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.
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
KEY FINDINGS

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.

How Gamers Play

- 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.

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.

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).

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.

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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### Resources
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.
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

- **Games**: 93%
- **No Games**: 7%

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.
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.

Screens and Game Devices in Australian Households (%)

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

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**

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.
Since 2005, the representation of females among the gamer population has risen from 38% with the largest increase in representation occurring 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

“[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.

“…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

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.

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.

"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 Stimulation

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

“When 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, nominated time to play followed by times using public transport.
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.

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.

How Gamers Play

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.
Families and Games

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 (%)

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
Families and Digital Games

Parents’ Preferred Game Devices by Gender (%)

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 (%)

"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.
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.

Most purchases by children are accompanied by adults

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
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
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
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.

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

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.

“Someone who understands video games can give appropriate ratings.”

Male, Parent, 32, Gold Coast, Household of 4
Influence of Classification on Game-buying Decisions (%)

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

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

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

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.

“[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
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.

“[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 online, 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

“[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.”

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

“[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.”

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

“[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.”

Female, Parent, 30, Regional QLD, Household of 3
Australian media consumers are exploring digital downloads when buying games, however most prefer to purchase games new from a local store.

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.

“[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

“[Games] form friendships that maybe wouldn’t otherwise exist”

Female, 21, NT, Household of 3

“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
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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UMR Research. (2010). Young People’s Use of Entertainment Mediums. Wellington: Office of Film and Literature Classification