

KANTAR

An overview of video gaming in Australia

Andreea Chirila

Associate Director at Kantar Media & Digital

May 2021



Research Methodology

TGI Global Quick View = an audience profiling tool that enables brands, agencies and media owners alike to complement the targeting of consumers across multiple markets with in-depth localised targeting and planning

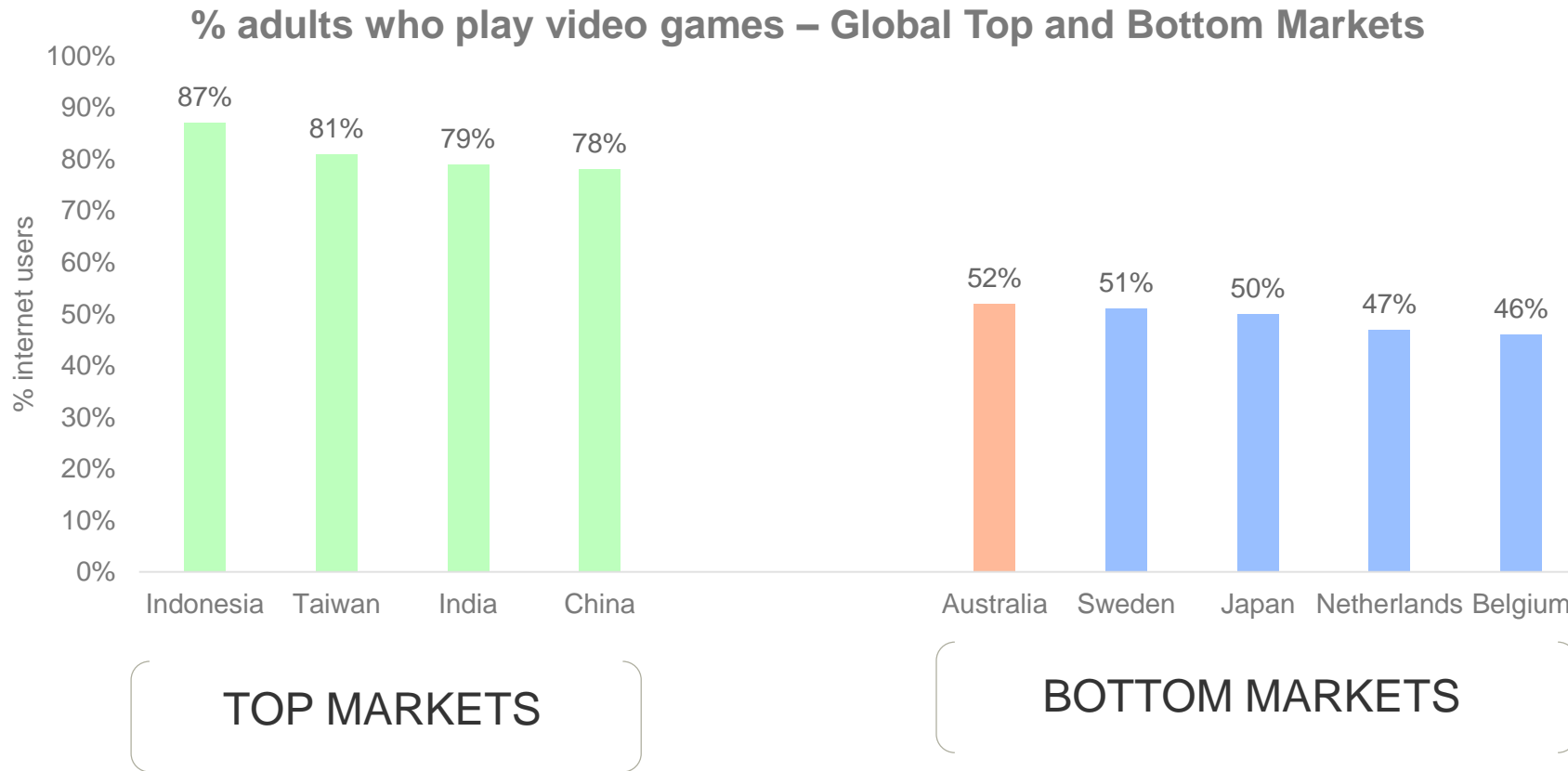
TGI Global Quick View comprises consumer data that covers **three key areas:**

- Online personality traits, e.g. including e-commerce user types, social media user types
 - Online media preferences, e.g. video and audio streaming habits, social platform habits
 - Online brand and purchase preferences, including multiple key global brands, purchase categories and preference reasons
-
- Period: March-May 2021
 - Location: across 25 countries (incl Asia Pacific, Asia, Europe, America)
 - Sample: internet using adults; Total sample Au National:



n=2,251

While more than half of our Australian sample stated they play games, there is headroom to grow the gaming industry further in Australia when compared to other markets



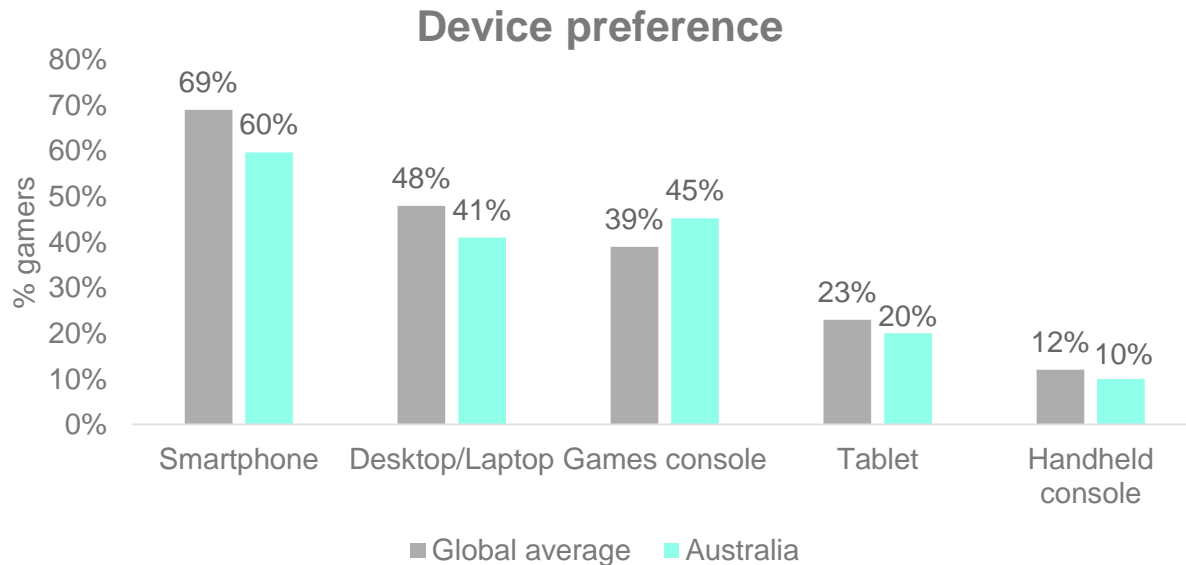
KANTAR

**Who is the typical
Australian
gamer?**

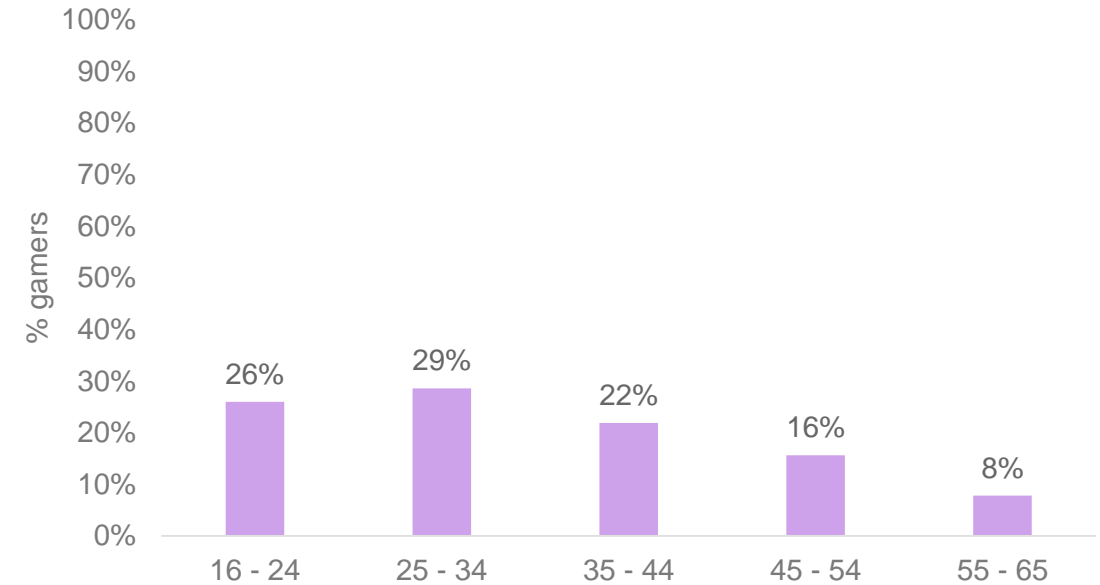


Time to forget the outdated gamer stereotypes

For some, still today the stereotypical go-to image of the hardcore gamer is a moody teenager in a darkened room playing on their game console all hours of the day. In actual fact, when it comes to most used gaming devices today **it is the smartphones that lead the way** by some distance, 60% of gamers in Australia used their smartphone for gaming, this is followed by games console (45%), desktop/laptop computer (41%), tablet computer (20%) and handheld consoles (10%)



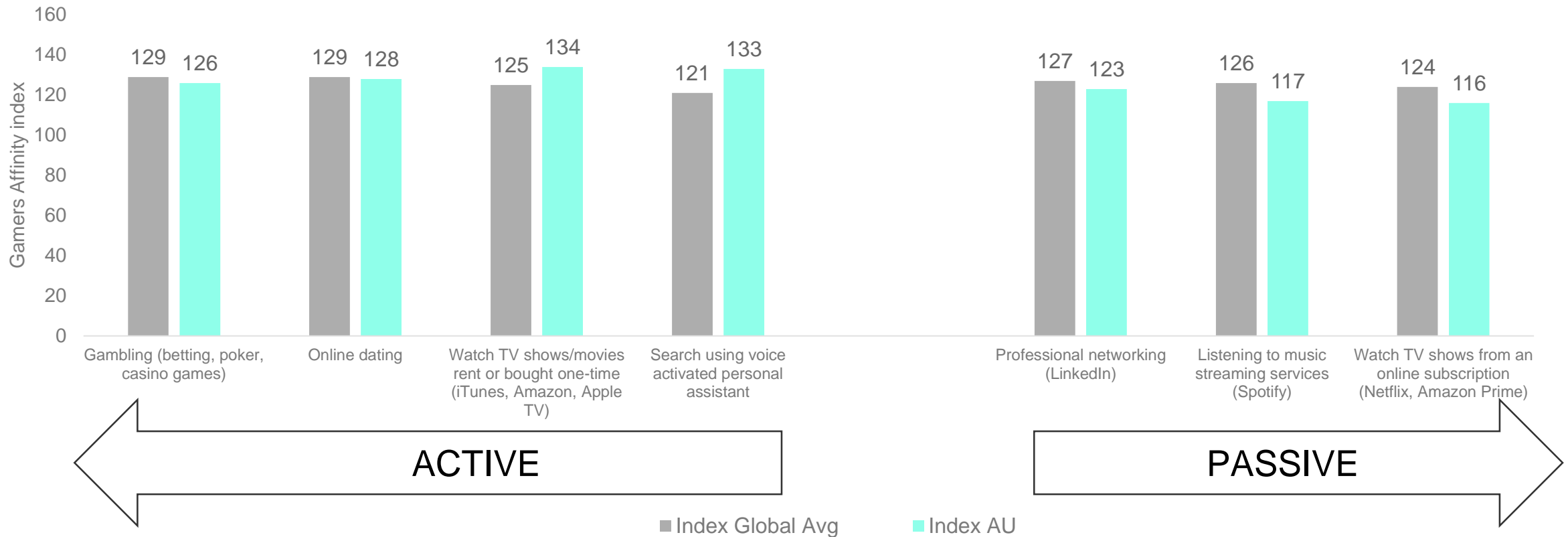
Gaming by age



Whilst there is a bias towards men, it is not huge, with **41% of all gamers women**. Similarly, TGI Global Quick View data reveals relatively little variation in gaming by age. Those aged 16-24 represent about a quarter of all gamers, with those aged 25-44 representing the highest share of gamers

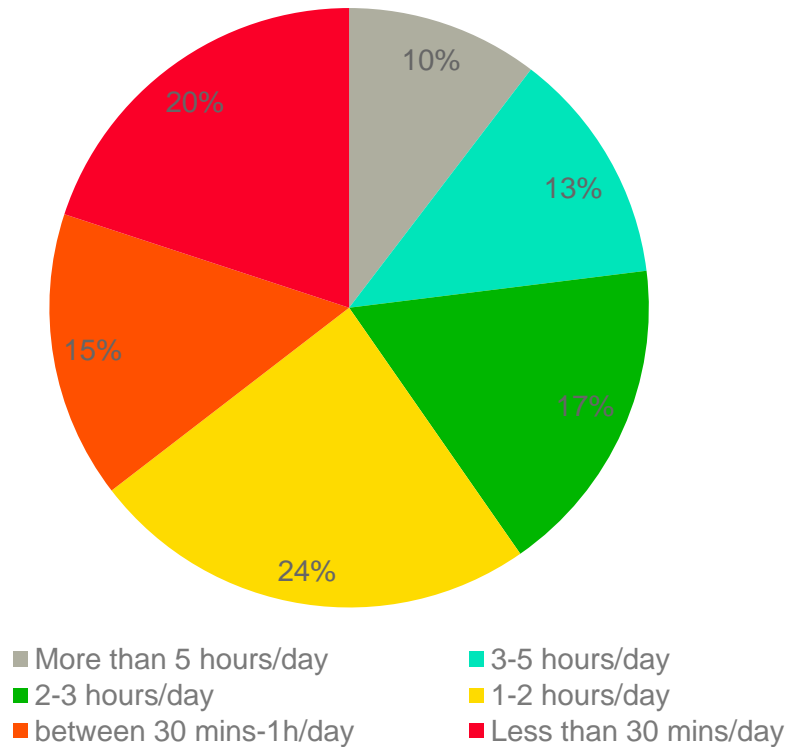
Australian gamers also generally heavily engage in a variety of other online activities; in particular, they are 34% more likely than the average Australian to rent or buy movies/shows and to use the voice-activated personal assistant as a search function

Gamers' affinity towards different online activities

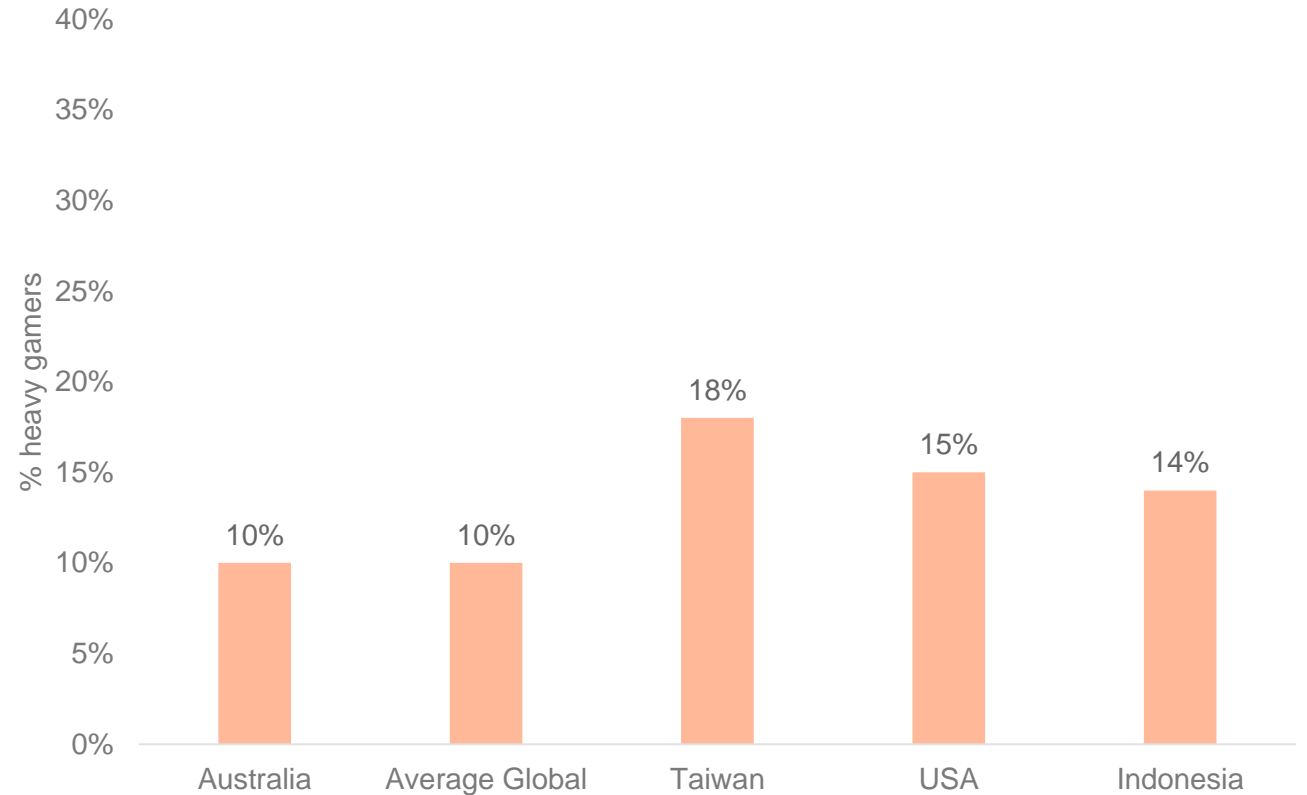


Australia is in line with the rest of the world in terms of heavy gamers

% share of gamers

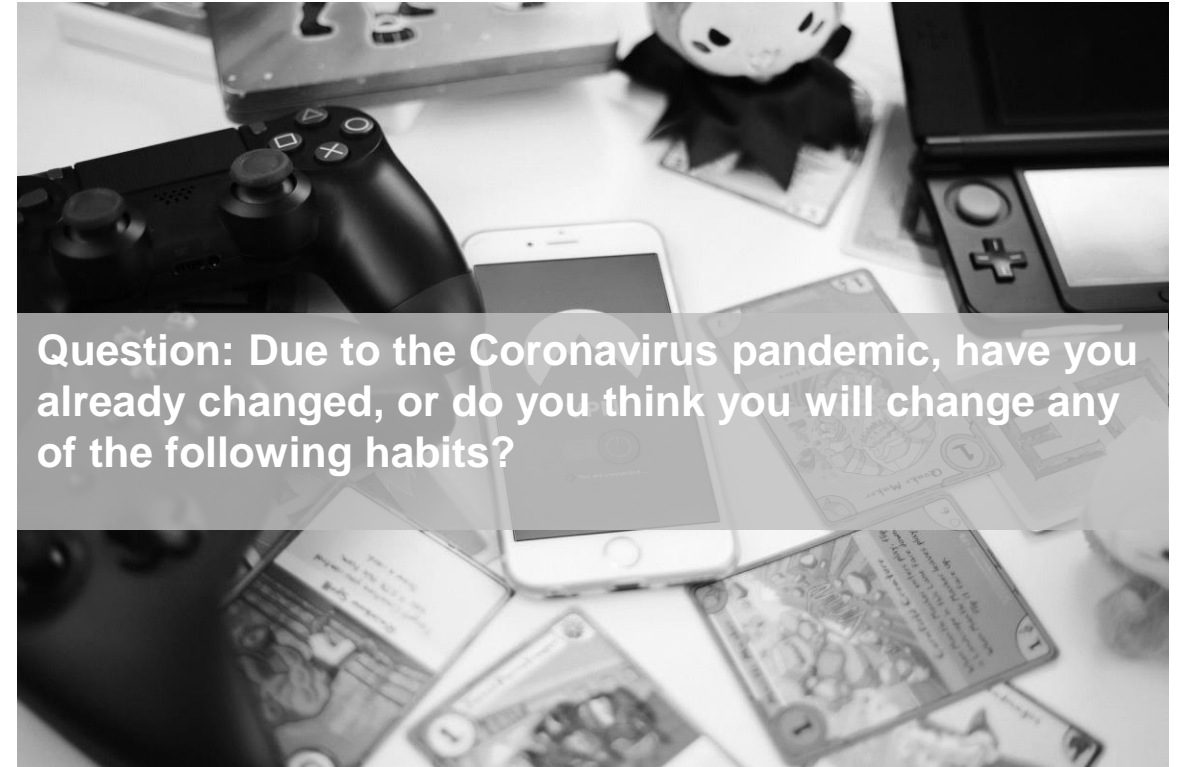
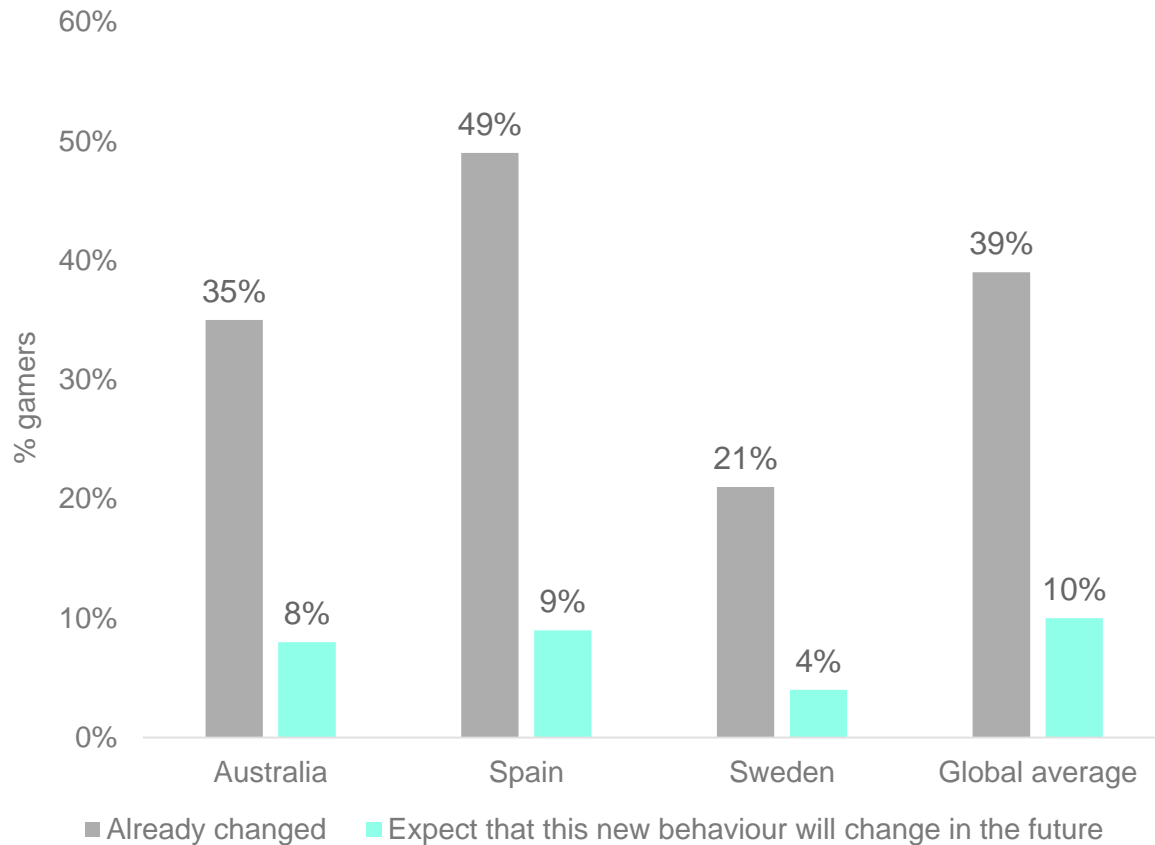


%Heavy gamers



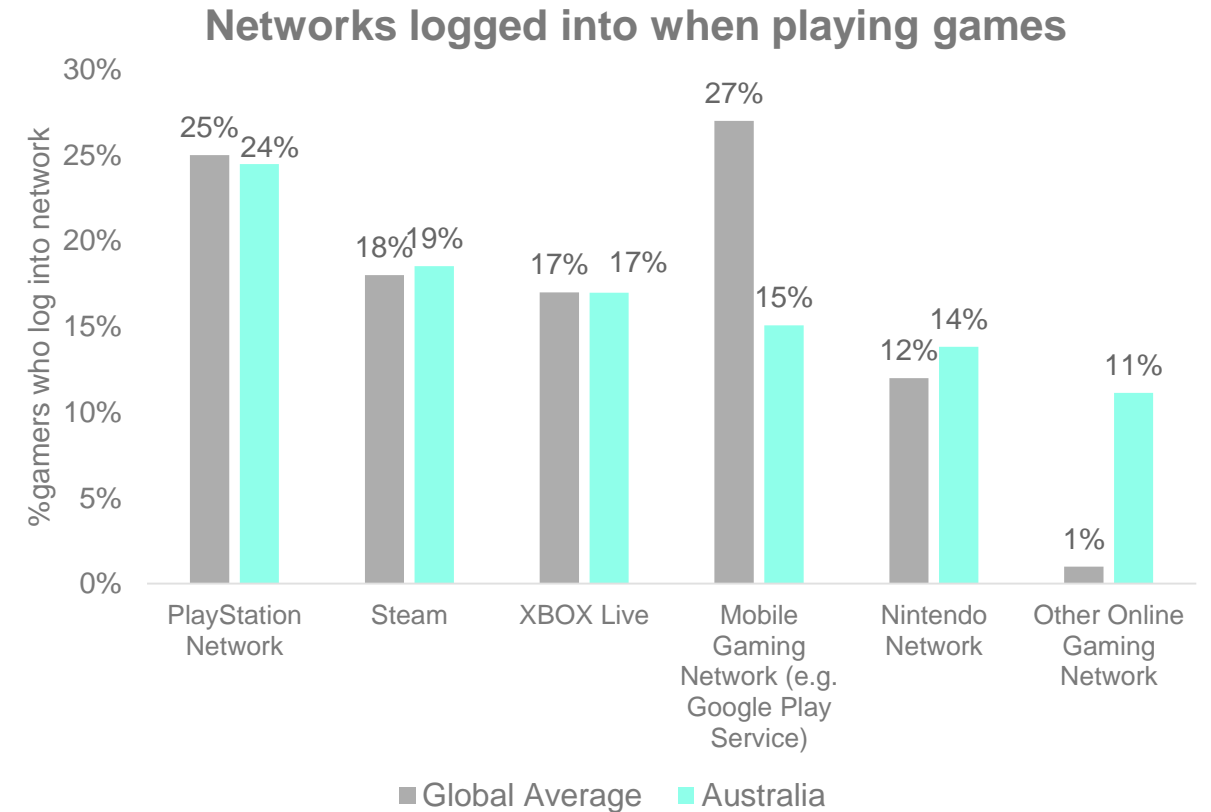
The coronavirus pandemic has changed gaming behaviour in Australia in a short space of time, despite limited restrictions compared to the rest of the world

Gaming behavioural changes



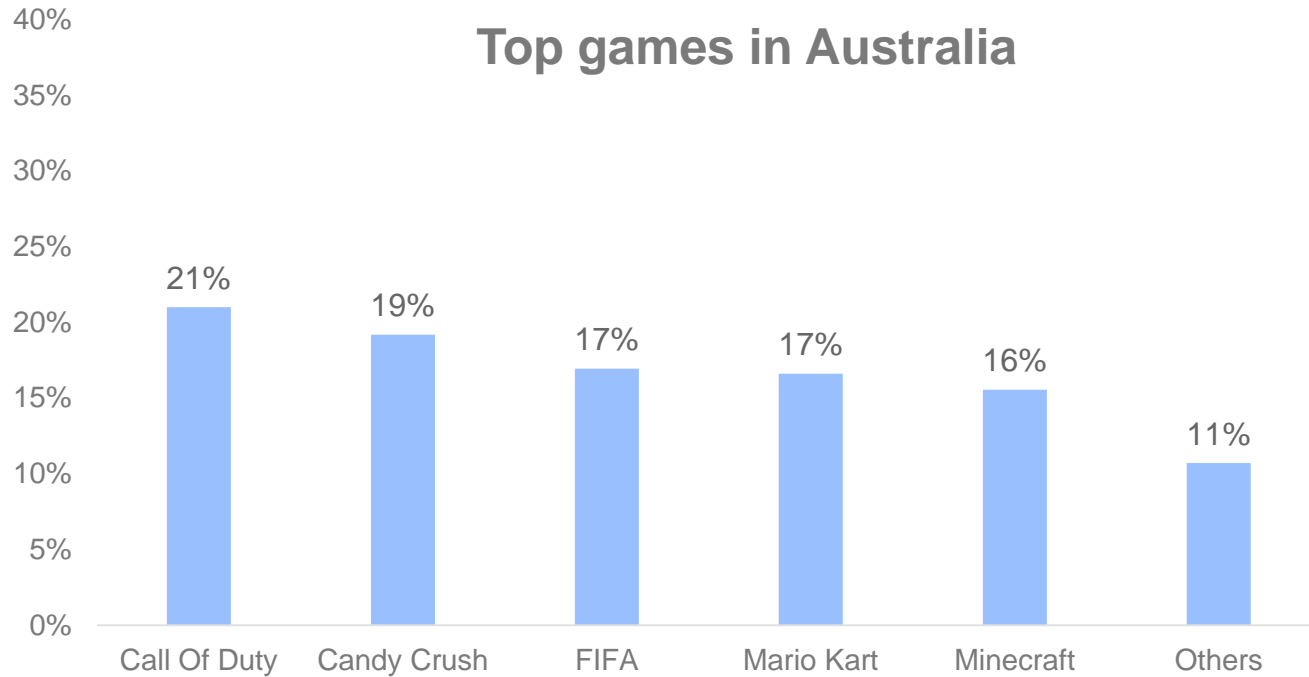


PlayStation remains the Australian favourite network; some catch-up can be done in terms of better using mobile gaming network



Top 5 games played in AU?

Top games in Australia



The results are broadly in line with what is seen globally although they can vary significantly by country in some cases; In the US, Grand Theft Auto is in the top three most played games, with FIFA pushed a fair way down the list (reflecting lower interest in soccer in the US).

Whilst in Taiwan – one of the most gaming obsessed nations – League of Legends and PlayerUnknown’s Battlegrounds join Candy Crush in the top three most played games.



Video Gaming in Australia Key Take-Outs

- While the gaming industry in Australia is a popular choice of activity, there is some headroom to grow further in the industry
- We need to forget about the classic stereotypical gamer; our Target Audience today encompasses both men and women of all ages
- The best environments where you can target your gamers are other platforms dedicated to online activities (renting/buying movies/shows online, online dating and gambling amongst the activities that our typical gamer is more likely to engage with)
- The coronavirus pandemic has changed gaming behaviour in Australia in a short space of time, despite limited restrictions compared to the rest of the world and that behaviour change is unlikely to change in the future, a strong indicator of an uptake in the gaming industry in the near future

Thank you!