Flanders
State of the Art

THE GAMING SECTOR IN AUSTRALIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

FLANDERS INVESTMENT & TRADE

Market Study

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THE AUSTRALIAN GAMING SECTOR

April 2023

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Flanders
State of the Art

CONTENT

1 EXECUTIVE SUMMARY

This study about the Australian gaming industry aims to provide an introduction to Flemish companies in this industry that are interested in exporting to Australia. Similarly, it might assist Flemish sector organisations to attract Australian investors to Flanders.

The market study starts with an overview of Australia's population and economy before providing an analysis of the Australian gaming industry. This analysis provides information about game development and publishing in Australia, but sometimes also the wider gaming retail sector. This market study excludes e-sports and gambling games such as poker machines and casinos.

Income generated by Australian game development studios during the financial year 2021-2022 increased to AUD 284.4 million. There are more than 400 companies active in this field in Australia and they account for 1327 full-time equivalent employees. Most companies are located on the eastern seaboard with Victoria (capital: Melbourne) hosting almost half of Australian game developers. Research shows that 92% of Australian households have at least one device on which to play video games and more than 17 million Australian residents are connected with video games. Trends in the industry include in-game additions and the metaverse; new technologies such as web3.0, 5G and streaming; the rise of VR and AR; and gamification. Most Australian game developers look overseas to market their products with Europe taking second place in their outlook.

In the chapter dedicated to Australian regulation, we provide a brief introduction to intellectual property and copyright; data collection and privacy; the Australian classifications system; and loot boxes and in-game gambling, which are still legal in Australia, even if they are increasingly under scrutiny from the federal government.

We answer Flemish companies' question "Why come to Australia" by giving an introduction to Australia's tech sector and where gaming fits in. We include an overview of government incentives and an introduction to Australia's large and vibrant university network which focuses on gaming as well.

Our elaborate contact lists include overviews of Australian game developers, publishers, potential end customers, universities research and development institutes, sector associations and media. These contact lists are available upon request via melbourne@fitagency.com.

Lastly, we include an overview of relevant trade shows, conferences, seminars and awards.

2 AUSTRALIA'S POPULATION AND ECONOMY

2.1 Population

On 30 September 2022, Australia's population was 26,124,814 people. The annual growth was 418,500 people (1.6%), an increase to previous periods due to the re-opening of Australia's borders after the COVID pandemic which has allowed renewed international migration, the main driver behind Australia's population growth.

	Population at 30 September 2022 ('000)	Change over previous year ('000)	Change over previous year (%)
New South Wales	8193.5	108.7	1.3
Victoria	6656.3	108.4	1.7
Queensland	5354.8	114.4	2.2
South Australia	1828.7	25.2	1.4
Western Australia	2805.0	50.4	1.8
Tasmania	571.9	4.1	0.7
Northern Territory	250.6	0.9	0.4
Australian Capital Territory	459.0	6.3	1.4
Australia (a)	26124.8	418.5	1.6

a. Includes Other Territories comprising Jervis Bay Territory, Christmas Island, the Cocos (Keeling) Islands and Norfolk Island.

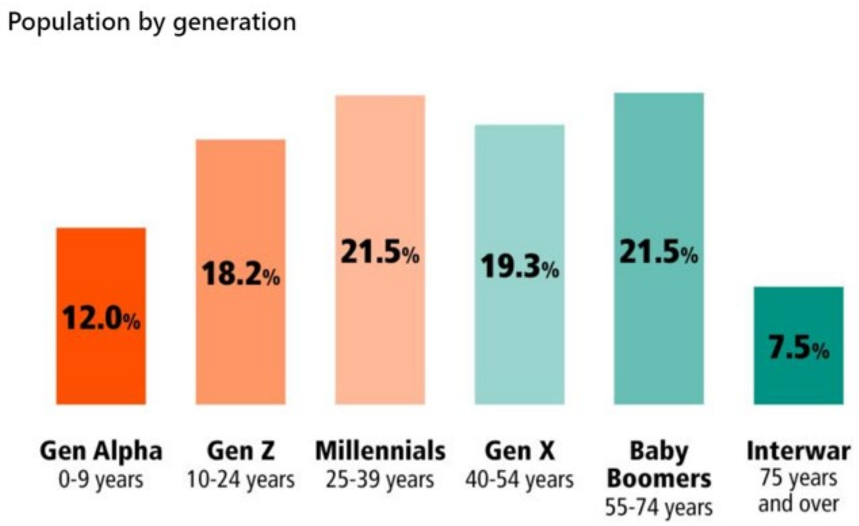
Despite the fact that Australia is a vast geographical area, approx. 90% of the Australian population lives in urban areas, with about two-thirds living in capital cities:

	ERP at 30 June 2021	2011-21 (no.)	2011-21 (%)
Sydney	5,259,764	650,815	14.1
Melbourne	4,976,157	806,791	19.4
Brisbane	2,568,927	421,491	19.6
Adelaide	1,402,393	138,302	10.9
Perth	2,192,229	358,662	19.6
Hobart	251,047	34,774	16.1
Darwin	148,801	19,695	15.3
Canberra	453,558	85,573	23.3
Total capital cities	17,252,876	2,516,103	17.1

Melbourne's population grew by 806,791 during 2021, which was the strongest performance by actual numbers for capital cities. It was followed by Sydney and Brisbane. However, looking at percentages, Brisbane and Perth grew strongest, narrowly followed by Melbourne.

The population of Australia consists of a unique composition. In 2021, there were 7.5 million migrants living in Australia. This means that 29.1% of the population was born abroad. The majority of migrants are born in the following countries: a] England – 967,000 people; b] India - 710,000 people, c] China – 596,000 people.

The median age of the Australian population has increased over time. The median age for capital cities (37.1 years) was younger than the rest of Australia (41.8). 49.3% of the population were male with a median age of 37 years old and 50.7% of the population were female with the median age of 39 years old.



Australians live longer than ever before, but half of the population lives with at least one chronic condition. Many of these chronic conditions, such as overweight and obesity, insufficient physical activity and alcohol consumption, are related to lifestyle factors.

2.2 Economy

The Australian economy is ranked 13th worldwide based on nominal GDP growth, after the country went through its first recession in 28 years in 2020. The COVID pandemic affected the Australian economy severely in 2020, 2021 and at the start of 2022 but the damage was not as severe as in other Western countries, mainly due to rapid intervention by the federal government at the time which provided a range of financial support to companies and people who lost their job as a result of the pandemic.

Due to the wide ranging COVID support package, gross government debt was AUD 894.6 billion at the end of October 2022 which will increase to AUD 1,159 trillion (43.1% of GDP) by mid-2026.

Like the rest of the world, Australia has been faced with high inflation numbers since the middle of 2022. This is mainly driven by disruptions in the supply chain due to the pandemic, but also because of natural disasters such as the floods of 2022. Additionally, the war in Ukraine has led to tensions in the energy market. Inflation in 2022 rose to 7.8% and there is no end in sight to the cost-of-living crisis. The Reserve Bank of Australia has been trying to control inflation since April 2022 by monthly cash rate increases. In April 2022, the cash rate was very low at 0.10% but has since increased to 3.6% (as of 9 March 2023). These continued monthly increases have been quite stressful for families who are seeing significant increases to their monthly mortgages.

GDP per capita is AUD 60,443.10 (2021, latest data available)

Other key economic indicators show the following (as of 9 March 2023):

- Unemployment rate 3.7% (employment growth is 3%)
- Inflation rate 7.8%
- Average weekly earnings AUD 1,378.60 with a household saving ratio of 4.5%

Australia's political stability, transparent regulatory system, and sound governance frameworks underpin its economic resilience. Ranked in the global top five on the Index of Economic Freedom, Australia's effective governance provides multinationals with a safe, secure business environment, offering:

- A business environment that is ranked 14th out of 190 economies for ease of doing business;
- A robust regulatory system noted for its strong finance and banking regulations;
- A competitive remuneration for professionals;
- A high purchasing power;
- A quality of life that is rated the 6th highest in the world.

3 ANALYSIS OF THE AUSTRALIAN GAMING INDUSTRY

This analysis of the Australian gaming industry provides information about game development and publishing in Australia, but sometimes also the wider gaming retail sector. This market study excludes e-sports and gambling games such as poker machines and casinos.

3.1 Statistics

According to the Australian Interactive Games & Entertainment Association (IGEA) sixth annual survey, income generated by Australian game development studios during the financial year 2021-2022 increased 26% to **AUD 284.4 million**. This follows a doubling of revenue between 2016 and 2021.

	2021/22	2020/21	2019/20	2018/19	2016/17	2015/16
No. of companies	102	187	97	143	114	63
Revenue (Million)	$284.4	$226.5	$184.6	$143.5	$118.5	$114.8
Revenue per employee (Million)	$0.14	$0.17	$0.15	$0.11	$0.13	$0.14

Almost half of the 102 participants in the latest survey project significant growth in the current financial year (2022-2023), indicating clear skies ahead for the industry.

PwC's Entertainment and Media Outlook 2022-2026 for Australia measures the industry quite broadly, including advertising and eSports ,but nonetheless, the consulting firm predicts that "Australia's growth rate is set to exceed both the UK and Canada."

The Australian Trade and Investment Commission (Austrade) reports that there are **405 companies** (incl. e-sports) in the Australian gaming ecosystem, broken down as follows.

- 6 large companies
- 28 medium companies
- 76 small companies
- 297 micro companies

Studio stage

45% OF STUDIOS ARE 5 YEARS OLD OR LESS

34% OF STUDIOS ARE 6-10 YEARS OLD

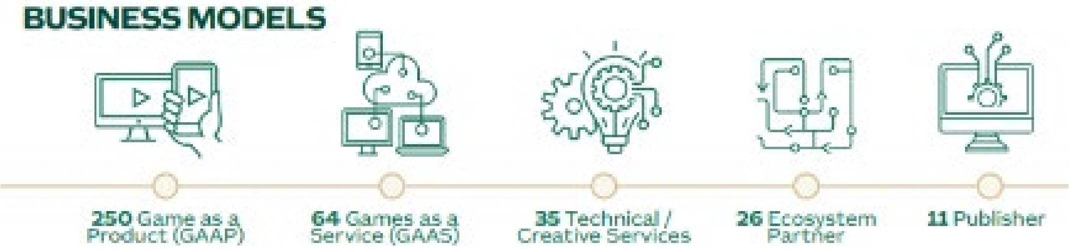
21% OF STUDIOS ARE 10 YEARS OLD OR MORE

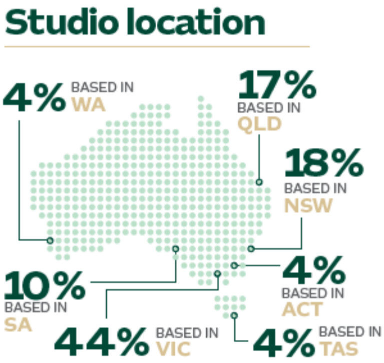
About half of these studios are young (5 years old or less), whereas 21% are more established studios of 10 years old or over.

Please consult the Austrade report for a snapshot and case studies of Australian gaming companies.

31% of the studios surveyed by IGEA, reported that they work on one individual game project per year. 25% work on two games, 14% work on 3 games and the remaining 22% develop more than 4 games per year.

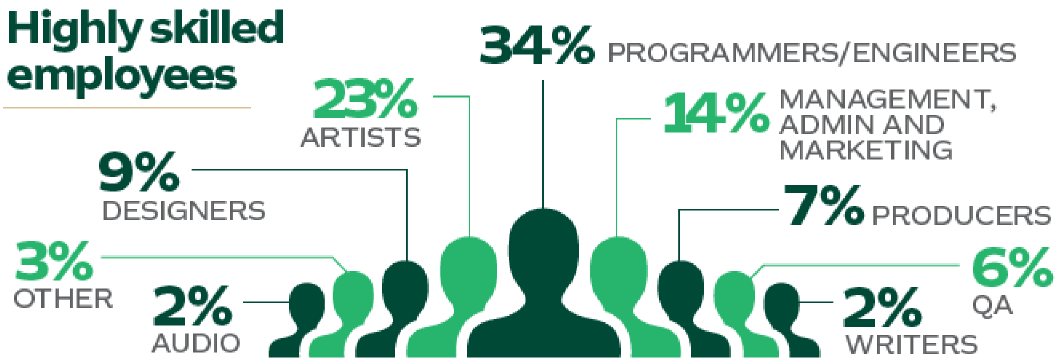
The **business models** of the 400+ gaming companies in Australia varies as well, with half of them developing games as a product.





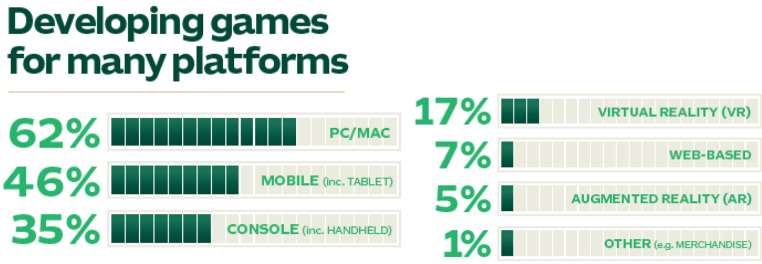
Victoria (capital: Melbourne) prides itself on housing 44% of Australian gaming studies, with New South Wales (capital: Sydney) and Queensland (capital: Brisbane) taking up second and third spots respectively.

About a third of the highly-skilled **1327 full-time equivalent employees in the sector** are programmers / engineers, followed by 23% artists and 14% management, administration and marketing staff. The number of employees in the sector has increased over the years and IGEA reports that 69% of the respondents to its survey are expecting to hire more staff this financial year.



The same survey shows that roughly a third of companies have 2-5 employees, 20% have between 6-10 employees. 15% of companies are sole traders and an equal amount has between 11-20 employees. The remainder has 21 or more employees.

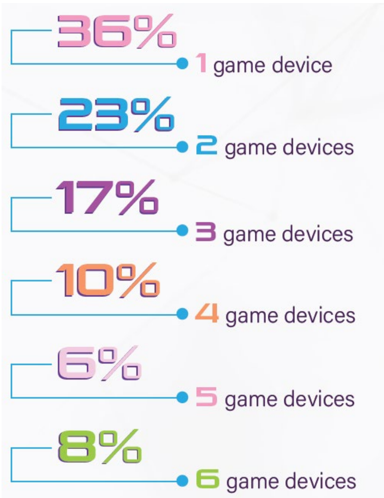
The industry develops **games for many platforms** with the majority aimed at PC/Mac, closely followed by games for mobile devices (incl. tablets). Console games round out the top three.



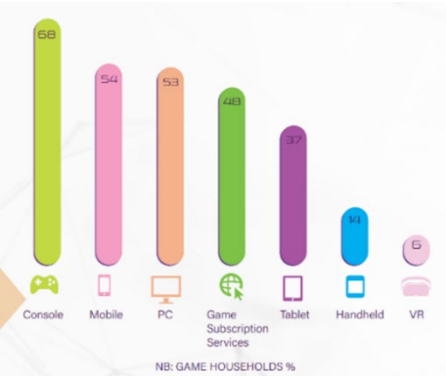
When looking at **online sales of video games in Australia** (incl. overseas developed games), market research group Ibis World reports that this industry segment has grown considerably over the past five years at an overall rate of 5.2% over the five past years to AUD 713.5 million. Games are still sold in hardcopy format as well but there is a general trend towards increasing online sales.

3.2 End-users

A study conducted by IGEA and Bond University, shows that **92% of Australian households have at least one device** on which to play video games. This translates to 8.6 million Australian households. Of those 64%, or more than 5.5 million, have two or more game devices.



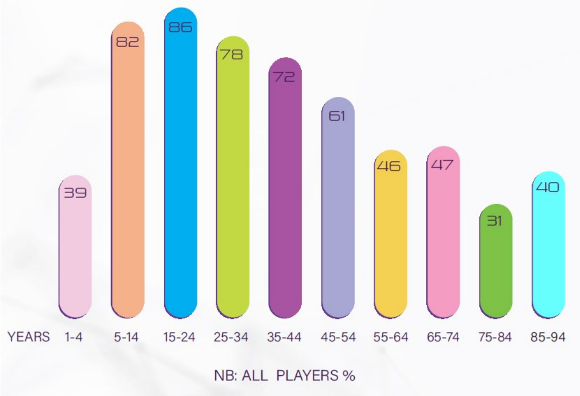
The 2022 study also states that: "the most common device for playing games in 2021 was a dedicated console (68%), trading places with PCs from a previous study. However, in 2021, they observed mobile rise to second place among devices used to play in game-connected households. Regardless of the type of device used to play games, 48% used a game subscription service."



Two-thirds, or **more than 17 million of Australia's 26 million residents, are connected with video games**: 46% of the players were identified as female, 53% were male and only 1% identified as non-binary.

"The average age of people who play video games in 2021 is 35 years, up from 34 years in the previous two studies reporting in 2019 and 2017. When this research series began in 2005, the average was 24 years. The increased average age of players over time reflects both the ageing population of Australia, and growth of new players among older adults as the platforms and types of games have grown.

The vast majority (67%) of all Australians who play video games are working-age adults; there are more than 11.5 million who connect with games. A further 11%, or 1.9 million video game players are aged 65 years or older with the oldest player in this year's study reporting they are 94 years old. The remaining 22% (under 4 million) are under the age of 18, and they are the most active connecting with games."



The report states that "the average daily total of play for Australians of all ages who play video games is 83 minutes. The average time children play per day is 106 minutes."

Finally, here's an overview of game genres by popularity:

3.3 Trends

3.3.1 In-game additions and the Metaverse

PwC's Entertainment and Media Outlook 2022-2026, predicts that the gaming sector will continue growing, driven by "a combination of ever-more immersive experiences and low-friction micro purchases. Revenues will be bolstered by rapidly increasing consumer spend, particularly in mobile (boosted by the expansion of 5G devices) and social gaming where low friction in-game purchases to unlock levels, buy personalised items, and access different content are the leading sources of revenue."

The report continues that "the metaverse itself presents the ability to incorporate out-of-home advertising into virtual worlds, such that the advertisements actually lend to the immersion of the user in the virtual space. This will offer opportunities for entertainment & media businesses to stitch advertising into the action in real time."

3.3.2 Web3.0, 5G and streaming

PcW expects that developing technologies such as Web3.0, the latest generation of internet technologies (Blockchain, NFT and Metaverse), and the adoption of 5G will "play major roles in the years to come, as the Gaming industry seeks to be a leader in innovation, and the challenges that coincide with it."

"Subscription services are expected to continue to grow in popularity and service offering. As of the end of 2021, providers have also started offering ***cloud based game streaming options****.*

Sony have also had a game streaming service since 2014, but have yet to enter the Australian market, likely due to the service being restricted by Australia's Internet infrastructure, as the concurrent download requirements remain relatively high. Internet infrastructure remains the primary restriction on the growth of game streaming services. Although unlikely to completely replace fixed broadband in the medium term, the ongoing adoption of 5G will aid in the adoption of streaming gaming services, as well as the mobile gaming market, with it being one of the primary target platforms for game streaming."

The aim of **Blockchain games** is to innovate the way players interact with gaming, allowing for greater ownership of in-game assets, often stored in the form of an NFT within a decentralised ecosystem. PwC predicts that Blockchain games are likely still a few years away from major releases, and one of the main challenges will be how policy and regulation will develop in line with technological advancement and its journey to release.

3.3.3 Virtual Reality (VR) and Augmented Reality (AR)

According to Statista Australia's AR and VR market is growing rapidly with a projected revenue of AUD 1.4 billion in 2023. The following six segments are included in this projection: AR advertising, AR hardware, AR software, VR advertising, VR hardware, and VR software.

Annual growth is expected to be 15%, which means that the market could reach AUD 2.5 billion by 2027. The main market segment is AR software, which is expected to generate over AUD 672 million in 2023. Additionally, around 20 million users are expected to make use of the AR & VR market by 2027.

For overviews of VR games currently popular in Australia, please consult

- Australia's PC Mag's recently published list of "The Best VR Games of 2023".
- Australian online gaming publisher Kotaku's recent list of "The Best Meta Quest Games If You're New To The World Of Virtual Reality".

Please refer to a list of VR/AR studios in Australia below. This list is available upon request.

3.3.4 Gamification

Gamification is the process of introducing game-like elements, such as scores, awards, challenges, and rewards, into activities or tasks which are not traditionally considered games. Gamification's major goal is to make these tasks more entertaining, interactive, and engaging by incorporating game design and mechanics. It offers a variety of uses, including education, healthcare, marketing, and workplace training. In the educational environment.

Below are a few examples of how gamification is used in Australia:

Education System

Games are increasingly used by teachers to connect with students. IGEA states that "of all parents, 60% say their children use games as part of their school curriculum, 36% say their children are developing games at school, and 36% say their children use games in clubs or for extra-curricular experiences."

Professional life

According to IGEA "employers have begun connecting workplace training with game environments. Moreover, the Vocational Education and Training (VET) sector has developed and used virtual and online experiences for training and testing. Nearly a quarter of adults who play video games indicate they have played a video game for work to learn workplace rules, new work-related information, learn a new skill, learn to use a new tool, or for health and safety."

Government

In Australia, the federal government has been exploring gamification in its work. Since 2018, the Gamifying Government Panel at the PAX Aus convention has showcased how government is using gaming, 3D and virtual reality technology. The convention is the largest pop culture and gaming event in the southern hemisphere.

Over the years, more than 10 government agencies have presented on the panel, including the National Film and Sound Archive and the Australian War Memorial. At Pax Aus 2022, the Australian Border Force (ABF), Services Australia and the Department of Agriculture, Fisheries and Forestry shared how government is using games-based technologies and practices to improve service delivery.

- The Australian Border Force College has developed a next-generation baggage search training program using virtual reality technology.
- Services Australia has introduced gamification principles to change how staff learn, using VR technology to simulate situations such as dealing with aggressive customers and identifying work health and safety risks.
- The Department of Agriculture, Fisheries and Forestry has used immersive 360-degree videos and media to model environments, such as mail centres and airports, to give biosecurity officers experiences in operational environments.

3.4 Internationalisation

3.4.1 Australian companies overseas

Austrade reports that the Australian gaming sector is export-focused with 82% of income generated in the industry coming from overseas markets and investments. In 2019, the main focus country for Australian games developers was the United States at 73%, followed by Europe at 60% and Asia at 57%.

Some examples:
Mighty Kingdom, Australia's largest independent game studio, is on its way to becoming a global entertainment giant. Since its inception in 2010, Mighty Kingdom has released over 50 games played by over 50 million players worldwide. They have created games for global giants such as Disney, LEGO, Snapchat, Moose Toys, Funcom, and Rogue.

IGEA hosted the **Australian delegation to the Games Development Conference** in San Francisco in March 2023. An overview of the companies that joined the mission can be found here.

3.4.2 EU companies in Australia

There are several European gaming companies that have been active in the Australian gaming scene for several years, many of them have established a strong presence in the country. These companies are involved in the many aspects from the industry which includes game development to publishing games as well as organising esports and gaming events.

One of the most known European gaming companies in Australia is French company Ubisoft which has been active in the Australian market since the early 2000s, and has established a studio in Sydney. Ubisoft has been a major sponsor of Australian e-Sport competitions.

Irish company Keywords Studios has (partially) acquired several Australian gaming companies such as Mighty Games Group and Tantalus.

Besides Ubisoft and Keywords Group, other European gaming companies that operate in Australia include

- CD Projekt Red, a Polish video game developer that has developed quite a few hits such as The Witcher and Cyberpunk
- Swedish video game developer and publisher, Paradox Interactive, specialising in strategy games is also active.
- Gameloft, a French video game developer and publisher, operates in Australia through partnerships and collaborations with the local companies.

FIT Melbourne has no knowledge of Flemish gaming companies active in Australia. It is, however, important to know that Flemish company Studio 100 owns Australian animation studio Flying Bark, which is very well-regarded in the industry and has an LA location as well. Flying Bark works with companies such as Marvel.

4 INTRODUCTION TO AUSTRALIAN REGULATION

4.1 Intellectual property (IP) and copyright

According the most recent information from Austrade 74% of game developers in Australia are creating their own IP rather than using existing IPs.

More information about IP and patents in Australia can be obtained from the federal government website IP Australia.

The Australian Copyright Council states that "there is no special category of copyright protection for games as a whole. Many of the elements or components of a game (such as the artwork for a board game) are likely to be protected by copyright. Names, ideas and concepts are not protected by copyright. In some cases, you may be able to rely on other areas of law, such as competition and consumer law, trademarks, designs and confidential information, to protect aspects of a game."

For more information, please visit:

- This webpage by commercial law firm Legal Vision
- This information sheet from the Arts Law Centre of Australia

Please contact FIT Melbourne via melbourne@fitagency.com should you wish to receive a contact list of commercial and IP law firms in Australia.

4.2 Data collection and privacy

Belgian data collection and privacy rules are regulated by the "General Data Protection Regulation (GDPR)" of the European Union. In Australia, the Privacy Act 1988 was introduced to promote and protect the privacy of individuals. It includes 13 privacy principles.

Belgium and Australia require game developers to obtain consent from players before collecting their personal data. Also, game developers must implement security measures to protect the collected data. Whilst Belgian regulations emphasize more on the importance of data minimization. Australia's Privacy Act emphasizes notifying players how their data will be used.

4.3 Australian Classification Board

The Australian Classification Board (ACB) is the equivalent of the Belgian Entertainment Software Rating Board (BESRB) which integrates the Pan-European Game Information (PEGI).

Both of the boards are responsible for the classification of video games. However, the ACB is also tasked with assessing and classifying movies and publications to their content so that the users can make a well-informed decision about the fair games they purchase or buy.

The main notable difference between PEGI and the ACB method is that **PEGI is a voluntary** system, which means that game publishers are not legally forced to rate their games across Europe..
In Australia, however, the **ACB age-rating system is legally enforced** and, therefore, mandatory for all games.

ACB classification	Meaning
G	General This category is suitable for all ages. Games in this category do not contain any material that parents would find inappropriate.
PG	Parental Guidance This category is suitable for children over the age of 8. Games in this category may contain mild violence, mild language, or mild themes.
M	Mature Games are not recommended for children under the age of 15, as they include portrayals of elements such as violence and themes that require a mature outlook. Parents, teachers and guardians may need to find out more about the specific content before deciding whether the material is suitable for children in their care.
MA 15+ RESTRICTED	Mature Accompanied (15+) This category is suitable for children over the age of 15. But only if they are accompanied by a parent or guardian. Games in this category may contain strong violence, strong language, or strong themes.
R 18+ RESTRICTED	Restricted (18+) This category is suitable for adults only. Games in this category may contain high-impact violence, sexual content, or themes that are considered to be highly offensive.
X 18+ RESTRICTED	Restricted (X18+) X 18+ films are restricted to adults. This classification is a special and legally-restricted category due to sexually explicit content including actual sexual intercourse or other sexual activity between consenting adults.

	**Check the Classification** The film or computer game has been assessed and approved for advertising. You should check the classification closer to the release date.

4.4 Loot boxes and in-game gambling

Loot boxes are a particular type of randomized loot system in games that consists of boxes that can be unlocked through normal play, or by purchasing more via microtransaction. The (free) rewards can be randomised and often there are purchases with real-life money involved, which is why they are seen as a form of online gambling.

The Federal government has reservations around Loot Boxes and microtransactions, a market that saw strong revenue increases across all platforms, and which heavily contributed to mobile/social gaming revenue. As yet, Australia has not seen any major regulations enacted, despite other countries having done so already. It is expected pushes for regulation in this space will increase as Web3.0 develops further.

Belgium is one of the countries that have banned loot boxes. The Belgian Gaming Commission declared that video games that offer loot boxes are considered gambling and violate Belgian gambling laws. Therefore, video game publishers were required to remove loot boxes from their games to prevent legal penalties.

5 WHY COME TO AUSTRALIA?

Australia offers a unique opportunity for European gaming companies looking to expand into the Asia-Pacific region.

5.1 The Australian tech sector

According to Austrade, the general tech industry contributed AUD 167 billion to Australian GDP in 2020, making it one of the biggest contributors. Australia has a large number of companies in fintech (733), edtech (600), MedTech (500), and agriculture and foodtech (400).

The New South Wales government is investing heavily in a world-class technology hub Tech Central through collaboration between universities, start-ups, high tech giants and the community. The goal is to create 250,000m² of floor space for tech firms including workspace for start-ups and scaleups. The government wants to create 25,000 innovative jobs and attract 25,000 new students in STEM and life sciences. Australian success story Atlassian, one of the five anchor tenant that signed the agreements in 2020, confirmed to strive to create 4,000 jobs, and focus on the tech areas including digital VFX and video games.

As mentioned above, approx. half of Australian game developers are based in Melbourne, which has created an extensive ecosystem in Victoria and offers support for its companies as described below.

5.2 Government incentives

The **federal government** has various support mechanism for the digital games industry, such as the proposed Digital Games Tax Offset (DGTO) and the reinstatement of the Australian Interactive Games Fund (AIGF) under the Australian National Cultural Policy.

DGTO will provide eligible gaming companies with a refundable tax offset of 30% of the qualifying expenditure on the development of digital games.

The AIGF initially came into life in 2012 to provide funding for the Australian gaming sector but was dropped in 2014. With its reinstatement, the federal government pledges an initial investment of AUD12 million to support game developers.

In addition to the specific games industry incentives, the government also offers incentives to businesses for research and development (R&D) activities through the R&D Tax Offset.

Australian **state governments** also provide support for the game sector. For example, the NSW government has implemented several initiatives to support the gaming sector's potential growth. One of the initiatives is the NSW Digital Games Rebate, which provides a 10% rebate for digital games that qualify. The initiative will complement the Australian Government's Digital Games Offset. The Rebate is administered by Screen NSW.

Across the state border in Victoria, The Victorian Government through VicScreen provides a suite of support:

- Victorian Screen Incentive grants of up to 10% on projects that spend at least AUD 500,000 on game development in Victoria
- Victorian Production Fund investments of up to AUD 500,000 for Victorian games companies and developers to develop and release high-quality, diverse and engaging original games
- Games Release funding of up to AUD 30,000 to assist Victorian games companies and developers to deliver a well-planned and marketed release of their project

5.3 Universities

Australia has a strong tertiary education sector, including 40+ universities which are ranked highly worldwide. The Times Higher Education World University Rankings 2023, includes the following Australian universities which are active in gaming:

1. Rank 33: University of Melbourne
2. Rank 44: Monash University
3. Rank 53: The University of Queensland
4. Rank 54: The University of Sydney
5. Rank 62: Australian National University
6. Rank 71: UNSW Sydney
7. Rank 88: University of Adelaide
8. Rank 131: The University of Western Australia
9. Rank 133: University of Technology Sydney
10. Rank 175: Macquarie University

In comparison, KU Leuven ranks 42, Ghent University ranks 107 and the University of Antwerp ranks 131.

Besides educational programs, several universities are active in Gaming R&D. For example, the University of Technology Sydney (UTS) Games Studio research group focuses on advancing the state of the art in building tools, techniques and methods to create the next generation of games and its related technologies.

Monash University hosts Exertion Games Lab which researches the future of interfaces for playful experiences. Their research focuses on merging play, technology and the active human body, drawing from streams such as interaction design, human-computer interaction (HCI) and computer games research.

Please refer to the list of Australian universities offering gaming education programs below. This list is available upon request via melbourne@fitagency.com.

6 CONTACT LISTS

6.1 Developers and publishers

6.1.1 New South Wales

6.1.2 Victoria

6.1.3 Other states

These contact lists are available to Flemish companies upon request via melbourne@fitagency.com

6.2 Potential end customers

6.2.1 Amusement Parks and Centres

6.2.2 VR/AR

These contact lists are available to Flemish companies upon request via melbourne@fitagency.com

6.3 Universities

This contact list is available to Flemish companies upon request via melbourne@fitagency.com.

6.4 Research and development

This contact list is available to Flemish companies upon request via melbourne@fitagency.com.

6.5 Sector associations

This contact list is available to Flemish companies upon request via melbourne@fitagency.com.

6.6 Media

This contact list is available to Flemish companies upon request via melbourne@fitagency.com.

7 RELEVANT TRADE SHOWS, CONFERENCES, SEMINARS, AWARDS

Most Trade Fairs in Australia are relatively small and focus on the domestic market. A list of most Trade Fairs is available on www.biztradeshows.com/australia where they are catalogued by date, sector and city.

Dreamhack

Dates:	28 – 30 April 2023
Location:	Melbourne & Olympic Parks Olympic Boulevard, Melbourne VIC 3000
Contact:	support@dreamhack.com
Website:	https://dreamhack.com/melbourne/
About:	DreamHack is an immersive gaming experience where the community comes to life. At the festival, visitors can experience professional eSports tournaments, amateur and high school gaming tournaments, world-famous bring-your-own-computer (BYOC) LAN party, cosplay, art, activities, expo, music and more.

Melbourne International Games Week

Dates:	October 2023
Location	all over Melbourne
Website:	https://gamesweek.melbourne/
About:	Melbourne International Games Week is the biggest games event in Asia Pacific and a fixture on the global calendar, connecting games, technology and culture, with a broad program for industry, educators, and game enthusiasts alike.
Remark:	Melbourne International Games Week includes Games Connect Asia Pacific, the Australian Game Developer Award and PAX Australia, listed below.

Games Connect Asia Pacific (GCAP)

Dates:	2 - 4 October 2023
Location	Melbourne Convention and Exhibition Centre 2 Clarendon Street, South Wharf (Melbourne) VIC 3006
E-mail:	events@igea.net
Website:	https://gcap.com.au/
About:	Games Connect Asia Pacific (GCAP) is Australia's premier professional development and networking event for the game development industry, focused on up-skilling and connecting the Australian sector via education, knowledge sharing and the provision of extended personal and business networks.

Australian Game Developer Awards (AGDAs)

Dates: October 2023
Contact: IGEA (see above)
E-mail: info@igea.net
Website: https://agdas.com.au/
About: The Australian Game Developer Awards (AGDAs) are a national event celebrating outstanding games and individual achievements by Australian game developers. This year, the AGDAs will be celebrating, encouraging and uplifting local talent.

PAX Australia

Dates: 6 - 8 October 2023
Location: Melbourne Convention and Exhibition Centre
2 Clarendon Street, South Wharf (Melbourne) VIC 3006
E-mail: info@paxaustralia.com.au
Website: https://aus.paxsite.com/
About: PAX Aus is a celebration of gaming and gaming culture featuring thought-provoking panels, an expo hall filled with publishers and independent studios, game demos, musical performances, tournaments, and an experience.

SXSW SYDNEY

Dates: 15 – 22 October 2023
Location: International Convention Centre Sydney
14 Darling Drive, Sydney NSW 2000
E-mail: info@sxswsydney.com
Website: https://sxswsydney.com/
About: For the first time ever, SXSW organises an event outside of the US. SXSW Sydney will be a week-long event where tech, innovation, gaming, music and screen industries converge with culture for unexpected discoveries.

DiGRAA Conference

Dates: 2024 dates TBA
Contact: Dr Brendan Keogh, current President of DiGRAA, brendan.keogh@qut.edu.au
Website: https://digraa.org/
About: DIGRAA is a free conference where academic and non-academic games researchers, critcs, designers, developers and artists share their work.

Game Expo (TGX)

Dates: 2024 dates TBA
Location: Melbourne Convention and Exhibition Centre
2 Clarendon Street, South Wharf (Melbourne) VIC 3006
E-mail: Contact@TheGameExpo.com
Website: https://www.thegameexpo.com/
About: TGX is dedicated to gamers, focused on the things gamers love to do and the culture and creativity of gamers. The Game Expo is all about them, and everyone who loves video games.

8 SOURCES

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