AUTHORS
Jeffrey E. Brand
Jan Jervis
Patrice M. Huggins
Tyler W. Wilson

Faculty of Society & Design
Bond University
Gold Coast, QLD 4229
https://bond.edu.au

EXECUTIVE PRODUCER
Raelene Knowles
IGEA
https://igea.net

GRAPHIC DESIGN
Mike C. Morphett, Design Director
M:29creative
M29creative.com.au

Graph designs & infographic design: Jan Jervis

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Digital Australia (DA20) is the culmination of over 14 years of research on how, why, and by whom video games are played in Australia.
Imagine not having video games. What would be lost?

On the surface, video games entertain us when we play. However, games have proven themselves to be a powerful medium through which people connect from all over the world; even people in the same home connect through video games.

THE POWER OF VIDEO GAMES

Today, games are used to educate in schools and train at work. Video games are used to help us live well through mental and physical stimulation in a range of contexts, including hospital care, aged care, and psychological care. Video games have produced one of the most vibrant and active communities of fans who gather together at major international popular culture festivals, and who play together online in competitive esports. Video games are designed and produced in a digital economy that promotes creativity and, in turn, enhances the economic gift of nations.

Video games are a surprisingly old medium. The first patent for a “cathode-ray tube amusement device” was filed in the United States Patent Office on 25 January 1947. The first experimental video game was displayed in the late 1950s and the first commercial video game, Computer Space, was launched in 1971. The first home console video game system to begin widespread consumer access to games was sold in 1975.

Since then, video games have sold billions of copies to billions of players who enjoy them on billions of electronic computing devices. There are thousands of titles and hundreds of platforms on which to play them. There are many genres of video games and multiple objectives and motivations for playing them.

THE POWER OF KNOWING GAMES AND PLAY

Digital New Zealand 2020 (DNZ20) is the culmination of over 10 years of research on how, why, and by whom video games are played in New Zealand.

In this edition of the research, we explore the Power of Games. In doing so, we observe the power of connection, community, creativity, living well, education, and economics through this remarkable medium.
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THE POWER OF CONNECTION
3 TOP REASONS
PARENTS PLAY WITH CHILDREN
+ A WAY TO SPEND TIME TOGETHER
+ CHILDREN ASK
+ TO MONITOR WHAT CHILDREN PLAY
42% PLAY WITH CHILDREN IN THE SAME ROOM
21% PLAY WITH PARTNERS ONLINE
91% FAMILIAR WITH PARENTAL CONTROLS

THE POWER OF COMMUNITY
70% READ OR WATCH WALKTHROUGHS SHARED BY OTHERS
42% WATCH ESPORTS
32% ATTEND GAME EVENTS
29% ENJOY THE CULTURE OF ESPORTS

THE POWER OF EDUCATION
59% GAMES PROMOTE STUDENT CREATIVITY
1/3 USE GAMES FOR WORK TRAINING
60% SAY THEIR CHILDREN USE GAMES FOR SCHOOL

THE POWER OF ECONOMICS
$72% SAY MAKING VIDEO GAMES BENEFITS NEW ZEALAND ECONOMY
15% CAGR DIGITAL GAME SALES IN NEW ZEALAND 2013-2018

THE POWER OF PLAY
5 TOP REASONS TO PLAY
+ HAVE FUN
+ PASS TIME
+ DE-STRESS
+ KEEP MIND ACTIVE
+ BE CHALLENGED

THE POWER OF GAMES
2/3 PLAY VIDEO GAMES
9/10 HOMES HAVE A DEVICE ON WHICH GAMES HAVE BEEN PLAYED
78% OF PLAYERS ARE AGED 18 YEARS AND OVER
34 YEARS AVERAGE AGE OF VIDEO GAME PLAYERS
46% OF ALL PLAYERS ARE FEMALE

THE POWER OF LIVING WELL
VIDEO GAMES MAY...
65% IMPROVE LIFE SATISFACTION
51% MANAGE PAIN
87% PROMOTE GENERAL KNOWLEDGE

THE POWER OF CREATIVITY
27% POST GAMEPLAY VIDEOS
22% PARTICIPATE IN COSPLAY
42% OF THOSE AGED 65 YEARS AND OVER PLAY VIDEO GAMES
Top 3 reasons parents play with children:

1. To spend time together,
2. Children ask, and
3. To monitor what children play.

42% of parents play with their children in the same room.

33% of parents play online games with their children.

91% are familiar with family controls on game systems.

84% of parents say they have talked with a child about playing games online.

1/3 parents say they can stop using classification between ages 15 and 17.

21% adult players play with partners online.

8% of adult players play video games with their parents in the same room.
85% say video games can help thinking skills.
68% say video games can help emotional wellbeing.
58% say video games can help social wellbeing.
87% say video games may increase mental stimulation.
72% say video games may help fight dementia.
60% say video games may help maintain social connections.
65% say video games may improve life satisfaction.
51% say video games may help manage pain.
87% say video games may promote general knowledge.
62% of players say video games can be effective in stress reduction.

60% of parents say their children’s schools use video games for education.
65% of parents believe video games can be effective for learning STEM.
48% of parents believe video games can give students greater confidence at school.
59% say games promote student creativity.
30% of adults have used games at work for health and safety training.
29% have used video games at work for new skills training.

72% of adults believe making video games in New Zealand benefits the economy.
Video games sales in New Zealand grew at a rate of 15% (CAGR) between 2013 and 2018.
The New Zealand video games retail industry sales in 2013 were $295 Million.
In 2018, total retail industry sales for video games were $548 Million.
In 2018, digital sales reached $405 Million.
Physical sales in New Zealand retail games were $143 Million.
46% of adults have made in-game purchases for themselves.
34% have made in-game purchases for others.

KEY FINDINGS

POWER OF CREATIVITY
More than a 1/4 of players have shared videos of their own game play online.
20% have competed in esports.
Of these,
42% compete because they enjoy the challenge.
36% compete because of social connections.
22% participate in cosplay.

POWER OF LIVING WELL
88% say video games can help thinking skills.
68% say video games can help emotional wellbeing.
58% say video games can help social wellbeing.
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72% say video games may help fight dementia.
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METHODS
Participants were drawn randomly from the Nielsen Your Voice Panel in March 2019; research was designed and conducted at Bond University. The margin of error ranges from ± 2.1% to ± 3.5%.
This report provides evidence for the **power of games**: video games are not only mainstream, they are now normalised in everyday New Zealand culture.

In **2010**, we observed that just under **nine out of ten New Zealand households** had at least **one device** on which video games were played.

That figure has remained stable since then.
We refer to the nine out of ten New Zealand homes with a device for playing video games as game households throughout this report. Roughly a quarter each have one, two, three, and four or more game devices. In other words, most (75%) have more than one device.

Households with children are slightly more likely than households without children to have a game device and child homes are more likely to have a greater number of devices.

We refer to these as game households throughout this report.
The devices used for playing in game households include personal computers including laptops (PCs), consoles such as Sony PlayStation 4 and Microsoft Xbox One X, mobile phones such as iOS and Android phones, tablet computers running iOS and Android systems, and dedicated handhelds including devices such as Nintendo Switch. The prevalence and mix of broad types of game devices in New Zealand game households has changed little in recent years.

In order of common use are: PCs, mobiles, consoles, tablets, and handhelds.

The ongoing and consistent presence of these platforms invokes a sense of the power of games.
Electronic Arts: The Power of Games

**Importance of AR and VR**

- **Use Virtual Reality (VR):** 19%
- **Use Augmented Reality (AR):** 71%
- **Total Use:** 83%

**Augmented Reality and Virtual Reality**

Given the relative novelty and apparently increasing ways in which augmented reality (AR) and virtual reality (VR) may be used, we measured both the use of the technologies and their perceived importance to the future of games.

- **One in five game households have players who have used a VR headset.**
- **Three in four game households have players who have used Augmented Reality (AR).**

**NB: ALL HOUSEHOLDS**

One in five game households have players who have used a VR headset.

However, because AR (as opposed to VR) may be used as a service on a mobile phone without additional headset hardware, it is not surprising that three in four game households have players who have used AR.

Asked whether AR and VR are important for future game play experiences, eight out of ten confirmed the technology will play an important role.
Video: What Type of Games do People Play?

This video is a snapshot of the type of games people play and why they play them.
Based on our analysis of all household members, video games are played by two thirds of New Zealanders and, of those who play, the average age of players remains 34 years, the same as it was in the DNZ18 report.

Over the years, we have observed a slow and steady, stepped increase in the average age of New Zealand video game players. 

"I use games as a way to pass the time on my phone. I’m on maternity leave and if I’m stuck under my baby feeding or sleeping I’ll play Candy Crush or something similar to pass the time."

Female, 32, Wellington Region, New Zealand.

"It helps me destress and is a form of escape from the mundane."

Male, 33, Auckland Region, New Zealand.
All participants identified either as male or as female and they identified other members of their households using this binary, despite the opportunity for participants to identify as other. Nearly half of all video game players in New Zealand are female (46%). When we started this series of studies in 2010, we observed the proportion was slightly smaller at 44%.
As a proportion of all players, children under the age of 18 constitute 22% of those who play video games, working-age adults 69%, and retirement-age adults 9%; the proportion of players who are older has increased modestly but steadily since each of the DNZ16 and DNZ18 reports (from 7% and 8%, respectively) and will continue to do so.

The proportion of those who play video games within simple age groups has remained relatively stable for adult age groups since the 2018 report, with 68% of working-age adults playing and 42% of retirement-age adults playing. In this report, we saw a decrease in the proportion of children players, with 69% of all children under the age of 18 playing.
Drilling down on the proportion who play using narrower age bands, almost all children between ages 5 and 14 play and almost all between ages 15 and 24 years play. Unsurprisingly, the youngest and oldest New Zealanders play least.
Video games are part of the larger media and leisure ecology in New Zealand homes and we are compelled to understand their place in our society.

While free-to-air television remains popular in New Zealand households, whether a household is home to adults or adults and children, digital media, like games, are a normal part of the media mix.

We used an index asking adult participants to rank their household’s media preferences from ten (highest preference) to one (lowest preference), and calculated the average.

Free-to-air TV clearly dominates in households without children, them while streaming movies and online videos pips TV at the post in households with children.

Games rank sixth in child households, and eleventh in home without children.
Player: Male, 47, Professional in Technology.
Family Background: Lives in Household of 4.
   Partner (42, game player).
   Sons 14 and 11 (both game players).
Location: Auckland Region.
Cultural Background: Chinese, New Zealander.
Years Playing Games: 10 years.
Types of Play: In-depth and Casual.
Typical Duration: Plays twice a week. Casual play 4 times a week x 10 minutes.
   In-depth play for 30 minutes.
Access to Games: Tablet, Smartphone, Xbox One.
Motivations for Play: To have fun, to relax and relieve boredom. To be challenged
   and to feel achievement and excitement. To do things not possible in real life, to take a break from daily life and to
   keep the mind active.
Other Interests: Dining out. Making things for hobby/craft/art, and attending
   cultural events/concerts/festivals. Playing with children and pets. Searching the internet and watching YouTube, TV and
   movies. Reading on social media and listening to music.

"GAMES SETTLE AND CALM THE STRESS OF WORK FOR THE DAY. SOMETHING FOR A CHANGE, CHANGE
OF PACE, SOMETHING I CAN SHARE WITH MY FAMILY."

Watson, 47, Auckland Region, New Zealand.
As the diversity of devices on which to play video games increases and the diversity of video game software explodes, there are many new and different ways to play. The arrival of smartphones over a decade ago opened up the opportunity for more casual play experiences that are both shorter and more frequent than longer established playing experiences on personal computers and video game consoles. However, some have argued that differences between casual play and more in-depth play are blurring.

We observed clear differences between casual games played frequently and for short periods of time, usually on mobile devices, and in-depth games played less frequently but for longer play sessions on computers and consoles. We classified casual gameplay as play in short bursts of up to 20 minutes each time, many times a day.

We classified in-depth gameplay as longer play periods in which games are typically played from daily to weekly to less frequently.

Key players in our sample usually play casual games one to three times a day for five to 15 minutes per session. The total estimated daily investment in casual games is therefore between around 20 to 25 minutes and only varies greatly from this pattern among the youngest and oldest players. There is little gender difference until middle adulthood when women overtake men in overall casual gameplay in their mid 40s.
The most commonly reported frequency for playing in-depth games in our sample is daily. The most common duration ranges from half an hour to two hours. We have observed this pattern now in the past four studies. The total estimated in-depth play ranges greatly by both age and gender. Younger players as a whole play more frequently than older players and they play for longer durations, peaking in late adolescence and early adulthood.

Combining total casual gameplay and total in-depth gameplay, males play more across the ages, until retirement age, when females spend more time playing games.
We observed in the previous study that among the oldest players, men played more than women; however, in this sample, women played markedly more than men. Findings for this age group are prone to higher variations due to smaller sample sizes.

Altogether, New Zealanders who play video games spend an average of 88 minutes a day including both casual and in-depth play. Women and girls play for 74 minutes a day on average while men and boys play for 100 minutes a day on average.

These play times have are similar to those found in the 2018 report, up by only a few minutes overall.
Top reasons adult players give for playing video games include to have fun, pass time, and de-stress. There are also more “serious” reasons people play games.

Adult players in our study report they want to keep their mind active by playing, to be challenged, and to learn.

To better understand the range of potential reasons New Zealanders play, we expanded our list of 10 reasons in the 2018 report to 20 for this report. By doing so, we discovered the relative importance of playing games for well-being reasons such as to take a break from daily life, to feel accomplishment, and for managing mental health.

To compare responses this year with those of earlier years, we calculated responses for each reason to play as a proportion of the total out of 100. We then weighted results for the same reasons to play in two previous report years, leaving out the new reasons to play added to the 2019 questionnaire.
Video: Why Do People Play Games?

People play games for so many different reasons and this video explains some of the reasons why they play and the benefit and enjoyment these players receive from games.
Although there are no systematic differences for why adult women and men in our sample play video games, we observed one pronounced difference for the top five reasons adults say they play among three age groups of adults (18-34, 35-64, and 65 years and older):

Older players play predominantly to keep the mind active.

Among working age adults (18-34 and 35-64), playing games to have fun is the number one reason to play, followed in order by passing time and relaxing/de-stressing, and lastly by keeping the mind active and being challenged.

For older adults, playing to keep the mind active ranks first and playing to pass time ranks last with having fun, being challenged and relaxing/de-stressing in the middle.

It appears from these results that working life is stimulating and challenging enough for working age adults who need to have fun and pass time during their day in an enjoyable way.

Arguably, video games serve rather therapeutic needs for all players.

I enjoy gaming as a stress relief and to get away from reality.
Female, 18, Canterbury, New Zealand.
New Zealanders who play video games also enjoy a wide range of other media for leisure. We demonstrated back in the first Digital New Zealand study (Interactive New Zealand 2010) that players and non-players mapped nearly identically in media and non-media leisure preferences.

This year, we asked players to identify all the things they do in addition to playing video games and found that 73% say they watch television, 68% watch movies and 63% enjoy listening to music and browsing the internet.

Watching YouTube videos (54%) rounds out the top five.

Listening to podcasts (17%) and audio books (8%) finish the list of non-game media activities.
New Zealanders who play video games also enjoy many of the non-media leisure activities commonly enjoyed by all New Zealanders as we have demonstrated in past reports.

This year, we asked players to identify all the things they do in addition to playing video games and using other media.

First among these leisure choices is dining out, nominated by 56% of the sample, followed by shopping (51%), playing with pets and children (47%), exercising (42%) and going to a pub (41%).

Rounding out the list of 17 activities were attending a sporting event (21%) and playing a musical instrument (12%).

Unsurprisingly games are just another entertainment medium people enjoy in their busy lives and sit alongside lots of other activities as well.
In June 2018, Stats NZ issued an update to its report, Internet Service Provider Survey, showing there are nearly 5 million mobile connections and 1.9 million broadband connections in New Zealand.

Between June 2017 and June 2018, the volume of downloaded data across mobile connections and broadband connections increased by 56% and 40% respectively.

This is arguably a result of increased game downloads and video streaming.

As games move from fixed media to online downloads and cloud services, these volumes will increase and place more pressure on infrastructure and consumer demand for better broadband data plans.

This year, we observed players are more often seeking to upgrade data plans at home and on their mobiles due to data limits and mobile data speeds.

Moreover, compared with DNZ18 report, more players say they are applying the brakes on game downloads both at home and on mobile devices to avoid going over poor data limits.

Given growth in digital sales discussed later in this report, there is a clear appetite for more bandwidth.
**DON: THE EMPOWERED PLAYER**

- **Player:** Male, 30, Unemployed.
- **Family Background:** Lives in Household of 2.
  - Mother, 63.
- **Location:** Auckland Region.
- **Cultural Background:** New Zealander.
- **Years Playing Games:** 25 years.
- **Types of Play:** In-depth and casual play.
- **Typical Duration:** Plays everyday. Casual play 2 times a day x 10 minutes. In-depth play x 1 hour.
- **Access to Games:** Computer, Smartphone.
- **Motivations for Play:** To have fun and relieve stress. To be challenged, to feel excitement and to take a break from daily life. To fulfill a fantasy, to try something new and to explore virtual spaces.
- **Other Interests:** Exercising, searching the internet, Watching YouTube and movies. Reading books. Listening to music and podcasts.

"HAVING AGORAPHOBIA FOR THE PAST 7 YEARS HAS BEEN TOUGH IS AN UNDERSTATEMENT. I AM UNABLE TO GET FAR FROM HOME WITHOUT PANICKING. WHEN I DO, IT’S OFTEN THE SAME PLACES. SEEING THE SAME HOUSES, STREETS, PEOPLE GETS INCREDIBLY MUNDANE VERY QUICKLY. GAMING ALLOWS ME TO VISIT DIFFERENT WORLDS, ITS [sic] AN ESCAPE FROM THE ANXIETY FOR A MINUTE OR AN HOUR. IT REALLY HELPS ME RESET AND RELAX."

Don, Auckland Region, New Zealand.
Playing video games is more often a social rather than an isolated experience.

**Only 19% of adult players play alone** all the time. Adults report that **playing with children in the same room** is the most common social context for play, with **42%** doing so, followed by **33%** who play with children online.

Nearly a third of adults say they play video games with their partner in the same room and a fifth say they play with partners online.

Other social play includes playing with friends, relatives, and siblings. Moreover, some young adults say they even play with their parents.

"Games have had an amazingly positive impact on my life! They have allowed me to make many more friends than I ever dreamed of and are amazing."

Male, 19, Canterbury, New Zealand.

"I play World of Warcraft, because I have met friends in game that I would never have met otherwise."

Female, 25, Waikato Region, New Zealand.
Over a third of adults (36%) responding to the survey said they are parents of a child under the age of 18 living with them. Of these, 89% said they themselves play video games. Of the two thirds who do not have children living with them, 71% play video games. It may have once been the case that having children was a pre-requisite for adults to play video games, but these findings demonstrate that the vast majority of adults play, regardless of parental status.

Still, parents are more likely to play, and for many reasons. We provided parents a list of reasons to play with their children.

Consistent with past studies, parents’ top reasons are that playing is a way to spend time with children, because children ask parents to play with them, and it’s a way to monitor what children play.

Parents largely reported a full range of reasons they use video games when parenting their children by indicating how much they agree with each from a list of uses. Talking about games, talking about playing online, and as a form of punishment top the list.
Video: What Do Games Mean to People?

This video illustrates what games mean to people and uncovers many fond memories associated with playing games.

(7:40 minutes)
Parents are also likely to report having rules for their children’s video game play.

Over many years of these studies, we have routinely observed the top three rules parents have for their children’s game play are when during the day, during the week or during the school year they can play, and what kind of games they can play, and rules about how long they can play in a session, providing clear evidence that parents hold the common concerns long-held about children’s access to media:

- How much they are used, what opportunity costs they present, and what they are exposed to that might present a potential harm or concern.

It is worth noting that parents are concerned about most of the potential harms of all media.
Potential concerns caused by elements of media content are many in the minds of parents. Parents also hold concerns that vary from medium to medium. We asked parents on a simple three-point scale (Not at all concerned, Somewhat concerned, or Very concerned) to indicate how concerned they were with different potential harms in three media including Social Media, Interactive Games, and Movies.

We then calculated a mean for each to weight the responses and ranked the concerns across the media. This helped us identify parents’ relative concerns about each medium. In this sample, advertising, social issues and smoking top the list. We believe the harms chosen reflect themes and agendas set by mainstream news reporting because priorities differ in each of the two previous studies.

A few years ago, sexual predation topped our list whereas today it sits at the bottom. Differences by medium are modest but present, with social media receiving the largest weighted volume of concerned responses (4,740), followed by movies (4,311), and then interactive games (4,073).

We conclude that the moral panic about games has subsided, replaced by greater concerns about social media.

We added three sources of concern about games reported more frequently in mainstream news media in the past two years, including loot boxes, in-game purchasing and user-generated content. Loot boxes and in-game purchases top the list of parents’ concerns about games.
Classification and ratings systems for video games operate in New Zealand within the Films, Videos, and Publications Classification Act 1993.

The main purpose of the classification scheme with respect to games is to guide consumers about the suitability of video games for them and their families based on the nature and presumed level of impact game content may have on players, particularly children.

Roughly one third of parents say the classification of a game has “A lot of influence” on the games they choose for their children to play. Less than a third say classification has a “Reasonable influence, and just over a third, when combined, said it has “A little influence” or “No influence”.

Curious about whether this varied depending on the age of children in the household, we found that these responses were largely uniform, regardless of age and number of children.

NB: PARENTS ONLY
Two-thirds of parents say they are either “Completely familiar” or “Mostly familiar” with classification labels used in New Zealand.

The remaining third report being “Vaguely familiar” or “Not familiar” with them.

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Female, 32, Otago, New Zealand.

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GTA5 - PLAYED ONLINE FOR FIRST TIME AND MADE NEW FRIENDS WHILE I WAS INJURED AT HOME.
Male, 34, Manawatu-Wanganui Region, New Zealand.
Classification markings operated by the Office of Film and Literature Classification include G, PG, M, R13, R15, R16 and R18; G, PG and M are advisory classifications while R13 to R18 are legally restricted classifications, meaning that it is illegal to sell, distribute, or show to children under those age designations. Adult players have different levels of confidence about what each classification label means.

They were asked whether each classification was “Clear,” “A little unclear” or “Unclear.” Grouping the latter two responses, around a quarter of adult players were unclear about the meaning of G and PG, and less than half of adult players were unclear about the meaning of M. One in five were unclear about the meaning of R13, R15 and R16, and the smallest proportion were unclear about the meaning of R18.

In other words, most confidence was expressed about R18, and least confidence was expressed about M.
There is little debate about the need to protect younger players from content, and parents in this year’s sample indicated that the need to use classification probably ends somewhere between 15 and 17 years; a third of parents said this was the age when they felt comfortable not using classification with children.

A third said they wouldn’t need classification for a younger age.

However, over a third also said they wouldn’t feel comfortable ceding oversight on their children until they became adults.

MADE NEW FRIENDS THROUGH GAMING. PEOPLE FROM ALL OVER THE WORLD PLAY THE GAMES I PLAY. GAMING HAS A WORLDWIDE REACH.

Male, 51, Hawkes Bay Region, New Zealand.

1/3 parents say age 15 - 17 years no longer need classification

NB: PARENTS
Online app stores use age categories for their ratings.

Only one in five parents are aware of and use these with their children. Another one in three are aware, but pay no attention to, or do not use the ratings.

Almost half of all parents said they were not aware of, and therefore did not use online store ratings.

1 in 5 parents said they were not aware of, and therefore did not use online store ratings.
Another way in which parents may exercise oversight of their children’s gameplay is through family controls built into the software of technologies used to play games.

Most parents say they are aware of family controls, with 35% saying they are “Vaguely familiar,” 44% saying they are “Mostly familiar,” and 12% saying they are “Completely familiar” with these tools.

Over half of parents say they use family controls, but use varies by platform with more parents indicating they set family controls on mobiles and tablets and fewest parents doing so for handhelds with PCs and consoles between these.

Compared with our 2018 report, there appears to be greater knowledge and use of family controls among parents.
AMIE: THE CONNECTED PLAYER

I HAVE A FEW GAMING CONSOLES IN MY HOUSE. WE LIKE TO USE THESE TO EASE OUR BOREDOM AND DISCOVER NEW GAMES. I HAVE GROWN UP PLAYING GAMES SINCE I WAS YOUNGER AND THINK IT'S A GREAT WAY TO GET THE FAMILY TOGETHER AND HAVE A FUN TIME.

Amie, 20, Wellington Region, New Zealand.
Video game cultural experience extends well beyond playing. Adult players enjoy learning about the games they play, sharing strategies, and communicating about them.

They also enjoy watching others play and review games. We observed growth in game culture engagement this year compared with two years ago.

Most adult players say they read or watch walkthroughs (70%) and watch YouTube videos of gameplay (61%). Under half watch esports in which players in amateur or professional teams play competitively (42%), and a similar number watch livestreams of gameplay on specialised streaming services (40%).

Roughly a third use third party add-on services (35%), attend gaming events (32%), and roughly a quarter attend esports events (26%).

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**NB: ADULT PLAYERS**

Female, 25, Waikato Region, New Zealand.

Most of my relationships have been with gamers so it was a way to spend time together and be involved with something. Now I like to play because it gives me things to do and makes me feel like I am having ‘me’ time.

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Male, 26, Wellington Region, New Zealand.

Games are a good form of entertainment for me. Have made some friends through gaming or a shared interest in games.
The popularity of esports continues to grow as a significant part of gameplay culture and enterprise, and over the intervening two years since our last report, we see increased interest in esports among adult players.

Of the 36% of adult players who have ever watched esports online or attended an esports event in person, 43% have done so because they enjoy watching the competitions, 36% followed to learn strategies that may help them improve their own gameplay, 29% followed to enhance their enjoyment of player culture, and 19% followed an esports team.

Watching presenters and generally supporting esports and rounded out the reasons.

"Just like the Olympics, watching the best of anything is exhilarating [sic]. Even more so when you enjoy the content.

Male, 29, Otago, New Zealand."
It is clear that participation in esports as a competitor further deepens engagement with player culture and provides opportunities to extend the personal satisfaction possible from play. Of fifth of adult players who said they have competed in esports on any level, nearly half have done so because they enjoy the challenge of pitting their skills against those of other players.

Nearly half say they have competed to be active members of the player community.

<table>
<thead>
<tr>
<th>Reason for Competing in Esports (%)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To become a better player</td>
<td>26%</td>
</tr>
<tr>
<td>Social aspects of esports</td>
<td>36%</td>
</tr>
<tr>
<td>Player community</td>
<td>41%</td>
</tr>
<tr>
<td>Enjoy the challenge</td>
<td>42%</td>
</tr>
</tbody>
</table>

Over a third have competed because they enjoy the social aspects of the pastime. Becoming a better player was indicated by about a quarter of esports players.

Male, 38, Auckland Region, New Zealand.

I enjoy competition, friendly competition. I’m also a board gamer. There is something about meeting the mind of another in an even pitched battle and competing. This is when I am happiest. It’s not the win or the lose, it’s the competition. Most of my gaming these days is a game called Blood Bowl. It is a computer adaptation of a board game about fantasy football, and I am in a league with a group of guys I now call mates in Australia, NZ, USA and Hong Kong. I run the board game equivalent of a league in Auckland. Blood Bowl is my biggest hobby and passion outside of my family. I travel for tournaments 3x a year. I also play single player games like action adventures when I don’t have a Blood Bowl game lined up. This is because I am not a fan of TV and my wife goes to bed 2 hrs before me. Recently the quality and maturity of these stories has escalated and I now believe gaming is the best way of telling stories. Examples: The new God of War, Bioshock, Bloodborne, The Last of Us. The stories of all of these have prompted stronger emotional reactions in me than movies or TV has.
ME AND MY FAMILY ARE WHAT YOU WOULD CONSIDER A GAMING FAMILY. WE LOVE TO PLAY GAMES TOGETHER EVEN WITH OUR 6 YEAR OLD. (HE EVEN BEATS ME). Lol.

Camille, 29, Auckland Region, New Zealand.
Active participation in game culture is possible through a variety of game-related cultural production.

In general, one in four adult players have engaged in some combination of cultural production; they post videos online of their own gameplay, make modifications to the content of games they play, and produce machinima or short videos as part of an animated story.

One in five dress up as a video game character for a party or event, participate in esports as noted above, and even make original games.

We found strong relationships among these activities, suggesting that while few in our sample do all these things, doing one of them is linked with doing others.

LOVE PLAYING GAMES TO DO THINGS IMPOSSIBLE IN REAL LIFE. EXPLORING MAGICAL WORLD, RESCUING HOSTAGES AND SHOOTING TERRORISTS, PLAYING FOOTBALL FOR MY FAVE TEAM, FLYING A PLANE ETC. TODAY’S GRAPHICS ARE SO GOOD, THE GAMES SEEM VERY LIFELIKE. GREAT FUN.

Male, 51, Auckland Region, New Zealand.
The popularity of cultural production and participation among adult players demonstrates the power of games to add to community, creativity, and to transform.

We presented adults in all households, regardless of whether they play video games, with an inventory of ways in which games might help people live well and we asked them to agree or disagree with each on a three-point scale.

The vast majority validated the view that games have the power to help people live well, starting with over three-quarters saying games may contribute to general and digital knowledge, add to specialist knowledge, and improve mental health.

Two-thirds said games may expand work skills, add to cultural knowledge, hone life skills, and increase life satisfaction.

Over half said games may improve physical fitness, quality of life, social relationships, and promote a healthy diet.

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NB: ALL ADULTS, PLAYER AND NON PLAYER
Adults players and non-players generally believe video games have the potential to deliver health and fitness benefits with more than three-fourths saying games can improve thinking skills and physical dexterity.

About two-thirds said game play may improve emotional wellbeing and reduce anxiety.

Over half said games could improve social wellbeing, physical fitness, balance, and be used to help manage pain. All adult player and non-player participants estimated the degree to which video games may help with ageing well. At least four-fifths said games can increase mental stimulation, and nearly three-fourths said games can fight dementia.

Two-thirds said games could encourage open-mindedness, improve life satisfaction and promote optimism in ageing. Over half said games may help older adults maintain social connections, add purpose to life, and improve balance. Less than half said they may help increase mobility and reduce arthritis.
I LIVE Alone AND DUE TO HEALTH ISSUES I SPEND A Lot OF TIME ALONE IN MY HOME. I FIND THAT COMPUTER GAMES PROVIDE A MENTAL CHALLENGE AND A CHANGE FROM READING. I AM QUITE HAPPY COMPETING AGAINST MYSELF AND IMPROVING ON MY SCORE OR TIMES. I VARY THE GAMES I PLAY AND USUALLY THEY ARE A DIVERSION FROM READING.

Gia, 78, Nelson Region, New Zealand.
Games are often made specifically for the education market. However, educators use some mainstream entertainment games such as *Minecraft*, *Assassin’s Creed*, and *Civilization V* to improve the learning experiences of their students.

Adult players were asked to evaluate the potential of games to benefit education in terms of **student support**, **school support**, and **learning areas**. In most cases, a majority of adult players said they believed games may serve these purposes. Of prominence were the **use of games to motivate students** and **inspire them to be creative**.

Games were also perceived to be useful when teachers used them to teach.

Games were seen as **beneficial for teaching students** in general learning areas, and in **Science, Technology, Engineering and Mathematics (STEM)** subjects in particular.
Video: How Have Games Improved Your Life?

In this video, players share their stories of how games have added to, and improved their lives.
Parents were asked whether and how their children had used video games at school.

Over half said their children had used them as part of their curriculum and classroom learning. Over a quarter said their children had used video games for co-curricular or “after school” activities at school, and almost a third said their children had been part of making video games as part of their formal education.

“I really enjoy *Who Wants to be a Millionaire*, it is challenging and you learn interesting things about history, music and other trivia. It piques my curiosity and I often seek out further information about things that are in the questions. I never buy in-app offers.”

Female, 46, Canterbury, New Zealand.
About a third of adult players said they have used games in the workplace related to learning and orientation. They have used video games designed to deliver new knowledge (38%), to learn new software or tool use (32%), for health and safety training (30%), to learn new skills of some kind (29%), or to learn workplace rules (27%).

This represents a modest increase from the findings we made in DNZ18.
BENNY: THE INSPIRED PLAYER

Player: Male, 18. Looking for work.
Family Background: Lives in Household of 3.
Mother, 45.
Sister, 15 (game player).
Location: Auckland Region, New Zealand.
Cultural Background: New Zealander.

Years Playing Games: 14 years.
Types of Play: In-depth only.
Typical Duration: Twice a week for two hours.
Access to Games: Computer, Tablet, Smartphone, Nintendo Handheld.

Motivations for Play: To have fun, to relax and to pass the time. To do things not possible in real life, to take a break from daily life and to explore virtual spaces. Also to connect with/make friends, to be someone else, to fulfill a fantasy and to try something new.

Other Interests: Doing water sports, playing a music instrument. Searching the internet and reading on social media. Watching YouTube and movies, listening to music, taking pictures and posting to social media.

GAMES HELP ME FORGET WHO I AM IN THE REAL WORLD AND IMMERSE MYSELF IN ANOTHER. THEY GIVE ME NEW CHARACTERS TO CALL FRIENDS AND ALLOW ME TO DO ALL KINDS OF THINGS THAT AREN’T POSSIBLE IN THE REAL WORLD - WEARING A MECH SUIT, LIVING IN A FANTASY SANDBOX, ETC. THERE ARE GAMES THAT HAVE STUCK WITH ME IN [MY] THOUGHTS FAR LONGER THAN ANY OTHER MEDIUM. SOME I HAVEN’T PLAYED IN OVER A DECADE, AND YET I STILL HAVE VIVID AND UNIQUE MEMORIES OF PLAYING THEM AS A CHILD. THE PURSUIT OF MAKING MY OWN GAME AT SOME STAGE IS WHAT DRIVES A LOT OF MY HOBBIES AND INTERESTS. I WOULD BE NOTHING WITHOUT VIDEO GAMES.

Benny, 18, Auckland Region, New Zealand.
New Zealand developers grew in number about a decade ago and the number of New Zealanders who work in the industry expanded too. As games become increasingly popular and ever more diverse and complex, there are many ways in which game developers can monetise their creative products.

After direct sales and subscriptions, developers use in-game purchases to support their diverse, modern economy business models.

In-game purchases are popular because players can readily identify reasons for making a purchase that have a direct benefit to gameplay for them or for their family or friends for whom they are making the purchase.

Just under half of adult players have made in-game purchases for themselves at one time or another and a third have made in-game purchases for another person, usually a child. Of those who have made in-game purchases, half have done so in order to unlock a timed trial game to continue playing.

Over a third have made in-game purchases to unlock new content. Between a fifth and a third have done so to personalise gameplay, speed up gameplay, or support a game.
About a quarter use in-game purchases to add to enjoyment. A fifth make in-game purchases to avoid advertising, while fewer to get weapons or accessory advantages to better compete or to enable multiplayer mode.

We have observed widespread use of games by New Zealanders in this iteration of the research. In doing so, we measured participant demographics in addition to age, gender, and household size.

Consequently, we were particularly interested in the cultural and linguistic diversity of players and non-players. Our sample had players and non-players from a range of backgrounds – meaning the cultural make-up of adult game players in New Zealand is as diverse as the New Zealand population itself.

For games to appeal to as wide an audience as possible, it is important to understand which character representations in games need more attention, according to adults who play them.

At the top of the list, 66% said games need to portray a greater diversity of cultural backgrounds, age, race and nationalities; 65% and 64% said games need to do a better job of presenting a range of people with disabilities and linguistic backgrounds respectively, and 61% said games needed to pay more attention to a wider range of gender diversity. Wider representation of sexual orientation was indicated by 57%, and more religious diversity by just over 50%.
All adult participants including players and non-players were asked how important they felt the video games industry was for the New Zealand economy.

Approximately three-quarters said making video games in New Zealand would add value to the national economy and they said it was an important industry to support through policy.

Twenty-seven percent of participants had at least some knowledge of computer programming; however, 16% said they or another household member had discussed plans to work in the industry or already work in it, with 12% saying they or another household member plan to or are currently studying for a career in the field.

Problematically, 8% said they or someone in their household intended to learn game or game-related programming – an essential part of game development and game work.
The New Zealand video game retail industry is booming. **Total sales reached just under $548 million in 2018**, made up of substantial growth in digital sales and fluctuating sales of physical game products including hardware and software. These results are exclusive of general use devices such as PCs, smartphones and tablet computers. The **compound annual growth rate (CAGR) of the New Zealand retail industry between 2013 and 2018 was 15%**.
**WAYNE: THE ACHIEVING PLAYER**

<table>
<thead>
<tr>
<th>Player</th>
<th>Male, 36. Manufacturing.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Background</td>
<td>Lives in Household of 6.</td>
</tr>
<tr>
<td>Wife</td>
<td>Wife, 36, (game player).</td>
</tr>
<tr>
<td>Sons</td>
<td>Sons, 11, 8, 7, 5 (all game players).</td>
</tr>
<tr>
<td>Location</td>
<td>Auckland Region.</td>
</tr>
<tr>
<td>Cultural Background</td>
<td>New Zealander.</td>
</tr>
<tr>
<td>Years Playing Games</td>
<td>29 years.</td>
</tr>
<tr>
<td>Types of Play</td>
<td>In-depth and casual play.</td>
</tr>
<tr>
<td>Typical Duration</td>
<td>Plays everyday. Casual play 5 times a day x 15 minutes. In-depth play for 4 hours.</td>
</tr>
<tr>
<td>Access to Games</td>
<td>Computer, Tablet, Smartphone, Xbox One, Nintendo Handheld, Older console.</td>
</tr>
<tr>
<td>Motivations for Play</td>
<td>To have fun, to relieve stress, to be challenged and to feel excitement. To do things not possible in real life, to be someone else and to take a break from daily life. To manage mental health, to fulfil a fantasy and to explore virtual spaces.</td>
</tr>
<tr>
<td>Other Interests</td>
<td>Dining out. Playing board/card games and playing with pets and children. Watching YouTube, TV and movies. Reading books and listening to music.</td>
</tr>
</tbody>
</table>

*I HAVE LOW SELF ESTEEM, CONFIDENCE AND DRIVE. THERE IS VERY LITTLE ACHIEVEMENT IN MY HOME OR WORK LIFE. GAMES ARE A CHANCE TO ESCAPE, BE MORE THAN I AM, WHILE ALSO ENJOYING A STORY AND FEELING A SENSE OF ACHIEVEMENT.*

Wayne, 36, Auckland Region, New Zealand.
IT FORMS A BREAK FROM A USUALLY BUSY DAY, TO HAVE FUN WITH FAMILY AND FRIENDS, SHARE THE EXCITEMENT AND JOY OF COMPETING... TO CHALLENGE ONESELF AND GET THOSE LITTLE GREY CELLS INSIDE THE HEAD CHURNING OVER...SOME GAMES TACTICALLY ARE GOOD AS THEY HELP YOU CLEAR THE MIND AND THINK DIFFERENTLY WHICH CAN BE RELATED TO WORK.

Male, 60, Canterbury, New Zealand.

I USE GAMES TO RELIEVE MY MIND FROM BUSY THOUGHTS ABOUT WORK. IT IS NOT A LARGE PART OF MY LIFE BUT IT HAS BECOME A TECHNIQUE I USE TO RELIEVE STRESS. I PREFER PROBLEM SOLVING GAMES THAT ARE CHALLENGING MENTALLY BUT DO NOT REQUIRE HOURS TO COMPETE [SIC].

Female, 58, Taranaki Region, New Zealand.

THE GAMES I PLAY IN MY FREE TIME HELP ME RELAX OR TAKE MY MIND OF [SIC] OTHER MATTERS, RELIEVES STRESS. I NEED THEM TO [FORGET] WHAT I'M DOING FOR A WHILE.

Female, 20, Auckland Region, New Zealand.

WII FIT INTRODUCED ME TO YOGA WHICH I [STILL] DO SEVERAL TIMES A WEEK.

Male, 44, Auckland Region, New Zealand.

GAMES SETTLE AND CALM THE STRESS OF WORK FOR THE DAY. SOMETHING FOR A CHANGE, CHANGE OF PACE, SOMETHING I CAN SHARE WITH MY FAMILY.

Male, 47, Auckland Region, New Zealand.

VIDEO GAMES HELP ME SOCIALIZE AND I OFTEN MAKE NEW FRIENDS. I ENJOY THE CHALLENGES NEW GAMES POSE AND LOVE GETTING GOOD AT GAMES.

Male, 19, Otago, New Zealand.

IN THEIR OWN WORDS
I HAVE BEEN USING ROCKSMITH 2014 FOR THE LAST 6/7 YEARS TO LEARN ELECTRIC GUITAR AND HAS ENCOURAGED ME TO START WRITING MUSIC. ROCKSMITH IS LIKE GUITAR HERO, YOU PLUG IN YOUR ELECTRIC GUITAR INTO YOUR PS4/PC AND LEARN TO PLAY SONGS FROM WELL KNOWN ROCK BANDS.  
Male, 28, Waikato Region, New Zealand.

I USE WINDOWS PINBALL GAME PURELY TO SWITCH OFF AND KEEP A RECORD OF ALL THE BEST SCORES I ACHIEVE. I ALWAYS LOVED PINBALL MACHINES IN AMUSEMENT ARCADES AS A YOUNGSTER AND THIS GAME ALMOST RE-CREATES FOND MEMORIES.  
Male, 72, Hawkes Bay Region, New Zealand.

I STARTED TO PLAY VARIOUS COMPUTER GAMES TO RELIEVE STRESS, TAKE MY MIND OFF MY PAIN AND TO JUST RELAX.  
Female, 72, Tasman Region, New Zealand.

I CAN BE SOMEONE ELSE I COULDN’T BE IN REAL LIFE. I FEEL EMPOWERED. IT INCREASES MY SELF ESTEEM.  
Male, 39, Taranaki Region, New Zealand.

I GENERALLY PLAY NINTENDO WII SPORTS AND WII FIT. THIS IS TO KEEP TRACK OF MY WEIGHT, TO HAVE A BIT OF FUN AND TO [DE-STRESS]. I LOVE THE YOGA AS IT RELAXES ME. IT’S IMPORTANT TO ME, BUT I CAN ALSO LIVE WITHOUT IT TOO, WHICH HAPPENS WHEN LIFE BECOMES A LITTLE CRAZY AND I JUST DON’T FIND TIME FOR IT. INSTEAD I READ A BOOK.  
Female, 48, Bay of Plenty Region, New Zealand.
Digital New Zealand 2020 (DNZ20) is an empirical study about digital games in New Zealand households with a focus on demographics, behaviours and attitudes.

In this report, the words computer games, video games, digital games, and interactive games are used interchangeably to refer to the broad class of interactive, digital entertainment.

A game household was one that had in it any device for playing a video game, including personal computers, smart phones, dedicated home consoles, tablet computers, and handheld game devices.

A player 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.

Questions in the survey included open-ended, short response, list selection, dichotomous response (such as Yes/No or Selected/Not selected), ranking (1-10), three-, four - and five-point Likert items (Strongly Disagree to Strongly Agree, for example).

These created over 400 measurement points.

Questions were grouped according to theme including:

- Household demographics,
- Household media environment,
- Media access to game devices, internet access and purchasing,
- Video gameplay preferences and routines,
- Motivations for playing video games and social relationships that result,
- Parental engagement with video games,
- Engagement with game culture including esports,
- Games related to education, work, health and ageing,
- Classification and ratings, and
- Attitudes and issues related to video games and policy.
Data reported here come from 801 New Zealand households and 2,225 individuals of all ages in those households.

Participants were drawn randomly from the Nielsen Your Voice Panel in February 2019. The Nielsen Company provided the research team at Bond University with raw data from the survey for statistical analysis at the University. The data were analysed by report authors using the SPSS Versions 24 and 25.

Results are calculated for three parts of households including responses to the survey by one adult member of the household (801 households) and of those, the adults who themselves play video games and another person in the home whose game habits they know (1,107 people), then all people in those households (2,225 people).

For clarity throughout this report, we refer to these in turn as households, adult players, key players, all household members, then all video game players among them.

The quality and size of the sample was high.

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.

Statistical weighting was applied for accurate comparisons where data from this study are compared with previous studies and new questions in this study required sum-total weighs.

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. The margin of error is ± 3.5% for the national sample comparing households and all household members, ± 3.9% for adult players, ± 2.9% for key players, and ± 2.1% for all players.
DNZ20
DIGITAL NEW ZEALAND 2020

THE POWER OF GAMES

IGEA
Bond University