dnz14

Digital New Zealand

National research prepared by Bond University for
the Interactive Games & Entertainment Association

igea interactive games & entertainment association

BOND UNIVERSITY FACULTY OF HUMANITIES & SOCIAL SCIENCES

Authors
Jeffrey E. Brand, Ph.D.
Pascaline Lorentz, Ph.D.
Trishita Mathew, Ph.D.

dnz14
Digital New Zealand

Foreward

We began national studies of computer game audiences in 2010 to widen the conversation about games and tackle stereotypes that prevented an understanding in the wider community that computer games were a popular medium that had become not only normalised, but a medium valued by New Zealanders of all ages. Rather than challenge negative stereotypes about games with rhetoric, we provided quantitative empirical data using established social and market research practice – something that had not been available for New Zealand's journalists and policy-makers who relied on overseas data. We have conducted five sister studies in Australia, the first published in 2005, and we sought to give New Zealand comparable data. Over the two New Zealand studies since 2010, we documented that computer and video games have taken centre stage in media culture.

Interactive New Zealand 2010 conveyed the reality that New Zealand is a nation of game-lovers who enjoy playing games on a sporting field and on the screen.

In 2010:

- 88.5% of New Zealand households had a device for playing computer games and PCs dominated consoles,
- 44% of gamers were female and the average age of gamers was 33,
- An hour was the play duration and every other day was the frequency,
- 46% of gamers played online and 59% with others in the same room,
- 63% of parents played computer games,
- 85% said New Zealand and Australia should have the same classifications for games,
- 56% said classification information was very influential when choosing games for their children, and
- 71% of gamers said interactivity in games made them more educational than other media.

Interactive New Zealand 2010 illustrated the growing ability of games to foster social interaction. Moreover, it demonstrated that games consoles and the Internet were popular and treated as a mature source of entertainment.

Digital New Zealand 2012 signalled the rapid maturation of digital media and more avenues for game experiences for anyone who wanted to play.
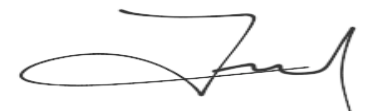
In 2012:

- 93% of households had a device for playing games and PCs still dominated consoles,
- 47% of gamers were female and the average age remained 33,
- An hour remained the play duration and every other day remained the frequency,
- 79% of parents played games, 90% of these with their children,
- 70% of households were home to 2 or more players, and
- 55% said classification information was very influential when choosing games for their children.

Digital New Zealand 2014 completes this phase of reports on computer games and New Zealanders. The profile of the gamer and the gaming household is nearly synonymous with the profile of the typical New Zealander and normal New Zealand household. It demonstrates that multiple screens and game devices are commonplace in homes and that games have expanded from the lounge-room to the pocket, played frequently and for longer durations. It suggests that the moral panic over established media like music, films, television and games is now moving to social media and the Internet. Adult gamers have formed great memories over the years of family time, characters, story, play and interaction from a medium that has emerged from its adolescence.

As lead author of this series, I hope these reports have served the conversation well.

Jeffrey E. Brand

what
New Zealanders
think about
DIGITAL GAMES

"I remember teaching my boy, at 2 years of age, rudimentary maths on our first computer playing Halo, Counter-strike, with my sons who are now living away from home. This was a bonding time for us."

Male, Parent, 49, Waikato Region, Household of 6

"Eldest son is physically disabled so interactive games allow him a degree of freedom that his body denies him."

Male, Parent, 44, Northland Region, Household of 4

"[Games were] our way of communicating ... before my husband and I got married as we were [dating] long distance."

Female, 26, Auckland Region, Household of 2

"The engaging stories which compliment game play in games such as Knights of the Old Republic or Mass Effect have given me some wonderful emotional roller coasters while playing them. I also recall literally jumping out of my chair while playing the original Silent Hill."

Male, 35, Canterbury, Household of 4

"It's good to see if you can beat someone else's score. My father has passed away and we are still trying to beat his score. It brings back many memories."

Female, 54, Waikato Region, Household of 2

"I have always enjoyed playing a wide variety of games rather than watching movies or TV. My son enjoys playing educational games and is showing signs of reading at just ... 2 [years old] mostly due to games and online videos."

Male, Parent, 35, Canterbury, Household of 2

dnz14
Digital New Zealand

41% PLAY TO KEEP THE MIND ACTIVE
Why older adult gamers play

DAILY
TYPICAL GAME PLAY FREQUENCY

1 HOUR
TYPICAL PLAY DURATION

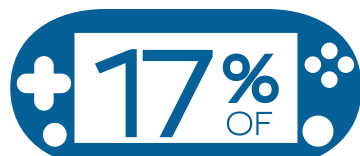**75%** OF MUMS PLAY VIDEO GAMES

79% OF DADS PLAY VIDEO GAMES

THE AVERAGE GAMER IS **33** YEARS OLD

48% OF GAMERS ARE FEMALE

17% OF GAMERS are OVER **51**

71% OF GAMERS are OVER **18**

FAMILIES AND GAMES

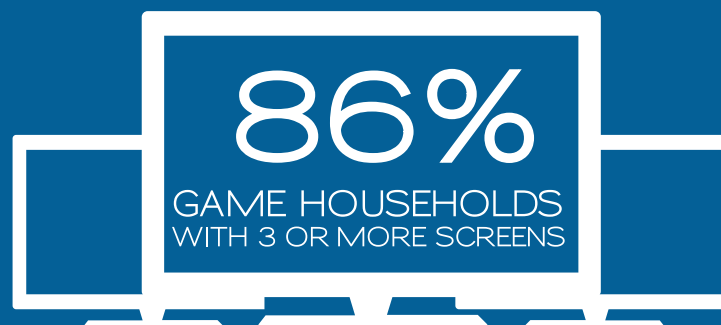**94%** UNDERSTAND AUSTRALIAN SYMBOLS

G PG M

CLASSIFICATION

70% OF HOUSEHOLDS have 2 or more gamers

22% HOUSEHOLDS USE A TABLET TO PLAY GAMES

86% GAME HOUSEHOLDS WITH 3 OR MORE SCREENS

98% OF HOMES WITH CHILDREN HAVE COMPUTER GAMES

44% USE A MOBILE PHONE TO PLAY GAMES
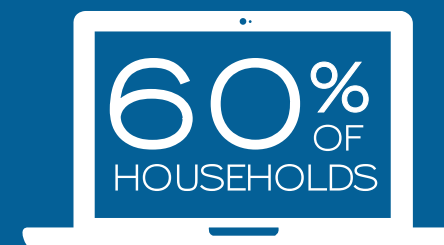
60% OF HOUSEHOLDS USE A PC FOR GAMES

$ 9% CAGR Games Spending 2010-2017

GAMERS IN NEW ZEALAND

82% OF GAMERS SAY GAMES REDUCE **STRESS**

GAMES IN NEW ZEALAND HOMES

GAMES AND BENEFITS

BUSINESS

BOND UNIVERSITY

igea
interactive games & entertainment association

dnz14

Digital New Zealand

KEY FINDINGS

Games in New Zealand Homes

- Mainstream - Computer and video games are everywhere.
- 94% - Households have a device for playing games.
- 98% - Homes with children under the age of 18 that have a device for playing computer games.
- 70% - The proportion of game households with 2 or more gamers.
- 86% - Game households with three or more screens.
- 61% - Game households with three or more game devices.

Gamers In New Zealand

- 33 years old - The average age of video game players.
- 48% - The proportion of the game population that is female.

- 71% - The proportion of gamers aged 18 years or older.
- 23% - The proportion of gamers 1 to 14 years old.
- 17% - The proportion of gamers 51 or more years old.
- 11 years – The length of time the average adult gamer has been playing.

How Gamers Play

- 25% - The proportion of gamers who play social network games.
- 11% - The proportion of gamers who play online role-playing games.
- Fun – the primary reason PC and console gamers play.
- Pass Time – the main reason mobile gamers play.
- Keep Mind Active – the main reason older adult gamers play.
- Social Interaction – the main reason younger adult gamers play.
- An Hour – Typical game play duration.
- Daily – The typical game play frequency.
- Weekends, holidays, evenings – Three top times gamers play.

Families and Games

- 75% - Proportion of mums who play video games.

- 79% - Proportion of dads who play video games.
- 86% - Proportion of gamer parents who play with their children.
- Mums – Play more on PCs and mobiles.
- Dads – Play more on PCs and consoles.
- 77% - Talk about games with their children.
- 70% - Proportion of the time an adult "always" makes the purchase when games are purchased for children.
- 53% - Are familiar with parental controls available in game systems.

Classification and Media Concerns

- 71% - The proportion of parents "completely" or "quite" familiar with game classifications.
- 28% - The proportion of New Zealanders who are aware that Australian symbols may be substituted for New Zealand symbols on games classified G, PG and M in New Zealand.
- 94% - The proportion of New Zealanders who say the Australian Symbols are clear and informative.
- 17% - The proportion indicating M is unclear.
- 3% - The proportion indicating R18 is unclear.

- 13% - The proportion saying classification has "a lot of influence" on games purchased for them to play.
- 53% - The proportion saying classification has "a lot of influence" on games purchased for children to play.

Games and Benefits

- 98% - The proportion of gamers who say games are mentally stimulating.
- 82% - The proportion of gamers who say games reduce stress.
- 81% - The proportion of gamers who say games are educational.

Game Spending

- 9% - The projected Compound Annual Growth Rate (CAGR) of the New Zealand retail games industry from 2010 to 2017.

Methodology

Digital New Zealand 2014 (NZ14) is a study of 805 New Zealand households and 2377 individuals of all ages living in those households. These participants were from an online national random sample using the Nielsen Your Voice Panel in June 2013. The research was designed and conducted by Bond University. The margin of error is ±3.4% for households and ±2.5% for all gamers. designed and conducted by Bond University. The margin of error is ±2.8%.

BOND UNIVERSITY • igea
interactive games & entertainment association

Contents

About Digital New Zealand 2014

This report covers one of two studies conducted in New Zealand and Australia in 2013.

Digital New Zealand 2014 (NZ14) is a study of 805 New Zealand households and 2377 individuals of all ages living in those households. These participants were from an online national random sample using the Nielsen Your Voice Panel. The survey was conducted in June 2013. The sister study in Australia was conducted at the same time. Only New Zealand data are reported here. The words computer games, video games and digital games are used interchangeably to refer to the broad class of interactive entertainment.

This report provides information about the digital game ecology in New Zealand households with a focus on computer game behaviours and attitudes. Adult participants responded to 77 questions about themselves and on behalf of all members of their households. The questions were grouped into nine sections:

Section 1: Introduction and qualification.
Section 2: Household demographics.
Section 3: Household media environment.
Section 3: Media purchasing and downloading.
Section 4: Video game play preferences and routines.
Section 5: Social game play.
Section 6: Classification knowledge, influence and attitudes.
Section 7: Attitudes and issues surrounding video games.
Section 8: Parental engagement with video games.
Section 9: Socioeconomics and conclusion.

The Nielsen Company provided Bond University with raw data from the survey for statistical analysis at the University. The data were analysed by the study author using the SPSS Version 20 and NVIVO Version X. The quality and size of the sample was high and no statistical weighting was applied. Statistical procedures included simple descriptive statistics such as frequencies, cross-tabulations, means, correlations, and tests of significance such as Chi-square and One-way ANOVA.

For the purposes of including results for all members of a given household, the Vars-to-Cases procedure was used to create individual records for all persons in a household identified by the participants in the study. Data reduction procedures included reducing the range for some questions to simplify presentation of responses. Some measures were combined into indices where obtaining a frequency or mean across a combination of measures simplified the presentation of findings. Missing values were eliminated from analysis on a per-question basis unless multiple measures were examined conjointly. For these, the case-wise deletion method was applied.

A game household was one that had in it any device for playing a computer game, including smart phones and tablet computers. A gamer was a person who indicated they play computer or video games, simply "yes" or "no" on any device including a PC, console, handheld, social network, mobile phone or tablet computer. The margin of error is ±3.4% for households and ±2.5% for all gamers.

Games and DIGITAL MEDIA in New Zealand Households

Almost all New Zealand households - 94% - have a device for playing computer games; moreover, 98% of households with children under the age of 18 years have a device for playing computer games – a figure that for any medium can be considered full market penetration.

Households with Games

6%

94%
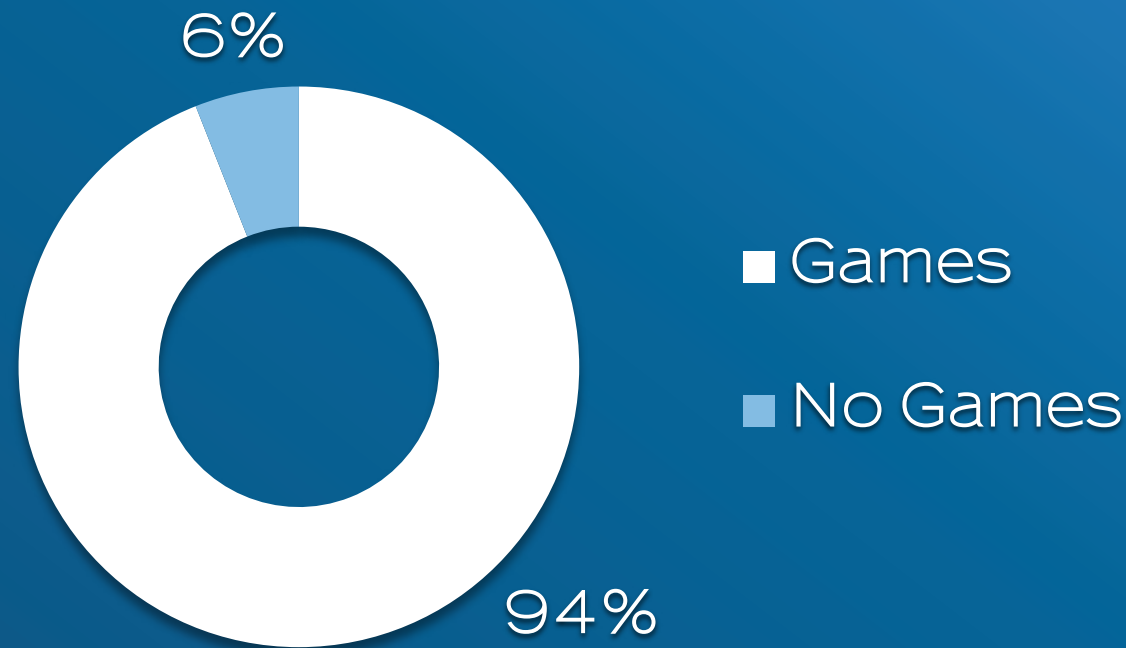
- Games
- No Games

98% of homes with children under the age of 18 have a device for playing computer games.

Households with Games Over Time
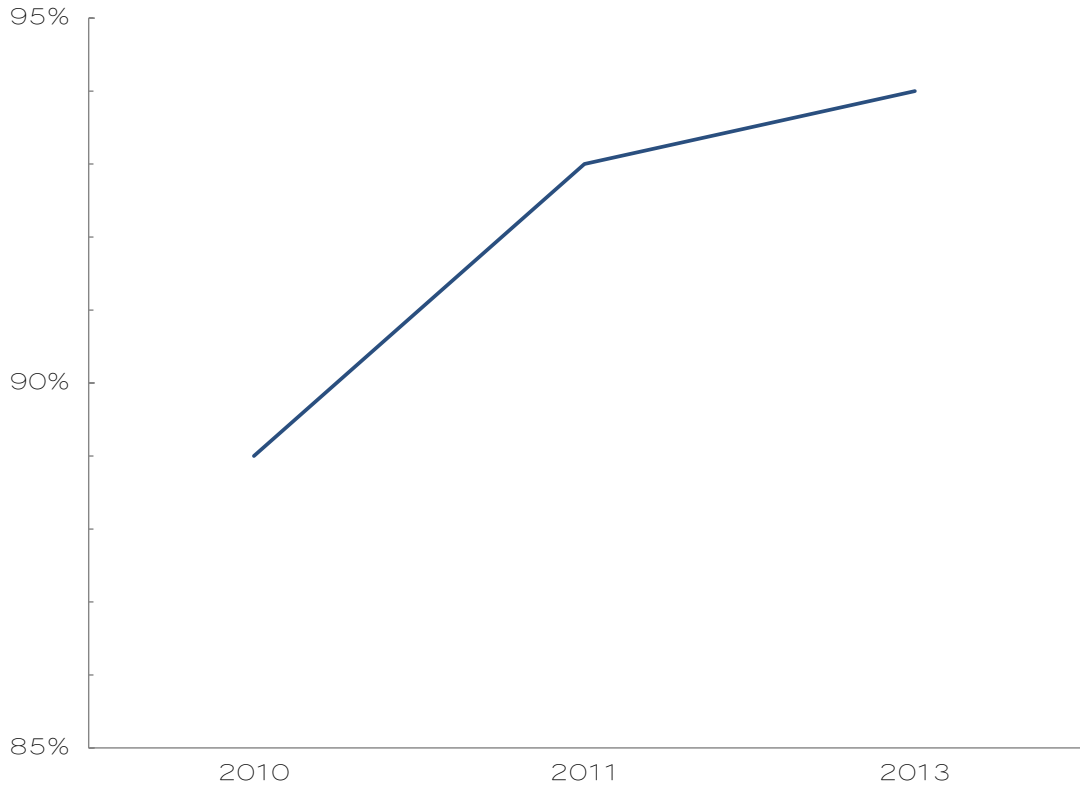
PCs are in 98% of game households with 60% of game households using a PC for games. Mobile phones are used increasingly to play games, now at 44% of game households, while tablet computers have shown significant increases, now at 22% of game households.

Consoles are popular with use in 53% of game households, while use of dedicated handheld consoles has increased, now at 13%. According to Statistics New Zealand, the number of households is approaching 1.7 million. Therefore, the install base of more than 1.5 million consoles and handhelds from the most recent technology cycle, according to the NPD Group New Zealand, means that the average household has purchased one of these game platforms. All leading console and handheld game platforms have contributed to the large install-base in New Zealand.

53%

OF HOUSEHOLDS USE A CONSOLE FOR GAMES

86%
GAME HOUSEHOLDS
WITH 3 OR MORE SCREENS
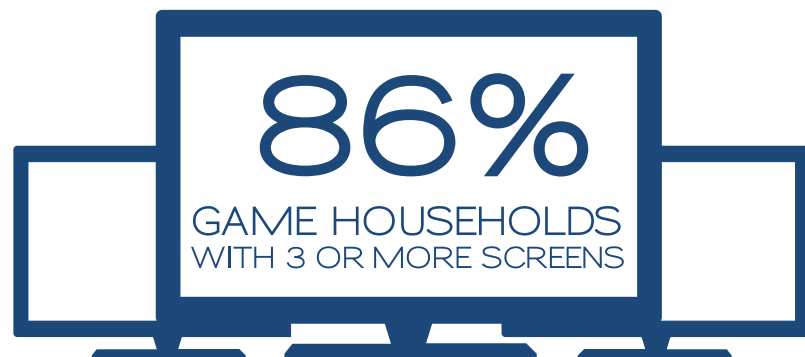
A third of New Zealand game households have four screens.

86% of New Zealand game households have three or more screens and three quarters have more than one device for playing computer or video games. The total number of game devices includes consoles, PCs, handhelds, mobile phones, and tablet computers.

MATURE MARKET:

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

Screens and Game Devices in New Zealand Households (%)

Game Devices Used in Game Homes (%)
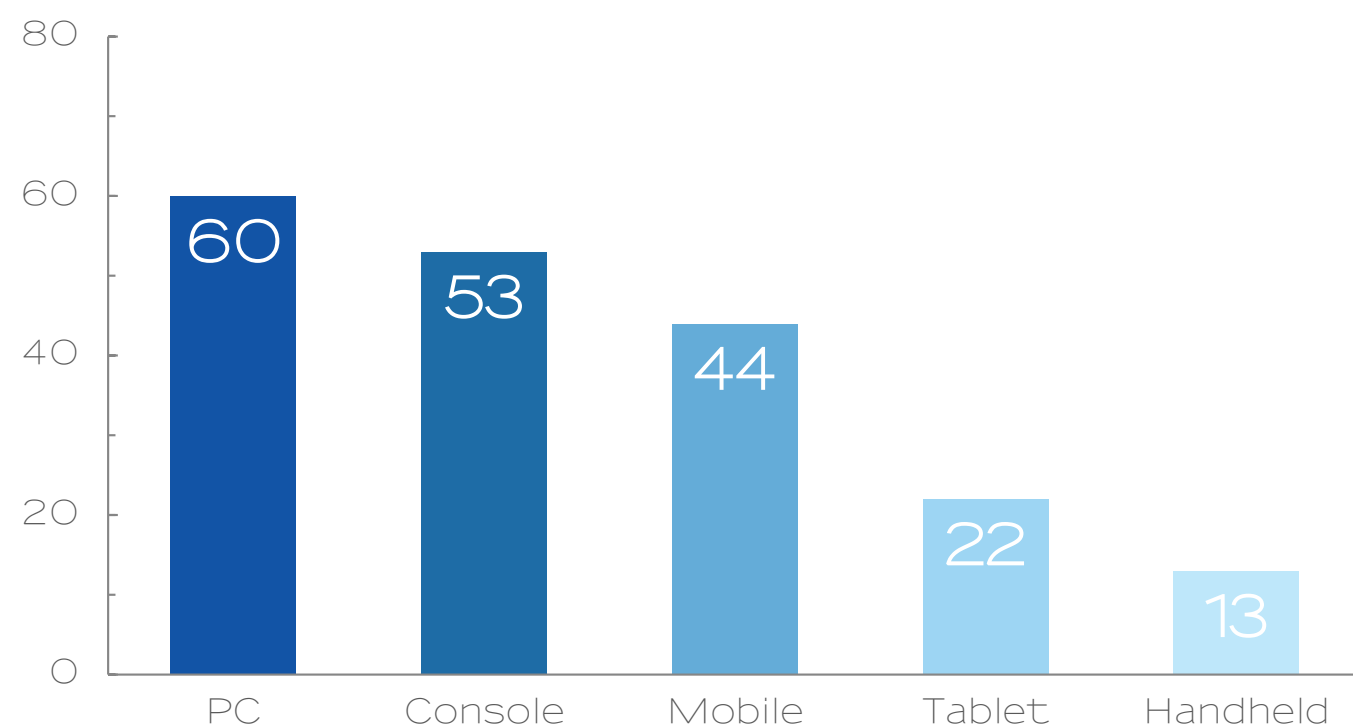
Device	%
PC	60
Console	53
Mobile	44
Tablet	22
Handheld	13

Screens and Game Devices in New Zealand Households (%)

	One	Two	Three	Four	Five	Six	Seven	Eight	Nine +
Screens		14	26	31	17	7	3		
Game Devices	23	16	20	14	10	8	4	3	2
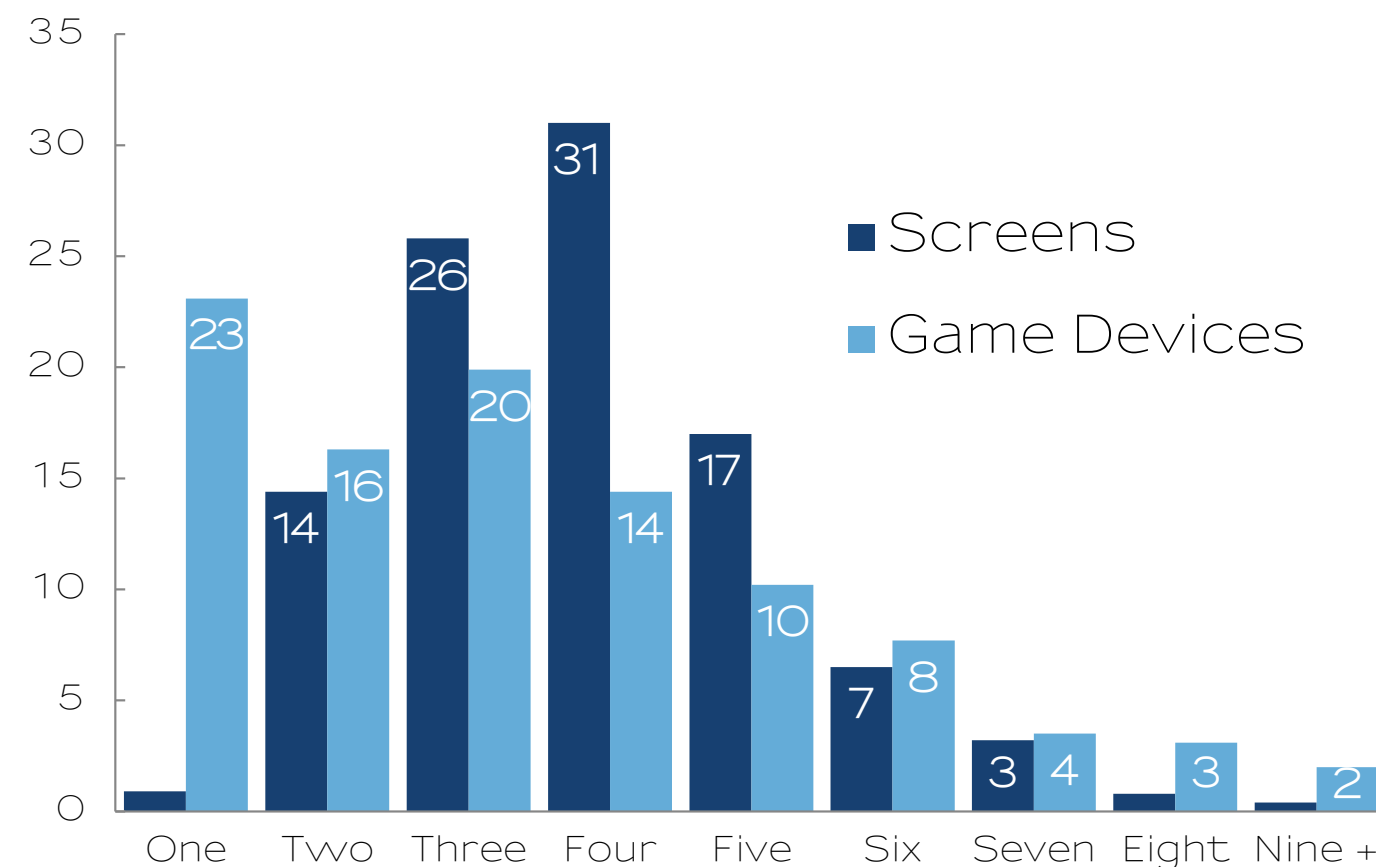
Gamers in New Zealand

33YEARS OLD

The average age of a gamer in New Zealand has plateaued at 33 years. The difference between those who play and those who do not play games is generally related to age. However, adult gamers continue to make up the largest growth market for games; New Zealanders in their 40s and 50s make up the largest group of new gamers.

Average Gamer Age Over Time
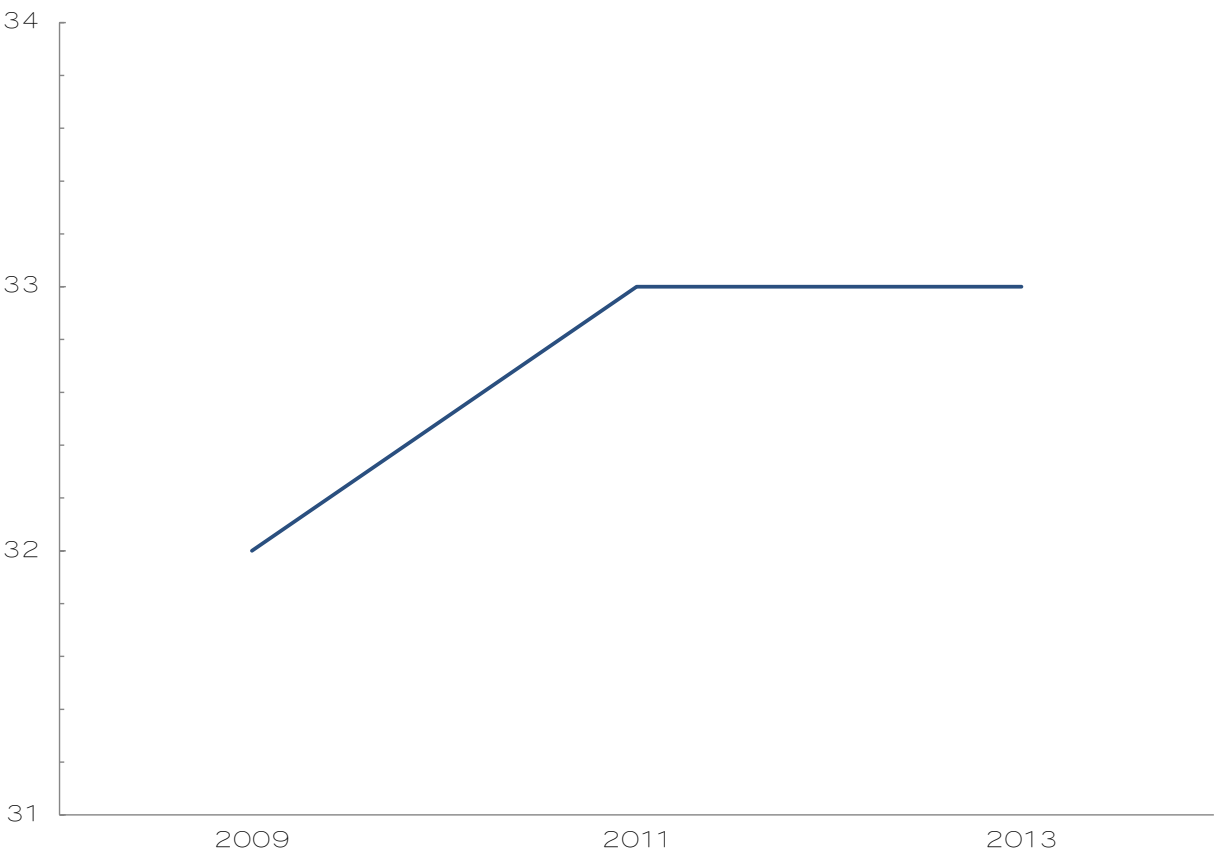
Proportion of Gamers within Age Group (%)
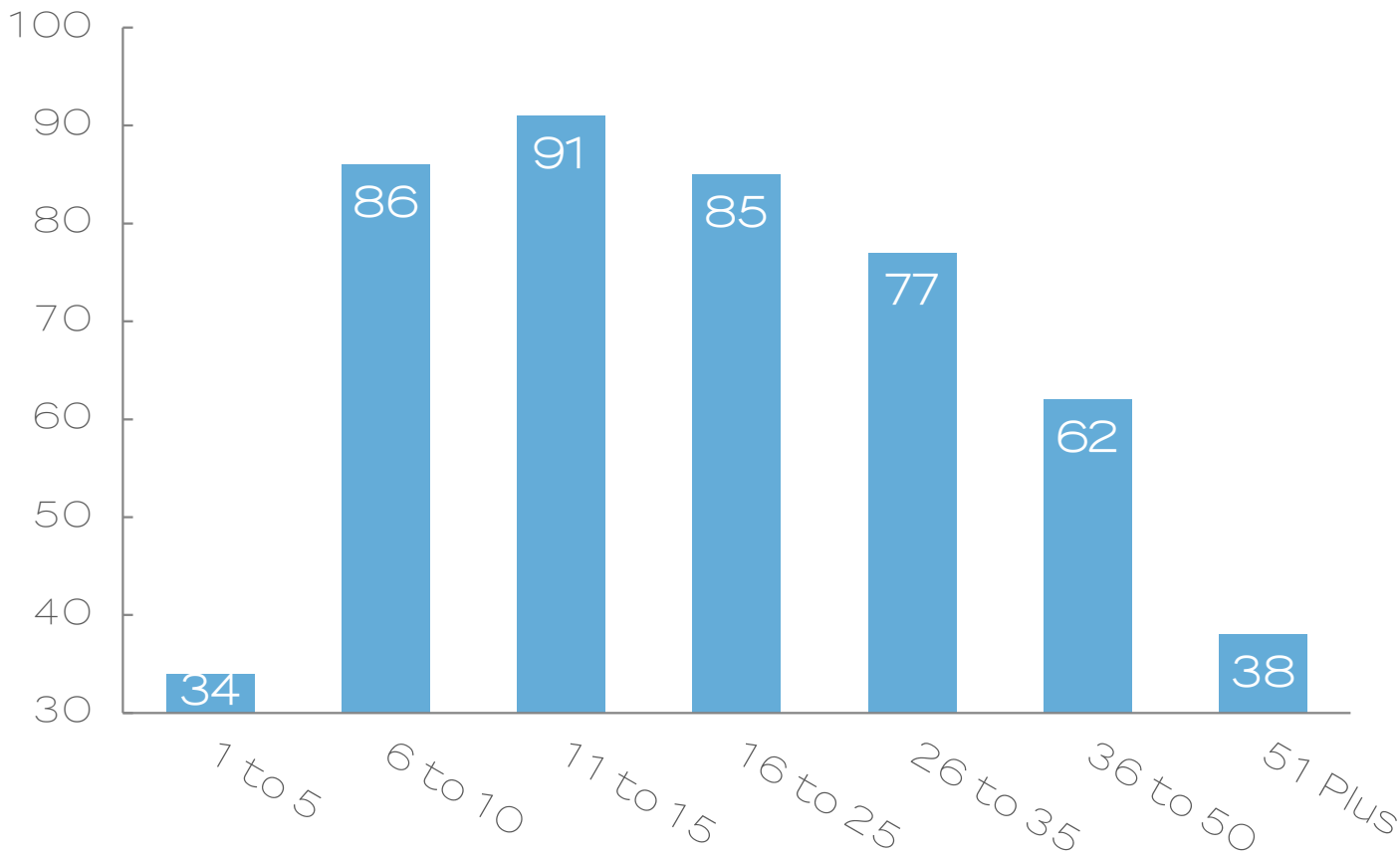
New Zealanders in their 40s and 50s make up the largest group of new adult gamers.

Overall, 65% of all New Zealanders, regardless of age play video games. Each age group contributes to the gamer population in different proportions. The youngest gamers represent a small number compared with the oldest gamers. Indeed, 17% of gamers are aged 51 years or older. The oldest gamer in the current sample is 86 years of age. Within this group of 51- to 86-year-olds, there is nearly equal representation of 5% per year until 70 years after which representation is nearly equal at 2-4%. The age band from 16 to 25 years blurs the line between the number of gamers who are adults with those who are not.

Proportion of Gamers Across Age Groups

4% 8% 11% 17% 19% 16% 25%

- 1 to 5
- 6 to 10
- 11 to 15
- 16 to 25
- 26 to 35
- 36 to 50
- 51 Plus
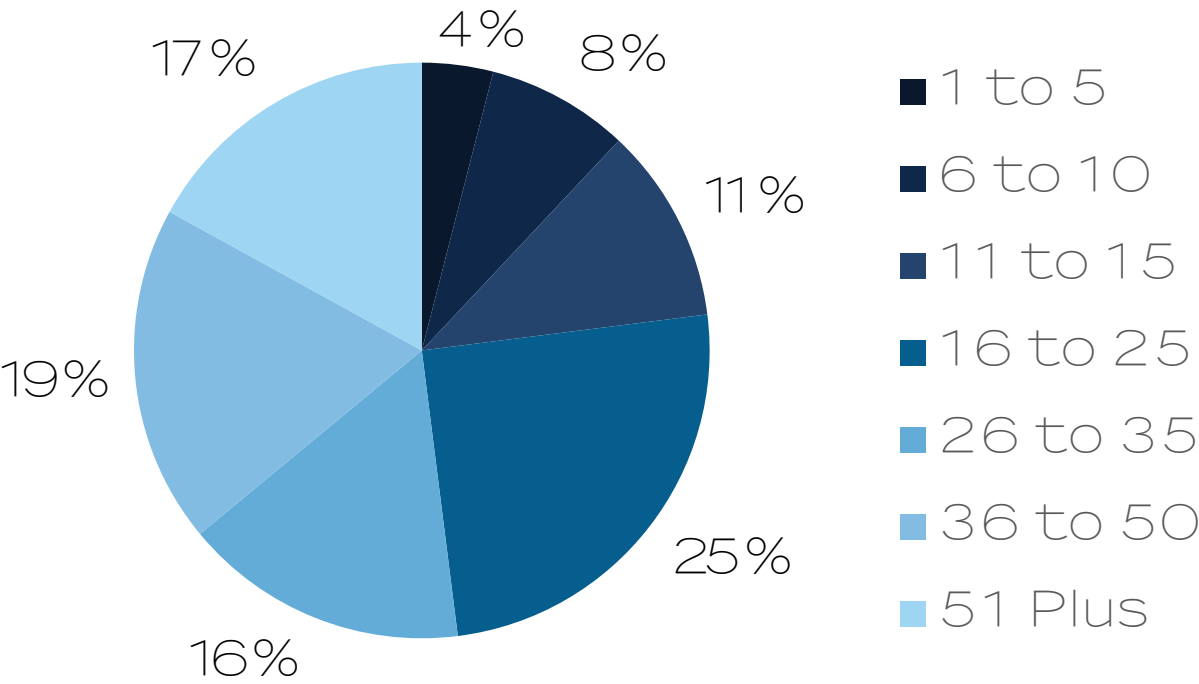
"[Video games] give us all something to do when we are bored, also enhancing brain function such as quick thinking, logical thinking, knowing the difference between right and wrong and also has it's learning side of things mathematical equations, survival skills, etc."

Female, 22, Manawatu – Wanganui Region, Household of 2

Adults as a Proportion of All Gamers

22% 7% 71%

- Children, <15
- Children 15 - 17
- Adults, 18+
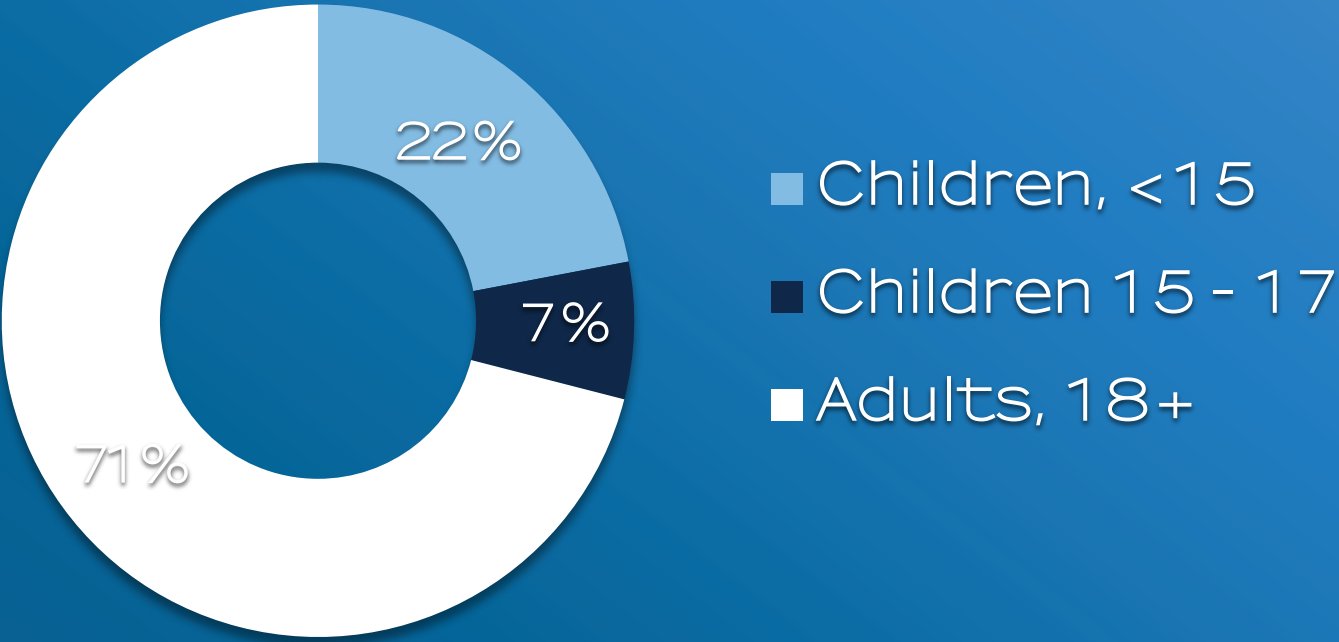
11 YEARS

The average adult gamer has been playing for 11 years. However, many New Zealand adults have more recently begun playing games. One in ten adults started playing games in the past year and almost two thirds of these new adult gamers are female for whom the average age is 39 years; the men who recently started playing games average 48 years of age.

71% OF GAMERS are OVER 18

Gender of Gamers

48%

■ Male

■ Female

52%
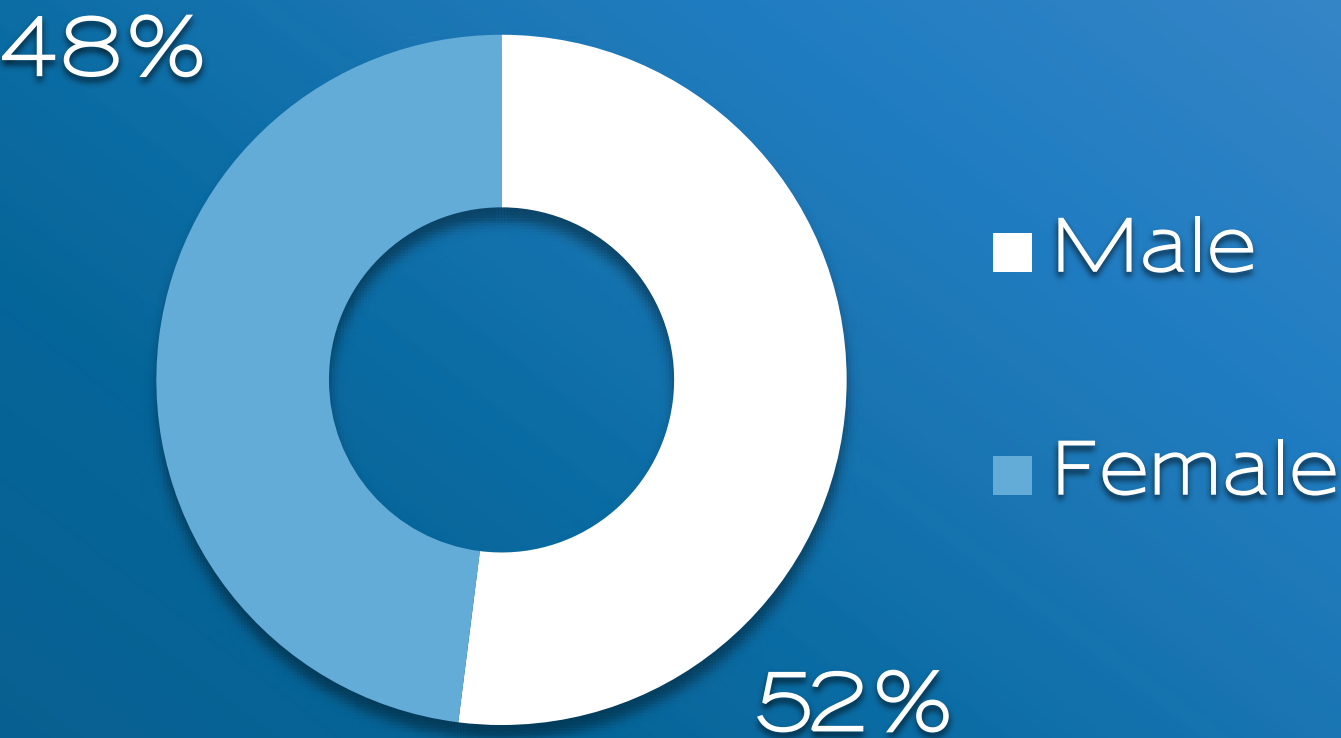
Since 2010, the representation of females among the gamer population has risen from 44% to 48%. It is likely that the greatest increase in female representation occurred prior to 2010, a phenomenon observed in the sister studies in Australia where females went from 37% of total gamers to 47% between 2005 and 2012.

♀48%

of gamers are female.

Like age, gender of gamers has approached the proportions represented in the population.

Female Gamers Over Time
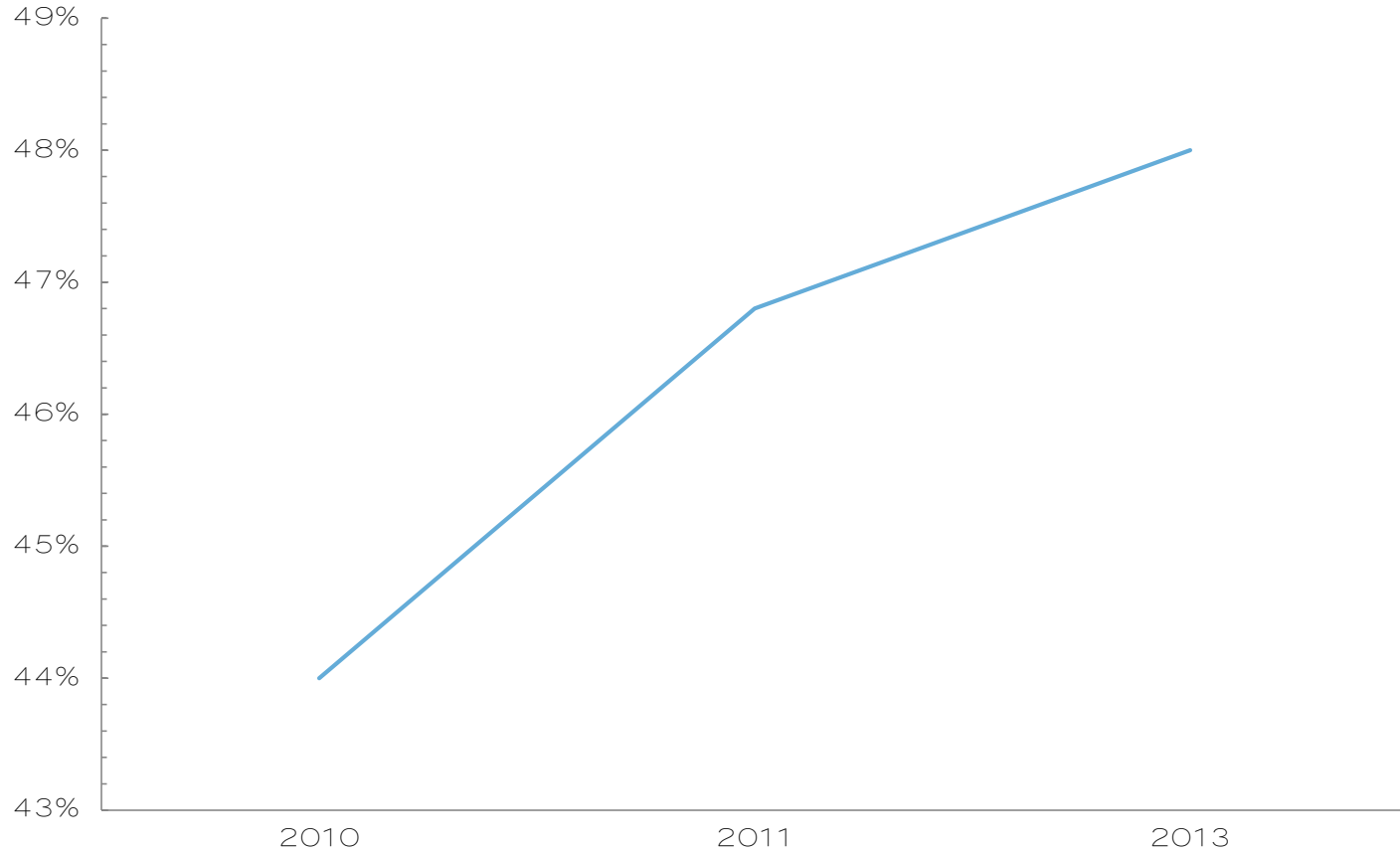
"[I have memories of] playing for hours on my family's computer and playing Prince of Persia, continuing on to clocking every PlayStation2 Prince of Persia game."

Female, 29, Auckland Region, Household of 2

"I have lots of fun and enjoy playing games with others either over the internet or in the same room. I am often very happy and laughing while playing games."

Female, 23, Manawatu – Wanganui Region, Household of 2

Consoles Deliver Fun.

Reasons to game differ by experience and game device. The biggest difference in the gratifications offered by home devices compared with mobile devices occurs between having fun and passing time. Consoles and PCs deliver fun whereas mobiles and tablet computers fill idle moments by helping pass time.

Reasons Gamers Play Video Games (%)
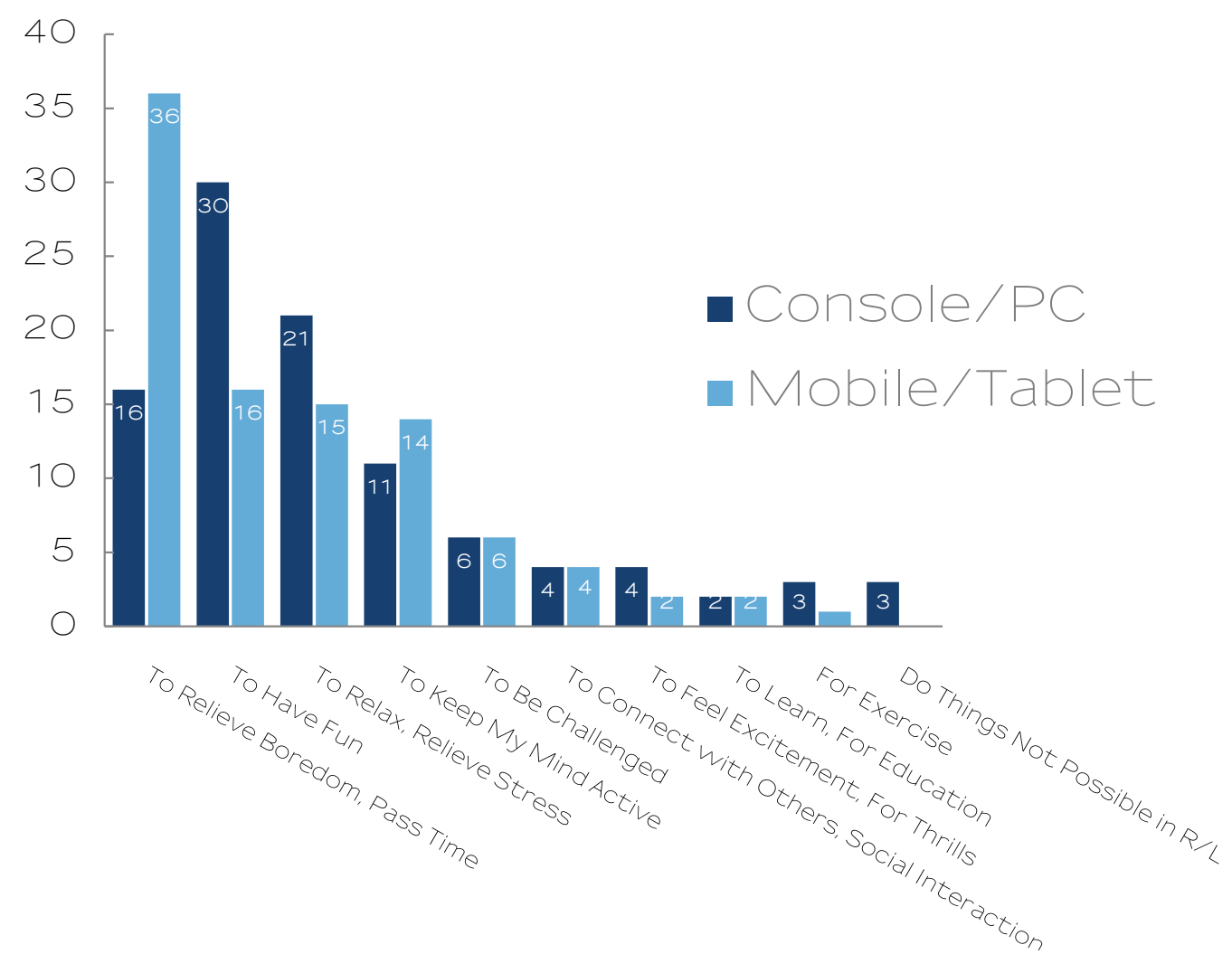
"[I remember the] scariest moment in Half Life when the lights went out and Gordon was taken into the garbage compactor and stripped of his weapons (very frustrating as I had only gotten to that level of armament only to have it all taken away and given that bloody crowbar back!) evenings spent with friends playing co-op games into the wee hours of the morning."

Male, 28, Wellington Region, Household of 4

"[We] have a healthy competition on the Wii between parents and children - lots of laughter."

Female, 47, Canterbury, Household of 5

"I particularly like how my imagination is stimulated as well as the competition with others. Oh, and sharing in-game experiences with other gamers."

Male, 33, Auckland Region, Household of 2

Reasons Gamers Play by Age Group

50%

45%

40%

35%

30%

25%

20%

15%

10%

5%

0%

Social Connections

Excitement/Thrills

Pass Time

Have Fun

Exercise

Learning/Education
Relax/Destress

Be Challenged
Experience Fantasy
Keep Mind Active

Keep Mind Active

Be Challenged

Learning/Education

Relax/Destress
Experience Fantasy

Social Connections
Pass Time
Have Fun

Excitement/Thrills

Exercise

16 to 25   26 to 35   36 to 50   51 Plus
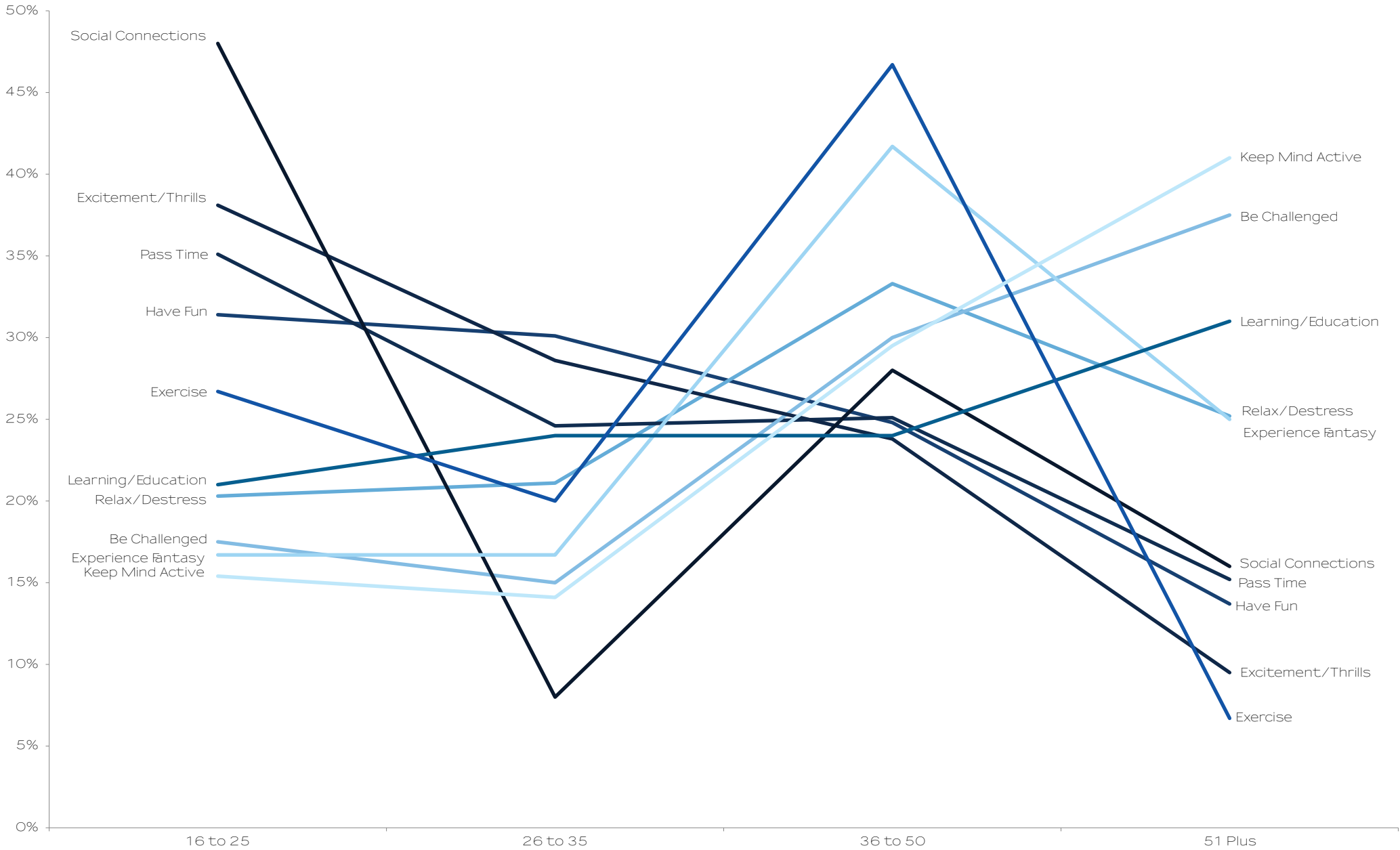
41% PLAY TO KEEP THE MIND ACTIVE

Why older adult gamers play

The reasons gamers choose to play varies by age group, suggesting that life stages play an important role in the way games suit varied lifestyles. Social interaction, thrills and relieving boredom are the highest motivation for playing among younger gamers whereas these are a lower priority among older gamers. By comparison, keeping an active mind, being challenged and learning are priorities for older gamers, while these are low priorities among younger gamers.

"Amazed that my ageing mind can still play some of the games that I have access to. I have found the games I play are very good for depression."

Male, 74, Canterbury, Household of 2

Most gamers play between half an hour and two hours at a time and most play daily. Concentric lines on the radar graph represent the number of participants; the radial lines show the duration of play from a few minutes to seven or more hours while the fill colours represent frequency of play.

Frequency and Duration of Play

Legend:
- Every day
- Every other day
- Twice a week
- Once a week
- Once a fortnight
- Once a month
- Once every 3 months
- < Once every 3 months

Radar axes: Few minutes, Half an hour, An hour, Two hours, Three hours, Four hours, Five hours, Six hours, Seven + hours
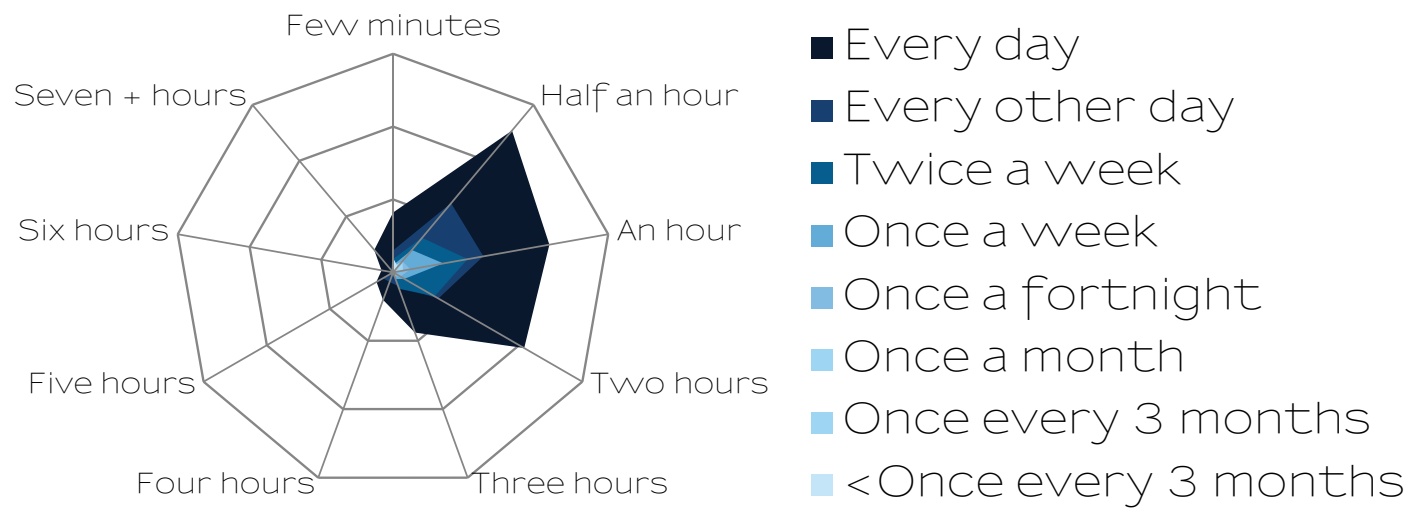
Gamers who play most frequently and for longer durations are more likely to be male and between ages of 11 and 25. By comparison, the lightest players are also the youngest in the population, young girls are least frequent, young boys play for the shortest duration. Between these two are mainstream gamers.

DAILY
TYPICAL GAME PLAY **FREQUENCY**

1 HOUR
TYPICAL PLAY **DURATION**

Frequency and Duration of Play by Age Band and Gender

Axis: Duration of Play / Hours (0.5 to 2.5); Frequency of Play / Every n Days (1.5 to 3.0)

Labels: Males 11 to 15, Males 16 to 25, Females 26 to 35, Males 26 to 35, Females 6 to 10, Males 51 Plus, Females 11 to 15, Females 51 Plus, Females 36 to 50, Females 1 to 5, Males 36 to 50, Females 16 to 25, Males 6 to 10, Males 1 to 5
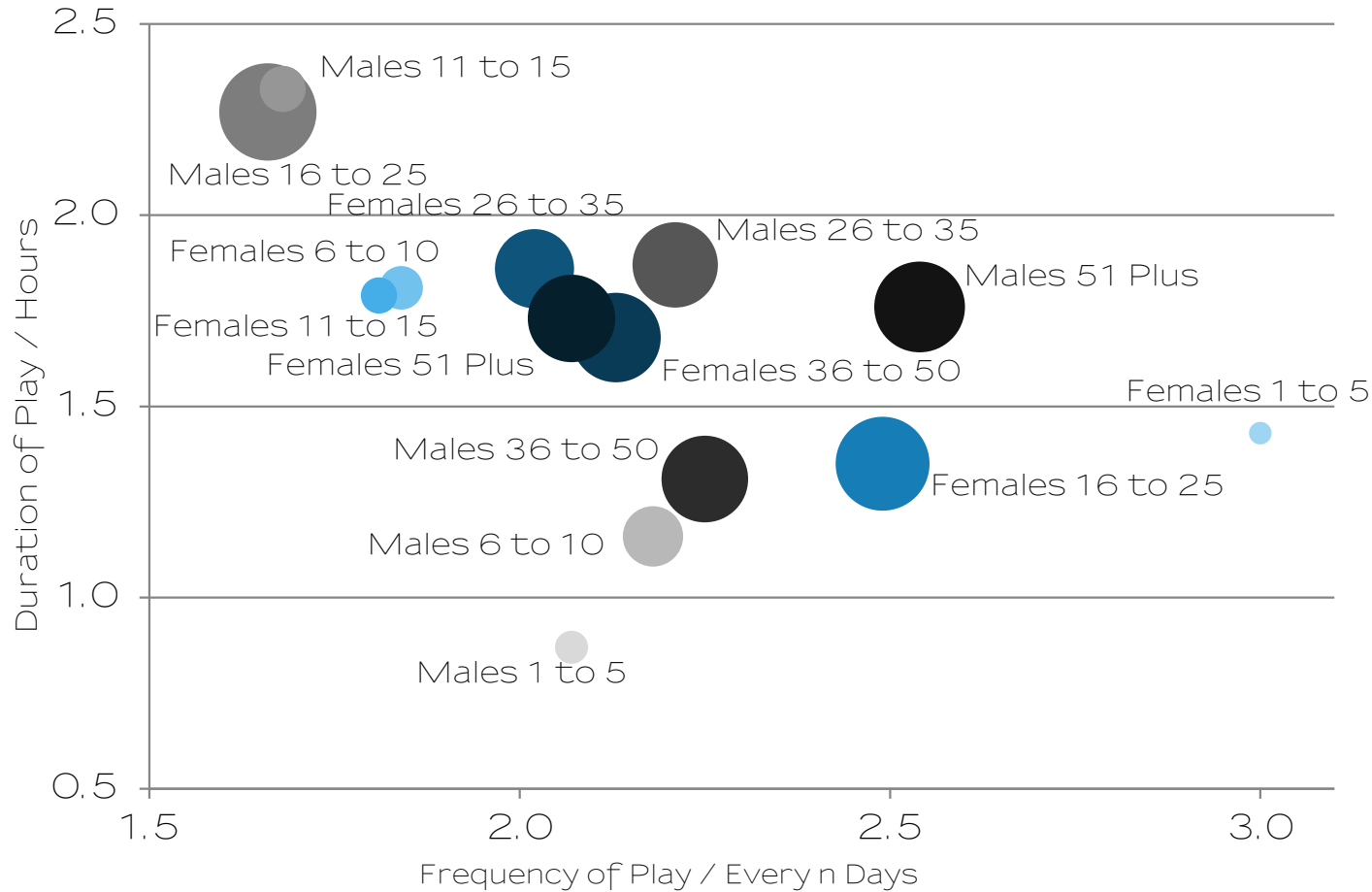
"[I recall] playing games where we compete with each other, or adults vs kids. Good way to bond with boys as they grow, as they are not always keen to talk."

Female, 37, Canterbury, Household of 3

Fun, Challenge, Competition and Stimulation

Fun and challenge top the list of reasons why New Zealanders choose to play and interact with games rather than passively consume "other media" on their many screens. Competition and stimulation are the third and fourth reasons given. By comparison, exercise ranked lowest.

Factors Attracting Audiences to Games over Other Media (%)

Factor	Value
Fun	3.0
Challenge	2.9
Competition	2.4
Stimulation	2.3
Education	2.2
Social Interaction	1.9
Create Memories	1.9
Emotional Engagement	1.8
Realism	1.8
Exercise	1.7
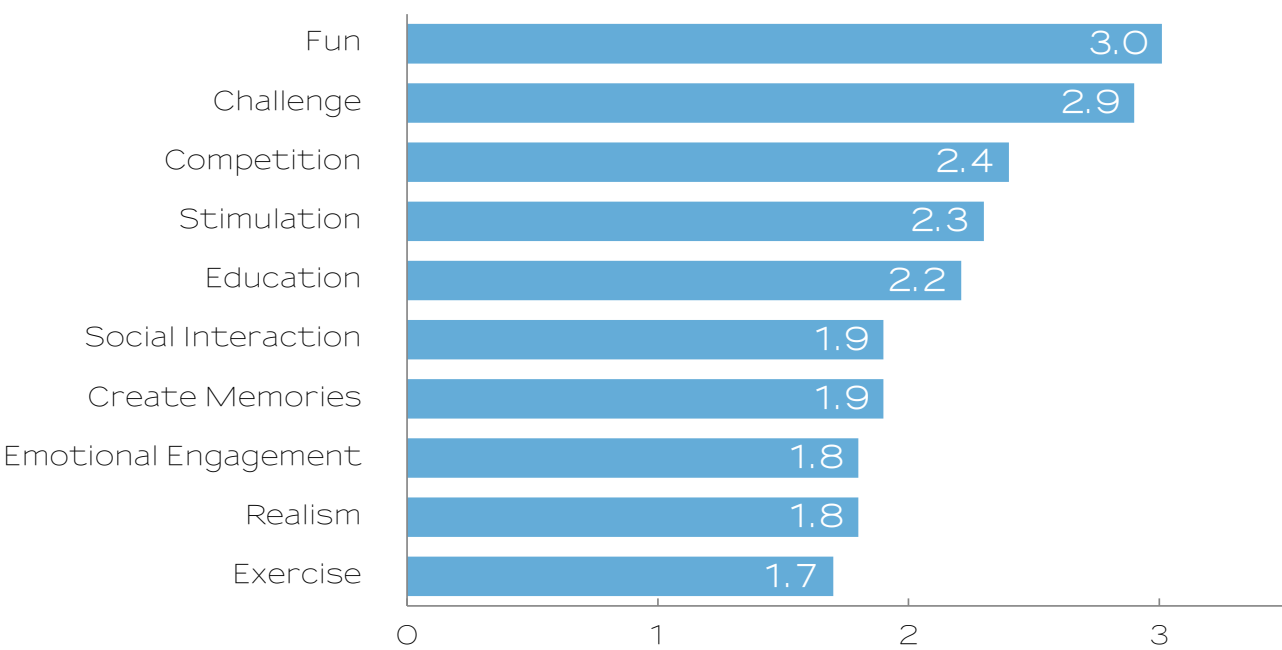
"We became closer to each other [family] as we have fun together."

Female, 17, Canterbury, Household of 6

Weekends and holidays are the best times to play.

The most frequent times when New Zealanders choose to play games are weekends and public holidays. Using public transport is the least frequently nominated time to play, followed by before work or school.

When and Where Gamers Play (%)

Time/Place	Value
Weekends	89
Evening	87
Holidays	86
After School/Work	68
Late Night	62
Break, Lunch	34
Before Work/School	28
Public Transport	23
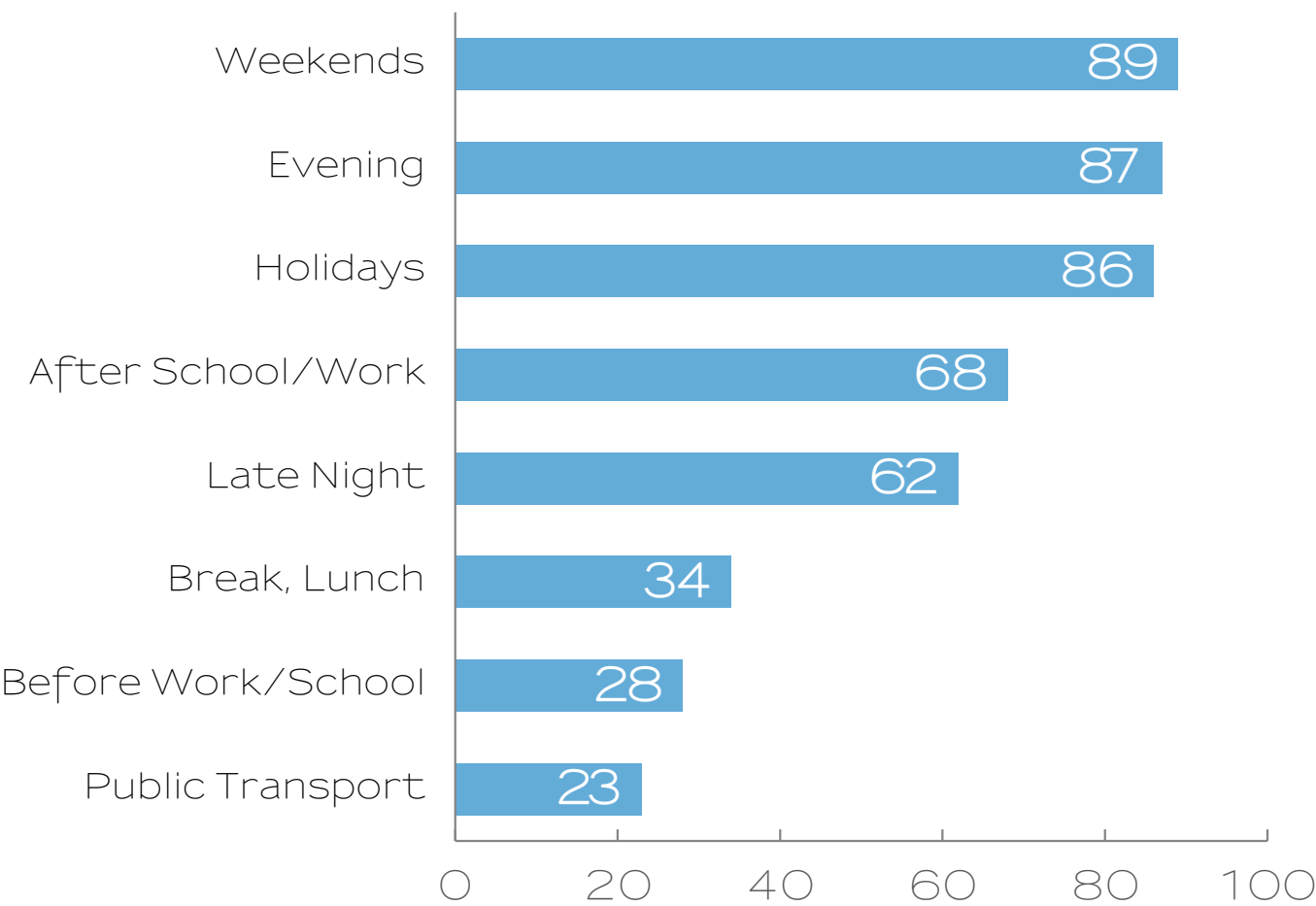
70% of game households have two or more gamers

Most game households are home to two or more gamers with the modal number being two after which the proportion declines steadily with 6-gamer households making up just 3%. According to Statistics New Zealand the average New Zealand households is shared by between two and three people.

Although others may be in the same room, the default game experience is single-player. Nevertheless, the number of households in which only one player is resident does not prevent online social play.

25% play online through social network games while 11% play online through role-playing.

Number of Gamers in Households (%)

Category	Value
One	30
Two	32
Three	19
Four	13
Five	3
Six Plus	3
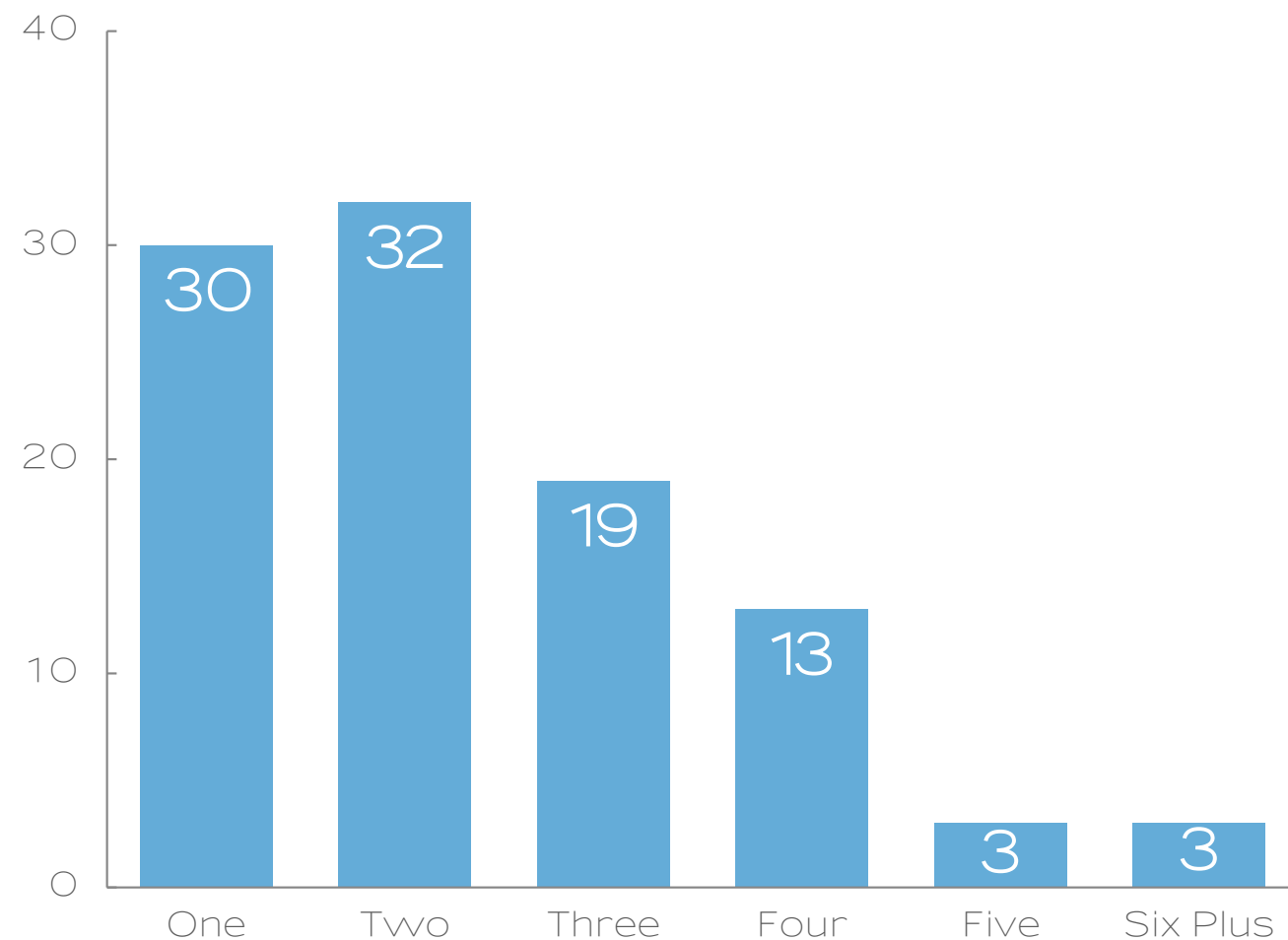
Common Playing Experience (%)

Category	Same Room	Online
Alone	69	
Stranger		20
Friend	26	32
Other Relative	15	15
Sibling	11	9
Parent	7	5
Child	24	16
Partner	31	15
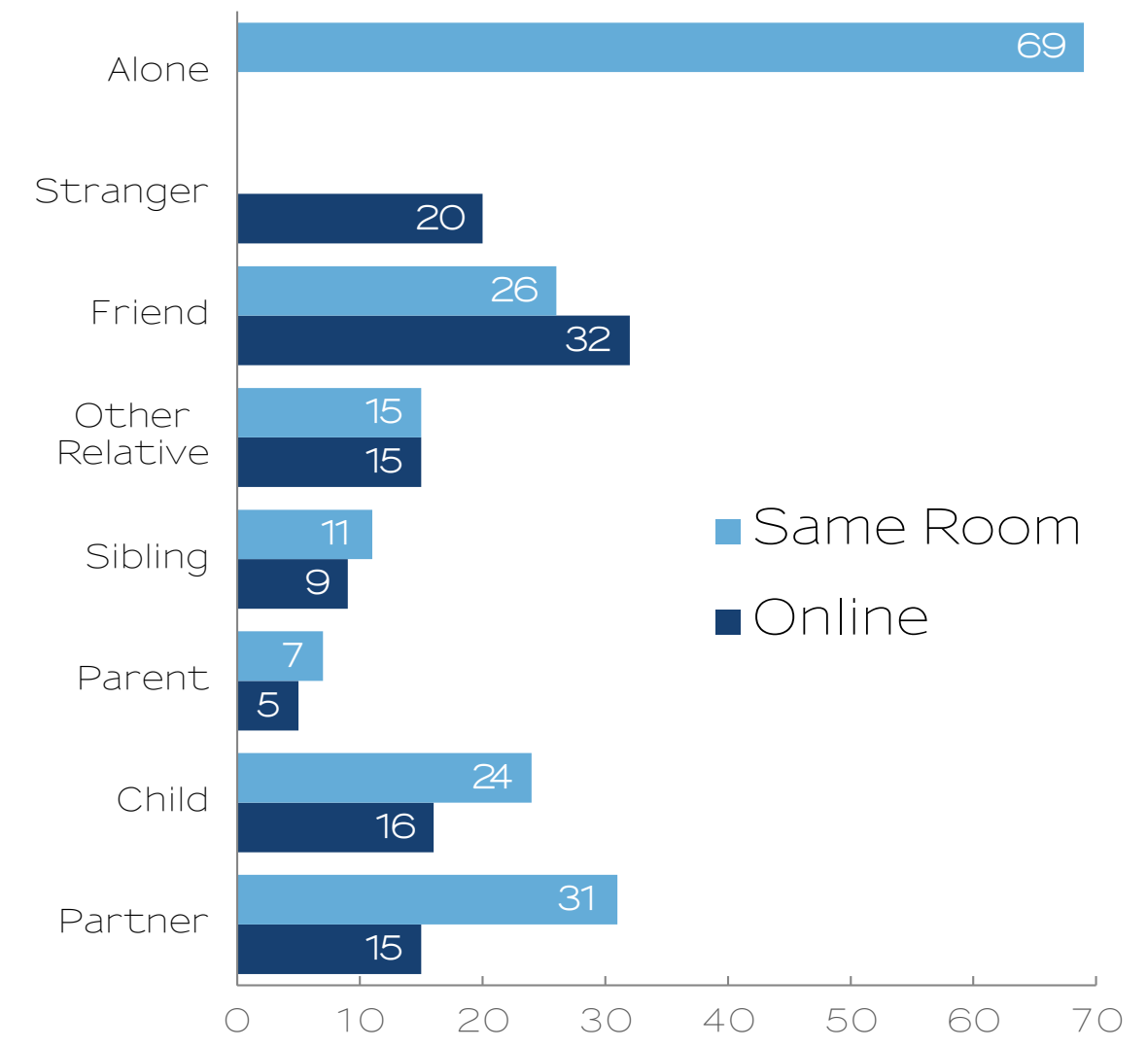
Video games are enjoyed by the entire family

Households with children are game households, but children aren't the only gamers; in homes with children under 18 years of age, 75% of mums and 79% of dads play video games. Of those parents who play video games, 86% play with their children. Consoles, PCs and mobiles dominate parents' game devices. However, tablets and handhelds are popular too. Older parents gravitate toward PCs for games.

"They [computer games] have provided some peace and quiet for the parents, and the educational ones have been useful to teach things such as times tables. The Wii games have been fun with friends for both adults and children, and have provided some exercise."

Female, 48, Auckland Region, Household of 6

"Xbox Kinect is a fun way to exercise and play inside as a family."

Male, 39, Waikato Region, Household of 4

Parents' Game Devices Span Age Groups (%)

Legend:
- 16 to 25
- 26 to 35
- 36 to 50
- 51 Plus

Console: 74, 76, 61, 49
PC: 76, 78, 81, 91
Mobile: 79, 72, 61, 35
Tablet: 43, 47, 39, 40
Handheld: 26, 25, 17, 7
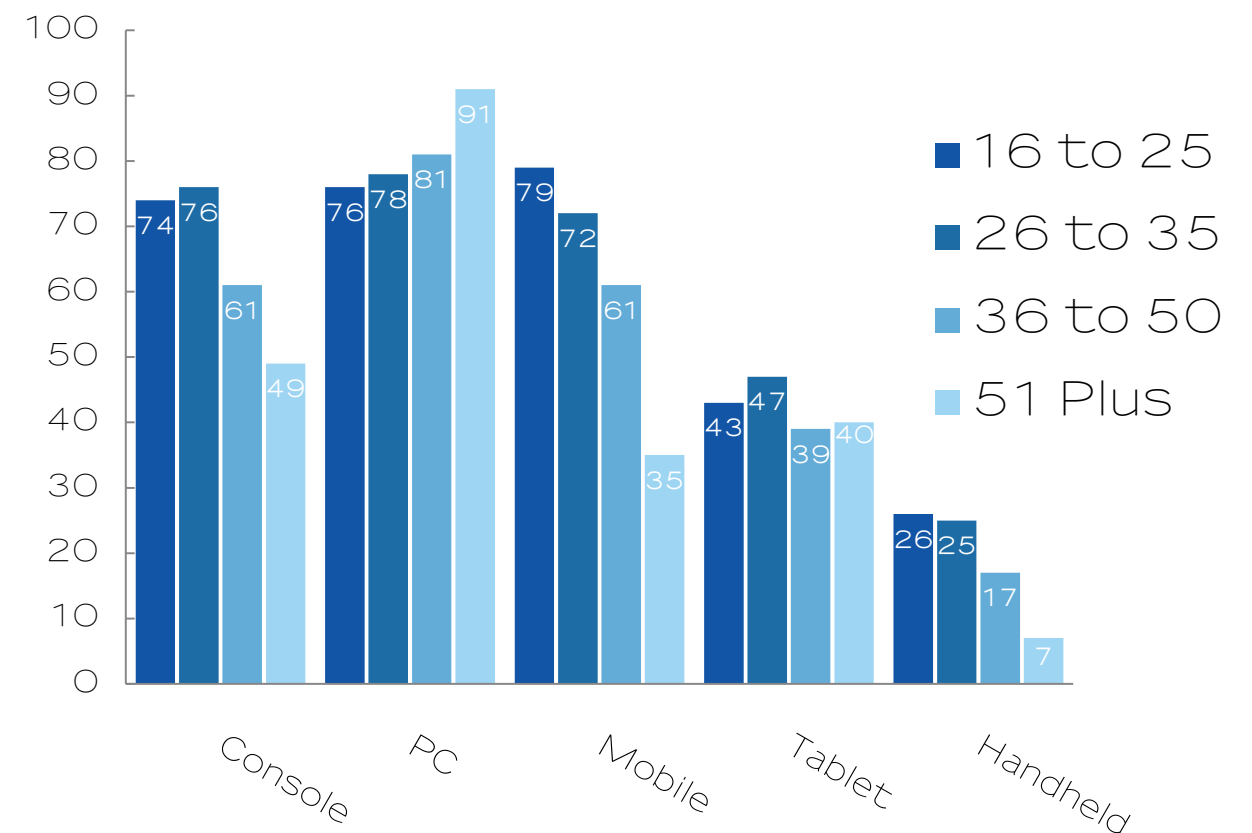
Parents play on a wide range of game devices, varying little by age group. Mums are more likely than dads to play on PCs and dads are more likely than mums to play on consoles.

"Our family and visitors have often played Rock Band and other interactive games together and this has helped break down barriers and help create fun times."

Female, 55, Northland Region, Household of 2

Parents' Preferred Game Devices by Gender (%)

Dads / Mums

Device	Dads	Mums
Console	61	40
Computer/Laptop	76	82
Mobile	56	61
Tablet	26	33
Handheld	6	(4)

Why Parents Use Games with Children (%)

Reason	%
It's a Way to Spend Time with my Children	61
Children Ask me to Play with Them	49
It's Fun for the Whole Family	45
It's a Way to Educate my Child	38
It's a Way to Monitor What my Children Play	37
It's a Way to Monitor How Often my Children Play	12
It's a Way to Control How Long my Children Play in a Go	10

61% of parents play games as a way to spend time with their children

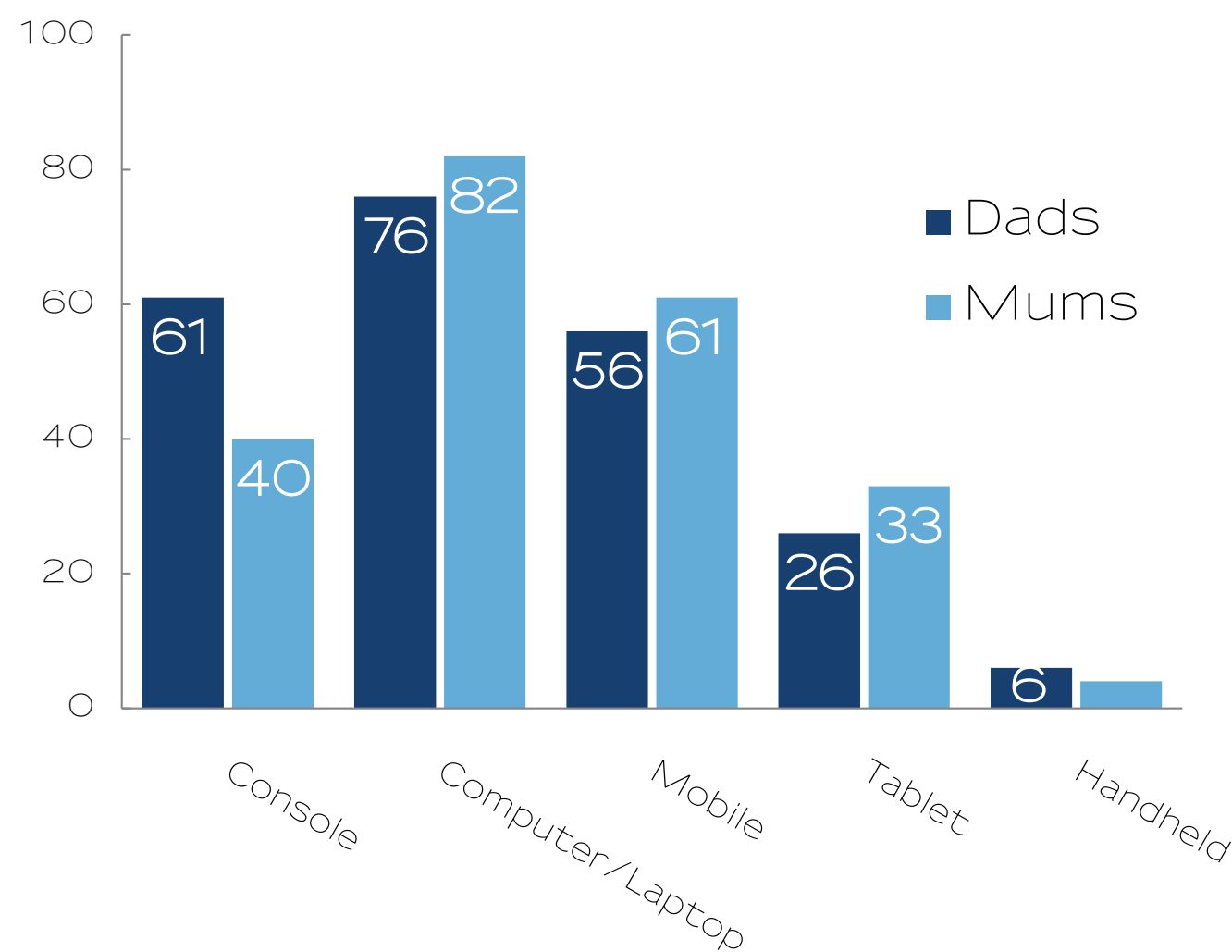Parents regularly play games with their children just as parents read to them when children are younger and play table-top and outdoor games with children when they are older. Parents' top reasons to play video games with their children are that "it's a way to spend time with my children" and "children ask me to play with them."
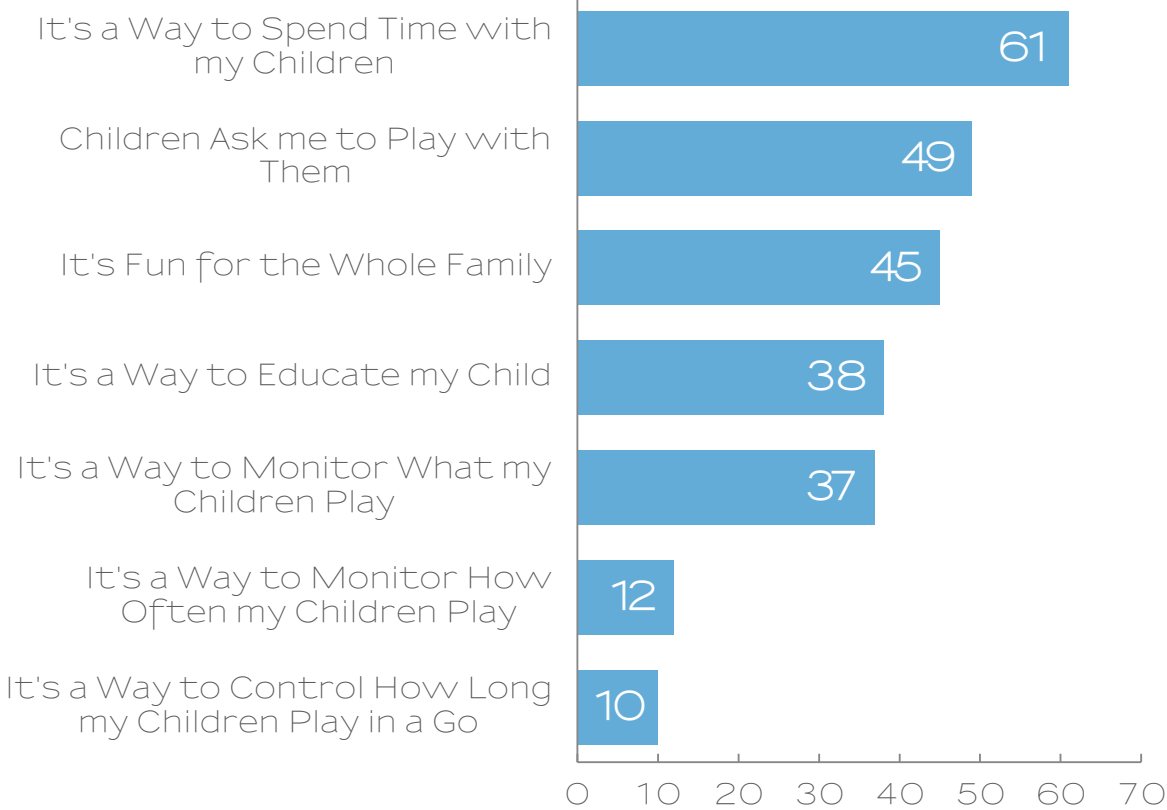
"I remember great nights experienced with a group of people at one point in my life or another - having a great time playing games. Many times I have connected with my kids while they have been teaching me how to play their games OR I have helped them through stages they couldn't achieve alone - good bonding instrument."

Female, 34, Auckland Region, Household of 3

When they play, parents use the opportunity to talk with children about games, use them as learning and teaching tools and use them for punishment and reward.

How Parents Use Games with Children (%)

Category	Value
Talk about Computer Games with Children	77
Use Games for Education	78
Restrict Games as a Punishment	69
Use Games as a Reward	53

Adult Presence when Games are Bought by Children

Always 70%
Most of the Time 21%
Sometimes 5%
Rarely 3%
Never 1%

Most purchases by children are accompanied by adults

Parental involvement at game selection and purchase is another opportunity to exercise parental guidance and relationship-building. However, purchasing guidance depends on the age of the child. Adults are always present in 70% of purchases and present most of the time in 21% of purchases. A small proportion (1%) indicates that an adult is never present – this accommodates those closer to age 18. Parents rarely purchase games for their children without their children being present: 57% said their child was present either "always" or "most of the time" while 34% said their child was "sometimes" present and 9% said their child was "rarely" or "never" present when the parent purchased a game for a child.

Parental controls and family settings provide another opportunity for parents to exercise influence and engagement with children's game playing, particularly on consoles. Parents are more likely than non-parents to know about game console access restriction settings and gamer parents are more familiar with them than non-gamer parents.

"Many games can be educational and I enjoy doing this with my children. Computers and technology are a way of life now but I think these must be used proactively."

Female, 40, Bay of Plenty Region, Household of 5

Familiarity with Parental Controls (%)

Legend:
- Gamers
- Non-gamers
- Parents
- Non-Parents

	Gamers	Non-gamers	Parents	Non-Parents
Not at all familiar	14	27	11	22
Not too familiar	34	39	36	35
Mostly familiar	37	26	40	30
Completely familiar	15	8	13	13

> "[Computer games] have influenced us positively, they allow my daughter to be a part of a different world (Minecraft) and imagine what she is going to build next time, or how she can build a better house quicker - so it is teaching forward thinking."
>
> Female, 34, Auckland Region, Household of 3

What Parents Think Children Get from Games (%)

	%
Learning about technology	96
Learning maths	92
Learning about Science	90
Learning about langauge	83
Learning to plan	83
Learning about others	78
Learning about work	75
Learning about Society	69
Learning about life	69

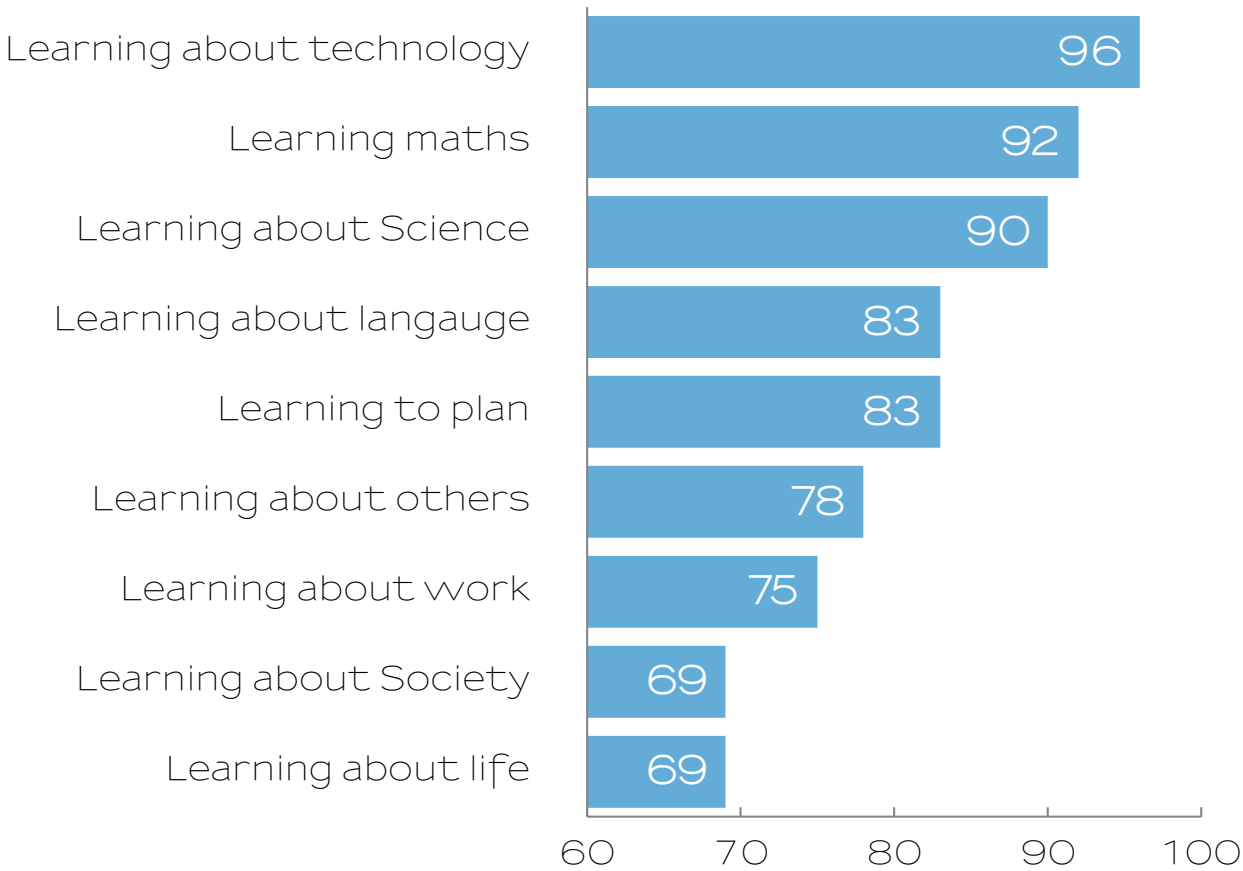## Parents are positive about the benefits of games for children.

Learning about technology, maths and science are the leading benefits parents identify for their children, when playing video games. These findings suggest that parents increasingly see problem-solving and strategising during game play as an active and productive mental activity.

Ratings and Classification of Digital Games

The ratings and classification of games has been a topic of robust discussion in the New Zealand community. The Office of Film & Literature Classificaiton (www.censorship.govt.nz) administers the classification of computer and video games in New Zealand under the Classification Act. The Classification Board makes classification decisions.
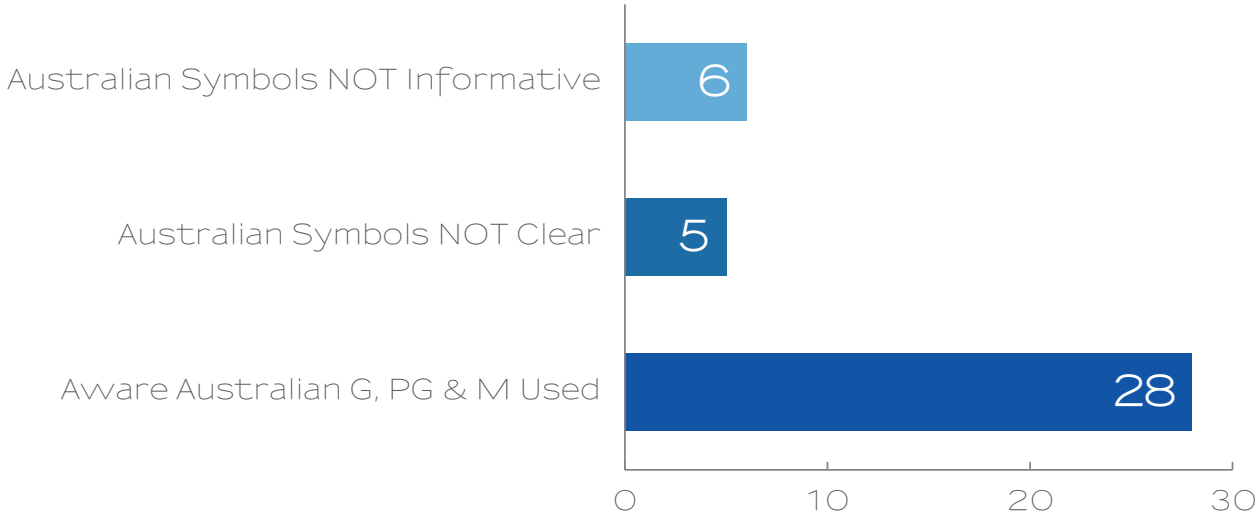
28% Aware Australian G, PG and M labels may be used in New Zealand.

According to the 2012 Annual Report of the Office of Film & Literature Classification, video games constitute a minor part of the publications classified as R18. As the OFLC's 2011 Annual Report states, "Overseas game developers and suppliers have to seek clarification about New Zealand's games classification regime as it is not as straightforward as other jurisdictions. For example, they are surprised that unrestricted level games can be supplied without New Zealand labels as they are an exempt category in the Act." The Act also provides for Australian classifications symbols to be used for G, PG, and M as a consequence – however, most New Zealanders are unaware of this; those who are familiar with Australian markings find them clear and informative.

94% Understand Australian symbols G, PG and M.

Familiarity with classification labels is mixed at home with 71% of parents saying they are "quite" or "completely" familiar with New Zealand classification labels while 56% of non-parents say they are "quite" or "completely" familiar "vaguely" with them.

Knowledge and Utility of Australian Symbols in New Zealand (%)

Category	Value
Australian Symbols NOT Informative	6
Australian Symbols NOT Clear	5
Aware Australian G, PG & M Used	28

Familiarity with Classification Labels (%)

	Parents	Non-Parents
Completely familiar	27	23
Quite familiar	44	33
Vaguely familiar	22	24
Not at all familiar	7	19
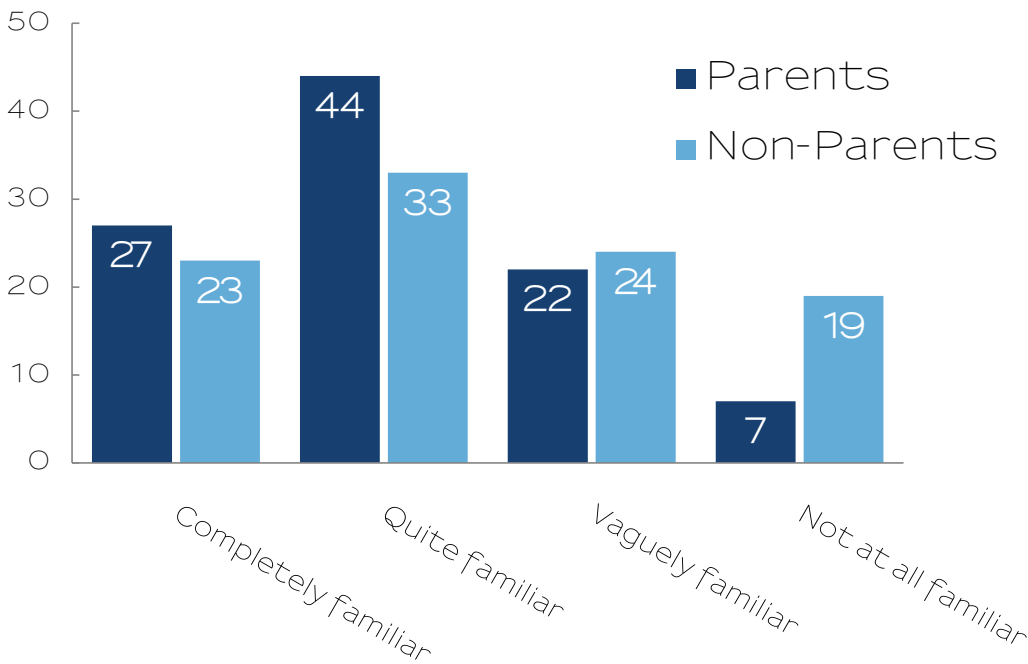
Confusion around classification distinctions appears greatest at M with 18% of parents and 16% of non-parents indicating M is unclear. Among parents, 5% say G is unclear, 6% say PG is unclear, 5% say R13 is unclear, and 3% Say %15 is unclear. R16 and R18 provide the greatest clarity for parents reading game classifications.

Confusion with Classifications (%)
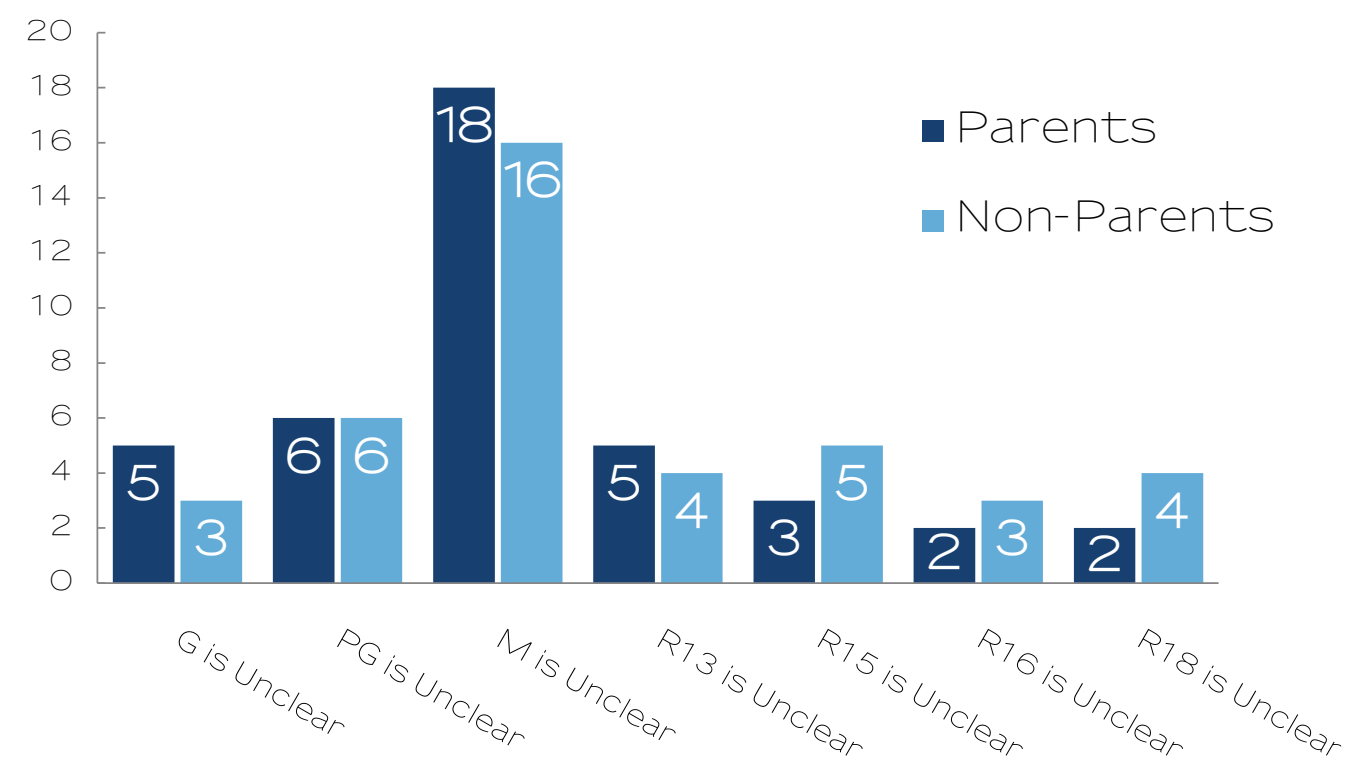
> *"… customers … are the people who play these games, the target market should give the proper and honest answers [about classification]. We are interested."*
>
> *Female, 24, Auckland Region, Household of 2*

Influence of Classification on Game-buying Decisions (%)
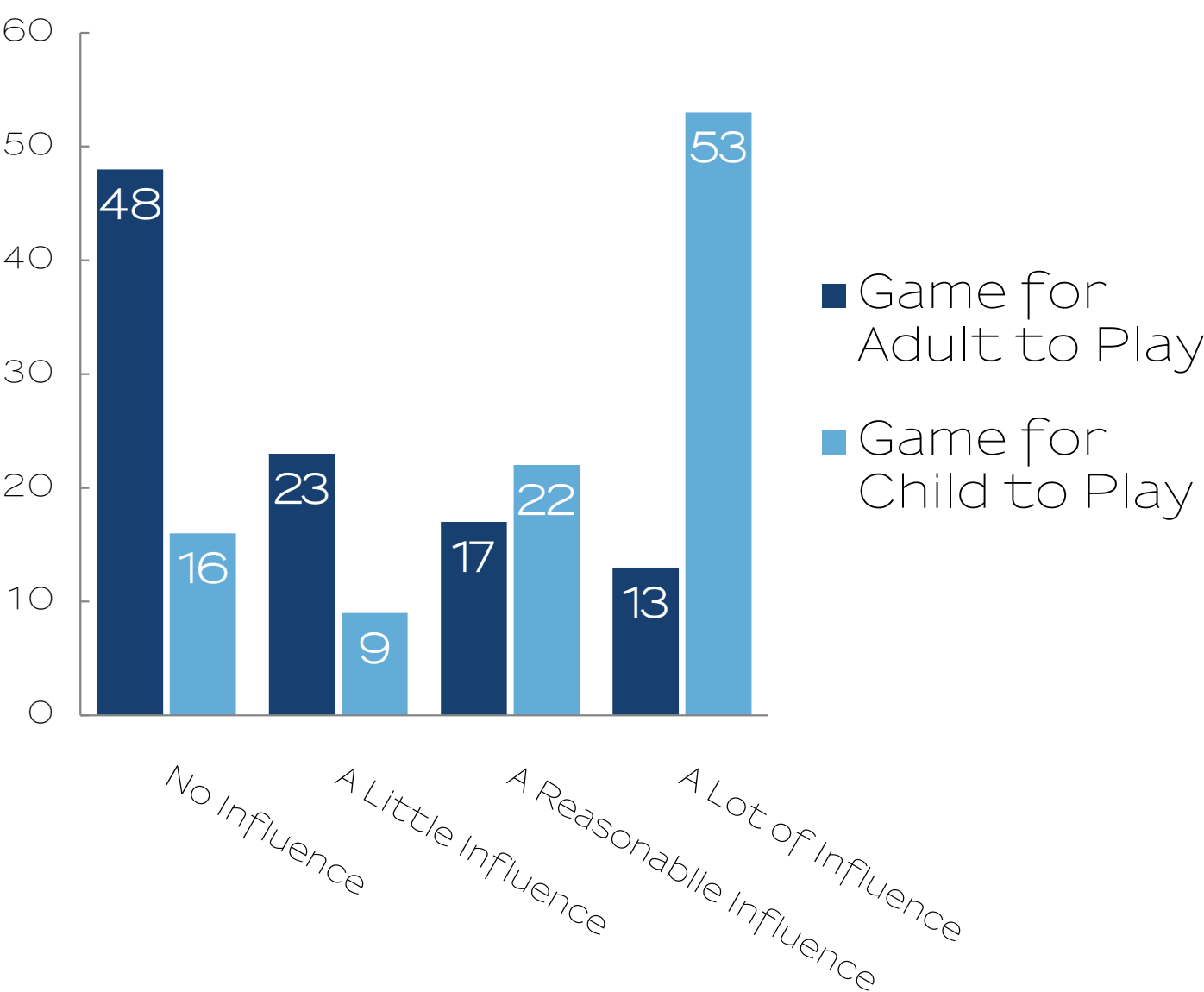
Influence of classifications on game buying decisions depends on who will play the game; 44% said they had " "a lot of" influence when purchasing for children, however 10% said classifications had that much influence when purchasing for adults.

Classification and New Media

New media give consumers great choice and many new experiences. They also generate some concern over potential risks leading to calls for classification. Whether for their use or children's use, adults are most concerned about the Internet generally, followed by social media specifically. The oldest of these three media, computer and video games, come last among new media, generating the least concerns.

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

"Parents and carers … know the maturity of the particular child in question."

Male, 64, Wellington Region, Household of 4
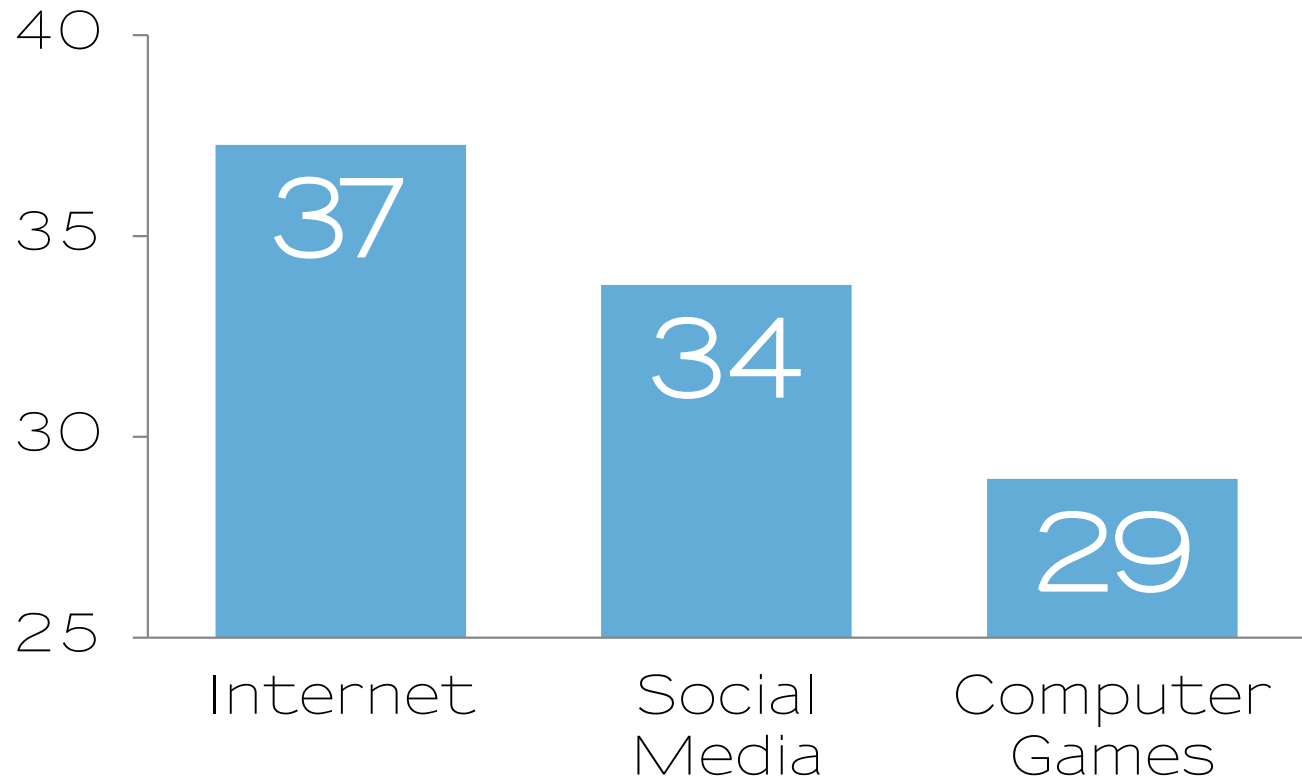
New Media and Concerns about Potential Risks to Children (%)
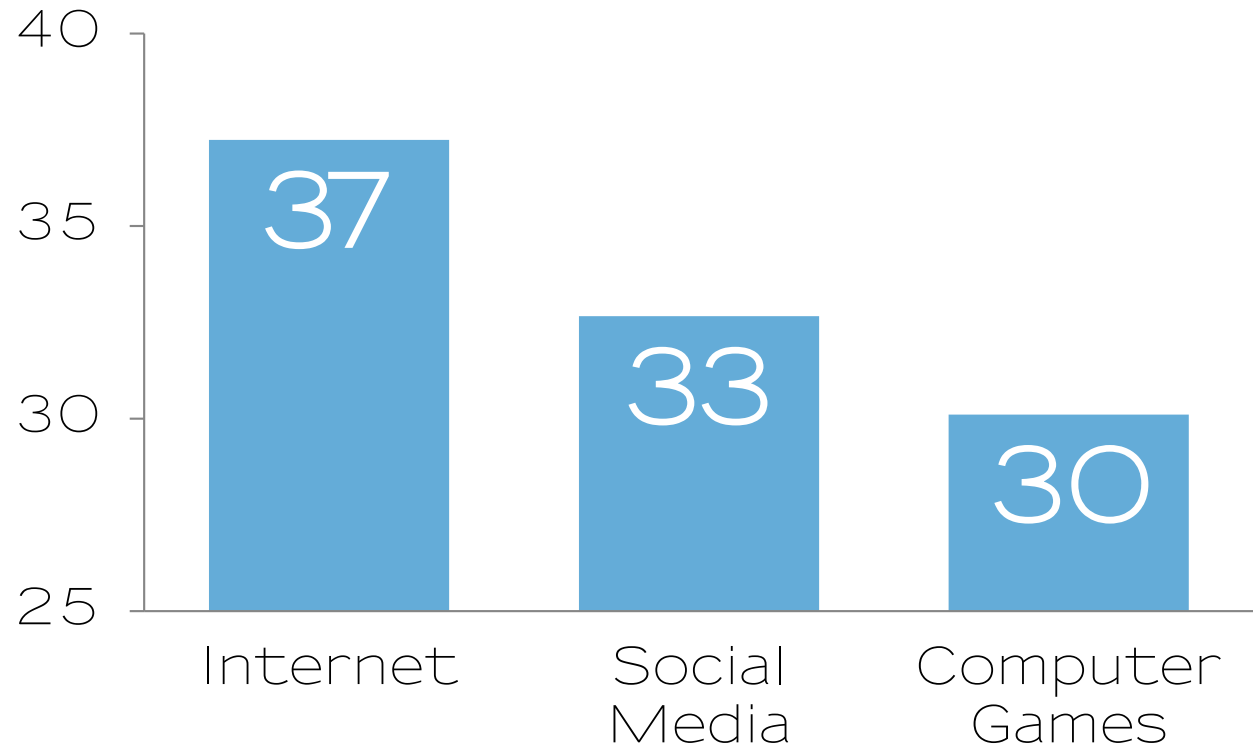
"I have been playing MMOs for a long while now and have made friends over the internet and all over the world. Even after 5 years those friends are there. Even with single player RPG's there's always an adventure."

Female, 22, Auckland Region, Household of 4

Concerns about the risks that may arise from media consumption varies by medium and by the audience using the medium. Given the opportunity to nominate whether or not different risks are of concern to them either for their use of a medium or for children's use of it, adults express concerns about contemporary issues. The ranking of issues differs in relation to adults and children with adults' consumption raising concerns about exposure to sexual predators, animal cruelty and harassment and children's consumption raising concerns about exposure to, sex, sexual predators and violence.

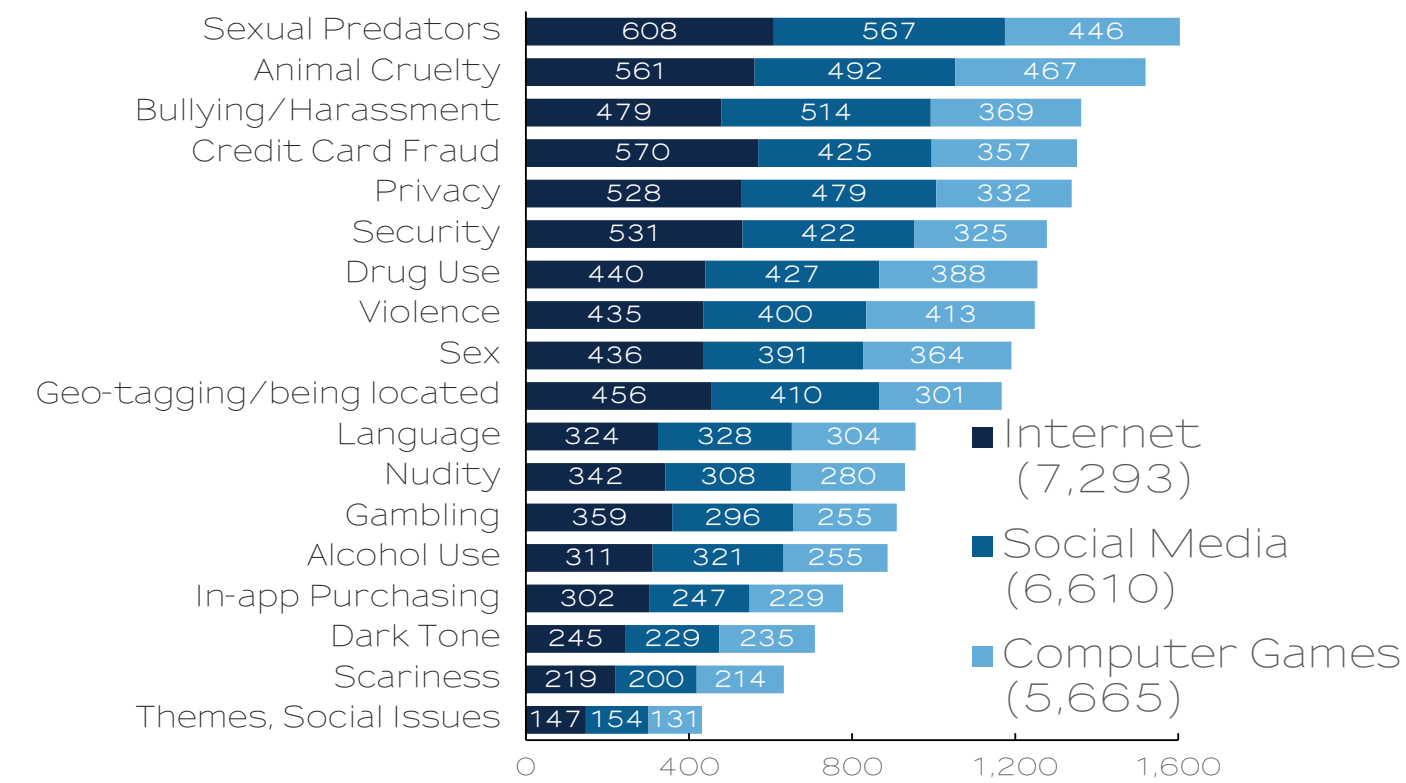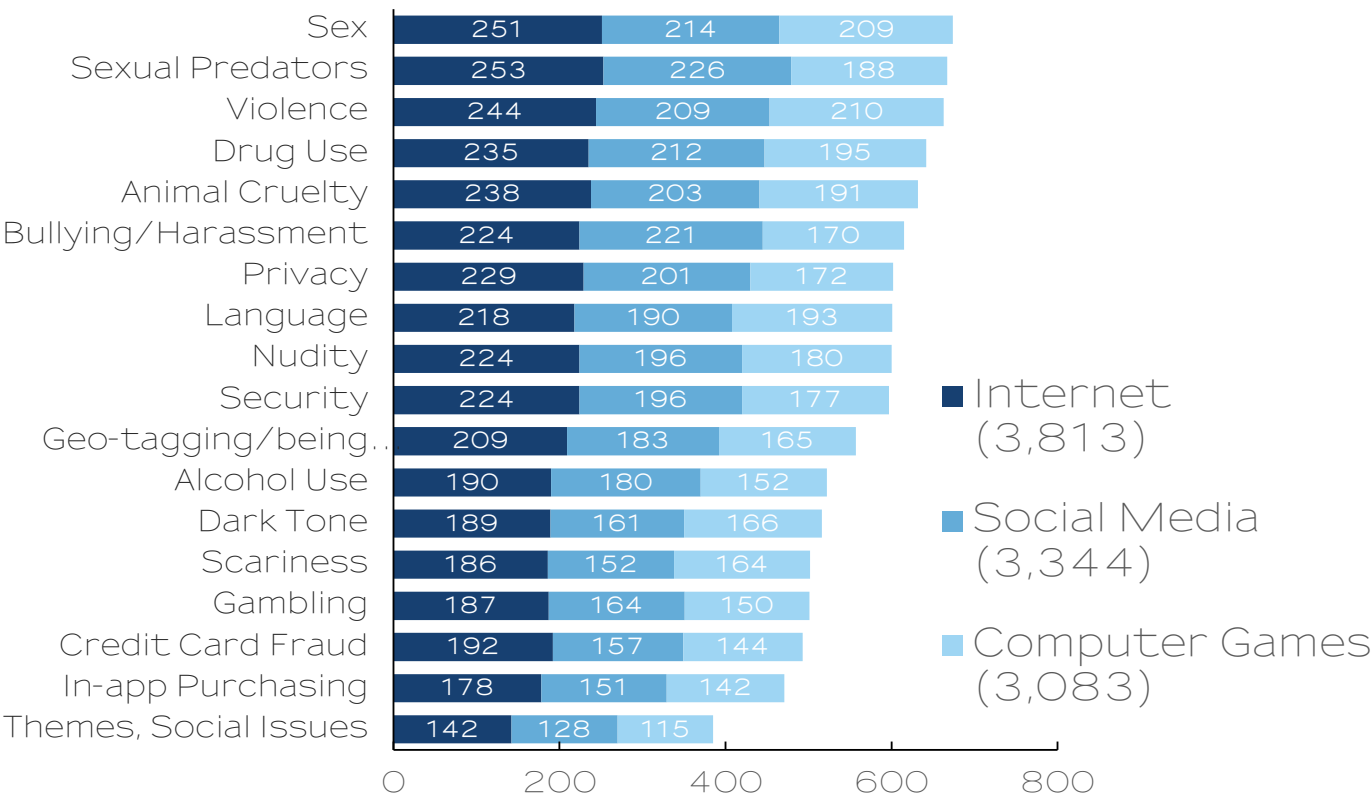## Concerning Elements by Medium, Adults

	Internet (7,293)	Social Media (6,610)	Computer Games (5,665)
Sexual Predators	608	567	446
Animal Cruelty	561	492	467
Bullying/Harassment	479	514	369
Credit Card Fraud	570	425	357
Privacy	528	479	332
Security	531	422	325
Drug Use	440	427	388
Violence	435	400	413
Sex	436	391	364
Geo-tagging/being located	456	410	301
Language	324	328	304
Nudity	342	308	280
Gambling	359	296	255
Alcohol Use	311	321	255
In-app Purchasing	302	247	229
Dark Tone	245	229	235
Scariness	219	200	214
Themes, Social Issues	147	154	131

"My children and grandchildren enjoy them and they have not harmed them."

Male, 77, Waikato Region, Household of 1

Concerning Elements by Medium, Children

	Internet (3,813)	Social Media (3,344)	Computer Games (3,083)
Sex	251	214	209
Sexual Predators	253	226	188
Violence	244	209	210
Drug Use	235	212	195
Animal Cruelty	238	203	191
Bullying/Harassment	224	221	170
Privacy	229	201	172
Language	218	190	193
Nudity	224	196	180
Security	224	196	177
Geo-tagging/being...	209	183	165
Alcohol Use	190	180	152
Dark Tone	189	161	166
Scariness	186	152	164
Gambling	187	164	150
Credit Card Fraud	192	157	144
In-app Purchasing	178	151	142
Themes, Social Issues	142	128	115

"[Video games are] something that my partner and I had as we were growing up and wanted our children to have the same pleasures ... taking into account that these are things that we as parents need to constantly be aware of especially around children. But [supervised] can be an enjoyable reward for all."

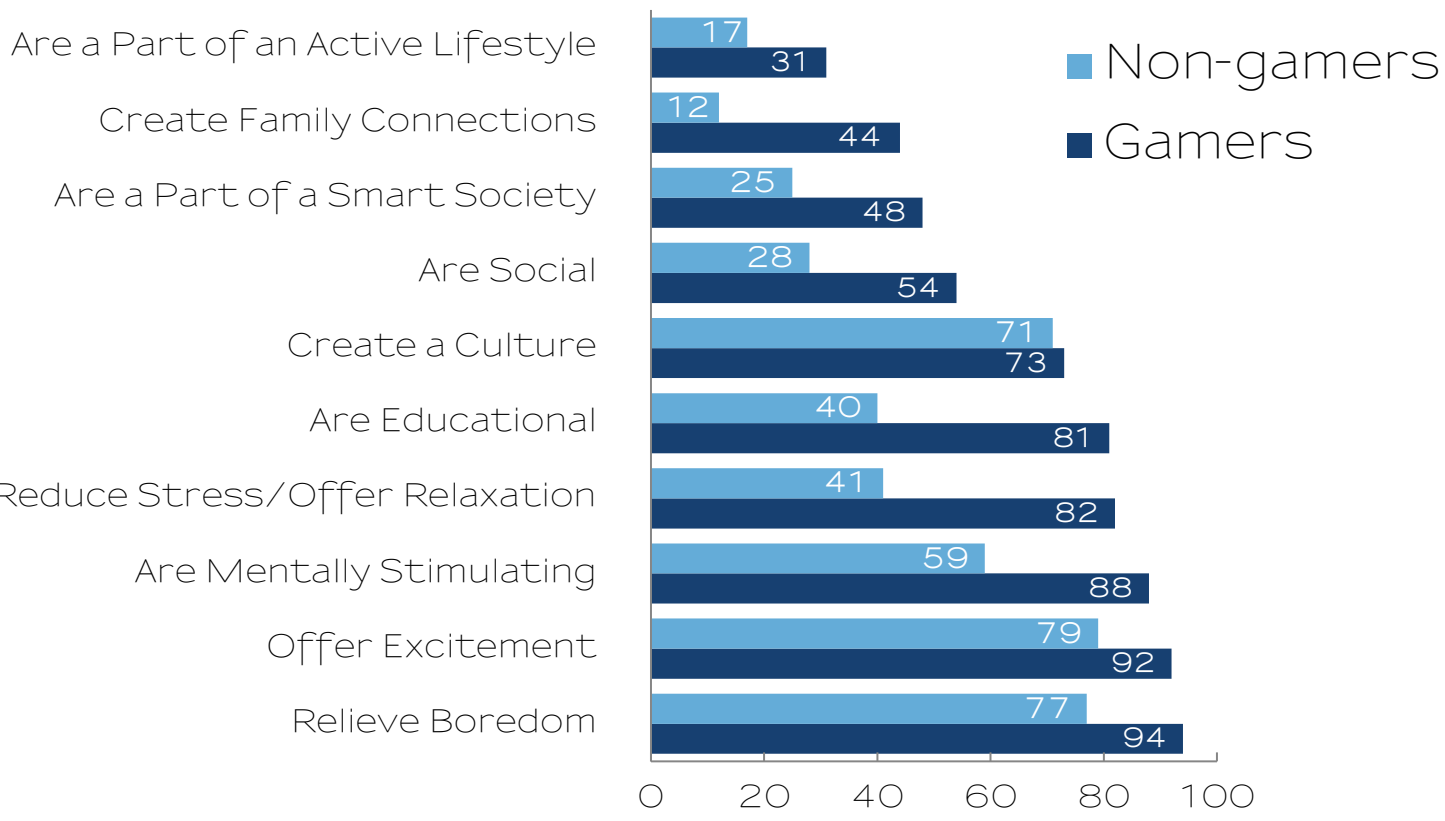*Female, 34, Wellington Region, Household of more than 6*

Attitudes About Games

There are marked differences in the extent to which gamers and non-gamers evaluate the potential roles that games play in society. The widest gaps in attitudes surround whether games provide cognitive and social benefits. The only role for games that non-gamers more frequently identify than gamers is that of violence in society – a perceived negative consequence. This contrasts with potential positive roles of games, which gamers more than non-gamers, are likely to identify. The one statement on which both non-gamers and gamers nearly agree is that games create a culture. An example of this was on display in July 2013 when hundreds of New Zealanders attended the first PAX (Penny Arcade Expo) event held in the Southern Hemisphere. The event sold out and demonstrated the strength of gamer culture.

"My son has autism and being able to show him pictures reinforces his learning…also helps with … motor skills and problem solving."

Female, 36, Auckland Region, Household of 5

Role of Games in Society (%)

	Non-gamers	Gamers
Are a Part of an Active Lifestyle	17	31
Create Family Connections	12	44
Are a Part of a Smart Society	25	48
Are Social	28	54
Create a Culture	71	73
Are Educational	40	81
Reduce Stress/Offer Relaxation	41	82
Are Mentally Stimulating	59	88
Offer Excitement	79	92
Relieve Boredom	77	94

"When I was younger [video games] were another way my father and I could bond. These days they're another way for my friends and I to bond, another thing to talk about, and a great way to chill out and kill time. I've been through a couple of periods in my life where it was a fantastic help to be able to escape into an "immersive" game world…"

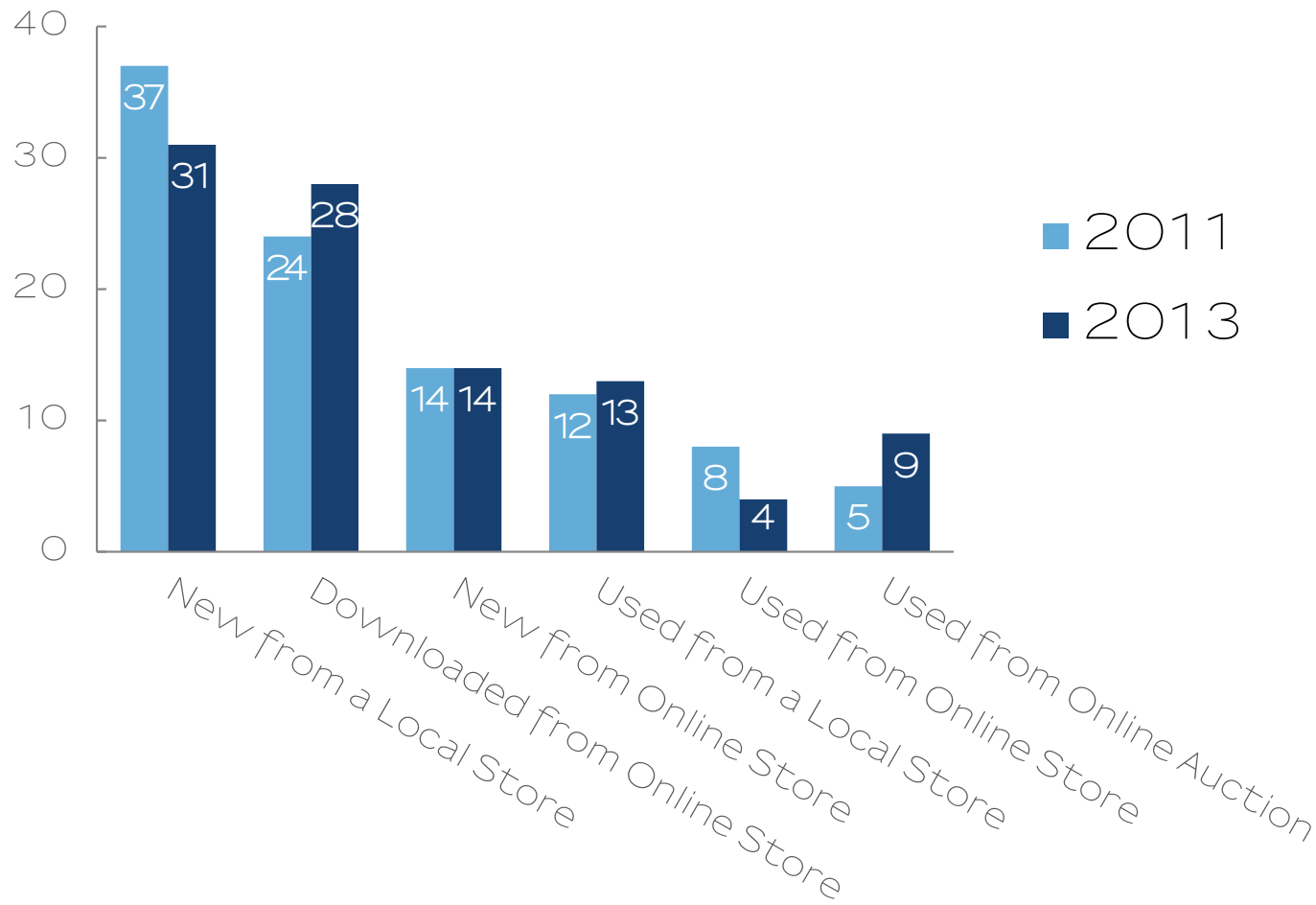*Male, 22, Waikato Region, Household of 4*

"I have quite a few memories … from playing video games. I met my partner while playing online."

Female, 33, Auckland Region, Household of 2

The Business of Digital Games

New Zealand media consumers are exploring digital downloads when buying games, however most prefer to purchase games new from a local store.

Preferred Ways to Buy Games (%)

Legend: 2011, 2013

- New from a Local Store: 37, 31
- Downloaded from Online Store: 24, 28
- New from Online Store: 14, 14
- Used from a Local Store: 12, 13
- Used from Online Store: 8, 4
- Used from Online Auction: 5, 9

## 9% CAGR Games Spending 2010-2017

Among ways to purchase and enjoy games are in-app purchasing, which 28% report trying, and purchasing game-related merchandise such as clothing, posters, and toys, which 14% of game households now own. The average in-app spend "last month" for all game households is $2. While the average game merchandise spend "last month" across all game households is $1.

The long-term trend for the value of business in games hardware and software in New Zealand is strong and positive with a Compound Annual Growth Rate of 9% between 2010 and 2017, based on NPD Group New Zealand's point-of-sale data and PricewaterhouseCoopers (PwC) Australian Entertainment and Media Outlook 2013-2017 as a proxy for New Zealand growth.

"Watching how my children adapt to finding their way around a computer through playing games has been great and they're having fun too."

Female, 41, Auckland Region, Household of 4

$2 on In-App Purchases **$1** on Game Merchandise

Annual Value of New Zealand Game Sales ($Mil)

- Software Downloaded
- Software Boxed
- Hardware
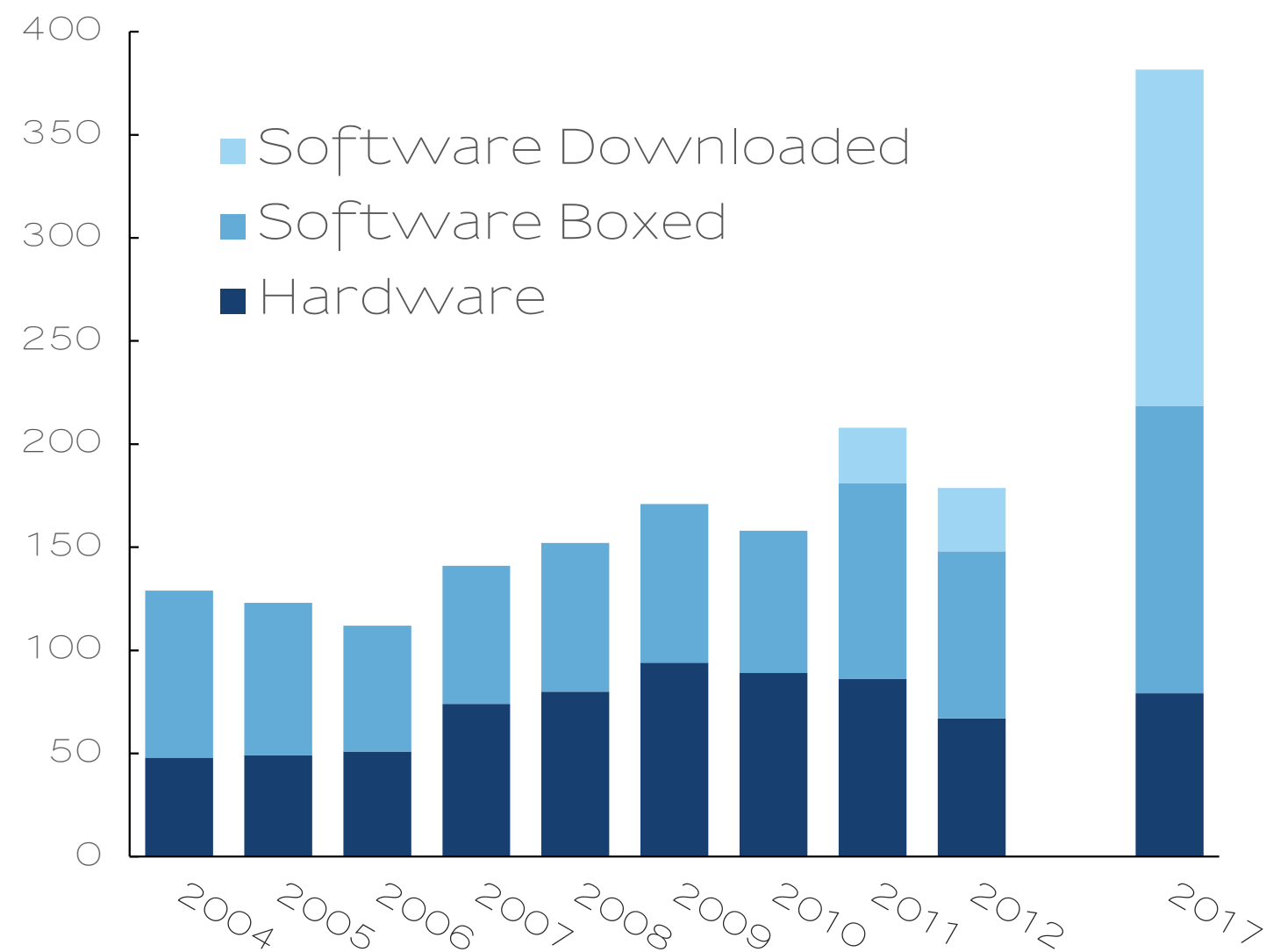
SOURCE: The NPD Group New Zealand, PwC Australia.

Exporting New Zealand-made video games is a fast-growing business. In 2012, New Zealand game studios exported over $35m worth of games, growth of 75% over the previous year according to the NZ Game Developers Association. Smartphone, tablet and digitally downloaded PC games were the most popular types of game produced in New Zealand.

"[We have] some fun time together; bridging the generation gap."

Female, 54, Manwatu – Wanganui Region, Household of more than 6

"[I have] made friends with other gamers, like-minded people, and people of different backgrounds, countries and opinions through online interaction in video games."

Male, 23, Wellington Region, Household of 1

"One of my favourite moments is finishing a Metal Gear Solid game. Whenever I do, I sit there watching the credits in awe; no media (TV or movie) makes me feel HONOURED to have experienced it."

Male, 21, Waikato Region, Household of 3

Australian Department of Broadband, Communications and the Digital Economy. (2012). Convergence Review Final Report. Canberra: DBCDE.

Australian Law Reform Commission. (2012). Classification – Content Regulation and Convergent Media. Sydney: ALRC.

Brand, J. E. (2005). GamePlay Australia: Australians and Computer Games. Sydney: Interactive Entertainment Association of Australia.

Brand, J. E. (2007). Interactive Australia 2007. Sydney: Interactive Entertainment Association of Australia.

Brand, J. E. (2010). Interactive New Zealand 2010. Sydney: Interactive Games and Entertainment Association.

Brand, J. E. (2011). Digital Australia 2012. Sydney: Interactive Games and Entertainment Association.

Brand, J. E. (2011). Digital New Zealand 2012. Sydney: Interactive Games and Entertainment Association.

Brand, J. E., Borchard, J. & Holmes, K. (2008). Interactive Australia 2009. Sydney: Interactive Entertainment Association of Australia.

Brand, J. E., Borchard, J. & Holmes, K. (2009). Australia's Computer Games Audience and Restrictive Ratings System. Communications & Strategies, 73(1), Pp. 67-79.

Classification—Content Regulation and Convergent Media: Final Report (2012). ALRC Report 118. Sydney: ALRC.

Colmar Brunton's Social Research Agency. (2011). Guidance and Protection – What New Zealanders want from classification system for films and games. Wellington: Office of Film and Literature Classification.

Colmar Brunton's Social Research Agency. (2012). Understanding the Classification System: New Zealanders'views. Wellington: Office of Film and Literature Classification.

Cummins, R. A. et al. (2011). The Wellbeing of Australians – Relationships and the Internet in Australian Unity Wellbeing Index Survey 25.0. Melbourne: Australian Centre on Quality of Life

Entertainment Software Association (2005). Essential Facts about the Computer and Video Game Industry 2005. ESA

Entertainment Software Association (2006). Essential Facts about the Computer and Video Game Industry 2006. ESA

Entertainment Software Association (2007). Essential Facts about the Computer and Video Game Industry 2007. ESA

Entertainment Software Association (2008). Essential Facts about the Computer and Video Game Industry2008. ESA

Entertainment Software Association (2009). Essential Facts about the Computer and Video Game Industry 2009. ESA

Entertainment Software Association (2010). Essential Facts about the Computer and Video Game Industry 2010. ESA

Entertainment Software Association (2011). Essential Facts about the Computer and Video Game Industry 2011. ESA

Entertainment Software Association (2012). Essential Facts about the Computer and Video Game Industry 2012. ESA

GameVision Europe (2010). Video Gamers in Europe 2010. Brussels: Interactive Software Federation of Europe

IPSOS MediaCT (2012). Videogames in Europe: consumer study. Brussels: Interactive Software Federation of Europe

Literature review on the impact of playing violent video games on aggression (2010). Barton, ACT: Commonwealth of Australia, Attorney-General's Department.

Nielsen Games (2007). Video Gamers in Europe 2008. Brussels: Interactive Software Federation of Europe

Nielsen Interactive Entertainment (2005). Video Gamers in Europe 2005. Brussels: Interactive Software Federation of Europe

Pan European Game Information (2007). PEGI Online Annual Report 2007. Brussels: Interactive Software Federation of Europe

Pan European Game Information (2009). PEGI Annual Report 2009. Brussels: Interactive Software Federation of Europe

Pan European Game Information (2010). PEGI Annual Report 2010. Brussels: Interactive Software Federation of Europe

Pan European Game Information (2011). PEGI Annual Report 2011. Brussels: Interactive Software Federation of Europe

UMR Research. (2006). Young People's Use of Entertainment Mediums. Wellington: Office of Film and Literature Classification

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