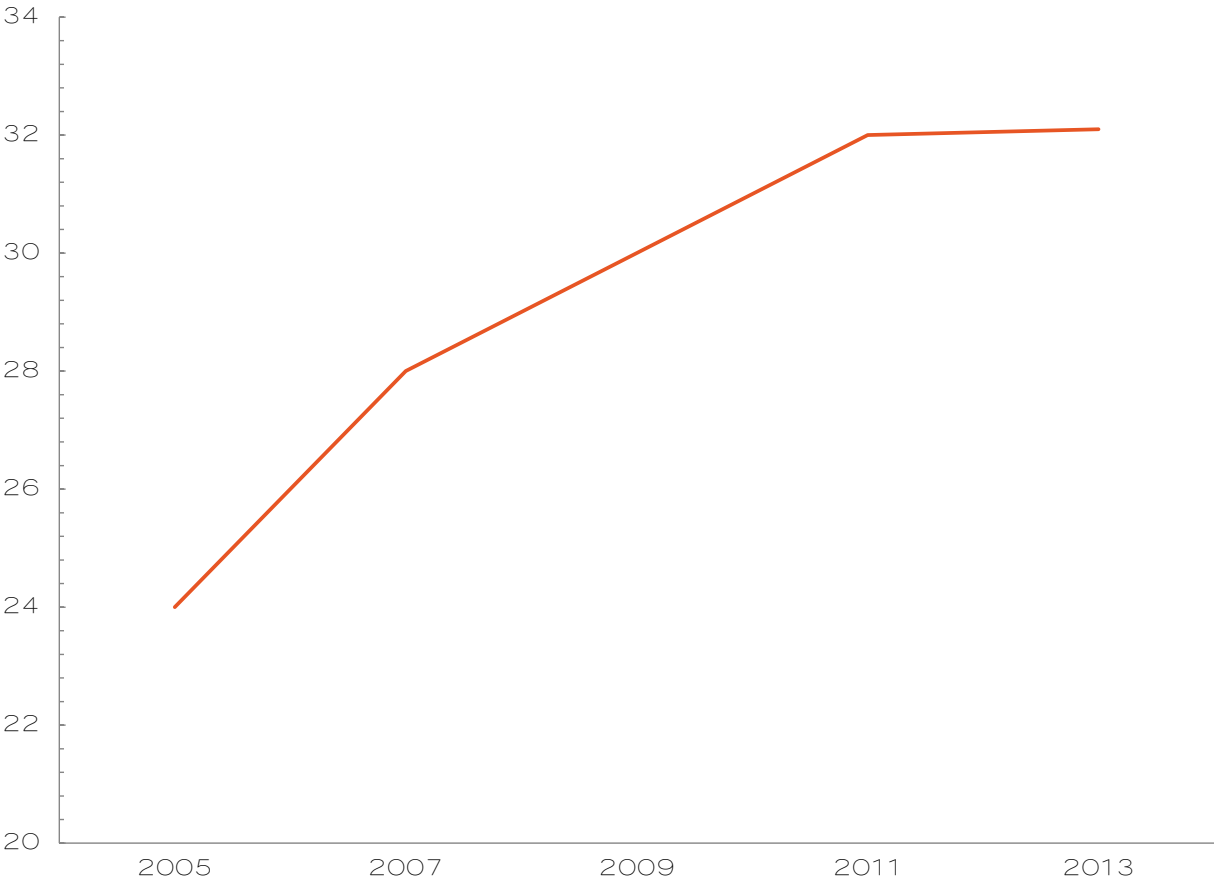
Proportion of Gamers within Age Group (%)
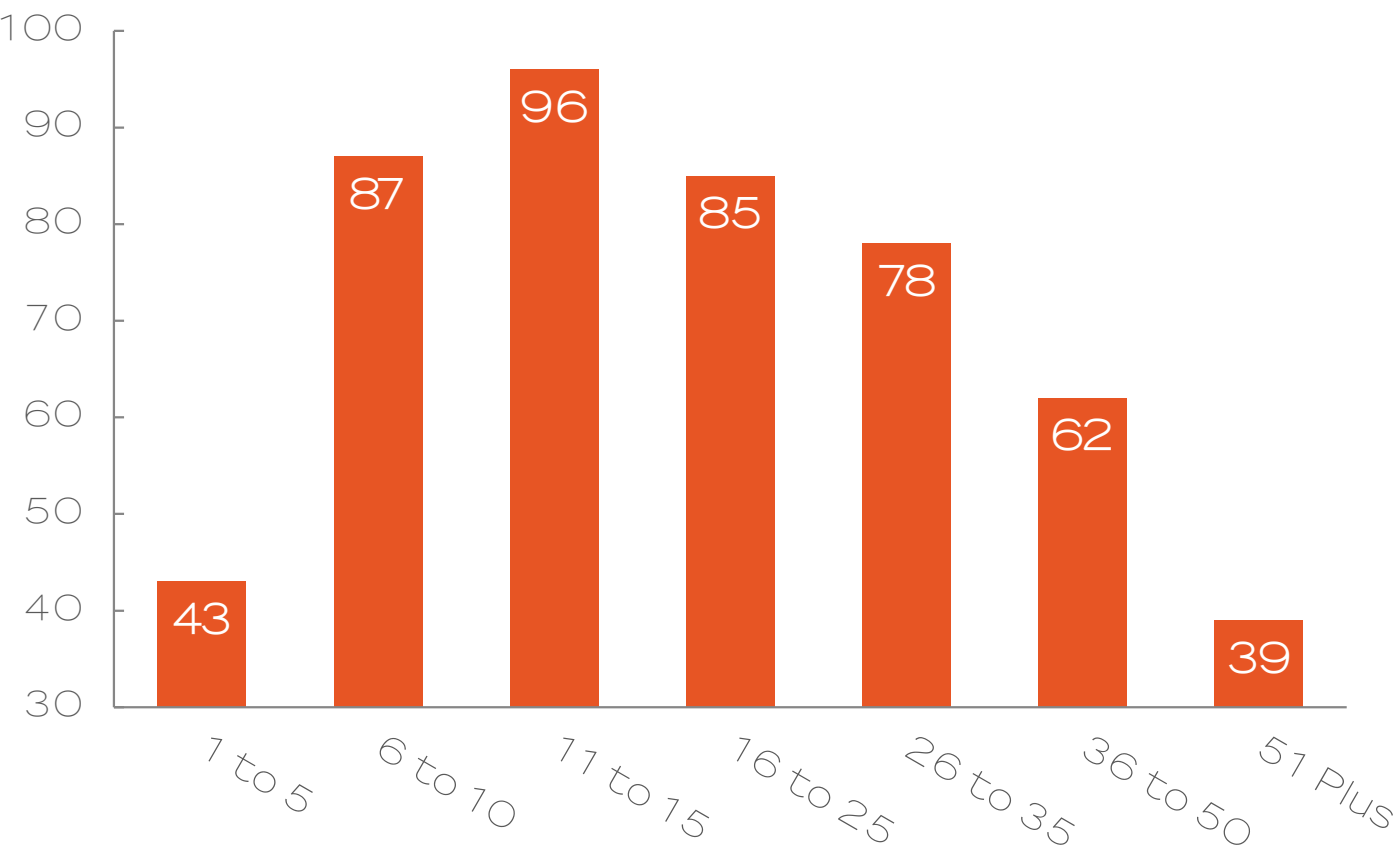
Australians in their 40s and 50s make up the largest group of new adult gamers.

Overall, 65% of all Australians, regardless of age, play games. Each age group contributes to the gamer population in different proportions. The youngest gamers represent a small number compared with the oldest gamers. Indeed, nearly one in five gamers is likely to be aged 51 years or older. The oldest participant in the current sample is 87 years of age. Within this group of 51- to 87-year-olds, there is nearly equal representation of 5% per year until 70 years after which representation is nearly equal at 2-4%. The age band from 16 to 25 years blurs the line between the number of gamers who are adults with those who are not.

Proportion of Gamers Across Age Groups

5% | 5% | 10% | 24% | 18% | 19% | 19%

- 1 to 5
- 6 to 10
- 11 to 15
- 16 to 25
- 26 to 35
- 36 to 50
- 51 Plus
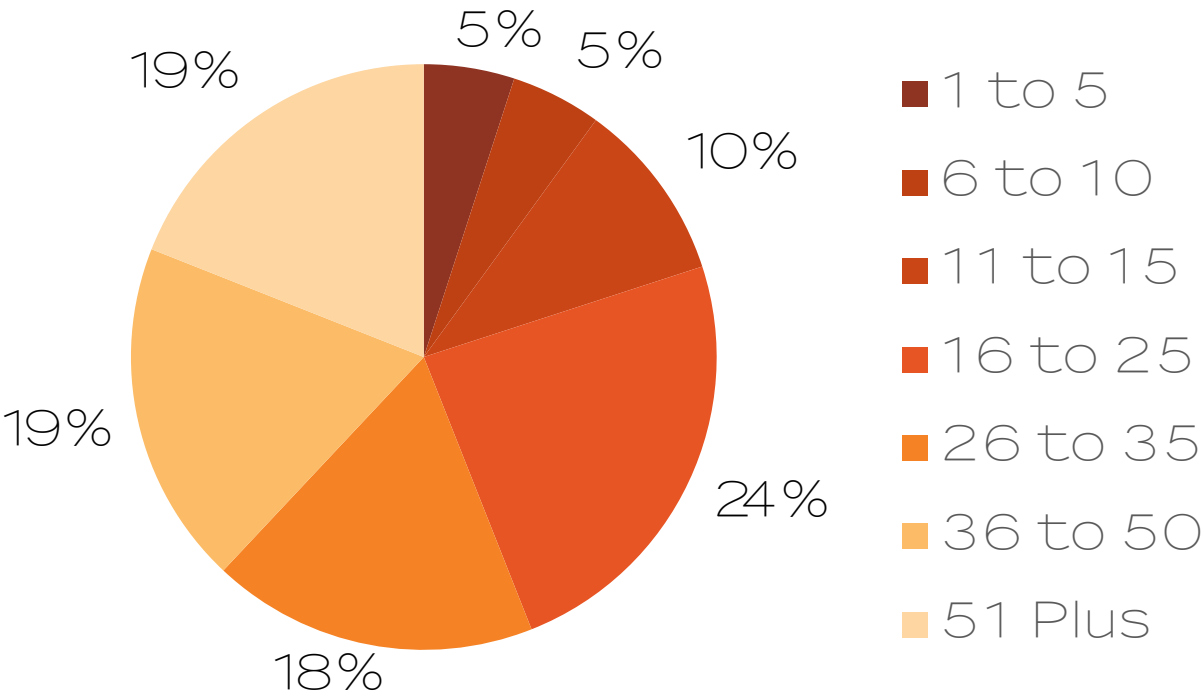
The National Classification Scheme breaks across different age bands with the most controversial at 18 years of age (the R18+ category) and 15 years of age (the MA15+); films and games classified at these levels are legally restricted and cannot be sold to consumers below those ages. In this context, the policy concentrates on 24% of the population, or those under the age of 18 years for the R18+ category and 15 years of age for the MA15+ category.

Adults as a Proportion of All Gamers

20%
4%
76%

- Children, <16
- Children 16 - 17
- Adults, 18+
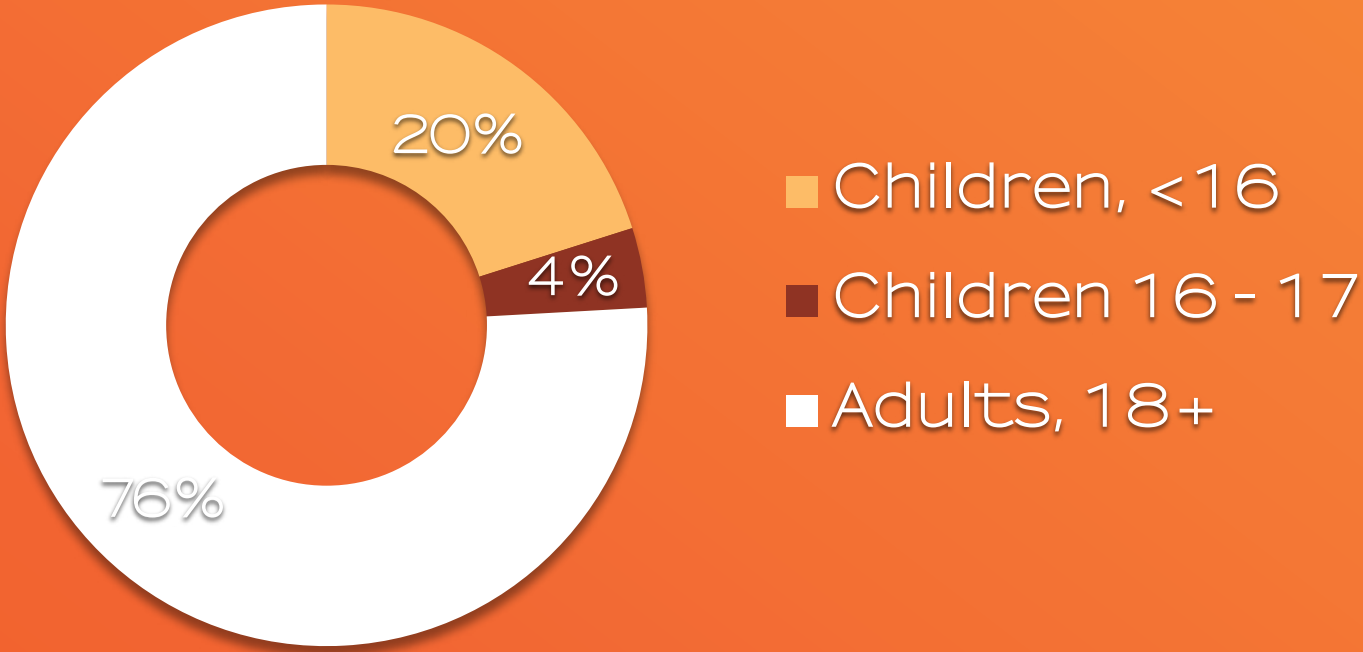
11 YEARS

The average adult gamer has been playing for 11 years. However, many Australian adults have recently begun playing games; one in ten adults started playing games in the past year and almost two thirds of these new adult gamers are female for whom the average age is 42 years; the men who recently started playing games average 49 years of age.

76% OF GAMERS are OVER 18

Gender of Gamers

47%

53%
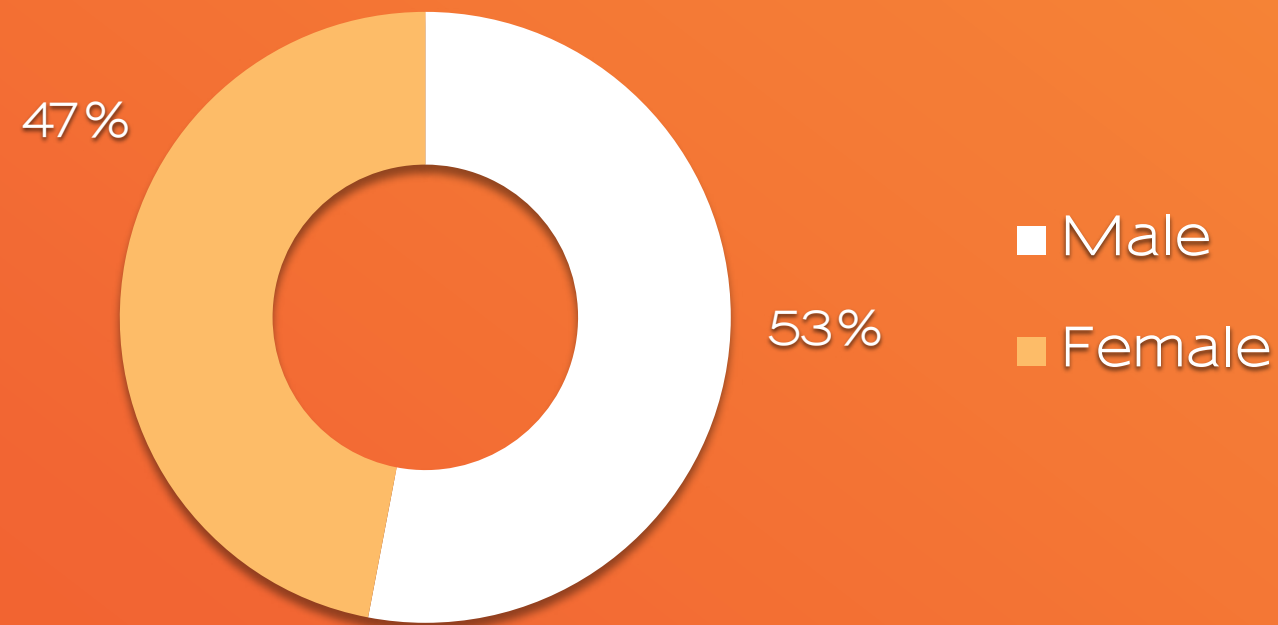
■ Male

■ Female

Since 2005, the representation of females among the gamer population has risen from 38% with the largest increase in representation occuring between 2007 and 2009.

"Some of my best memories are of playing LAN style with my flatmates. Or bunking in on a rainy day for endless entertainment on my PC"

Female, 28, Brisbane, Household of 3

⚢ 47%
of gamers are female.

Gender of gamers has approached, but not reached, their proportions represented in the population.

Female Gamers Over Time
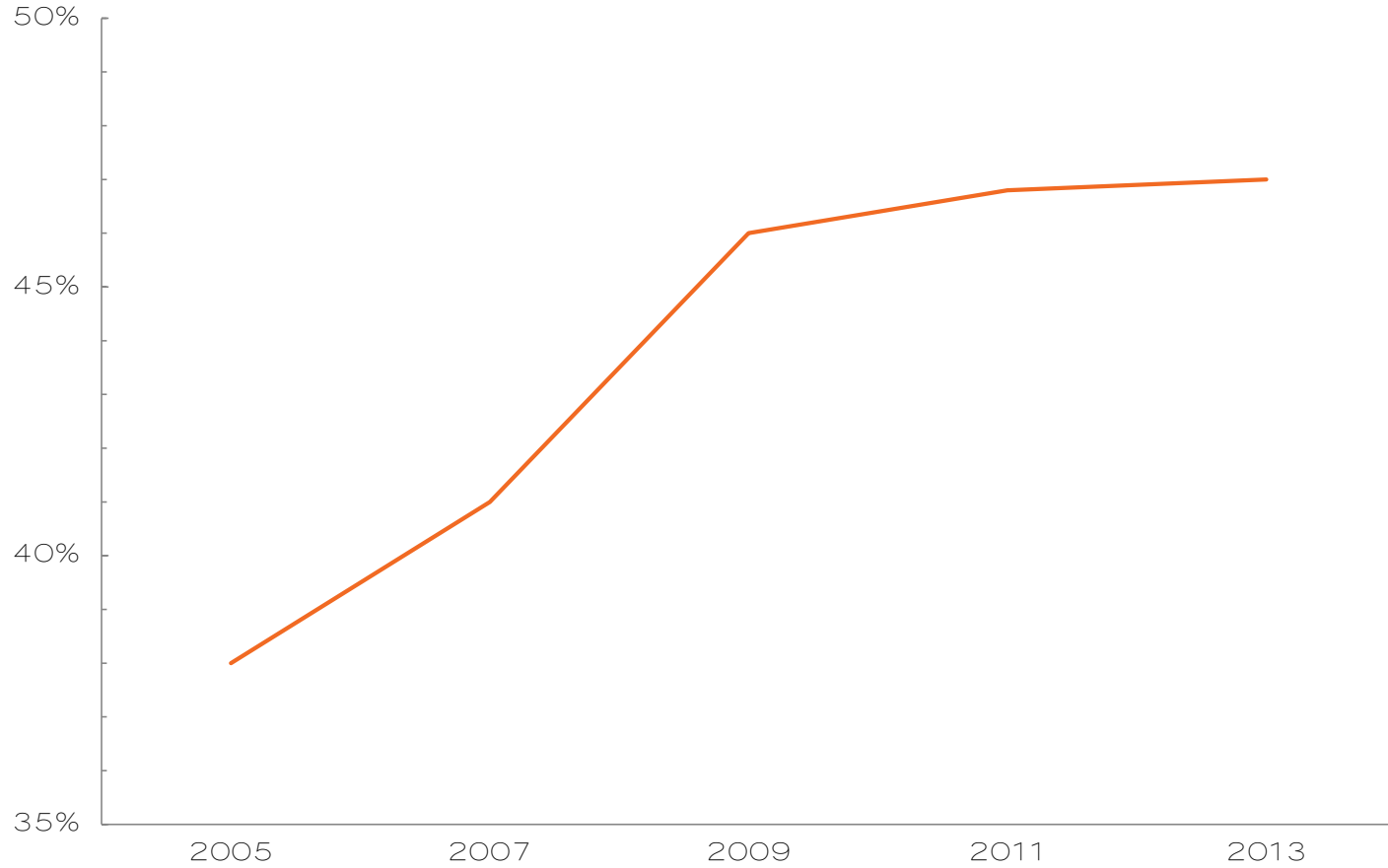
"[Playing games] relieves stress for me and provides fun for my family."

Male, 18, NT, Household of 5

"It has helped us all enjoy family time from time to time and to relax and have a good old laugh."

Female, Parent, 36, QLD, Household of 2

Consoles Deliver Fun.

Reasons to game differ by experience and game device. The biggest difference in the gratifications offered by home devices compared with mobile devices occurs between having fun and passing time. Consoles and PCs deliver fun whereas mobiles and tablet computers fill idle moments by helping pass time.

Reasons Gamers Play Video Games (%)
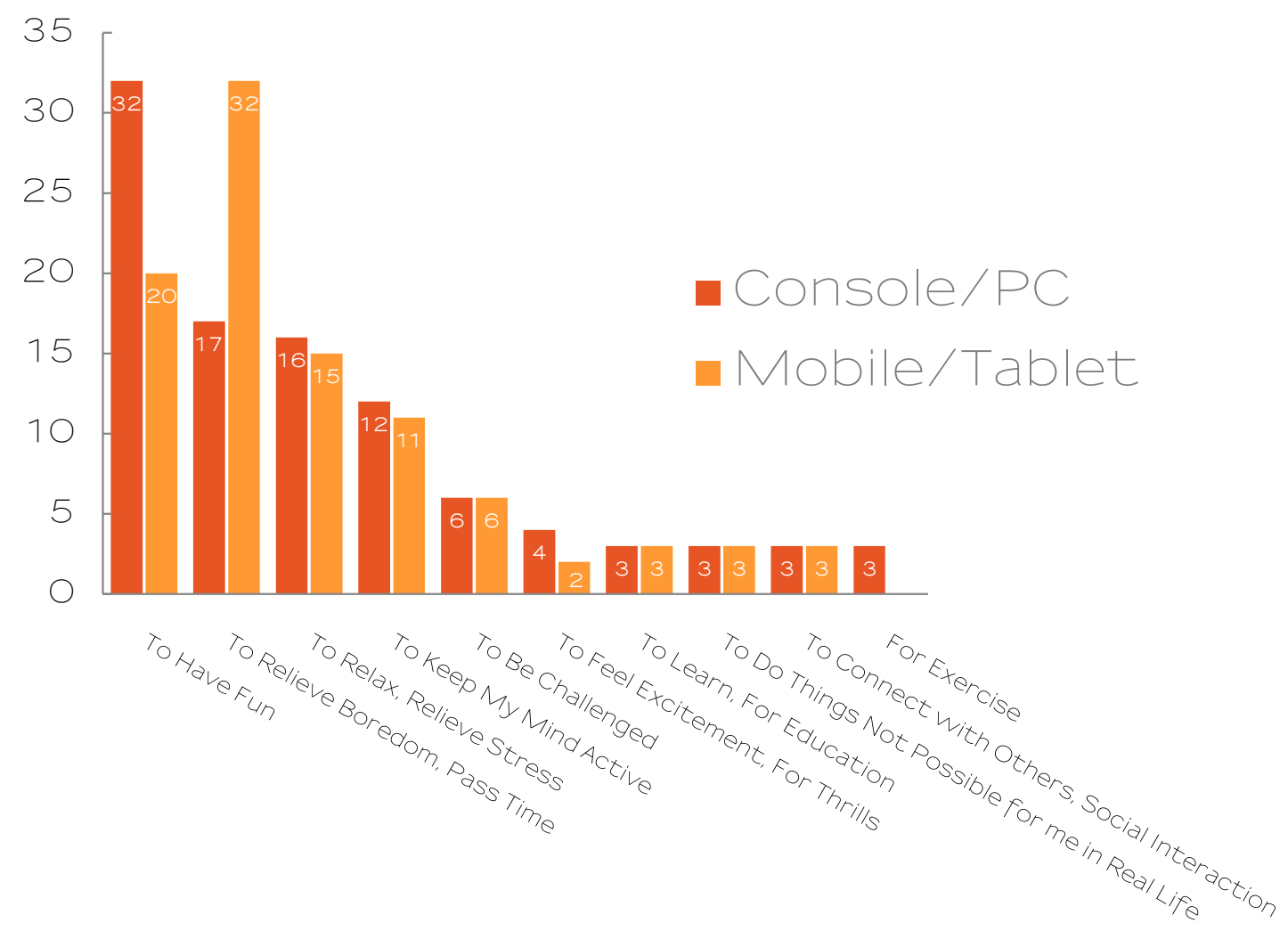
"…I have learnt about other people and cultures by playing MMOs and interacting with others. It keeps my mind a little sharper now I am getting older, and I think it helps with my reflexes. My son met his wife via WoW, so it has improved his life …."

Male, Parent, 47, Regional QLD, Household of 3

"Doing puzzles and games keeps my mind active."

Male, 67, Regional QLD, Household of 2

"[Games] have aided in a process of relaxation and are a method of self-soothing."

Female, 23, Melbourne, Household of 4

Reasons Gamers Play by Age Group
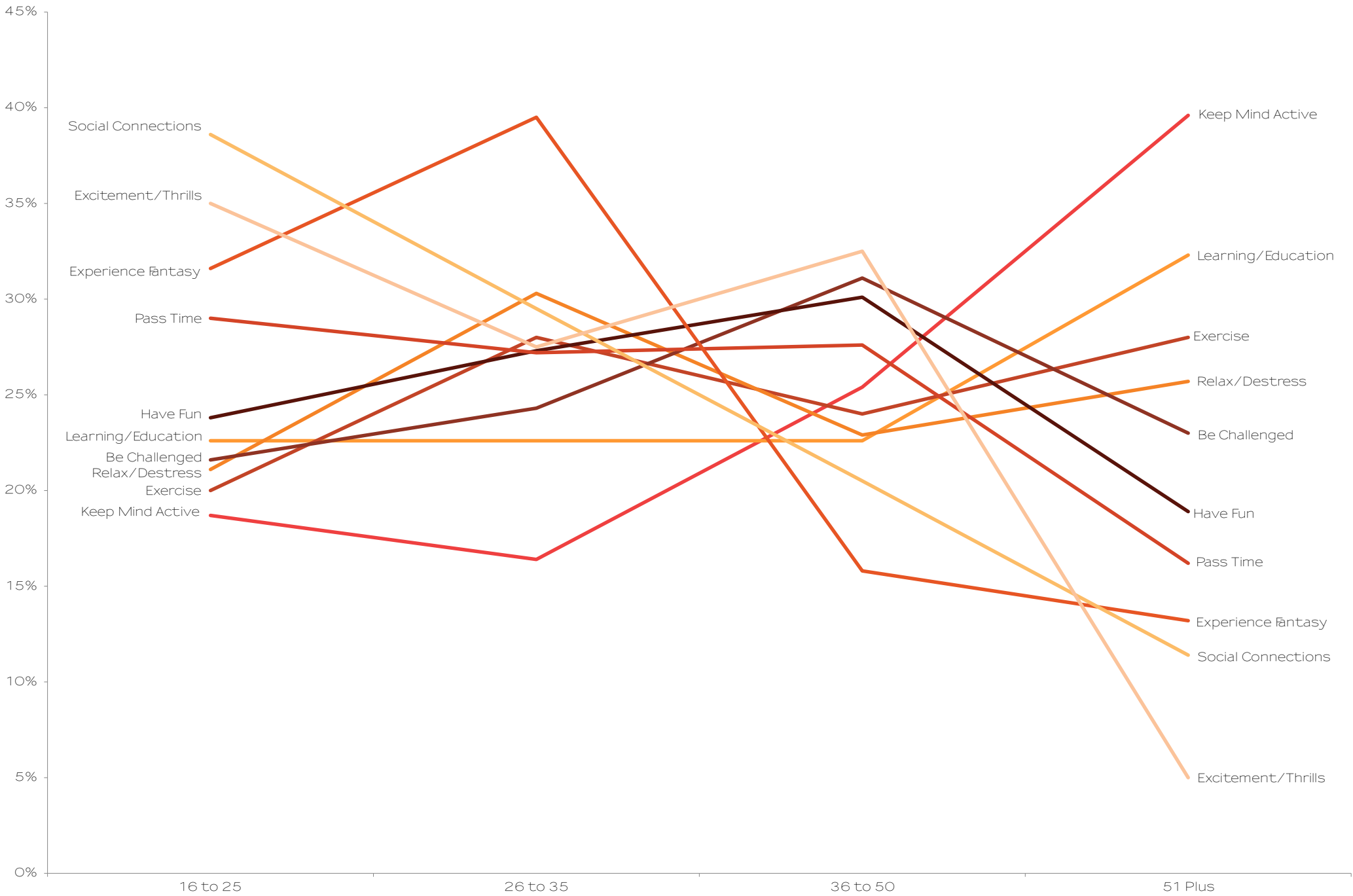
40% PLAY TO KEEP THE MIND ACTIVE

Why older adult gamers play

The reasons gamers choose to play varies by age group, suggesting that life stages play an important role in the way games suit varied lifestyles. Social interaction, thrills and relieving boredom are the highest motivation for playing among younger gamers whereas these are a lower priority among older gamers. By comparison, keeping an active mind and learning are priorities for older gamers, while these are low priorities among younger gamers.

"[Games are a] great family entertainment medium, far better than just sitting around staring at TV which is apparently more socially acceptable"

Male, 30, NSW Metro, Household of 4

Most gamers play between an hour and two hours at a time and most play between daily and every other day. Concentric lines on the radar graph represent the number of participants; the radial lines show the duration of play from a few minutes to seven or more hours while the fill colours represent frequency of play.

Frequency and Duration of Play

Few minutes
Half an hour
Seven + hours
An hour
Six hours
Two hours
Five hours
Three hours
Four hours

■ Every day
■ Every other day
■ Twice a week
■ Once a week
■ Once a fortnight
■ Once a month
■ Once every 3 months
■ <Once every 3 months
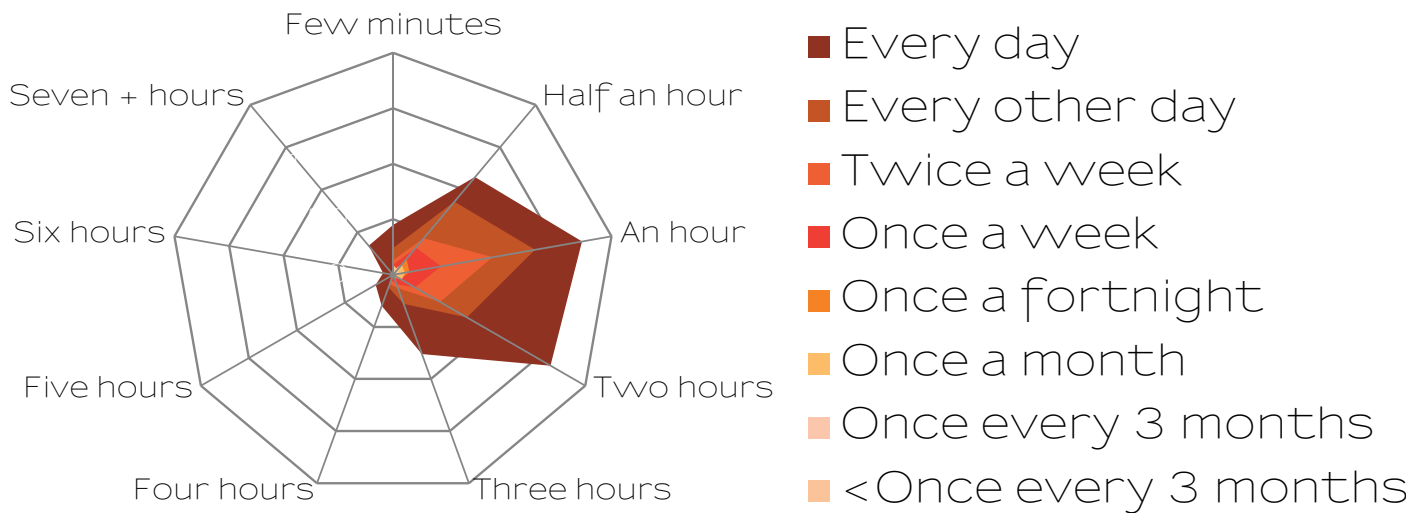
Gamers who play most frequently and for longer durations are more likely to be male and between ages of 6 and 35. By comparison, the lightest players are also the youngest in the population. Between these two are mainstream gamers.

DAILY TYPICAL GAME PLAY **FREQUENCY**

1 HOUR TYPICAL PLAY **DURATION**

Frequency and Duration of Play by Age Band and Gender

Duration of Play / Hours

3.0
2.5
2.0
1.5
1.0
0.5
0.0

Males 16 to 25
Males 11 to 15
Males 26 to 35
Males 6 to 10
Females 16 to 25
Males 36 to 50
Females 11 to 15
Females 50 Plus
Males 50 Plus
Females 26 to 35
Males 1 to 5
Females 6 to 10
Females 36 to 50
Females 1 to 5

1.7   1.9   2.2   2.4

Frequency of Play / Every n Days
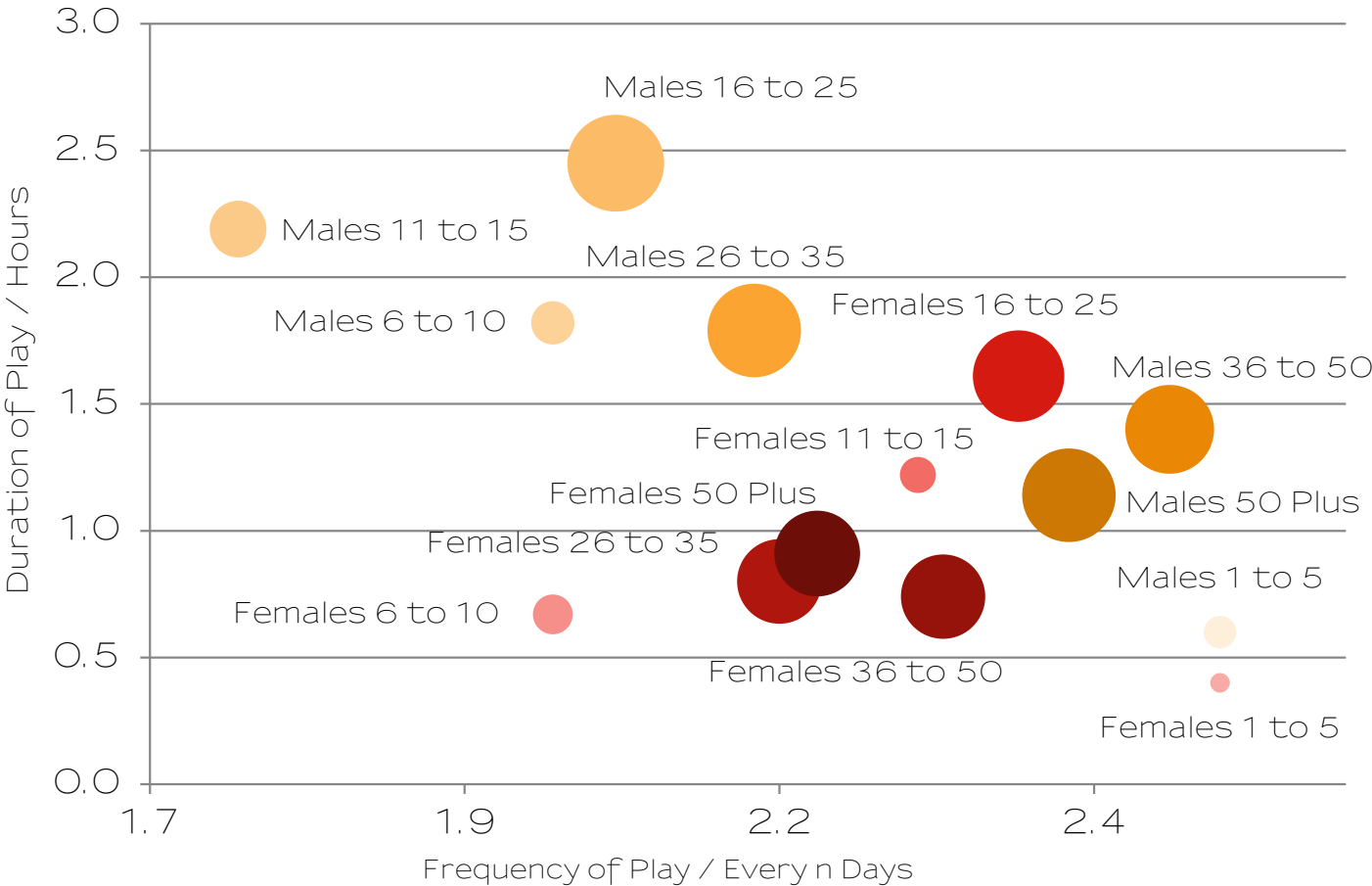
"Video games are an option to spend some time together ... Children learn to share and take turns, be more patient and pick up tips and tricks from playing with adults also. [Games] can present an opportunity to teach motor skills, puzzle solving skills and strategic moves to accomplish successful results within the game."

Male, Parent, 47, Regional QLD, Household of 3

Fun, Challenge, Competition and Simulation

Fun and challenge top the list of reasons why Australians choose to play and interact with games rather than passively consume "other media" on their many screens. Competition and stimulation are the third and fourth reasons given. By comparison, exercise scored lowest.

Factors Attracting Audiences to Games over Other Media (%)

Fun	3.0
Challenge	2.9
Competition	2.5
Stimulation	2.5
Education	2.2
Social Interaction	2.2
Emotional Engagement	2.1
Create Memories	2.1
Realism	2.0
Exercise	1.9
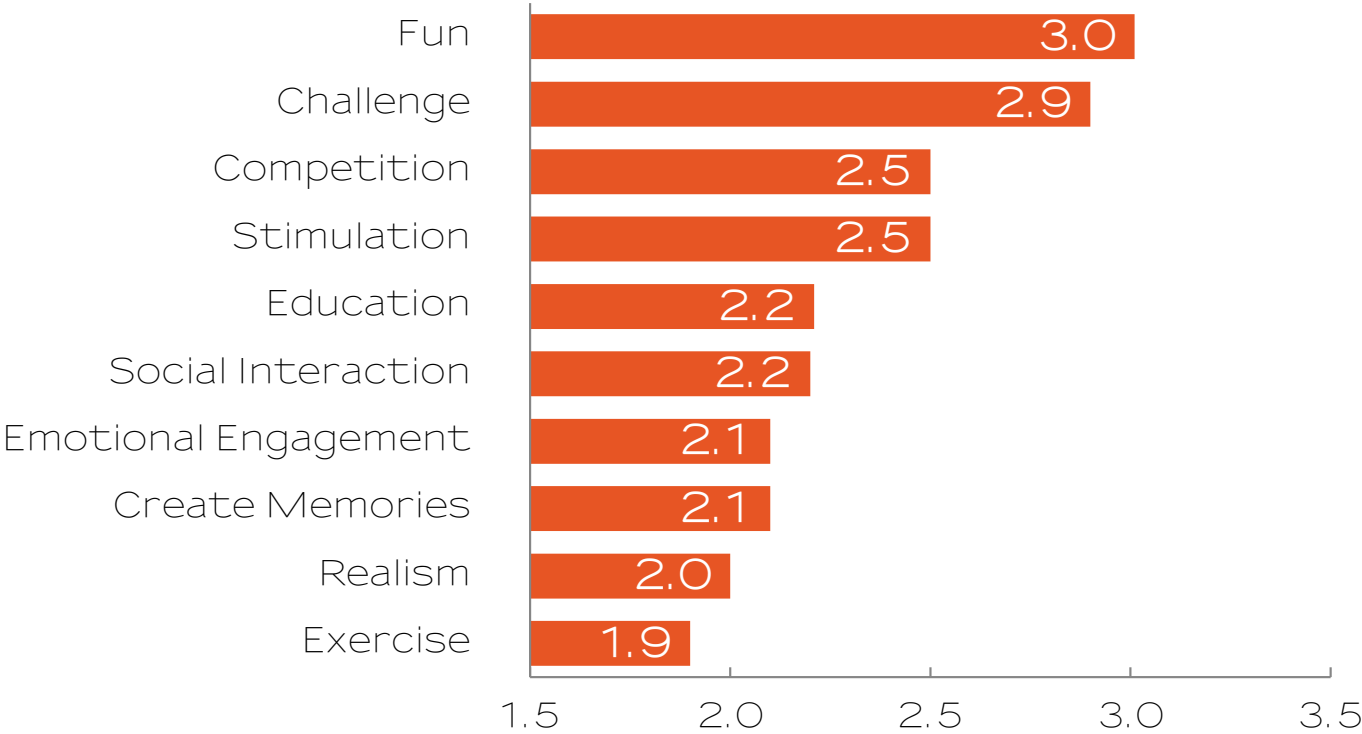
"…I think games can bring people together. Not just for fun, but to actually spend time with each other, even working together, it can be a very good thing."

Male, 31, Perth, Household of 3

Weekends and holidays are the best times to play.

The most frequently chosen times when Australians choose to play games are weekends and public holidays. Before work or school is the least frequently nominated time to play followed by times using public transport.

When and Where Gamers Play (%)

Weekends	91
Holidays	87
Evening	86
After School/Work	67
Late Night	66
Break, Lunch	45
Public Transport	37
Before Work/School	35
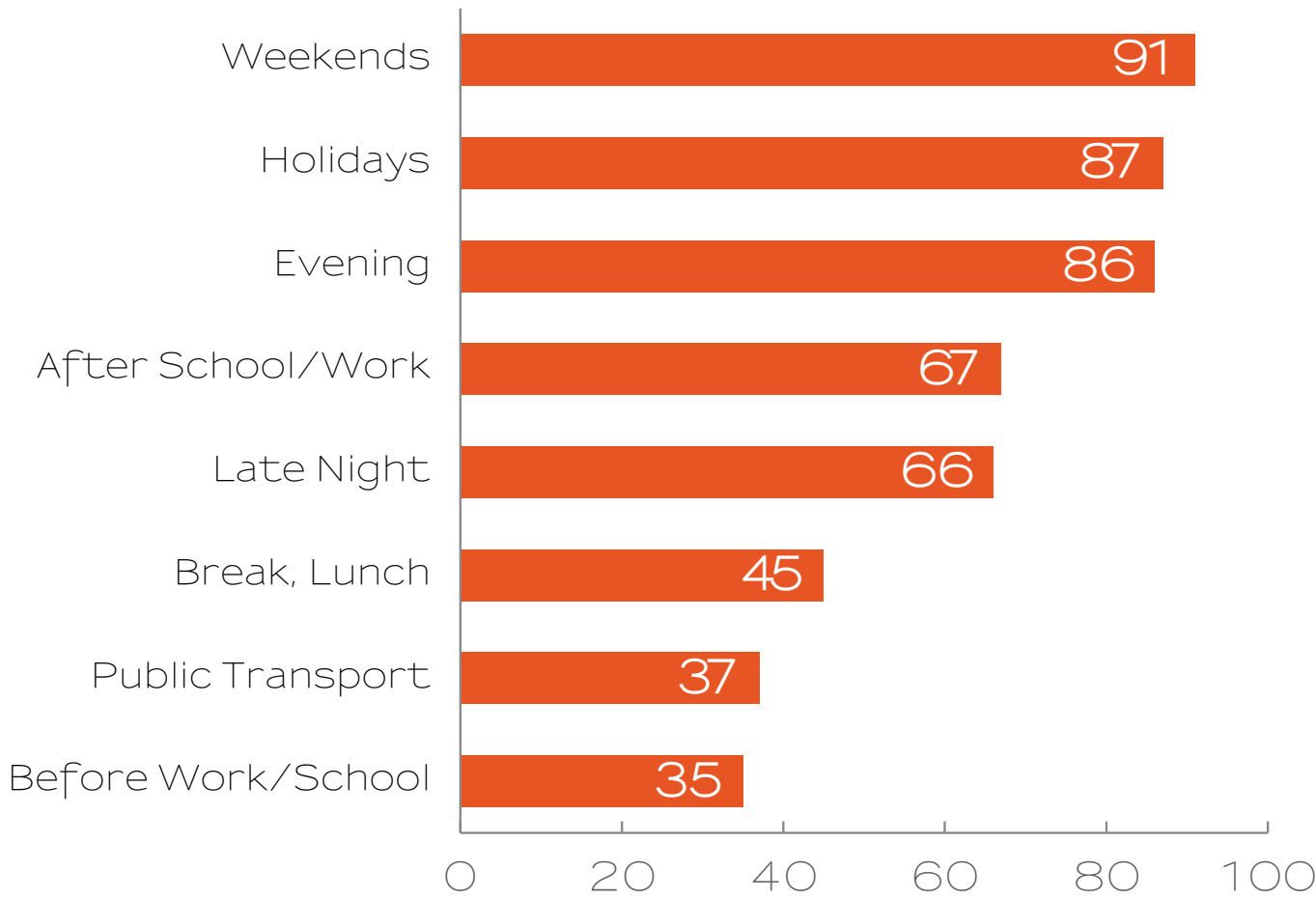
71% of game households have two or more gamers

Most game households are home to two or more gamers with the modal number being two after which the proportion declines steadily with 6-gamer households making up just 1%. According to the ABS the average Australian households is shared by between two and three people.

Although others may be in the same room, the default game experience is single-player. Nevertheless, the number of households in which only one player is resident does not prevent online social play.

24% play online through social network games while 15% play online through role-playing.

Number of Gamers in Households (%)

Category	Value
One	29
Two	34
Three	21
Four	12
Five	4
Six Plus	(1)

Common Playing Experience (%)

	Same Room	Online
Alone	69	
Stranger		23
Friend	32	37
Other Relative	23	22
Sibling	18	16
Parent	13	10
Child	26	21
Partner	34	21
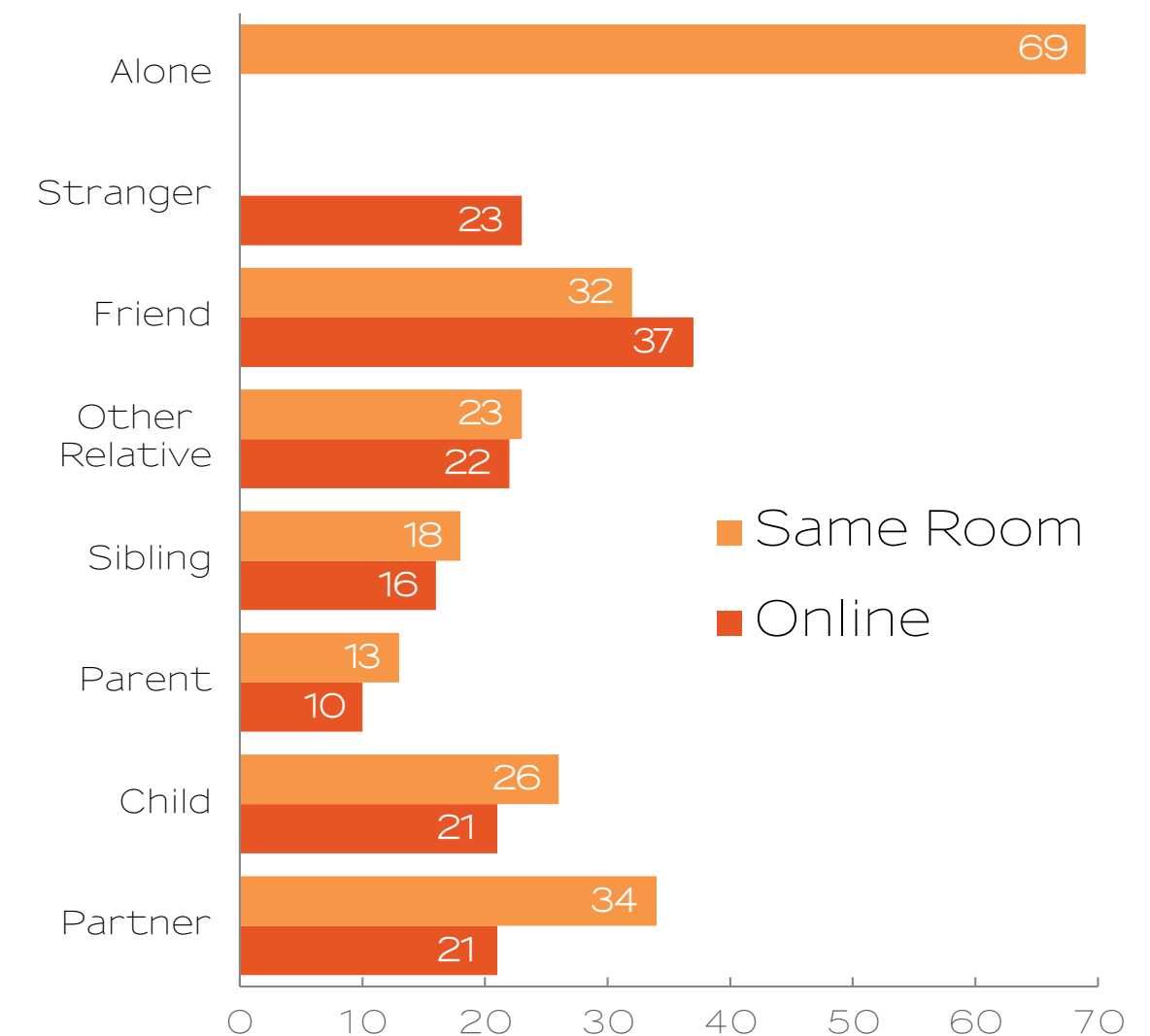
Video games are enjoyed by the entire family

Households with children are game households, but children aren't the only gamers; in homes with children under 18 years of age, 81% of mums and 83% of dads play video games. Of those parents who play video games, 86% play with their children. Consoles and PCs dominate parents' game devices, however, mobiles and tablets are popular too. Older parents prefer PCs whereas younger parents play across consoles, PCs and mobiles.

> "Video games are something for kids to do with dad, get exercise during rainy/cold weather and can be creative and fun. My memories of them are mostly seeing kids learn new things then try to teach me. Often they are the only things my boys can do together without fighting."
>
> *Female Parent, 42, Sydney, Household of 4*

> "Fills in boredom for adults and can be used as a treat for children."
>
> *Female, Parent, 31, WA, Household of 4*

Parents' Preferred Game Devices by Age Group (%)

Legend:
- 16 to 25
- 26 to 35
- 36 to 50
- 51 Plus

Device	16 to 25	26 to 35	36 to 50	51 Plus
Console	74	76	61	49
PC	76	78	81	91
Mobile	79	72	61	35
Tablet	43	47	39	40
Handheld	26	25	17	7
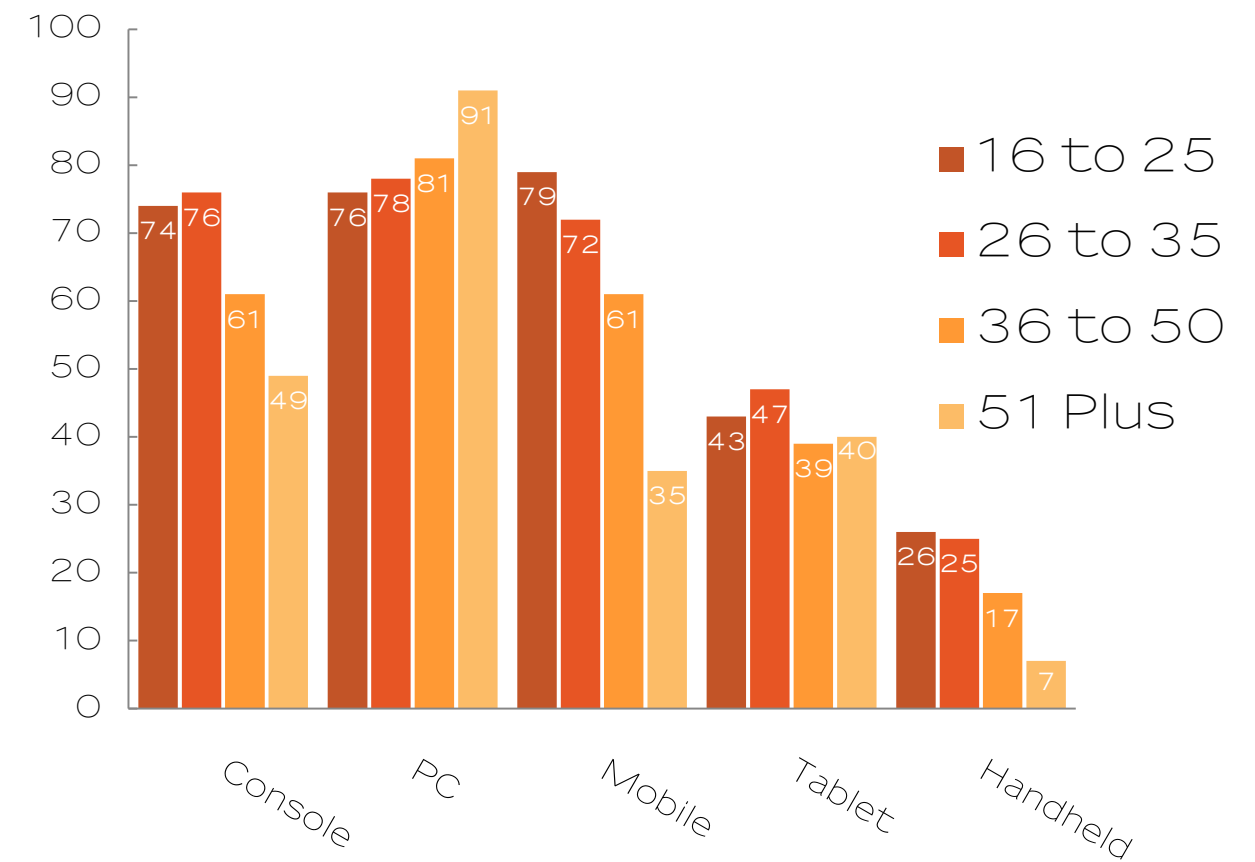
Parents play on a wide range of game devices, varying little by age group. Mums are more likely than dads to play on PCs and dads are more likely than mums to play on consoles.

> "[Digital games are] bringing family together by creating common interests."
>
> *Female, 23, Melbourne, Household of 4*

Parents' Preferred Game Devices by Gender (%)

Chart: Dads vs Mums preferred game devices
- Console: Dads 70, Mums 62
- Computer/Laptop: Dads 76, Mums 84
- Mobile: Dads 56, Mums 67
- Tablet: Dads 42, Mums 42
- Handheld: Dads 20, Mums 19
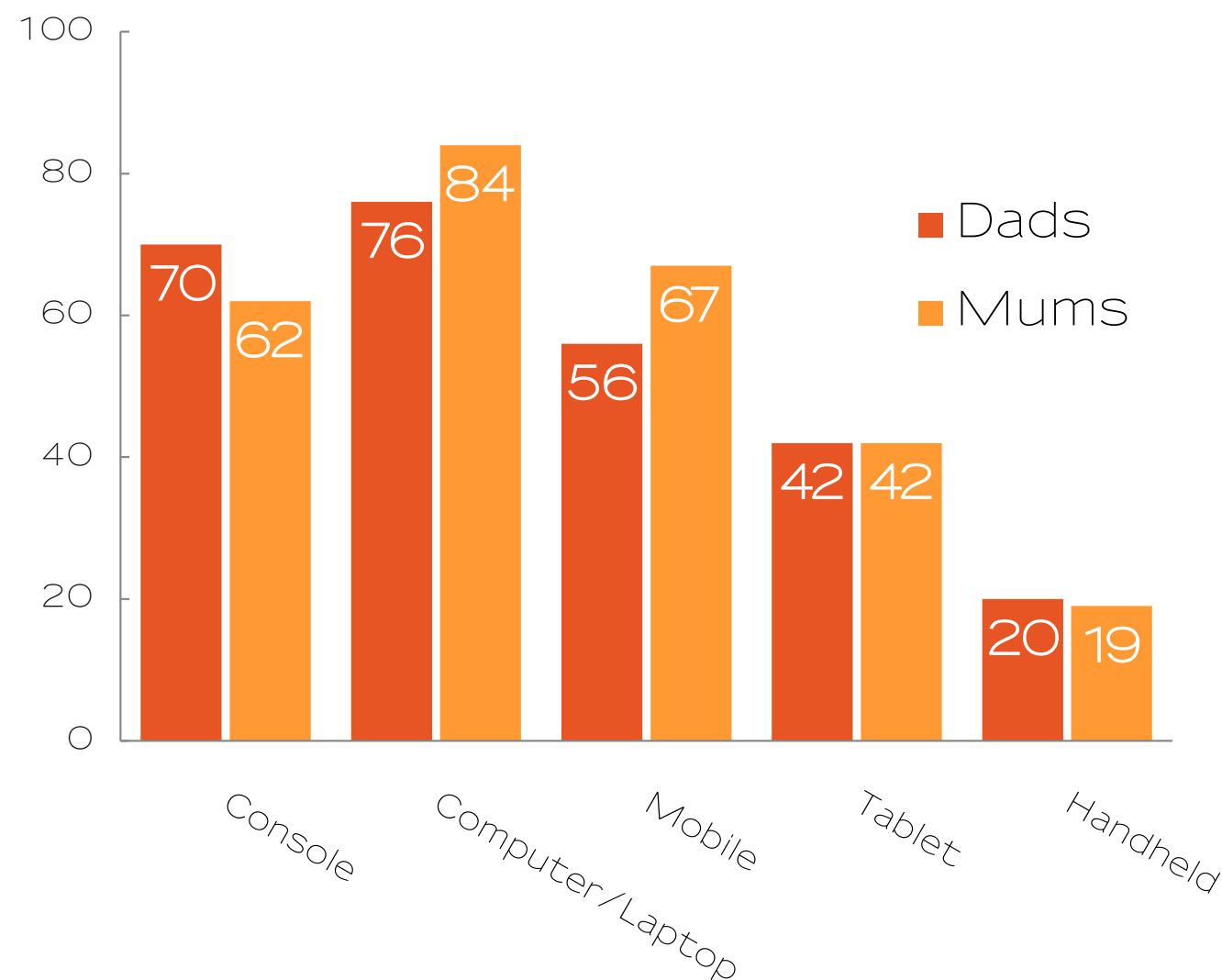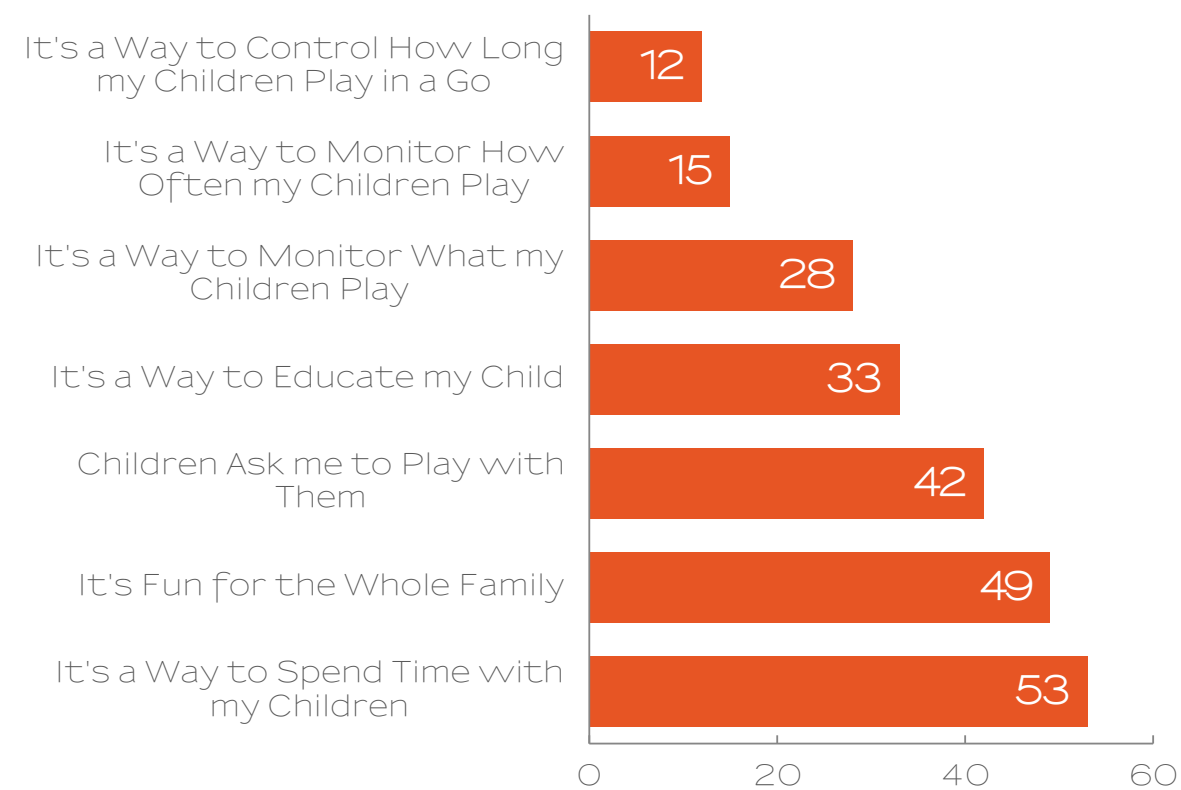
53% of parents play as a way to spend time with their children

Parents regularly play games with their children just as parents read to them when children are younger and play table-top and outdoor games with children when they are older. Parents' top reasons to play video games with their children are that "it's a way to spend time with my children" and "it's fun for the whole family."

Why Parents Use Games with Children (%)

Chart: Why Parents Use Games with Children
- It's a Way to Control How Long my Children Play in a Go: 12
- It's a Way to Monitor How Often my Children Play: 15
- It's a Way to Monitor What my Children Play: 28
- It's a Way to Educate my Child: 33
- Children Ask me to Play with Them: 42
- It's Fun for the Whole Family: 49
- It's a Way to Spend Time with my Children: 53

"We play them together and discuss them and the issues that might come up while playing or that come up in the game. We also talk about what games others are playing and why."

Female, Parent, 44, Metro Vic, Household of 4

When they play, parents use the opportunity to talk with children about games, use them as learning and teaching tools and use them for punishment and reward.

How Parents Use Games with Children (%)

Talk About Computer Games with Children	73
Use Computer Games for Education	71
Restrict Computer Games as a Punishment	63
Use Computer Games as a Reward	48
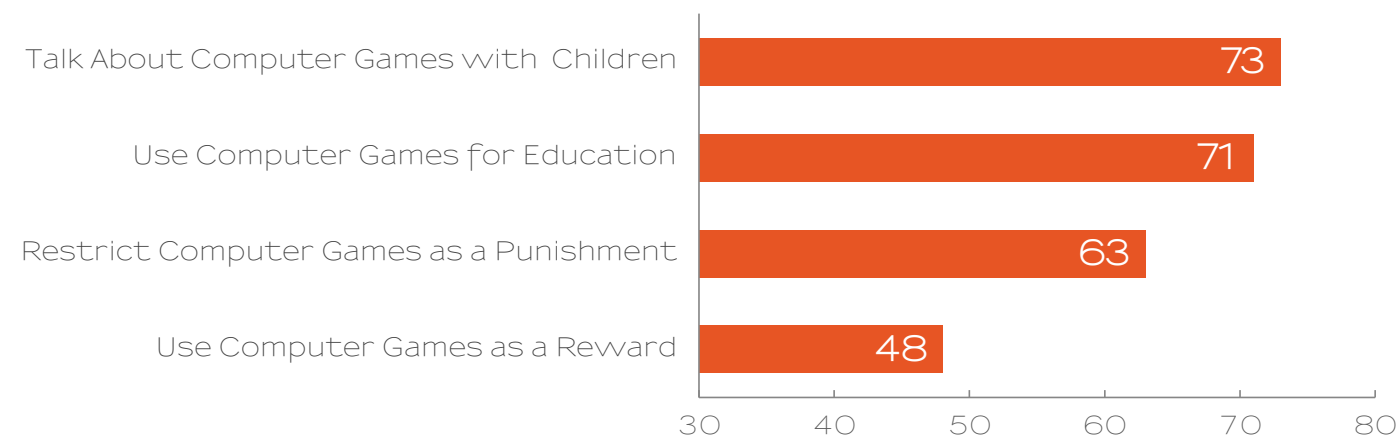
Most purchases by children are accompanied by adults

Parental involvement at game selection and purchase is another opportunity to exercise parental guidance and relationship-building. However, purchasing guidance depends on age of the child. Adults are always present in 60% of purchases and present most of the time in 21% of purchases. A small proportion (3%) responded that an adult was never present which accommodates those closer to age 18. Parents rarely purchase games for their children without their children being present; 55% said their child was present either "always" or "most of the time" while 33% said their child was "sometimes" present and 12% said their child was "rarely" or "never" present when the parent purchased a game for a child.

Adult Presence when Games are Bought by Children

- Always
- Most of the Time
- Sometimes
- Rarely
- Never

2% 3%
14%
6
60%
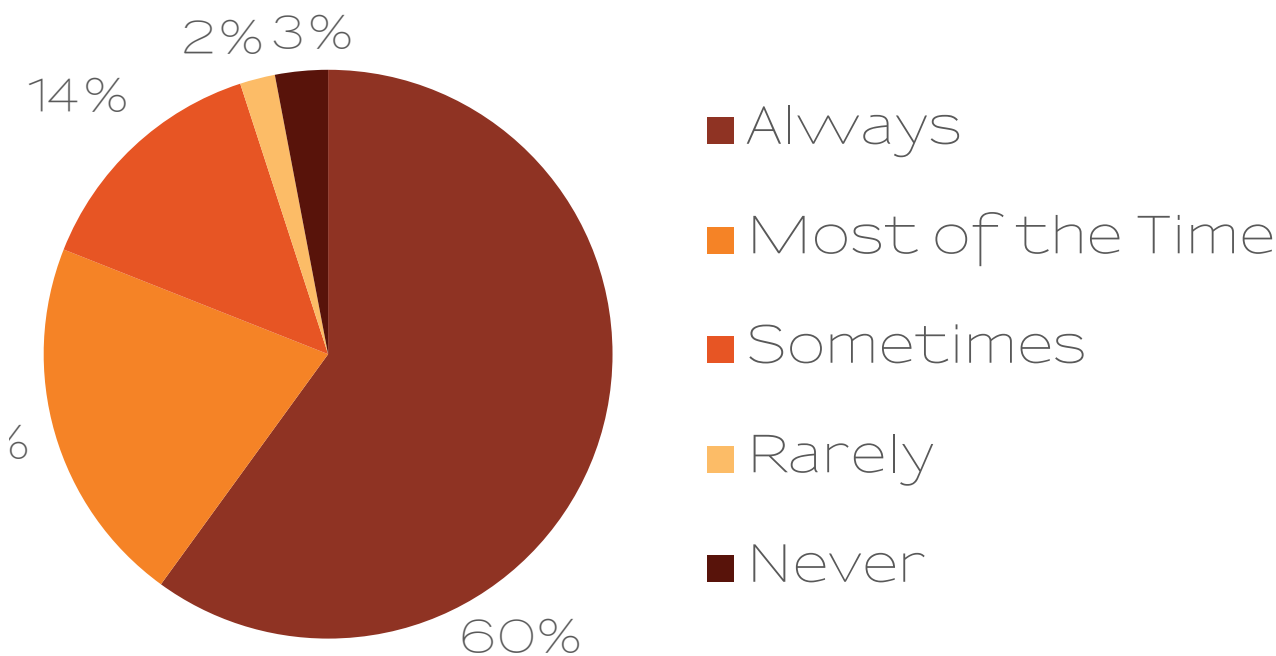
Parental controls and family settings provide another opportunity for parents to exercise influence and engagement with children's game playing, particularly on consoles. Parents are more likely than non-parents to know about game console access restriction settings and gamer parents are more familiar with them than non-gamer parents.

"…my son playing children's games, trying to reach new levels and overcoming his need to always win."

Female, Parent, 30, Regional QLD, Household of 3

Familiarity with Parental Controls (%)

Legend:
- Gamers
- Non-gamers
- Parents
- Non-Parents

Category	Gamers	Non-gamers	Parents	Non-Parents
Not at all familiar	19	30	13	27
Not too familiar	36	38	35	38
Mostly familiar	34	25	39	28
Completely familiar	11	7	14	8
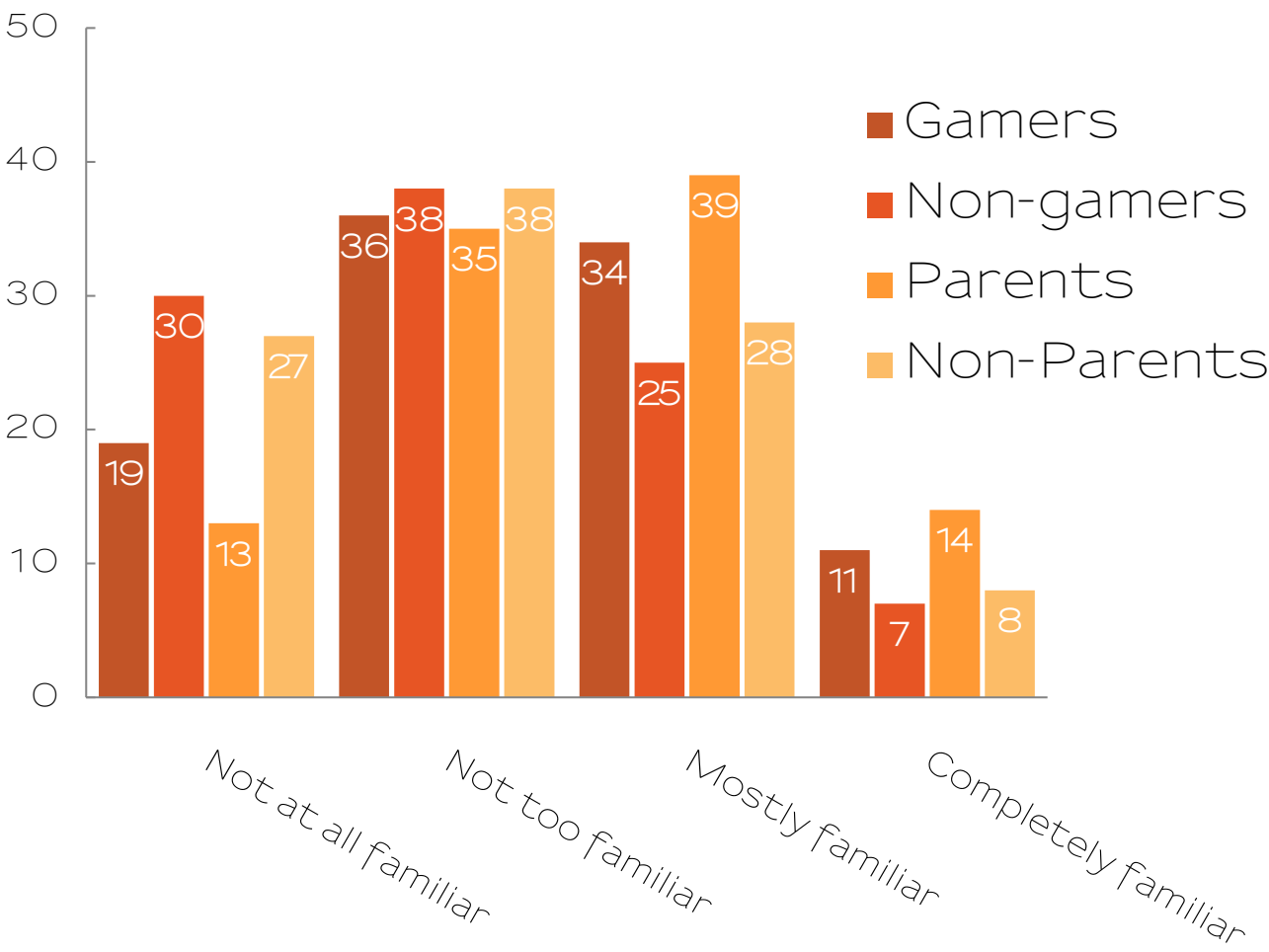
Parents are positive about the benefits of games for children.

Learning about technology and learning about maths are the leading benefits, followed by learning to plan. These findings suggest that parents increasingly see problem-solving and strategising during game play as an active and productive mental activity.

"They [children] enjoy games that involve growth and change within the game. Also, we've added educational games, mainly maths which teaches the subject during game play and encourages the children to improve their scores".

Female, Parent, 40, Regional NSW, Household of 4

What Parents Think Children Get from Games (%)

	%
Learning about langauge	80
Learning about society	81
Learning about life	82
Learning about work	83
Learning about others	86
Learning about science	89
Learning to plan	90
Learning maths	90
Learning about technology	94
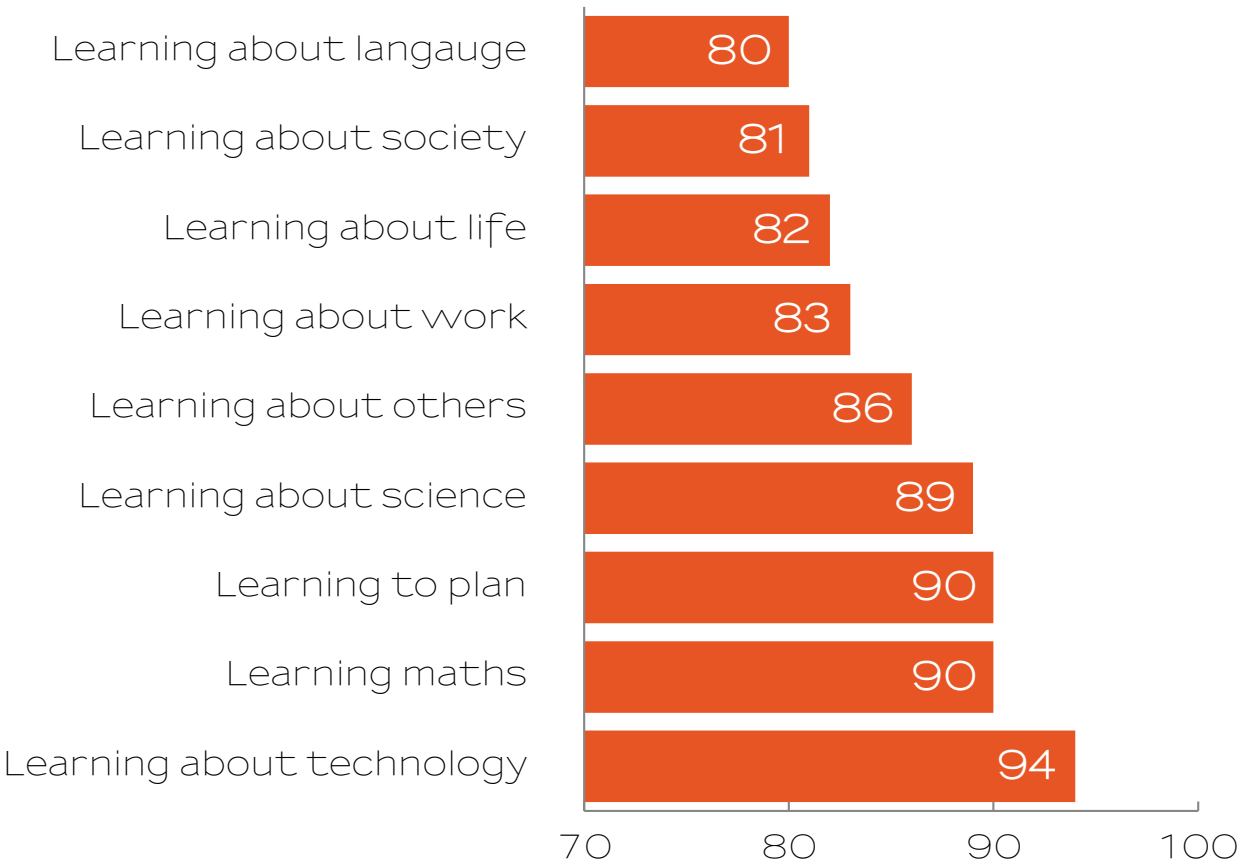
Ratings and Classification of Digital Games

The ratings and classification of games has been a topic of robust discussion in the Australian community. The Classification Branch of the Commonwealth Attorney-General's Department administers the classification of computer and video games in Australia under an Act of Parliament. The Classification Board makes classification decisions.

83% of games receive unrestricted classifications

The Classification database shows that decisions on those games submitted for classification from January to August 2013 resulted in 17% of all games being classified restricted, 11% at MA 15+ and 6% at R 18+. The vast majority of games classified in the period, indeed 83% of them, received unrestricted classifications: 38% at G, 30% at PG and 15% at M. By comparison, film classifications in the period from January to August 2013 resulted in 31% restricted (24% classified MA 15+ and 7% R 18+) and 68% unrestricted (15% classified G, 22% PG and 31% M).

"Non-gamers have no idea and tend to make rules based on their own agenda/fear/likes etc."

Male, 47, Parent, Regional QLD, Household of 3

Classification Decisions Jan-Aug 2013

- G
- PG
- M
- MA 15+
- R 18+
- RC

6% <1%
11%
15%
38%
30%
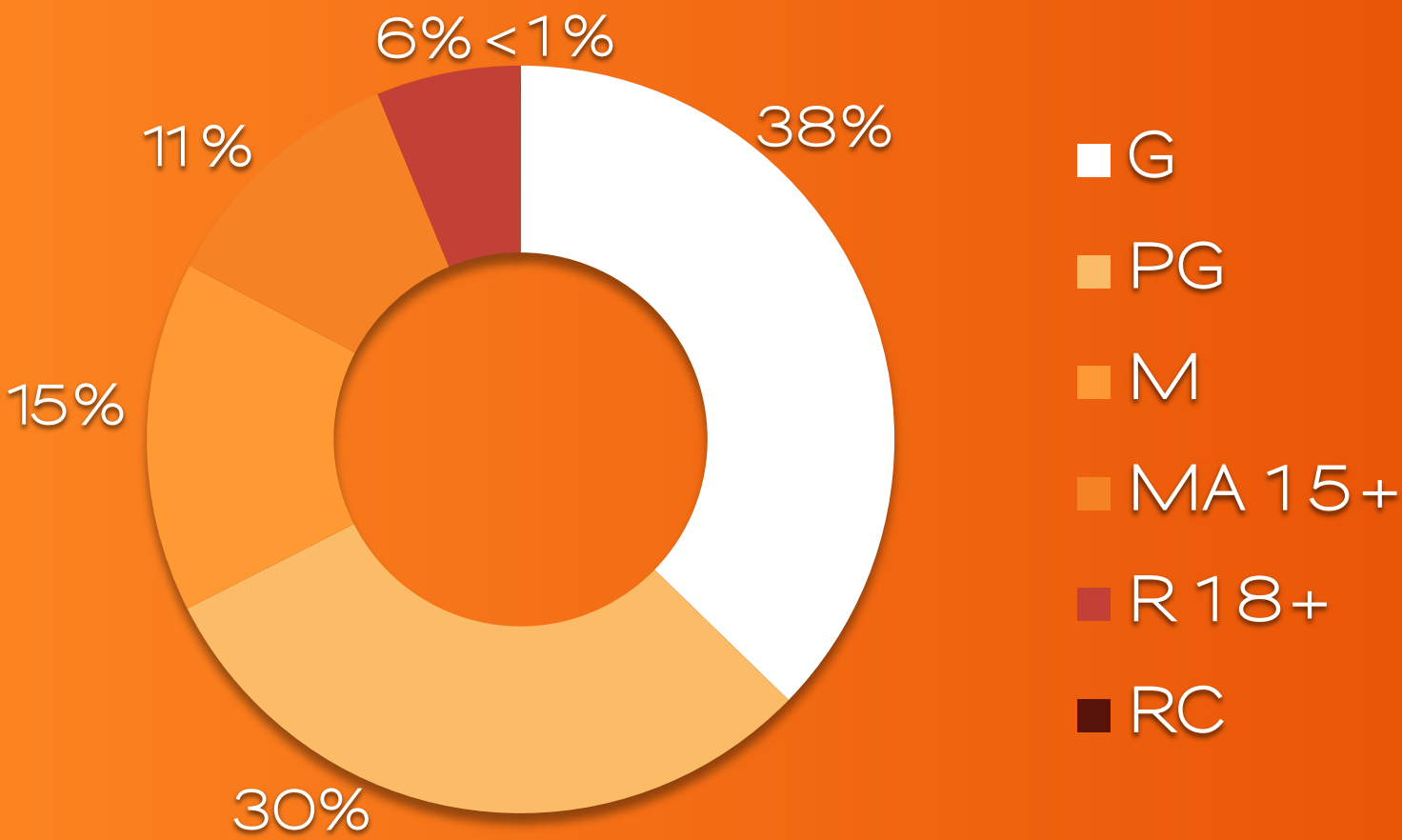
Familiarity with classification labels is mixed in Australia with 57% saying they are "quite" or "completely" familiar with Australian determined markings while 43% say they are "vaguely" or "not at all" familiar with them.

Familiarity with Classification Labels (%)

Confusion with Classifications (%)
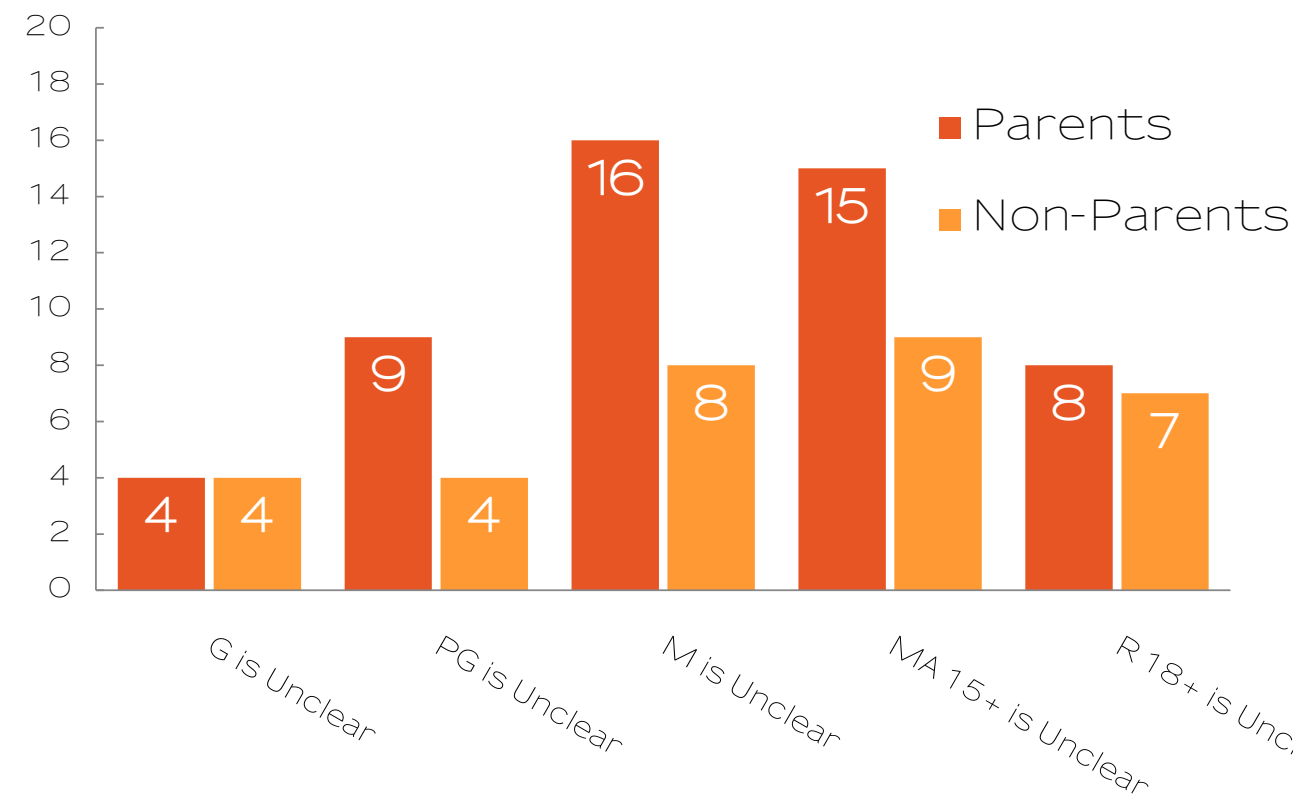
Influence of classifications on game buying decisions depends on who will play the game; 44% said they had " "a lot of" influence when purchasing for children, however 10% said classifications had that much influence when purchasing for adults.

Confusion around classification distinctions appears greatest at M and MA 15+. As many as 4% say G is unclear, 6% say PG is unclear, 11% say M is unclear, 11% also say MA 15+ is unclear while 7% say R 18+ is unclear.

"...parents ... know what's best for their kids."

Male, Parent, 45, TAS Rural, Household of 3

"Someone who understands video games can give appropriate ratings."

Male, Parent, 32, Gold Coast, Household of 4

Influence of Classification on Game-buying Decisions (%)

- Game for Adult to Play
- Game for Child to Play

	No Influence	A Little Influence	A Reasonable Influence	A Lot of Influence
Game for Adult to Play	48	23	19	10
Game for Child to Play	20	13	23	44

New Media and Concerns about Potential Risks to Adults (%)

Internet	Social Media	Computer Games
37	34	29
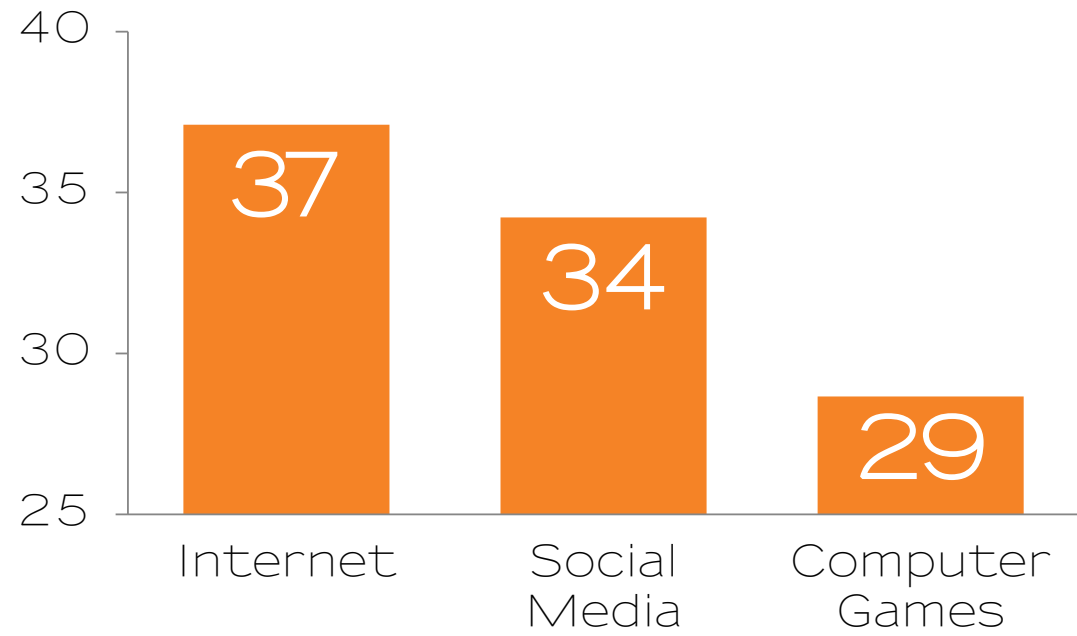
New Media and Concerns about Potential Risks to Children (%)

Internet	Social Media	Computer Games
37	33	30

Classification and New Media

New media give consumers great choice and many new experiences. They also generate some concern over potential risks leading to calls for classification. Whether for their use or children's use, adults are most concerned about the Internet generally, followed by social media specifically. The oldest of these three media, computer and video games, come last among new media, generating the least concerns.

Concerning Elements by Medium, Adults

	Internet (10,316)	Social Media (9,514)	Computer Games (7,969)
Sexual Predators	850	801	580
Animal Cruelty	757	675	634
Privacy	792	732	484
Credit Card Fraud	862	600	515
Security	802	669	487
Bullying/Harassment	644	736	488
Violence	607	553	572
Geo-tagging/being located	653	617	452
Drug Use	583	581	506
Sex	575	538	479
Gambling	568	475	431
Language	426	478	421
Alcohol Use	449	461	376
Nudity	464	436	383
In-app Purchasing	445	353	341
Dark Tone	302	286	314
Scariness	294	263	326
Themes, Social Issues	243	260	180

"[Games are] part of contemporary life and you feel part of what's going on - games can be great entertainment and relaxation, but selectivity, age-appropriateness, etc. must be applied and a balance maintained with all the other diverse aspects of living."

Female, Parent, 51, Sydney, Household of 3

Concerning Elements by Medium, Children

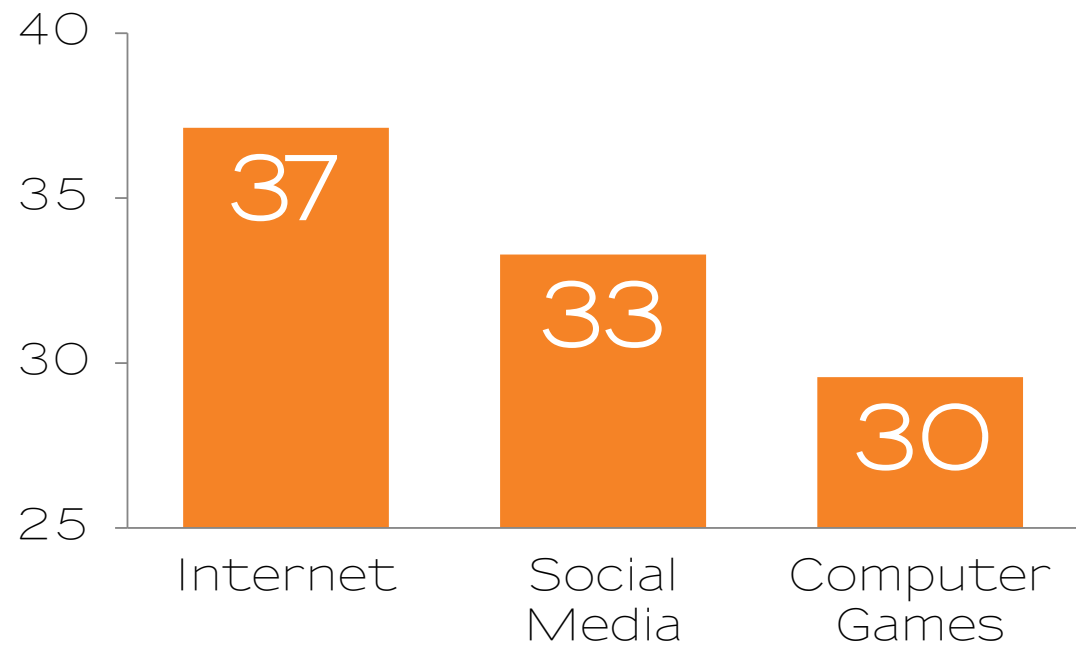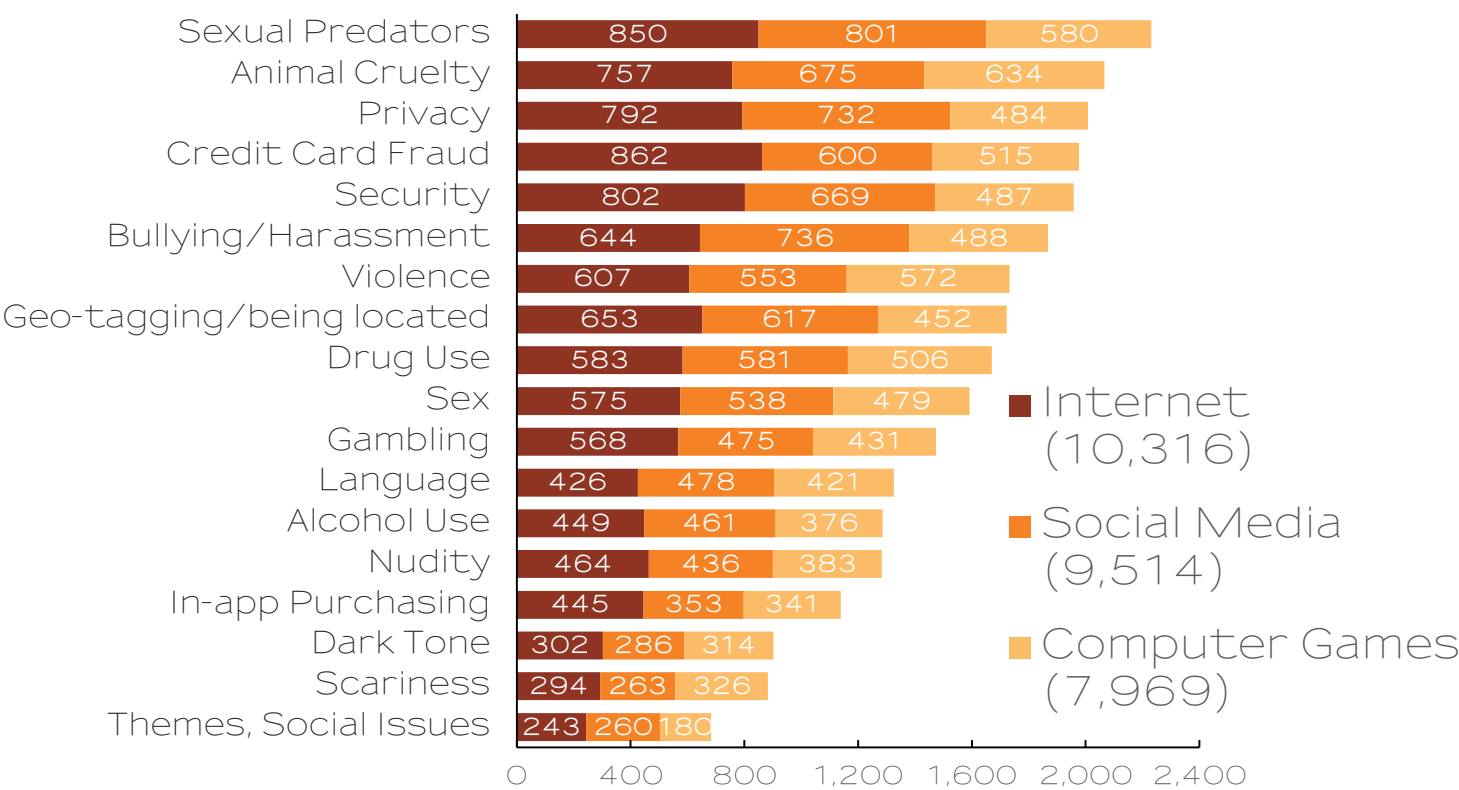|	Internet (4,274)	Social Media (3,832)	Computer Games (3,404)
Violence	274	226	255
Sex	271	236	226
Sexual Predators	274	260	198
Drug Use	258	239	212
Bullying/Harassment	250	259	189
Privacy	263	241	182
Language	235	227	215
Security	261	236	179
Animal Cruelty	247	215	206
Nudity	245	212	198
Geo-tagging/being...	235	220	178
Alcohol Use	227	206	185
Gambling	236	194	186
Credit Card Fraud	228	187	151
In-app Purchasing	212	172	160
Scariness	194	166	174
Dark Tone	192	166	172
Themes, Social Issues	172	170	138

Concerns about the risks that may arise from media consumption varies by medium and by the audience using the medium. Given the opportunity to nominate whether or not different risks are of concern to them either for their use of a medium or for children's use of it, adults express concerns about contemporary issues. The ranking of issues differs in relation to adults and children with adults' consumption raising concerns about exposure to sexual predators, animal cruelty and privacy violations and children's consumption raising concerns about exposure to violence, sex and sexual predators.
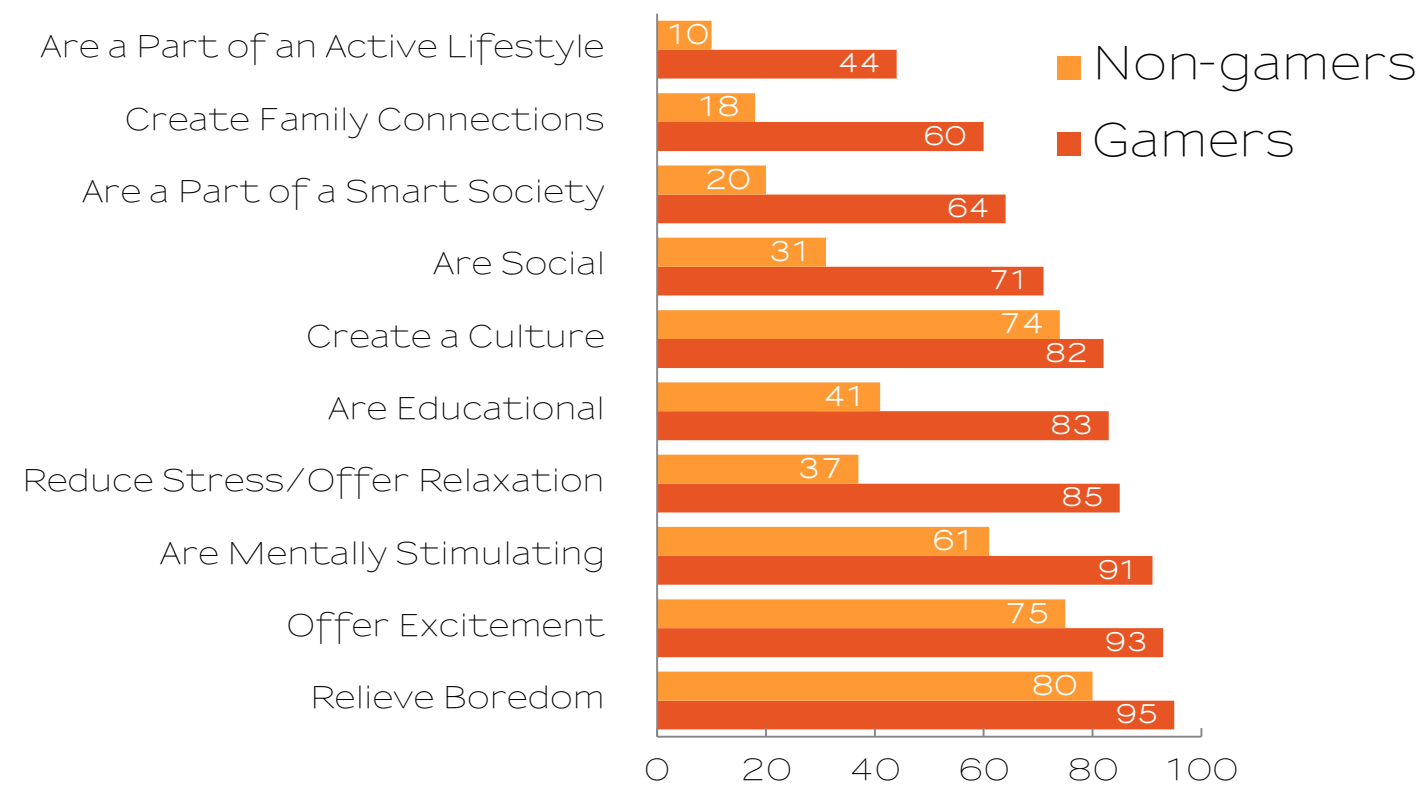
There are marked differences in the extent to which gamers and non-gamers evaluate the potential roles that games play in society. The widest gaps in attitudes surround whether games provide cognitive and social benefits. The only role that non-gamers more frequently identify than gamers is that video games cause violence in society – a perceived negative consequence. This contrasts with potential positive roles of games, which gamers more than non-gamers, are like to more frequently identify. The one statement on which both non-gamers and gamers nearly agree is that games create a culture. Nowhere has this been more evident than the sell-out success of the Penny Arcade Expo (PAX) Australia in Melbourne from 19-21 July 2013, the first held outside the United States; critics noted the cultural significance for games and gamers.

"When the children were a lot yonger we used to play with their grandmother which is a wonderful memory."

Female, Parent, 30, Regional QLD, Household of 3

Role of Games in Society (%)

Role	Non-gamers	Gamers
Are a Part of an Active Lifestyle	10	44
Create Family Connections	18	60
Are a Part of a Smart Society	20	64
Are Social	31	71
Create a Culture	74	82
Are Educational	41	83
Reduce Stress/Offer Relaxation	37	85
Are Mentally Stimulating	61	91
Offer Excitement	75	93
Relieve Boredom	80	95

"[Our] kids played games to be sociable with their friends. My wife and I play them to pass the time, relax etc. I've played them with waiting for flights etc. when travelling on business."
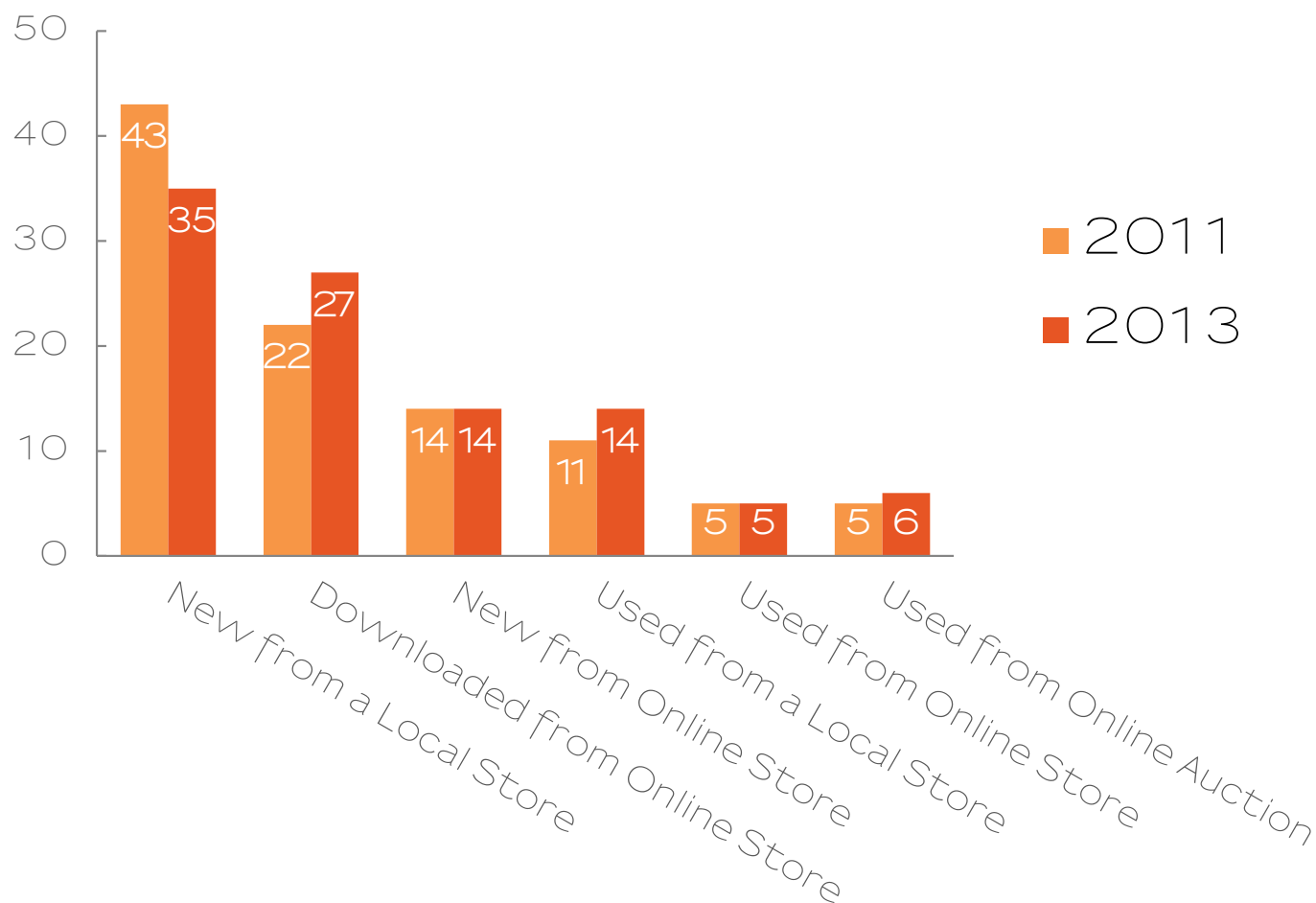
Male, 59, Melbourne, Household of 2

"My now adult children … play some games on line, as I know they have both at different times travelled to the weddings of people they have played games online with who live in other cities.

Female, 61, Regional QLD, Household of 2

The Business of Digital Games

Australian media consumers are exploring digital downloads when buying games, however most prefer to purchase games new from a local store.

Preferred Ways to Buy Games (%)

Legend: ■ 2011 ■ 2013

Data:
- New from a Local Store: 43 (2011), 35 (2013)
- Downloaded from Online Store: 22 (2011), 27 (2013)
- New from Online Store: 14 (2011), 14 (2013)
- Used from a Local Store: 11 (2011), 14 (2013)
- Used from Online Store: 5 (2011), 5 (2013)
- Used from Online Auction: 5 (2011), 6 (2013)

"I remember great times with friends, engaging stories, lateral and strategic thinking development, epic surprise twists.... so many good times."

Male, Parent, 33, Regional QLD, Household of 3

"[Games] form friendships that maybe wouldn't otherwise exist"

Female, 21, NT, Household of 3

Among ways to purchase and enjoy games are in-app purchasing, which 41% report trying, and purchasing game-related merchandise such as clothing, posters, and toys which 25% of game households now own. The average in-app spend "last month" for all game households is $5. While the average game merchandise spend "last month" across all game households is $1.
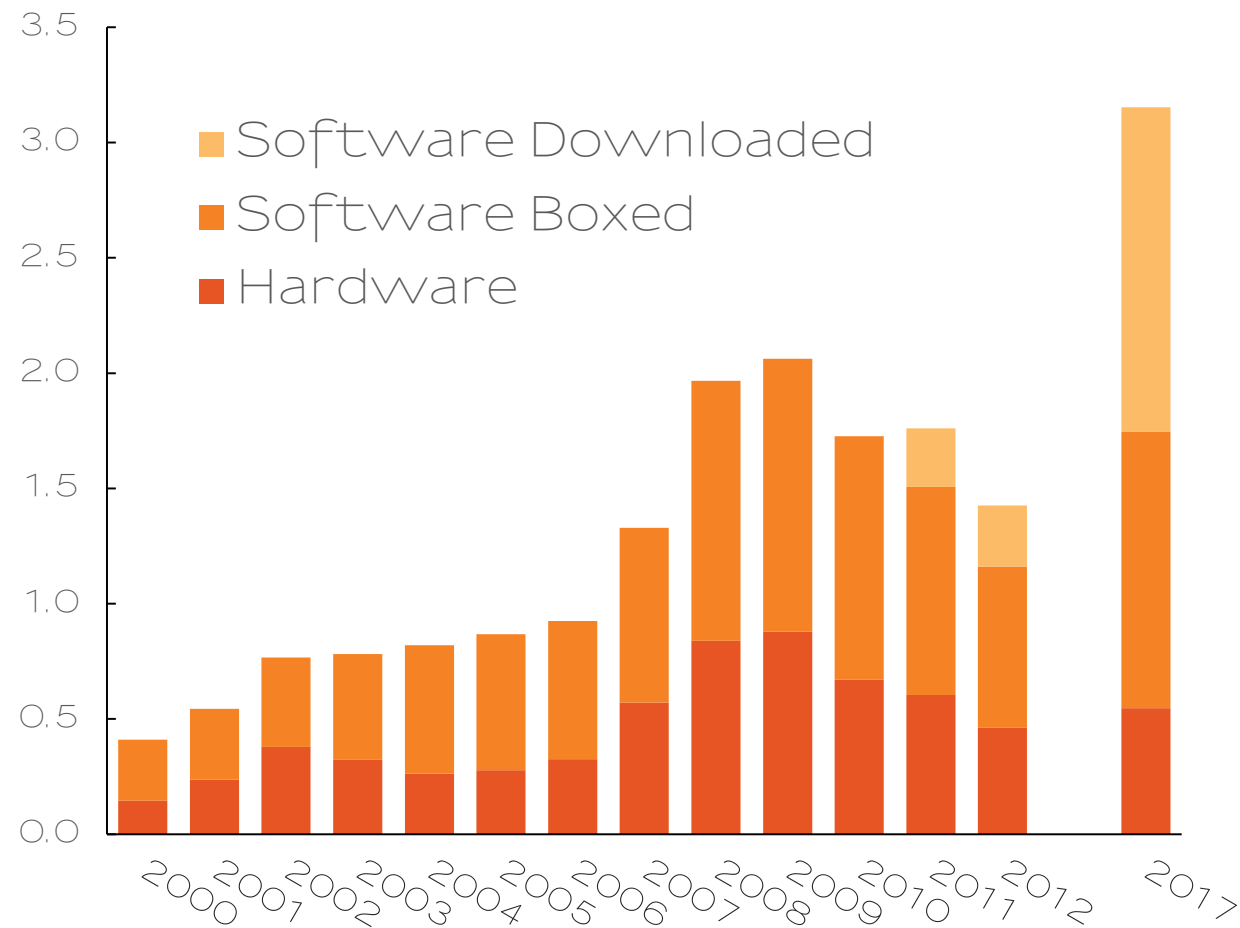
$5 on In-App Purchases **$1** on Game Merchandise

"[Games] are a form of entertainment to us, cinemas are so expensive, and if the weather is bad and we can't play outside, computer games are good."

Female, Parent, 50, Melbourne, Household of 5

Annual Value of Australian Game Sales ($Bil)

Legend:
- Software Downloaded
- Software Boxed
- Hardware

Y-axis: 0.0, 0.5, 1.0, 1.5, 2.0, 2.5, 3.0, 3.5

X-axis: 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2017

SOURCES: The NPD Group Australia, PwC Australia.

$ 8% CAGR AUSTRALIAN Games Spending 2010 - 2017

The long-term trend for the value of spending on games hardware and software in Australia is strong and positive with a Compound Annual Growth Rate of 8% between 2010 and 2017, based on NPD Group Australia's point-of-sale data and the PricewaterhouseCoopers (PwC) *Australian Entertainment and Media Outlook 2013-2017*.

"I have learnt to challenge myself."

Female, Parent, 34, Brisbane, Household of 5

"I have memories of fun and entertainment in my childhood. Playing games now reminds me of my childhood and keeps my life fun."

Female, 22, Regional NSW, Household of 2

'I love video games. They are as creative, if not more than the best art found in any Art Gallery or Museum on earth, and I am able to access this easily whenever I want in the convenience of my home. It has vastly increased my creativity and enjoyment in life."

Male, 40, Sydney, Household of 1

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