da12

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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Digital Australia

what Australians think about DIGITAL MEDIA

"We have fun with kids games... It gives kids something they can beat parents at. We use games to compete in a fun environment against each other."

Female, Parent, 44, Brisbane

"Digital media brings a continuing change to one's understanding and learning."

Male, 71, Melbourne

"They're good for learning and helping you see a different viewpoint."

Female, 25, Sydney

"Being a passionate and eager consumer of music and film, a big part of my life is digital media. My children are learning to appreciate the educational value of games … as well as the music and digital radio..."

Male, Parent, 39, Perth

"..a lot of fun together beating each others scores … its family fun."

Female, 19, Adelaide

"My 4 year old sits on my knee as we play alphabet games and other things on the computer. This is an enjoyable time for the two of us as we are learning and interacting with each other."

Female, Parent, 38, Regional VIC

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About Digital Australia 2012

Digital Australia 2012 (DA12) is a study of 1252 Australian households and 3533 women, men, girls and boys in them. These participants were from an online national random sample using the Nielsen Your Voice Panel. The survey was conducted in July 2011.

It provides information on the digital media ecology in Australian households with a focus on computer game use and attitudes. The place of all digital media in the lives of everyday Australians of all ages was the secondary focus of this research. Adults responded to over 80 questions and responded on behalf of all other members of the household. The questions were grouped into sections:

Introduction: Time required, instructions.
Section 1: Demographic profiles.
Section 2a: Devices and hardware used at home, travelling, at work.
Section 2b: Media libraries, physical and digital.
Section 3: Internet access, use and dependency.
Section 4: Media spend, subscriptions and services used.
Section 5: Gaming status, behaviours.
Section 6: Games converging with other media.
Section 7: Games, families, social elations and parenting.
Section 8: Security,privacy and access.
Section 9: AttitudesToward Interactive Entertainment(open-ended)
Section 10: Positive use stories
Conclusion: Last demographics, contact information.

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.” The margin of error is ±2.8% for the national sample comparing all households and ±2.2% for all gamers.

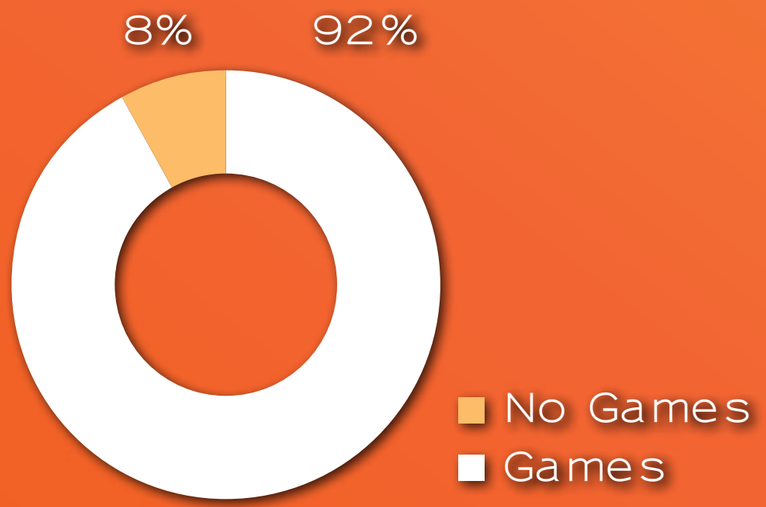
The Nielsen Company provided Bond University with raw data from the survey for statistical analysis at the University. The data were analysed by study author using the PASW Version 18. Statistical procedures included simple descriptive statistics such as frequencies, cross-tabulations, means and tests 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 for analysis on a per-question basis unless multiple measures were examined conjointly. For these, the case-wise deletion method was applied.

Games and DIGITAL MEDIA in Australian Households

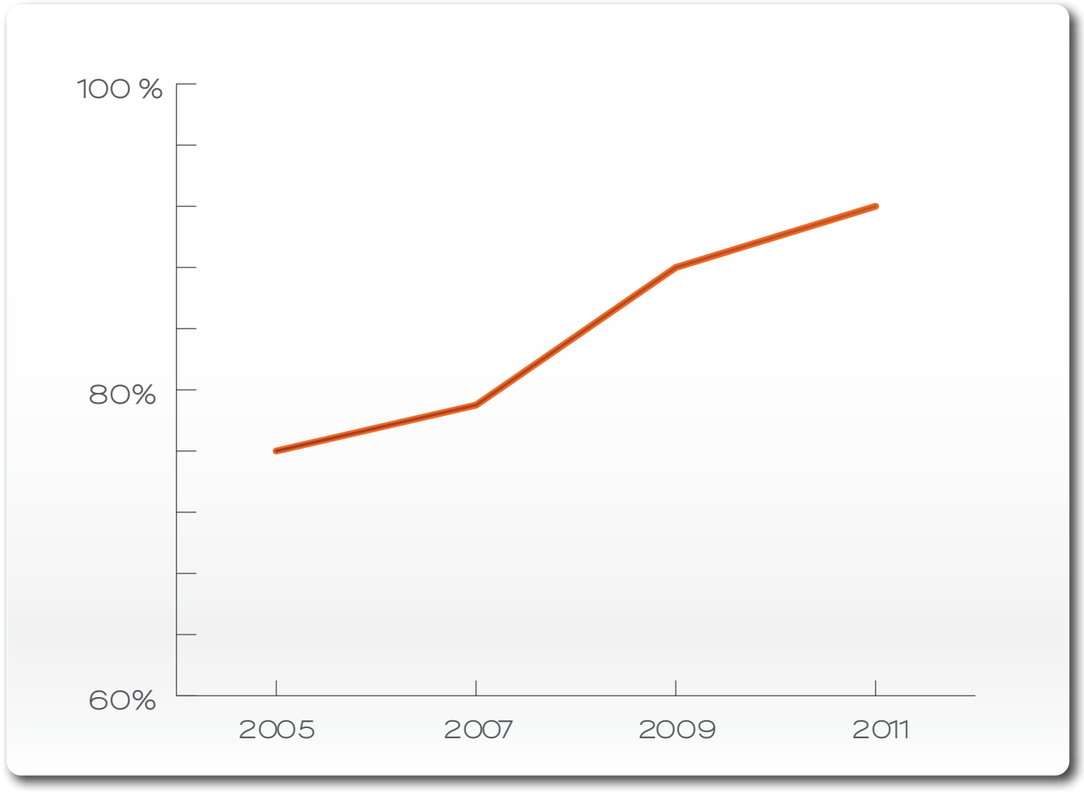
Australians enjoy digital games and the vast majority of Australians live in a household with at least one device used for playing games whether on a PC, console, handheld, phone or tablet.

Households with Games



95% of homes with children under the age of 18 have a device for playing computer games.

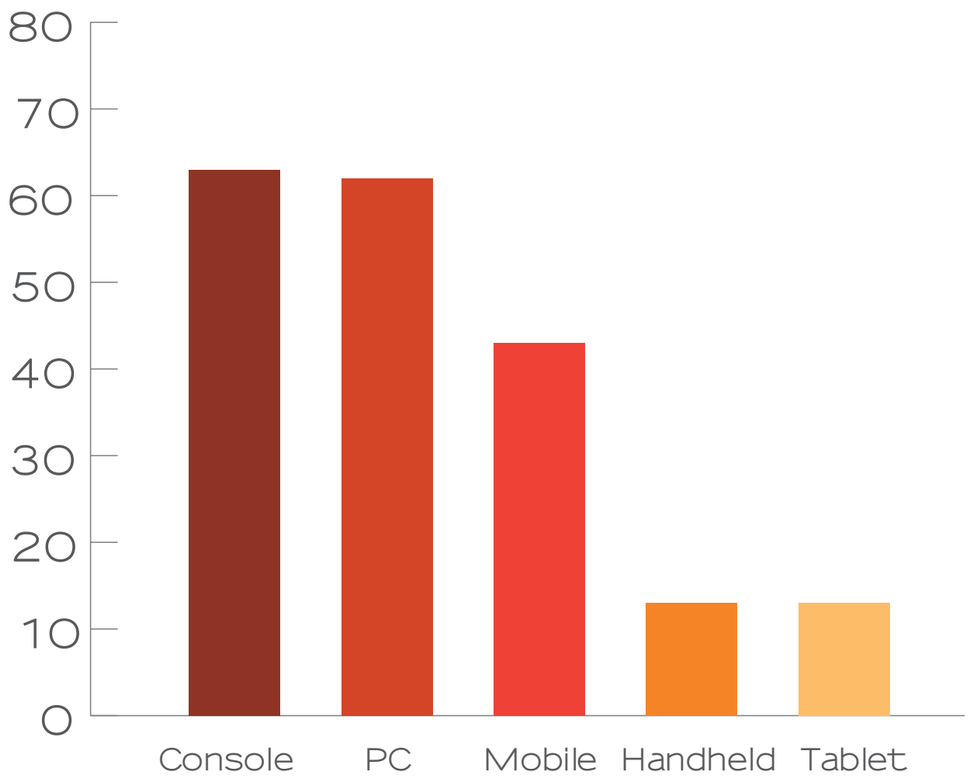
Households with Games Over Time



PCs are in 98% of game households with 62% of game households using a PC for games. Game consoles are in 63% of game households, dedicated handheld consoles in 13%. Mobile phones are used to play games in 43% of game households, tablet computers in 13%.

Households that include game devices as part of their digital media ecology are also rich in other media and demonstrate early and greater adoption of digital media. Games and the internet are an important part of this ecology.

Game Devices Used in Game Homes



Media Used in Game and Non-Game Homes

Device or Service	% In Game Homes	% In Non-game Homes
*Standard Media**		
Mobile Phone	100	100
PC/Laptop	98	99
All Print Media	88	85
Flat-panel TV	85	70
DVD Player	66	66
Sound/Music System	51	67
Newer Media		
Portable Music/iPod	44	3
Surround Sound	42	14
e-Print Media	39	18
DTV Set-top Box	32	33
DVD Recorder	31	32
Subscription TV	27	-
BluRay Play/Rec	21	7
PVR	14	8
DAB – Digital Audio	5	2
Older Media		
VCR	39	50
CRT TV	29	38

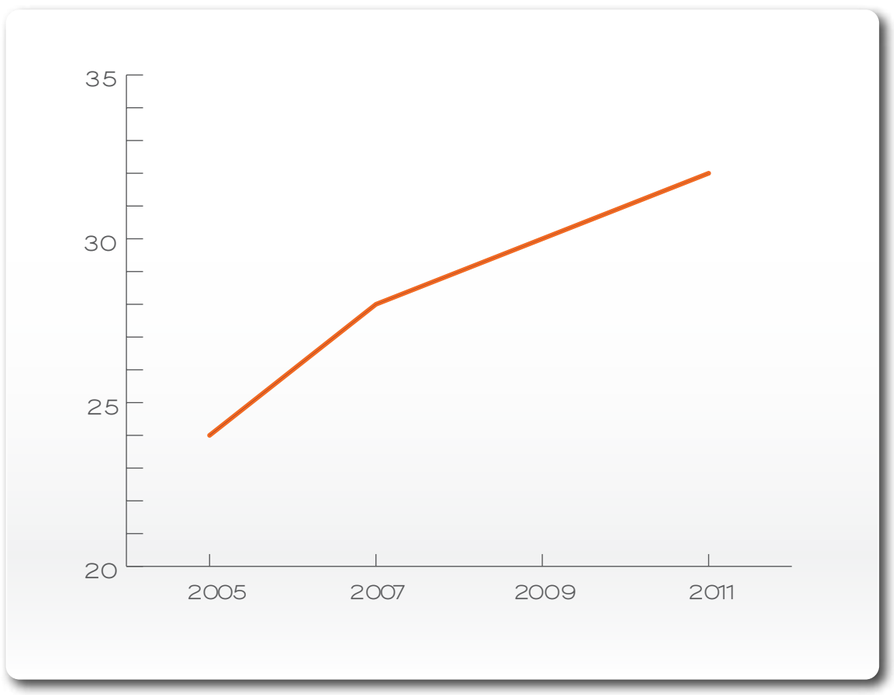
* Defined as existing in a majority of all homes.

Gamers in Australia Today

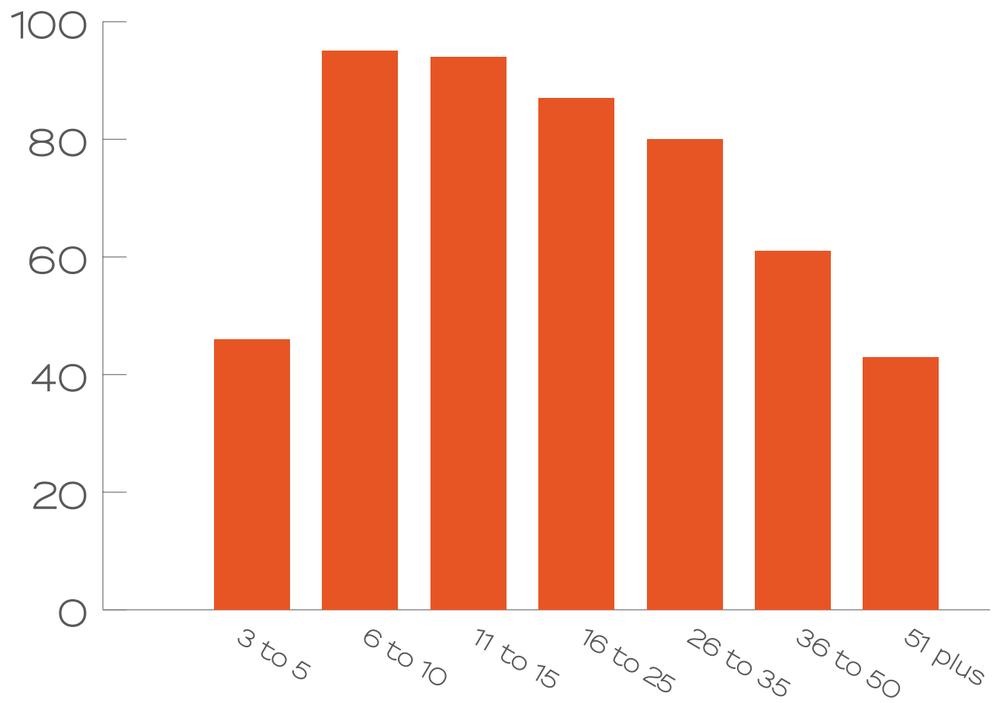
32 YEARS OLD

The average age of a gamer is 32. The average age of Australians is 36 years. Non-gamers are older. In the seven years from 2005 to 2011, the average age of gamers has increased steadily.

Average Gamer Age Over Time



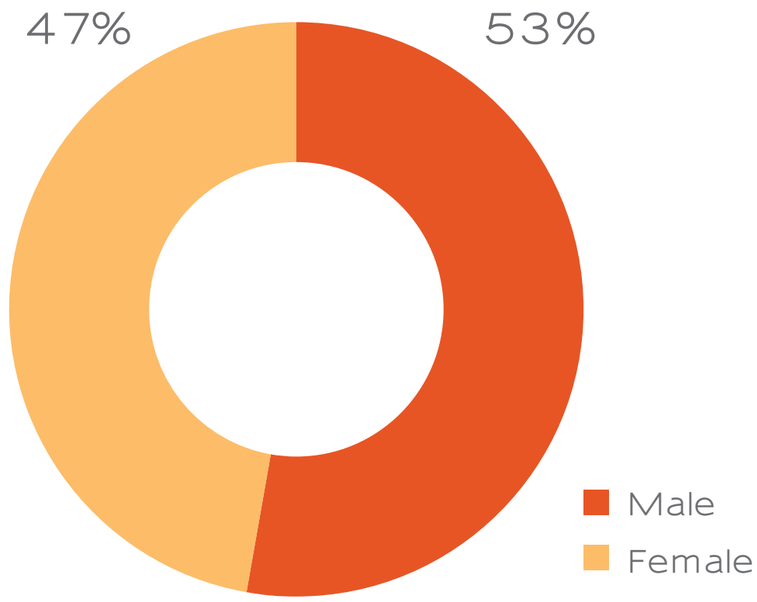
Gamers by Age Group



75% over 18

Most gamers are 18 years or older; 94% aged 6 to 15 are gamers and 43% aged 51 or older are gamers.

Gender of Gamers



In the seven years from 2005 to 2011, the proportion of gamers who are female has increased steadily from 38% to 47%. Female representation equal to males among gamers is imminent.

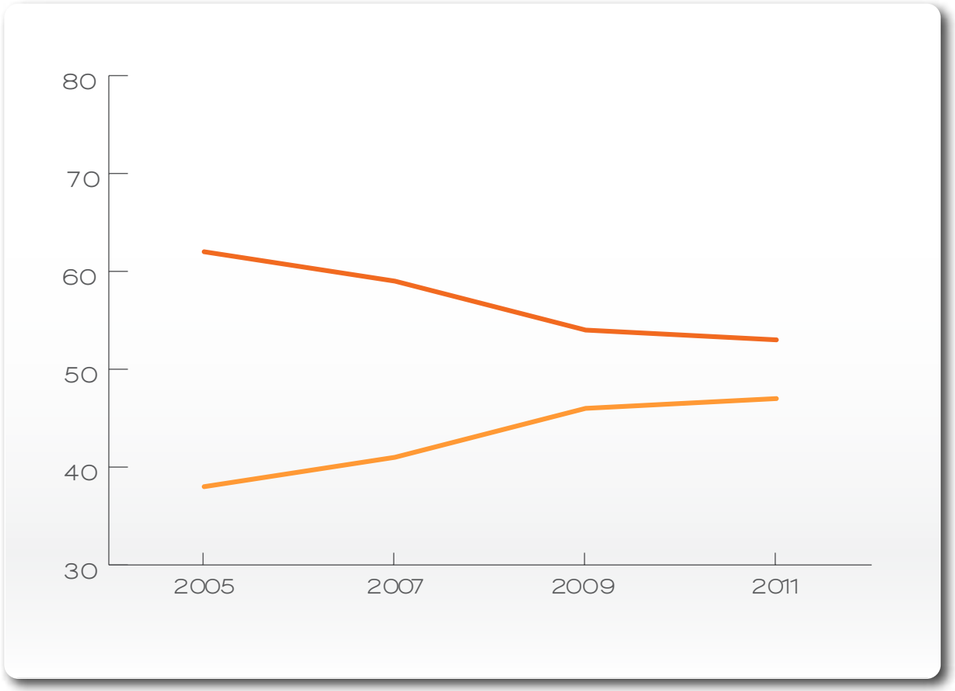
"It brings fun and exploration to our family as we are always learning from new things."

Male, 35, Regional TAS

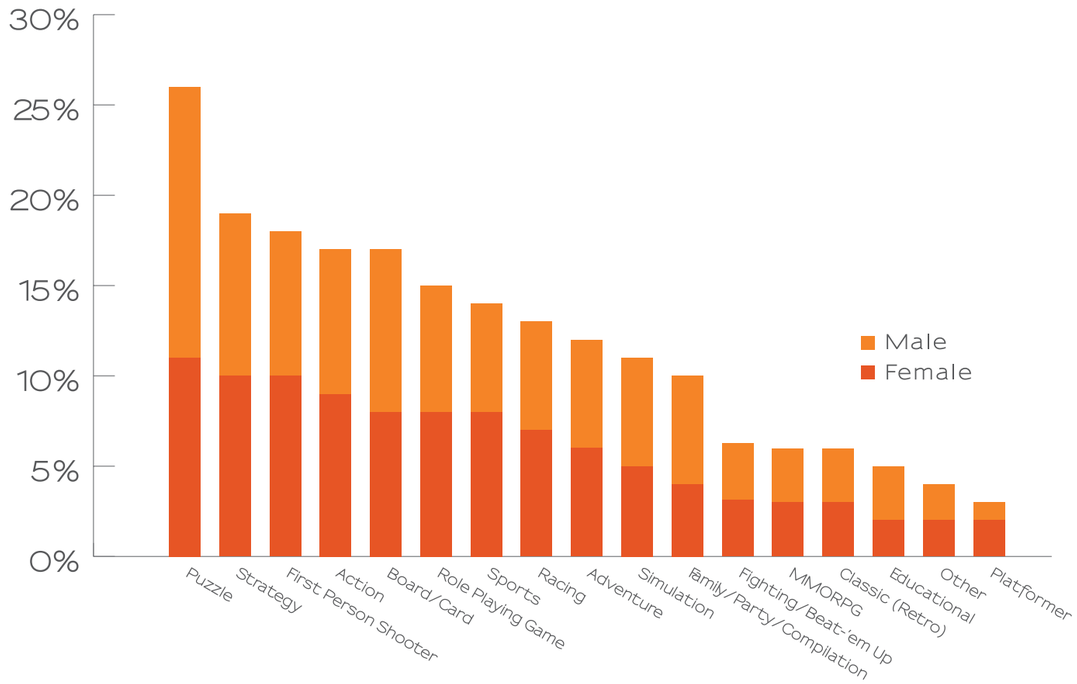
"The games I remember best are the simple, older games from when I was growing up in the '80s - learning time management and planning from a text-based 'warehousing' game on our C64; having to put a cartridge in to load a simple racing game, waiting 50 minutes for a game to load from a cassette before you could play it!; falling through mine shafts in Pit Fall!"

Female, 39, NT

Gender of Gamers Over Time



Favourite Types of Game by Gender

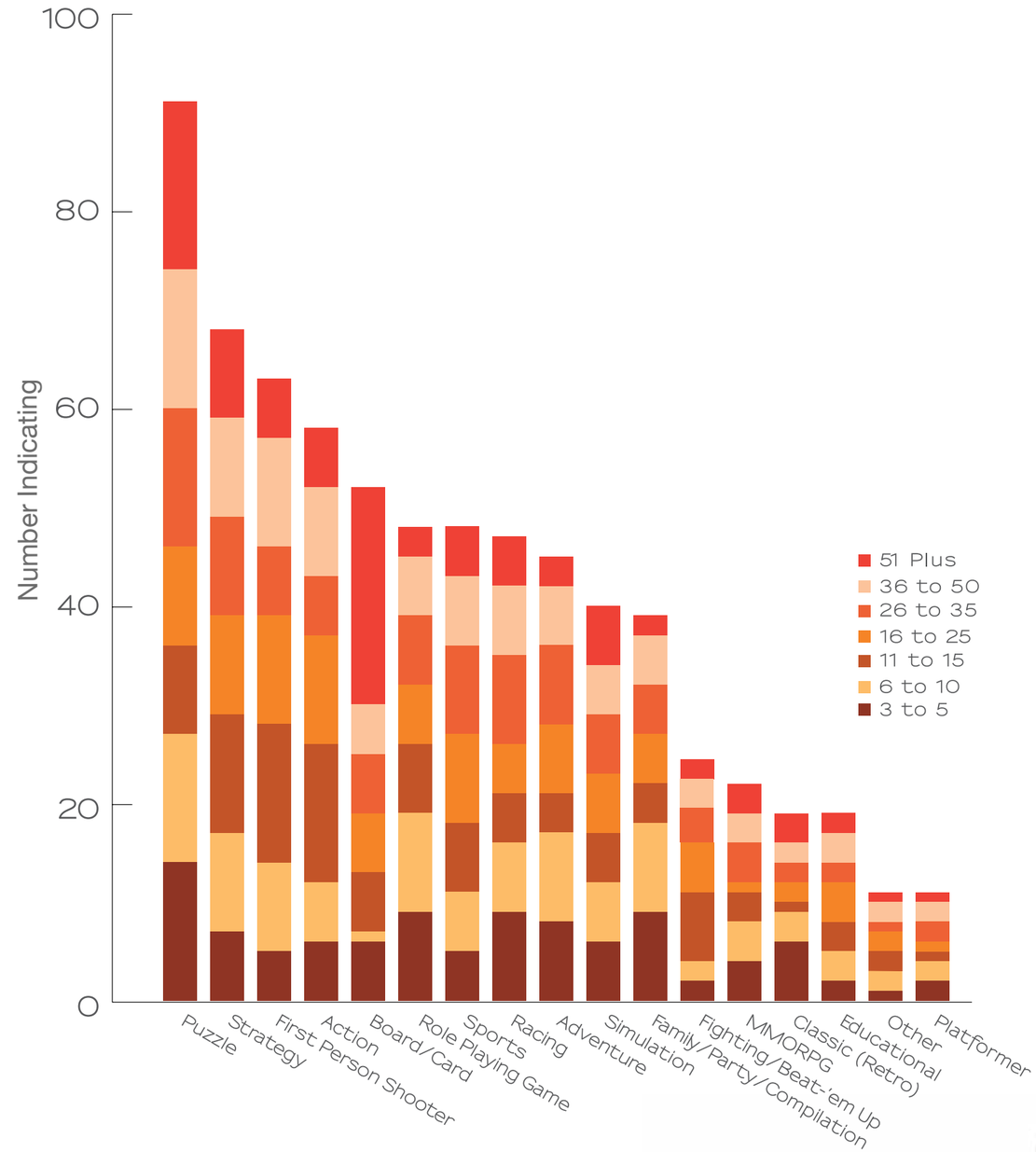


Nearly 1 in 5 gamers play social network games and 1 in 10 massively multiplayer games. Growing social and online play is driving interest in online content. One in five gamers say they would either be "motivated" or "very motivated" to sign up to a faster broadband service for game downloads and online play.

"Digital & interactive media provides an easy-to-use release for recreation as well as a convenient learning & general knowledge resource."

Female, 22, Regional VIC

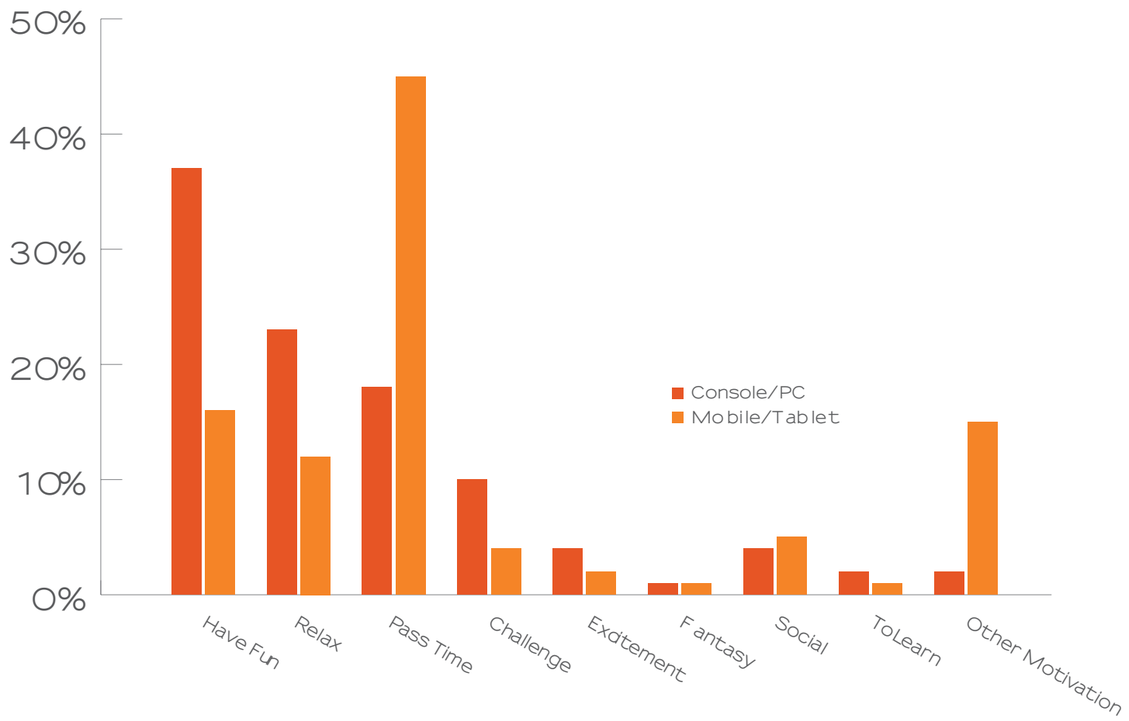
Favourite Types of Game by Age Group



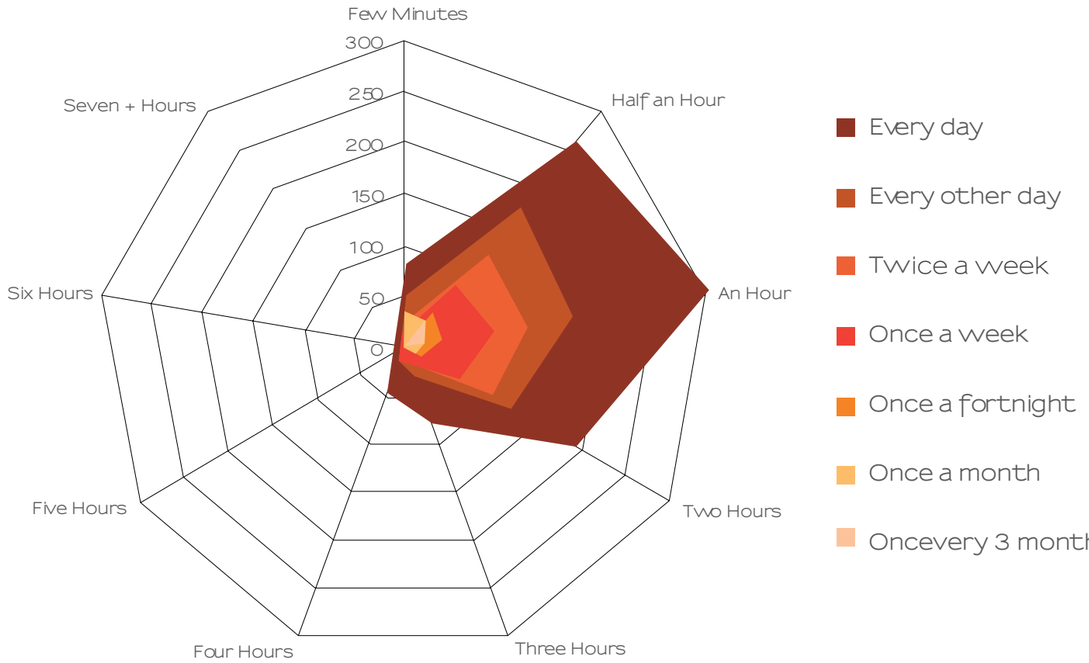
12 YEARS

The average adult gamer has been playing for 12 years; 26% have been playing for more than 20 years. Among gamers of all ages, reasons to game differ by experience and game device. Consoles and PCs deliver fun and relaxation whereas mobiles and tablet computers fill idle moments by helping pass time.

Reasons Gamers Play Video Games



Frequency and Duration of Game Play



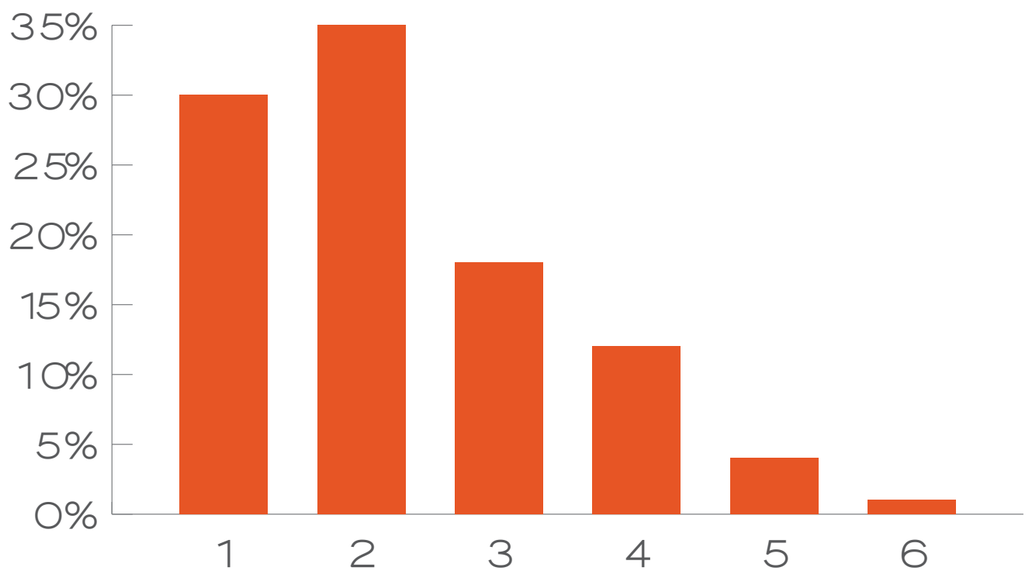
1 HOUR EVERY OTHER DAY

Most gamers play between half an hour and an hour at a time and most play every other day 59% play for up to an hour at one time and just 3% play for five or more hours in one sitting 57% of all gamers play either daily or every other day..

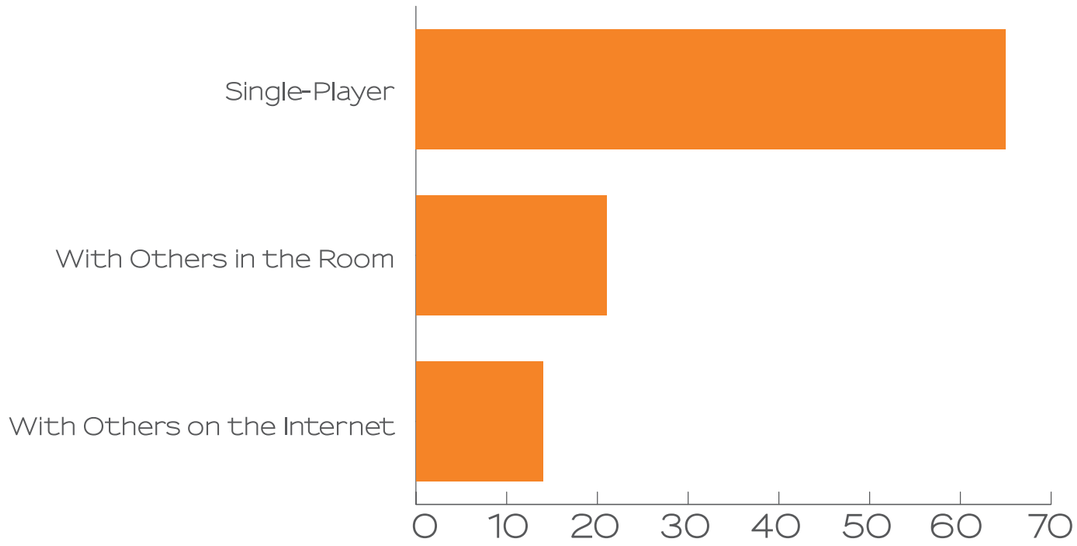
70% enjoy GAMES with others

Most game households are home to two or more gamers. And although others may be in the same room, the default game experience is single-player.

Number of Gamers in Households



Typical Playing Experience

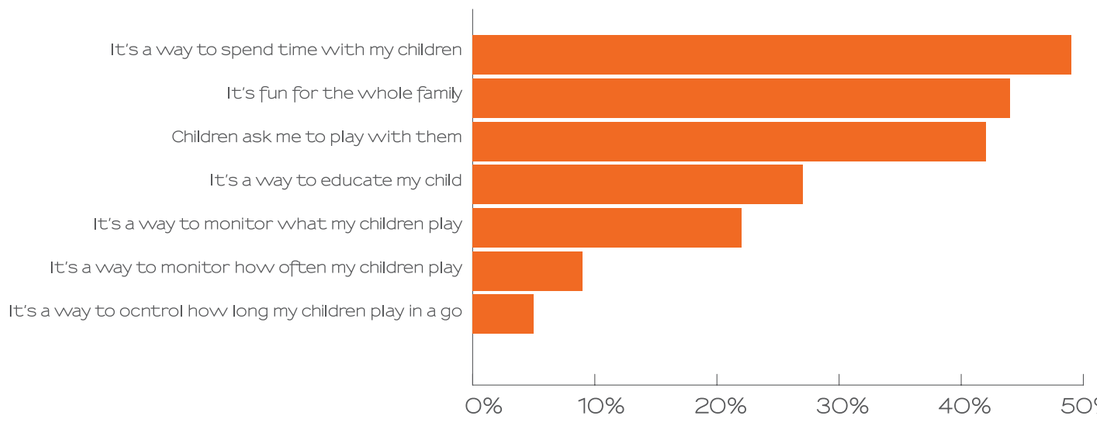


"I have enjoyed seeing the competition and challenge and excitement of winning with computer games, as well as the satisfaction of seeing one person teach another how to play a game, or use different strategies to win."

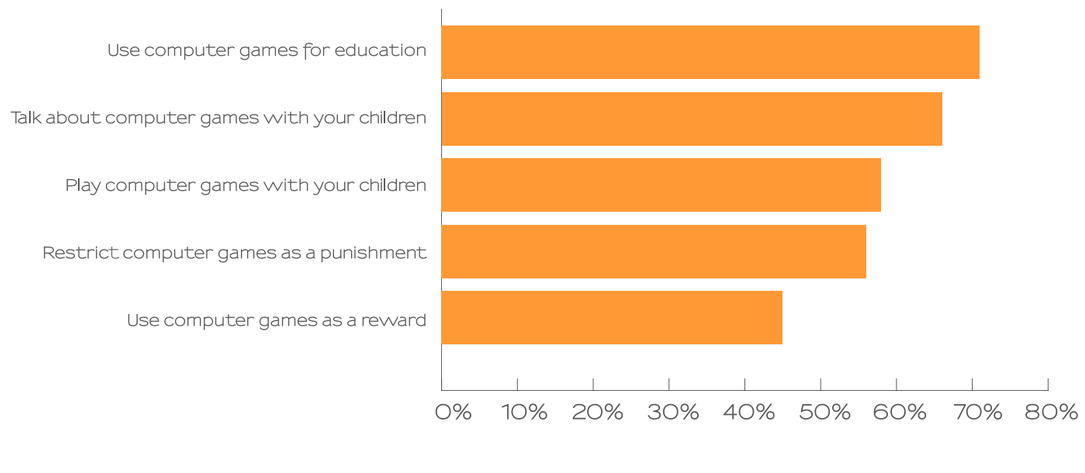
Female, 62, Brisbane

Families and Digital Games

Why Parents Play Games with Children



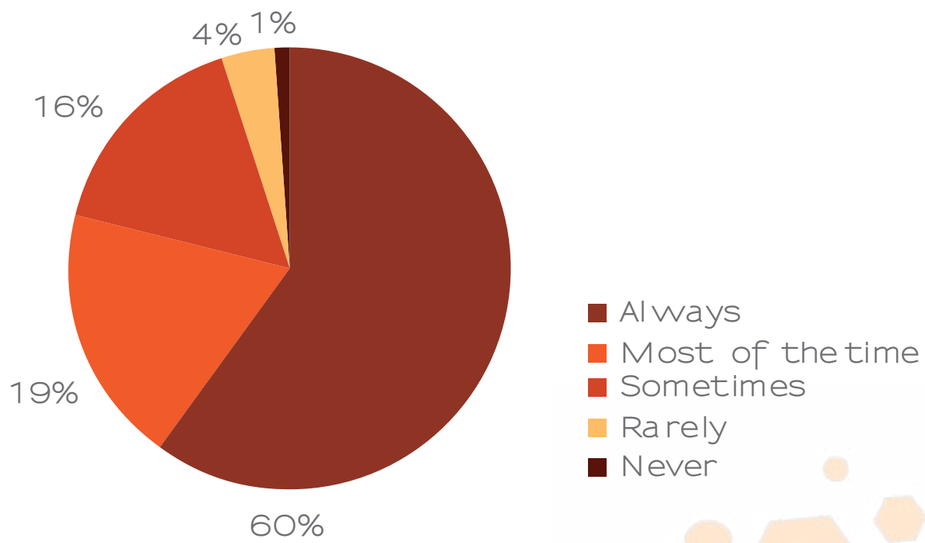
How Parents Use Games with Children



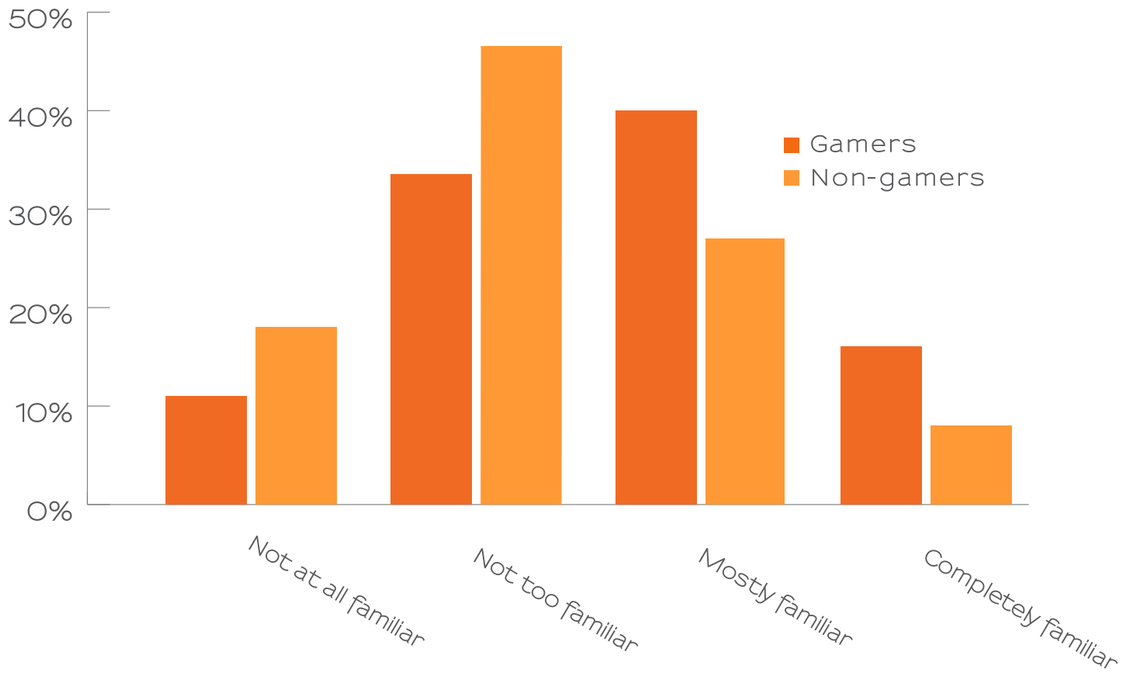
83% of parents play VIDEO GAMES

Almost all parents of children aged 18 and under living with them play computer games. The proportion has increased from 70% in 2008. Of parents who play, 88% play with their children, up from 80% in 2008.

Adult Presence when Games are Bought by Children



Familiarity with Parental Controls



"You must be very clear on what you want to get out of interactive media for your family. It is a wonderful tool when used wisely."

Female, Parent, 50, Regional WA

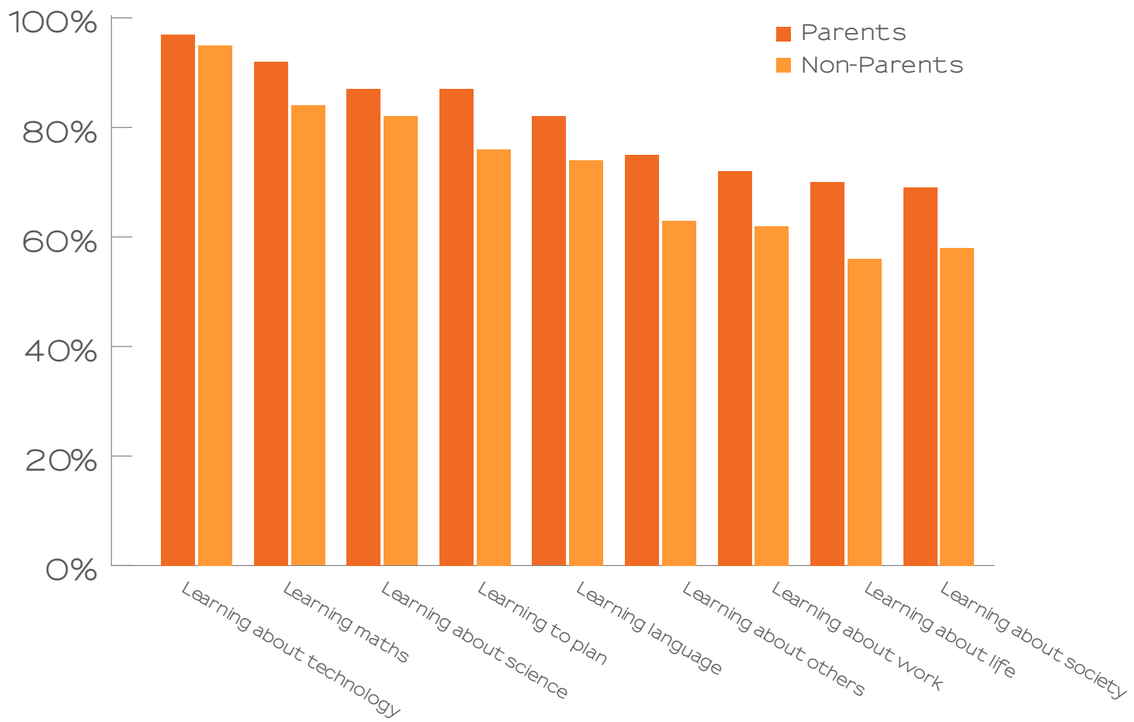
Our thoughts about digital media . . .

Click above image to play

"Digital and interactive media has become a part of our lives on our terms. Video games always bring my family together without the conversations that can get really awkward really fast. I remember everyone clustered around the TV squabbling over which way was the best way to beat a boss, or opponent.

Female, 19, Perth

What Adults Think Children Get from Games



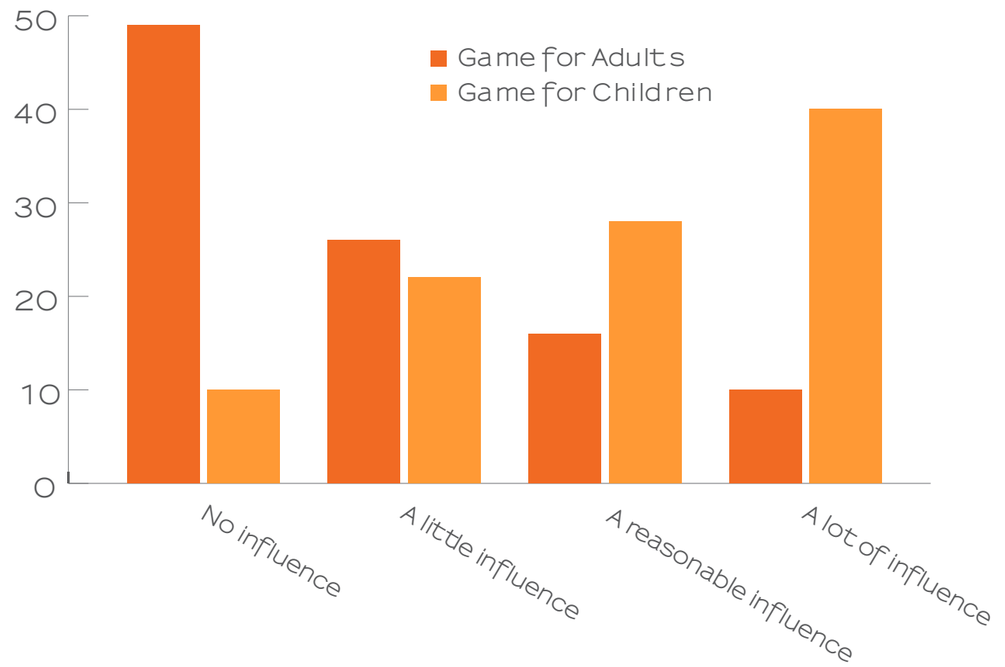
"Games offer a sense of achievement, teamwork and learning to overcome problems."

Male, 24, Melbourne

Parents are generally more positive than non-parents about the benefits of computer and video games for children. They are more attuned to the social and life-skills that games may impart.

But regardless of parental status, adults feel that the classification system has more influence on choosing games for children than for adults.

Influence of Classification on Game-buying Decisions



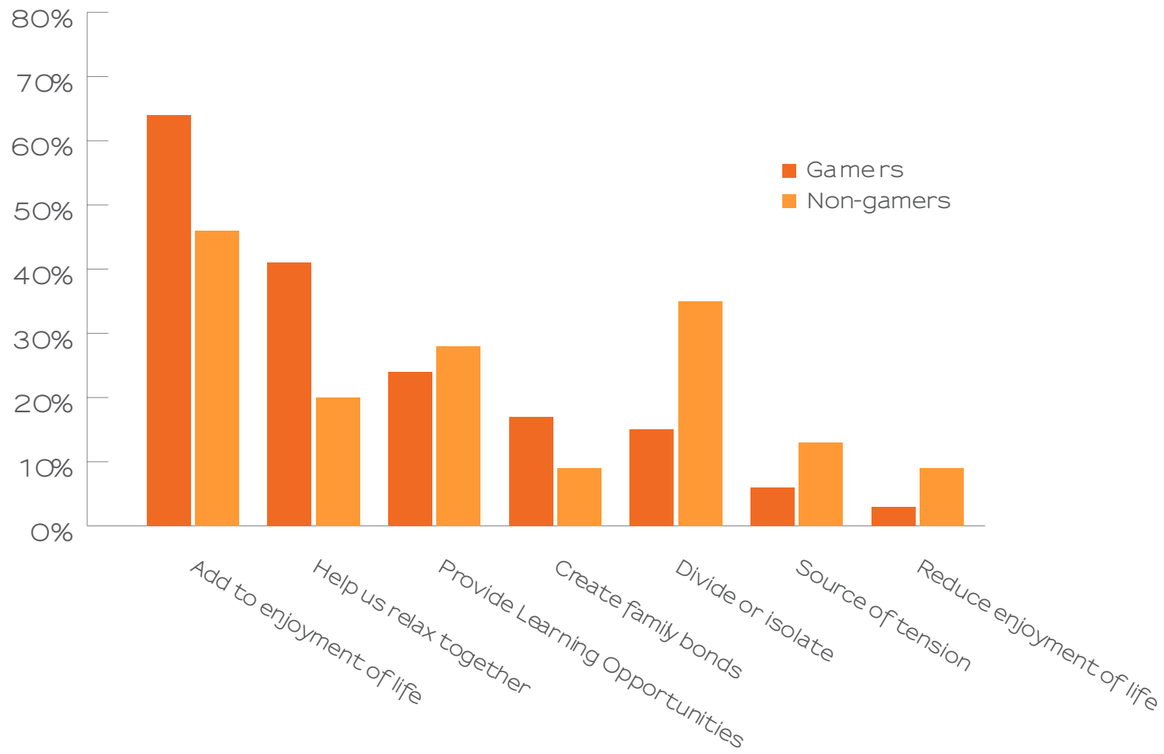
Games in the Family . . .

Click above image to play

"We live in a small country town with no cinemas so for family entertainment we have DVDs and games. Internet is used for education as well as communication and so are phones."

Female, Parent, 45, Regional NSW

Role of Games in the Family



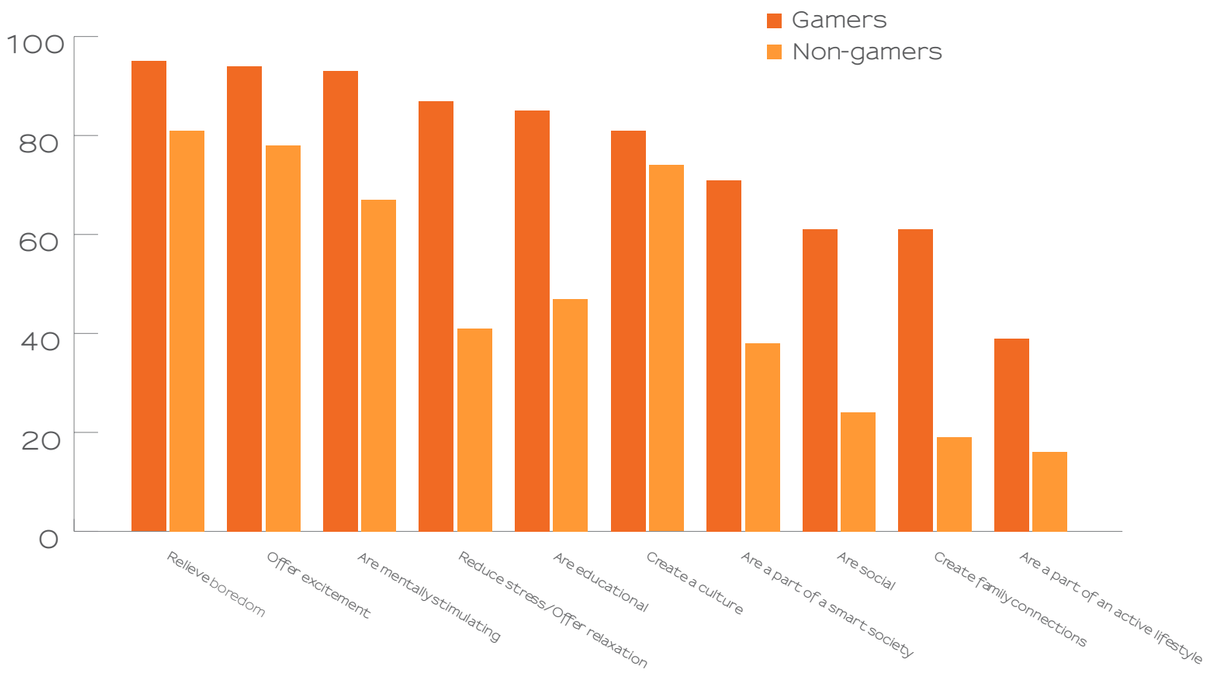
"...playing games brings back your childhood about having fun."

Female, 24, Sydney

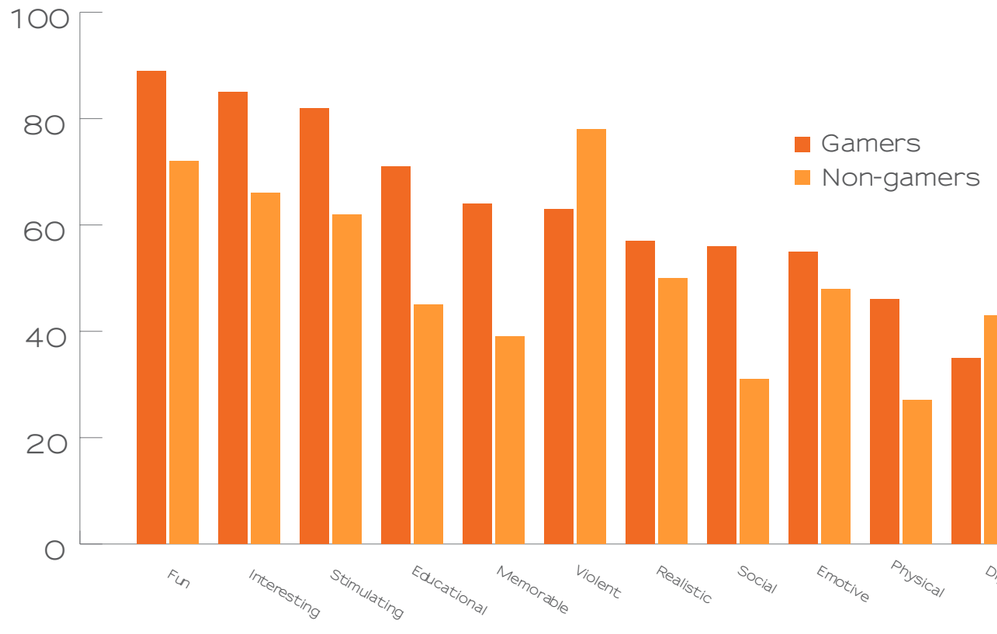
Attitudes About Games

The experience of gamers with games over time has given them an understanding of the medium quite different from the understanding of non-gamers. Adult gamers are more positive about the role of games and also more positive about the function of interactivity in games compared with other media.

Gamers and Non-gamers on the Role of Games



Effect of Interactivity on Game Play Outcomes

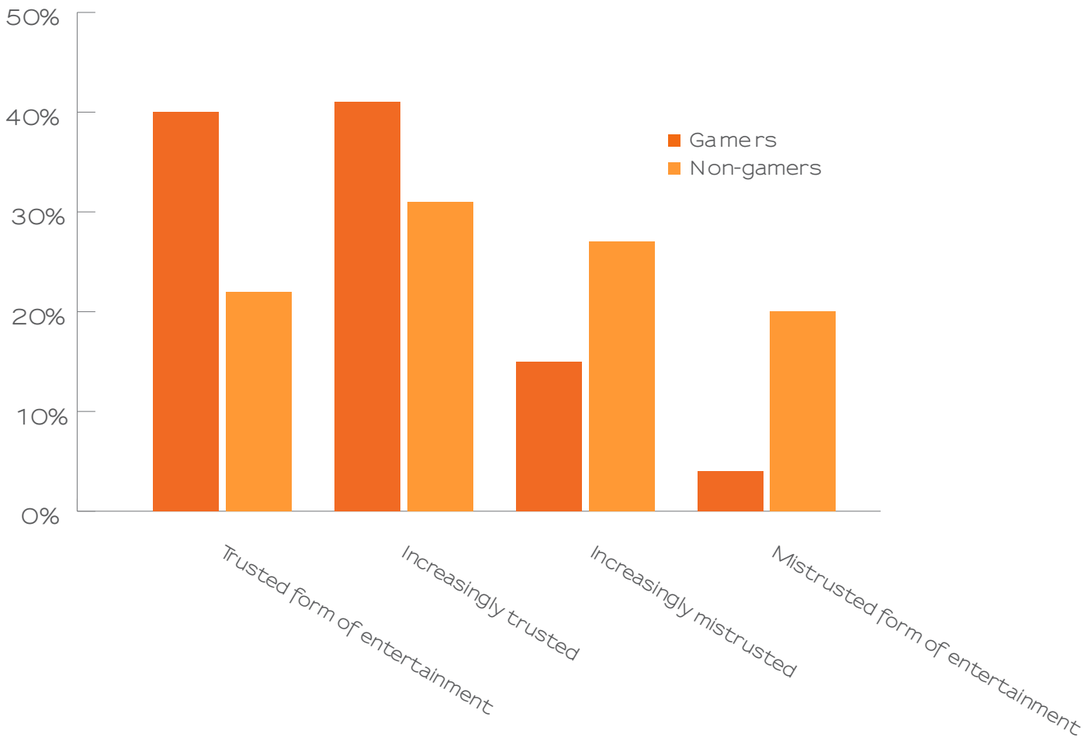


"We love interactive media - we have a lot of fun together beating each others' scores and its family fun."

Female 19, Adelaide

Trust in Games as Entertainment

Gamers, more than non-gamers, believe there is trust of games in the communities they inhabit. Non-gamer communities are less trusting of games.



"I have enjoyed playing multiplayer video games with my family. These have been good bonding experiences. I also play single player games together with my girlfriend and this has also been an experience we both enjoy."

Male, 24, Melbourne

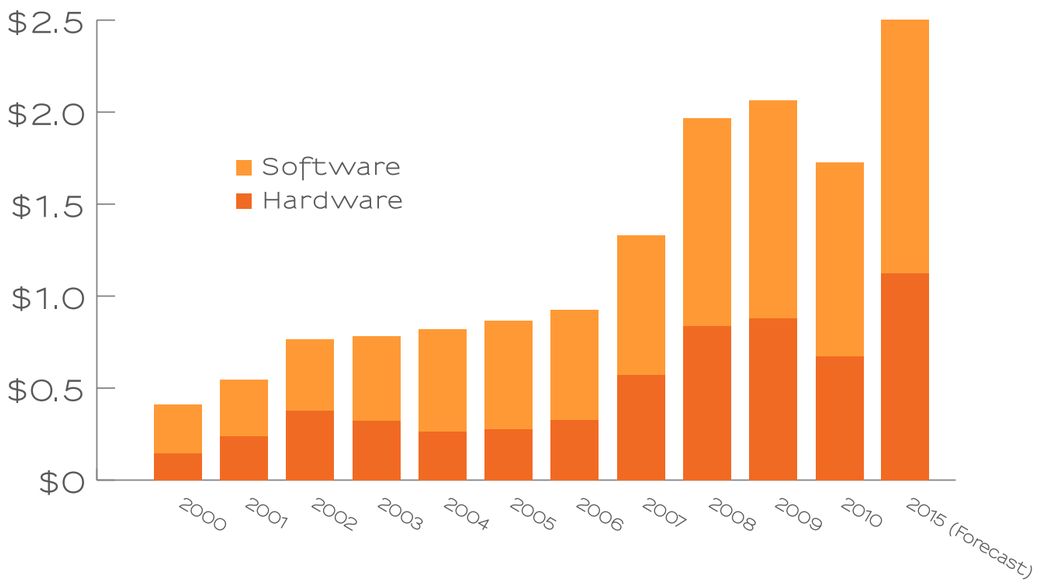
About DA12

Click above image to play

"Games have been some of the best moments of my life. From acquiring new consoles, playing Mario on the NES when I was a little kid... Actually, waiting for my parents to finish playing so my brother and I could."

Female, 25, Regional WA

Annual Value of the Australian Games Industry ($Bil)



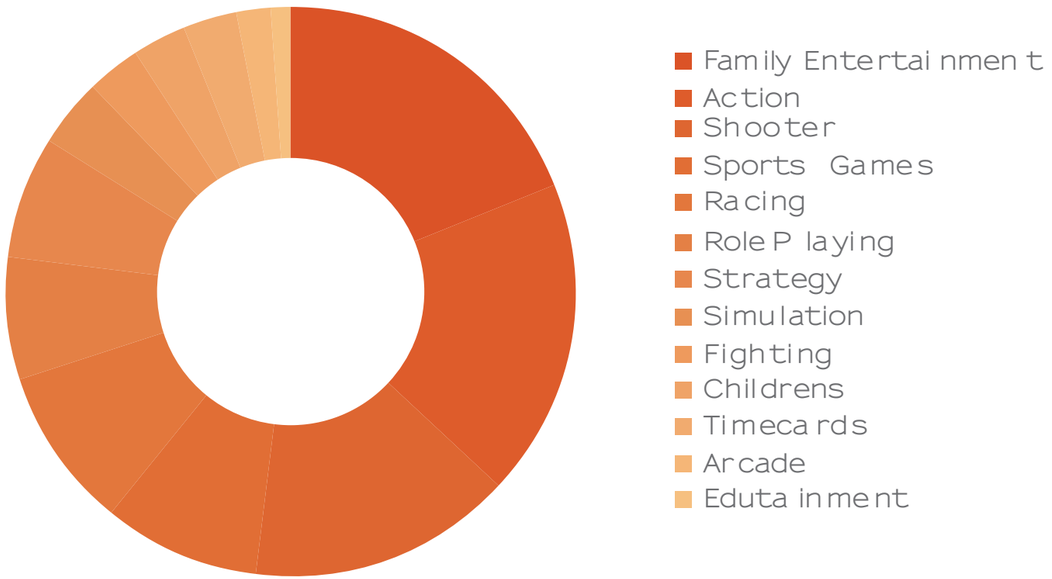
SOURCE: The NPD Group Australia, PricewaterhouseCoopers

The Australian games industry is forecast to reach $2.5 billion by 2015, a compound annual growth rate of 9.5%. Globally the interactive game market is expected to reach $90.1 billion by 2015, a compound annual growth rate of 8.2% according to the PwC report, *Australian Entertainment & Media Outlook, 2011-2015*.

Preferred Ways to Buy Games

Among participants in this study, the average total physical and online store spend on all media "in the past week" was $29. Games accounted for 28% of the total non-subscription media spend. Australian gamers prefer to purchase box games new from a local retailer (43%), while 22% prefer games from a download store and 14% new boxed games from an online store; 11% prefer to buy used from a local store and 5% each used from online stores and auctions.

Most Popular Game Genres by Unit Sales, 2010



SOURCE: The NPD Group Australia

Family games accounted for 19% of all unit game sales in 2010 followed by Action (18%), First-Person Shooters (15%) and Sports and Racing games (9% each) according to The NPD Group Australia point of sale data.

"I guess we are pretty up to date with the modern technology. We sometimes download movies and now with the Internet TV, the TV picks up the computer and you can watch movies directly from the computer or play games."

Female, Parent, 39, Melbourne

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