GAME PLAY

AUSTRALIA 2005

Brought to you by the IEAA

An independent study on the thoughts and habits of Australians in relation to computer and video games

What Australians Think…

"Video games can be a great social activity or alternatively, a great way to tune out."
- Male, 24, NSW

"My daughter just loves video games. But she's not old enough to get all the concepts so we play them with her."
- Female, 37, VIC

"Games give you the ability to do things that would be currently impossible to do in real life and you're able to socialise with other people around the world."
- Male, 18, VIC

"Video games keep my mind active because I have to concentrate."
- Female, 51, QLD

"Video games are like a new version of chess…people play them to relax, unwind and even test their skills."
- Female, 48, VIC

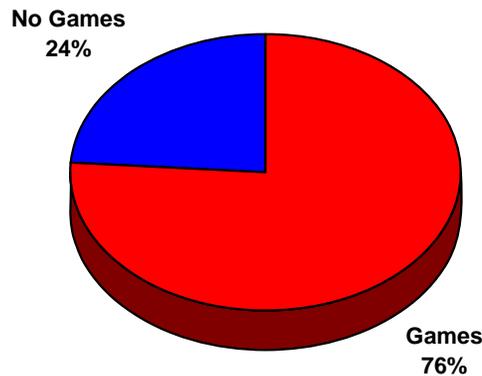*"I like the challenge of some of the games and I like the World War II games, the historical importance of it all."*
- Male, 42, WA

Level 1: Intro

Of **1601** Australian households surveyed at random in 2005…

76% have a device for playing computer or video games.

**No Games
24%**

**Games
76%**

Of these 1222 "game" households…

91% have a personal computer.

57% have a home video game console.

14% have a hand-held game device.

42% are homes with children.

"Video games are proactive forms of entertainment, not passive. They are designed to challenge you, to make you think, to solve puzzles and to work successfully in groups to achieve objectives that are frankly impossible to achieve on your own. These are all valuable skills. Video games are almost perfect training vehicles for the corporate world, and thus should be encouraged by our market-driven government. On the other hand, TV (for example) is almost completely passive (except for the expensive/cynical SMS tie-ins etc.) and as a result is designed to pacify, and effectively dumb-down, the audience. I watch about 5 hours of TV per week, (mostly Lateline*) and play 15-20 hours of video games per week. I am comfortable with this balance, as is my partner. Her entertainment habits are similar to my own, and we fit into the "young, professional, upwardly mobile" demographic. As do our friends who also play games."*
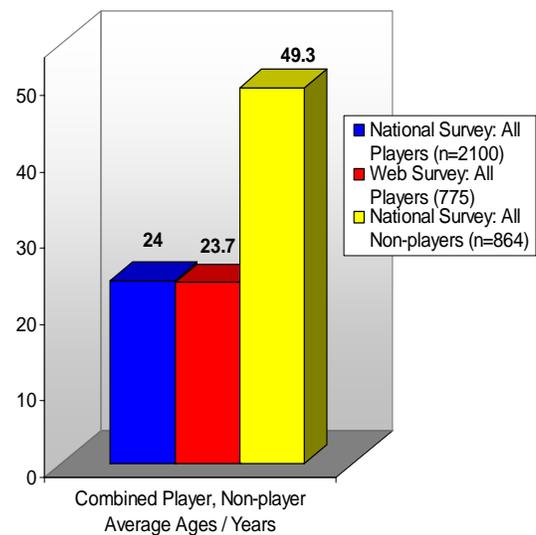
-Male, NT, Web Survey

Level 2. Australian Players

Of those who have played a computer or video game in the past year **38%** are female.
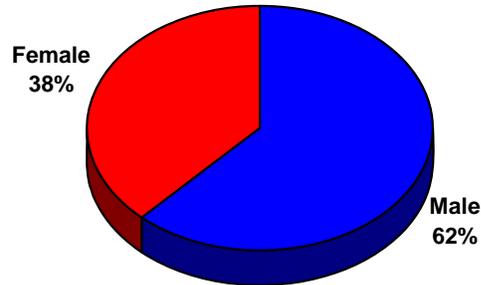
Including all adults and children in "game" households, the average Australian computer or video game player is **24 years old**.

NB: National survey "game" households = 1222, national survey players = 2100.

Play Behaviour

70%   Play at least once a week.

62%   Play up to an hour in one go.

42%   Play with others.

55%   Will be playing video or computer games as much or more in 10 years.

Players' Regular Leisure

47%   Play sport.

55%   Read books for pleasure.

62%   Shop.

**43%**   Go to the park.

Australian Attitudes

78%   of adults in game households say computer and video games are educational.

59%   of adults in game households say computer and video games are a normal leisure activity in their homes.

58%   of adults in game households see computer and video games as a social activity.

Level 3. Australian Market

40% of game households in Australia purchased a computer or video game in the first half of 2005.
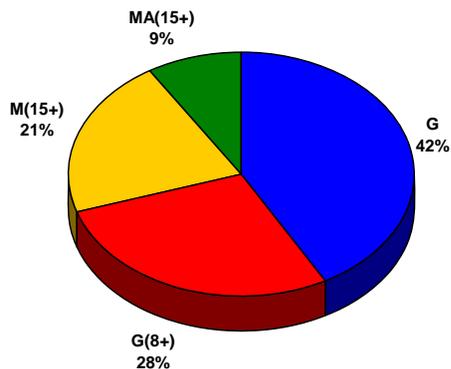
54% plan to purchase a computer or video game in the second half of 2005.
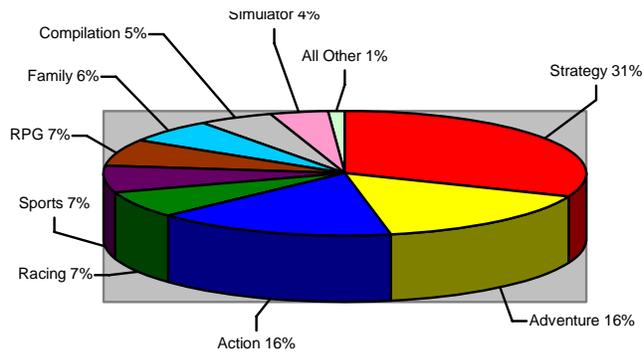
Sales of Game Hardware and Software
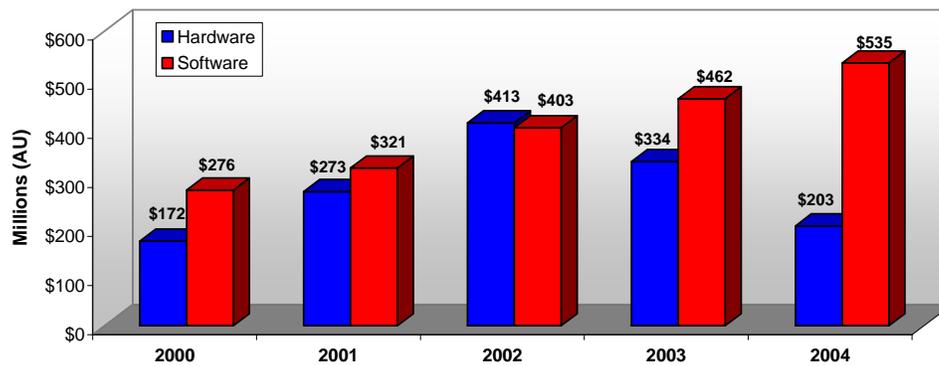
Source: GfK

Games Classified by the OFLC

70% of games classified by the OFLC are G or G(8+)

Most Popular PC Games

Most Popular Console Games

Top Selling Games (by units sold)

Rank	Title	Format	Genre	Distributor
1	Gran Turismo 4	Playstation 2	Racing	SCE Australia
2	GTA: San Andreas	Playstation 2	Adventure	Take 2 Interactive
3	Pokémon Emerald	Gameboy Advance	RPG	Nintendo
4	Need For Speed: Underground 2	Playstation 2	Racing	Electronic Arts
5	Simpson's Hit & Run Platinum	Playstation 2	Adventure	Vivendi
6	Super Mario 64	Nintendo DS	Adventure	Nintendo
7	The Sims 2: University	PC	Strategy	Electronic Arts
8	Burnout 3	Playstation 2	Racing	Electronic Arts
9	World Of WarCraft	PC	Strategy	Vivendi
10	GTA: San Andreas	Xbox	Adventure	Take 2 Interactive
11	Need For Speed: Underground Platinum	Playstation 2	Racing	Electronic Arts
12	Ratchet & Clank 2 Platinum	Playstation 2	Adventure	SCE Australia

Level 4. Issues

Computer and video games are a family medium: while **42%** of game households include children, only **14%** of non-game households have children.

"For me it's family time. It helps me stay in touch. I deal with kids 24/7, so it keeps me in touch with my own kids and then it's an interest with my other 28 kids that I have during the day, so it sort of helps close that generation gap as I'm getting older, I guess."

- Female. 28. Teacher. Brisbane Focus Group

Family Matters

66%   of parents who play computer or video games play at least once a month with their children.

61%   of Australian parents monitor their children's game play "a lot", another 26% monitor it "a little."

76%   of Australian parents set rules about the types of games their children can play.

71%   of game purchases or hires are made by a parent or other adult in Australian households.

87%   of parents are present or have given permission when games are purchased by their children.

Violence

Parents rank violence in computer and video games second behind violence in TV news.

The types of violence most concerning for parents are:
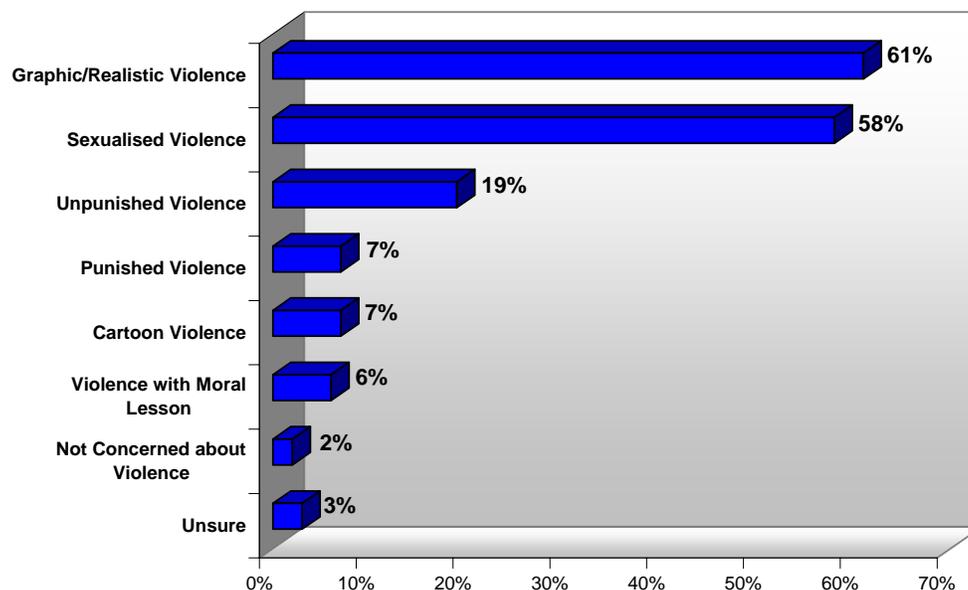
"I don't think you want your kids playing games that teach them how to steal cars before you've had enough time to teach them not to steal cars. What it comes down to is your kid has to be old enough to know the difference between reality and fantasy. And the unfortunate thing is that there are some adults who haven't gone to the trouble of telling them the difference between reality and fantasy. I think it's just like real life…there are violent things in real life….books, films, art, games…everything reflects that and as much as you want it to go away, it's part of life. You've got to accept it, deal with it and move on."

- Male, 35, Melbourne Focus Group

Classification

68% of Australian parents say classification information is "very important" when they hire or purchase a game.

27% of Australians know that Australia has no R(18+) classification for computer and video games.

88% of Australians, regardless of whether they play or have a game device say Australia should have an R(18+) classification for computer and video games.
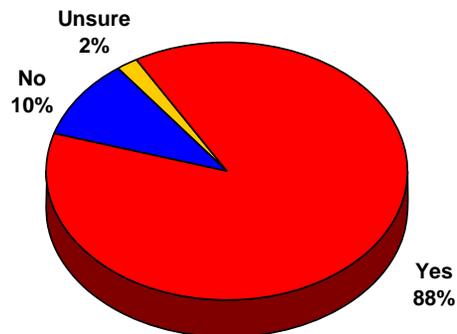
Top reasons for supporting an R(18+) classification for computer and video games are to…

47% Deal with high-level violence.

45% Protect children.

18% Make classification easier to understand.

Level 5. Online

85% of Australian game households have an internet connection.

Of these…

49% are broadband connections.

35% play games on-line.

20% download games, demos, add-ons and updates.

10% of Australians who play games and have a broadband connection, have broadband mainly to play games online.

15% of Australians prefer to buy games online.

Software Piracy

More than half of Australians in game households believe software piracy is a problem:

54% express concern about illegal downloads of computer and video games.

52% express concern about swapping of illegal computer and video game copies.

59% express concern about the buying and selling of pirated computer and video games.

"When you think about the amount of work that goes into making the game, which is a massive amount of hours and a person actually designs it and then you think that people pirate it, so they're trying to get the money by raising the prices so at least the person that designed the game gets something back. It's like a catch 22 situation, because if people didn't pirate it, it would be cheaper, but people pirate it because it's expensive. That's the problem."

- Female, 33, Hobart Focus Group

Level 6. Forecast

In the next decade, computer and video games will continue to grow in popularity and legitimacy as a form of entertainment for all ages.

> *"I sort of see games heading towards being interactive movies. You can choose a character, you can be that character and instead of putting up with some Hollywood scriptwriter's ideas of what to do, you do it yourself. I just think it's going to get better and better and more life-like and I don't think they're going to be separate industries in 20-plus years."*
>
> *- Male, 35, Melbourne Focus Group*

61% of Australians who play computer or video games say they will buy new hardware for games over the next two years.

Of these…

53% plan to buy a new video game console.

40% plan to buy a new PC to play games.

20% plan to buy a new handheld game device.

Bonus Level. About

GamePlay Australia 2005 has been designed to overcome the limitations of using Australian research that is aging or overseas information that may not be representative of Australia. It has been designed to address the difficult environment that arises when public debate and public policy are based on limited information. It has been designed to assist industry, public policy officials and the community in forming ongoing directions for computer and video games. In short, GamePlay Australia 2005 has been designed to deliver hard data on the state of play in Australia in 2005. This information can be added to the growing body of research available around the world as well to round out the picture of the state of play around the world.

To conduct the study, the Bond University Centre for New Media Research and Education (CNMRE) served as a research consultant to the Interactive Entertainment Association of Australia (IEAA). The CNMRE proposed the scope of the study to the IEAA. It designed the study in consultation with the IEAA. The IEAA funded the study. However, the CNMRE conducted the study independently and without any contractual or other preconditions determined by the IEAA. In short, the CNMRE and IEAA wanted to learn as much objectively about the Australian community of computer and video game players as any other organisation or individual might.

Three methods were used to collect information. The first was a random national telephone survey of 12 minutes on average and asked over 60 questions. The national survey was conducted by iView, an independent market and social research company. The survey was designed to collect information on two units of analysis: the household and multiple individual players inside that household. In total 1601 households were studied in this way. In these households, 2100 gamers and 794 non-gamers were studied. The purpose of this method was to get a representative sample of all Australians and to study both people who play computer and video games and people who do not. The margin of error for the national survey is ±2.4%. The margin of error for all gamers is ±2.1%.

The second method was a national web survey that was almost identical to the national telephone survey. It was publicised on game forums and game-related web sites in Australia to attract participants who are expert gamers. In total, this method produced information on 370 households in which there were 775 game players. We did not seek information about people in these households who do not play computer or video games. The margin of error for the web survey is ±5.1%.

The third method was a series of four focus groups, one each in Brisbane, Sydney, Melbourne and Hobart. There were 9 to 10 participants in each focus group and these groups were recruited to include men and women aged over 16 years who play computer games at least once a week on average to learn more about light, medium and heavy players and to gather information about game play in their own words. The questions asked in the focus groups paralleled those asked in the telephone and web surveys. In total, there were 39 participants, with an average age of 29 years; 11 were female.

The national telephone survey was conducted from Brisbane and Melbourne offices of iView in mid-June, 2005. The Web survey ran from late July to early August 2005 on a server at Griffith University, Gold Coast, using a web survey tool called SurveyMaker. The focus groups were facilitated by the CNMRE at Bond University in mid August 2005.

In total, this research collected information about 2009 households and 3708 individuals.