IA9

INTERACTIVE AUSTRALIA 2009

2008 REPORT

National Research
prepared by Bond University for the
Interactive Entertainment Association of Australia

ieaa
interactive entertainment association of australia

BOND UNIVERSITY
FACULTY OF HUMANITIES & SOCIAL SCIENCES

© Interactive Entertainment Association of Australia 2008
Suite 145 National Innovation Centre
Australian Technology Park,
Garden Street Evenleigh, NSW 1430

www.ieaa.com.au

This work is copyright. Apart from any fair dealing for the purpose of private study, research, criticism or review, as permitted under the Copyright Act 1968, no part may be reproduced or transmitted, in any form, or by any means of process, without the written permission of the publisher.

Authors: Jeffrey E. Brand, Ph.D.
Jill Borchard, MCom
Kym Holmes, BCom, LLB (Hons)

Published by: The Centre for New Media Research
Bond University Gold Coast, QLD 4213
www.bond.edu.au

EXECUTIVE SUMMARY

Interactive Australia provides data on who is playing games in Australia, what their game play behaviours are, the importance of games in the family experience, the role of online access in game purchasing and play, and how gamers compare with non-gamers on key demographics and attitudes toward games. Issues of importance to the business and regulation of games is also documented, particularly classification and piracy. Additional data from GfK provides games market information and data from the Australian Classification Board has been included to provide information about past classification decisions. Note that the terms "computer games", "video games", and games are used interchangeably in this report for expressive variety unless specific reference is made to PC games as computer games or console games as video games. This is the third study of its kind since 2005 including two previously published studies: GamePlay Australia 2005 and Interactive Australia 2007, each including over 1600 households.

METHODS

IA9 is based on a national random sample of 1614 households in which as many adults responded to more than 75 questions providing over 300 data points in a 20-minute online survey. The survey was fielded by Nielsen Research in July 2008. Multiple units of analysis are explored in the study: the household (n=1614), and all individuals within game households (n=4671) plus the participant adult from households without a game device (n=181). Of the 4852 individuals studied, 3162 (68%) were identified as gamers (simply, yes or no, did they play computer or video games). In total, this research collected information about 1614 households and 4852 individuals, 3162 (68%) of them gamers.

KEY FINDINGS

GAME HOUSEHOLDS

In 2008, 88% of Australian households have a device for computer games. Of these households, 39% have one device, 27% have two devices and 16% have three devices. 18% of game households have four or more devices for gaming.

PLAYERS

- The average age of computer and video game players in Australia is 30 years old (up 2 years on the average in 2007).
- Non-players are 40 years old on average. According to the ABS, the average age of all Australians is 36 years.
- 95% of all children 6-10 play computer games compared with 52% of those over the age of 50. Gamers over the age of 50 make up 19% of all gamers in Australia.
- By 2014, the average age of gamers will be the same as the average age of non-gamers.
- Half of all gamers play either daily or every other day. Another 25% play at least once a week. Including all players in Australian households, 63% play for up to an hour at one time; 5% play for four or more hours in one sitting, demonstrating moderate play habits.

FAMILY

- 70% of parents in game households play computer games. 67% of mothers and 69% of fathers agree that they play computer and video games as a way spend time with their children. A third play them with children as a way to monitor what their children play.

INDUSTRY

- The Australian computer games industry is growing at an annualised rate of more than 15% and conducted over AUD1.3 Billion in 2007 according to GfK point of sale data.
- 70% of Australians mainly purchase games new from a local retailer, 19% download games from online vendors.

KEY FINDINGS ON CLASSIFICATION

- According to the Classification Board, 75% of all computer and video games classified in Australia in 2006-2007 were either G or PG. 1% of games were either refused classification or withdrawn from the process.
- 63% of participants do not realise Australia has no R18+ classification for games. 91% of Australian adults (including those who play computer or video games gaming AND those who do not) think that Australia should have an R18+ for games.
- 78% of parents say an adult is present when games are purchased for their children. 92% of parents say they are aware of the games that are played in their homes.

CLASSIFICATION IN AUSTRALIA

Australia is the only developed nation without a classification for games suitable for adults. Great Britain has an 18+ certificate under the BBFC (British Board of Film Classification). The United States has the AO classification for adults only under the ESRB (Entertainment Software Ratings Board). Twenty-nine countries across Europe have an 18+ certificate under PEGI (Pan-European Game Information).

Australia has MA15+ under the Classification Board, formerly the OFLC (Office of Film and Literature Classification), which was folded into the Federal Attorney General's office in 2006. In Australia, games that do not fit within the restricted range of G to MA15+ are "Refused Classification," designated RC. In effect, they are banned from distribution and sale in Australia.

Nearly half of all games are classified G and another quarter PG. M and MA15+ games make up nearly another quarter of games. A lot of media attention has been given to this anomaly and to the alternatives adult Australians seek to obtain games that have been banned. Although it is a small proportion of games (less than 1%, of the hundreds of games classified every year), games receiving an RC decision are increasingly the object of debate as the audience for games grows older on average and the proportion of gamers who are adult makes up an increasing number of the gaming population.

AWARENESS OF CLASSIFICATION

- Australians can be forgiven for not being aware of, or for being confused by, the absence of an R18+ for computer and video games when for other media, the classification applies.
- 37% are aware of no R18+ and 63% are not aware.
- In 2005, the GamePlay Australia study found that one quarter of Australian adults were unaware that Australia had no R18+ for games. In 2008, the proportion has exceeded just one third.
- Nearly two-thirds of all Australian adults are unaware that the Australian classification system has no R18+ for games even though it does have an R18+ for other media. As a result, parents say things like, "If I know that I wouldn't think MA15+ was for my 15-year-old." Others are afraid they cannot get games they want to play. Still others are worried that games that should be R18+ are "slipping under the radar" and "skipping Aussie businesses" by coming from online suppliers who operate overseas.
- 91% of Australian adults in this study, whether from game or no-game households, whether gamers themselves or non-gamers, think that Australia should have an R18+ for games just as it does for other media.
- Australian parents are more likely than not to engage with their children when their children want them to purchase a new game. More than 51% have their children with them when a game is purchased for their child either "most of the time" or "always" and another 36% have their children with them "sometimes." Only 13% say their children are "rarely" or "never" with them at the time of purchase. For those parents, it seems discussion, education, negotiation and engagement is a standard part of their desire to serve their role as a parent.
- 92% of parents say they are either "completely aware" or "mostly aware" of the games that are played in their homes. Less than one percent claim not to know. Further, more than half of all parents in homes with new consoles featuring parental control systems say they are using these to regulate the games their children can access.

CONCLUSIONS ON CLASSIFICATION

There is a very large awareness deficit about the classification system in Australia despite years of attempts at educating Australians by the Classification Board. Indeed, 63% of adults do not realise Australia has no R18+ classification for games. This is a clear policy and communication failure. When made aware, 91% of Australian adults (including both gaming and non-gaming) think that Australia should have an R18+ for games. Fortunately, the absence of a complete classification regime does not affect the way most Australians go about buying games. 78% of parents say an adult is present when games are purchased for their children and 92% of parents saying they are aware of the games that are played in their homes. Even more heartening is that the increasing number of parents who also play computer games means they are more knowledgeable about the games on the market. Gamer adults use their knowledge of games to make informed decisions about games they buy for younger players, non-gamer adults rely more on the classification on game packaging