

Poland

November 2012

November 2012



CONTENTS

INTRODUCTION

Research overview	3
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Gaming formats and devices covered	3
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SUMMARY

Infographic results summary	4
-----------------------------	---

Key headlines	5
---------------	---

GAMING: WHO, WHAT AND HOW?

Who plays videogames?	7
-----------------------	---

Frequency of gaming	8
---------------------	---

Types of games played	9
-----------------------	---

Devices used to play games	11
----------------------------	----

Online gaming	12
---------------	----

PERCEPTIONS OF GAMING

Interest in gaming	14
--------------------	----

Broader media and activities interest	15
---------------------------------------	----

Words associated with different media/activities	17
--	----

GAMING AND THE FAMILY

Parents and children who play games	20
-------------------------------------	----

Words associated with gaming: Parents	21
---------------------------------------	----

The effect of games on children	22
---------------------------------	----

SUPERVISION

Parental supervision of children's gaming	24
---	----

Use of parental controls	27
--------------------------	----

PEGI RATING SYSTEM

Awareness, usefulness and clarity of rating systems	29
---	----

How rating systems should be applied	30
--------------------------------------	----

RESEARCH OVERVIEW

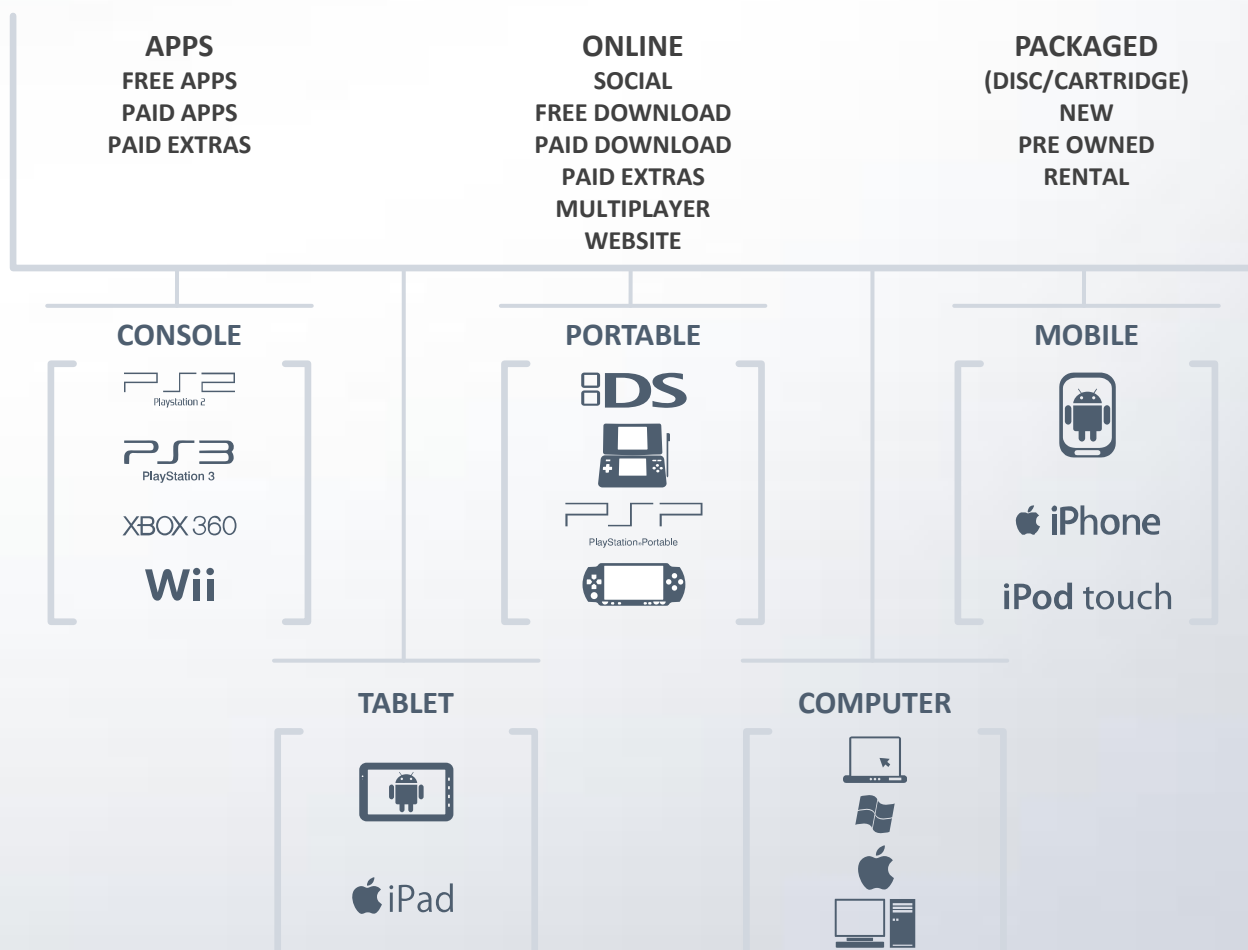
The European Consumer Study is a multi-country survey run by Ipsos MediaCT, in partnership with the Interactive Software Federation of Europe (ISFE). It is designed to provide a better understanding of the societal context in which games are being played today in 16 European countries. The study used a combination of online self-completion survey and offline interviews and targeted respondents aged between 16 and 64.

For the purposes of this report, 'Gamers' are defined as anyone who has played a game on any of the devices and formats listed below in the past 12 months.

In Poland, 1,335 respondents completed an online survey over a two week period in October 2012.

The data was weighted to a profile of online gamers using data from an offline omnibus survey.

GAMING FORMATS AND DEVICES COVERED





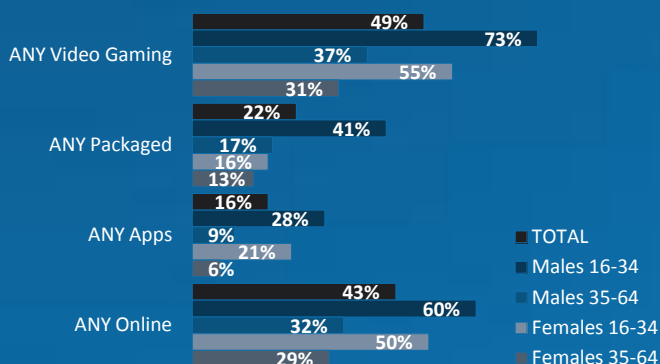
OVERVIEW OF GAMING

49%

of the online population aged 16 to 64 years old in Poland
have played a game in the past 12 months

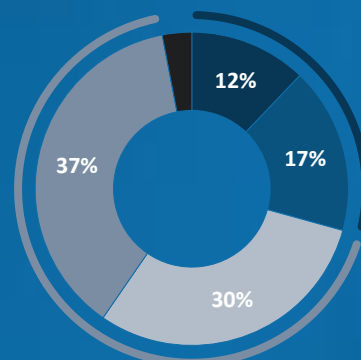


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

Very interested Fairly interested Not very interested
Not at all interested Don't know



67%

Not very/at all interested

30%

Fairly/very interested

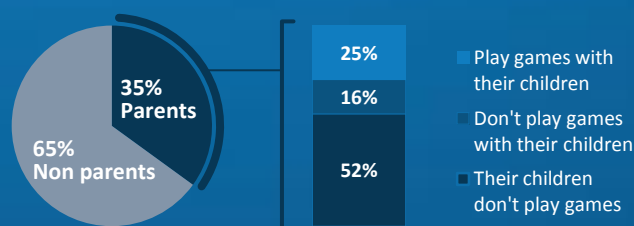
TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Immersive	41%	53%
2	Fun	38%	53%
3	Entertaining	36%	52%

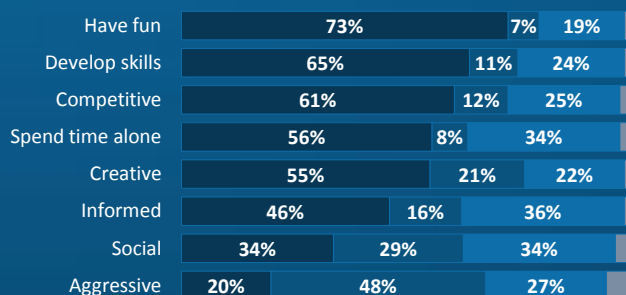
GAMING AND THE FAMILY

41%

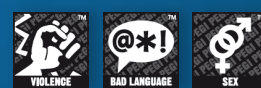
of parents have children who play games

EFFECT OF GAMES ON CHILDREN:
PARENTS OF CHILDREN WHO PLAY GAMES

More No difference Less Don't know



PEGI RATING SYSTEM



56%

aware of PEGI age rating
symbols

30%

aware of PEGI content
symbols

70%

agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

23%	The age rating system for videogames should be stricter overall than that used for movies
46%	The age rating system for videogames and movies should be the same
4%	The age rating system for movies should be stricter overall than that used for videogames
27%	Don't know

KEY HEADLINES

1

Incidence of gaming amongst the online population is at 49%

The profile of gamers is skewed slightly towards younger males, with around 2 in 5 gamers falling in the males 16-34 group.

Online is the most popular form of gaming amongst the online population in Poland.

Around 1 in 4 adults are playing games on a weekly basis. For non-gamers, a lack of interest in the category is the main barrier.

2

30% of the online population are very or fairly interested in gaming

Gaming is perceived as a fun, immersive and entertaining activity by the majority of gamers.

A higher percentage of gamers than non-gamers are interested in most of the activities.

There is a strong interest in the Internet amongst gamers (92% vs. 65% non-gamers).

Gamers are also more likely to be interested in technology (61% vs. 38% non-gamers) and film (89% vs. 71% non-gamers).

3

25% of parents play games with their children

The most common reason parents play games with children is to monitor how long they play for.

Many parents see gaming as having a positive impact on their child(ren). Two thirds believe gaming encourages their child to develop their skills more.

55% believe it encourages their children to be more creative, although a similar proportion believe it encourages them to spend more time alone (56%).

4

1 in 5 parents of children aged 6+ describe themselves as 'not at all' or 'not very' knowledgeable about the games their child plays

45% children aged 10-15 have bought a game for themselves, compared to 3 in 10 children aged 6-9.

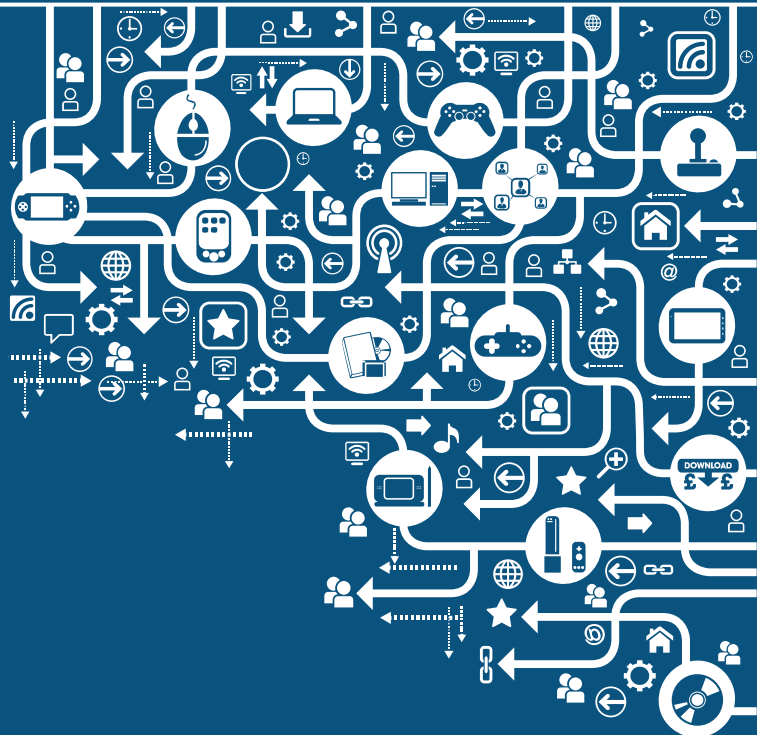
Across all ages, half of all parents believe their child has played a game with a higher age rating than their age.

5

56% of the online population recognise PEGI age rating symbols

7 in 10 agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.

23% believe that the age rating system for games should be stricter than movies, although twice as many (46%) believe the same level of strictness should be applied to both.





WHO PLAYS VIDEOGAMES? (ALL ONLINE RESPONDENTS)

49%

of the online population aged 16 to 64 years old in Poland have played a game in the past 12 months



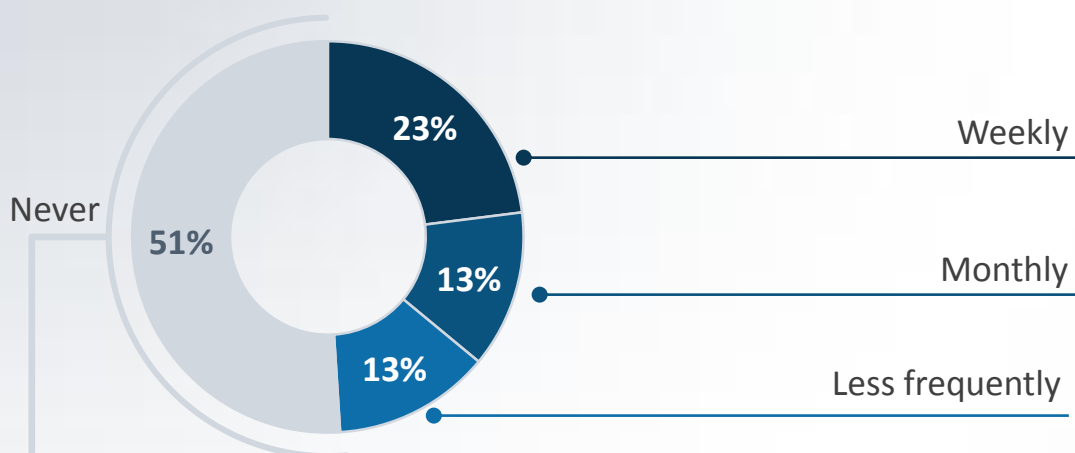
7%	16-19	7%
12%	20-24	7%
19%	25-34	13%
9%	35-44	10%
5%	45-54	3%
4%	55-64	3%

Incidence of gaming amongst the online population in Poland is at 49%.

The profile of gamers is skewed slightly towards YOUNGER MALES, with around 2 in 5 gamers falling in the males 16-34 group.



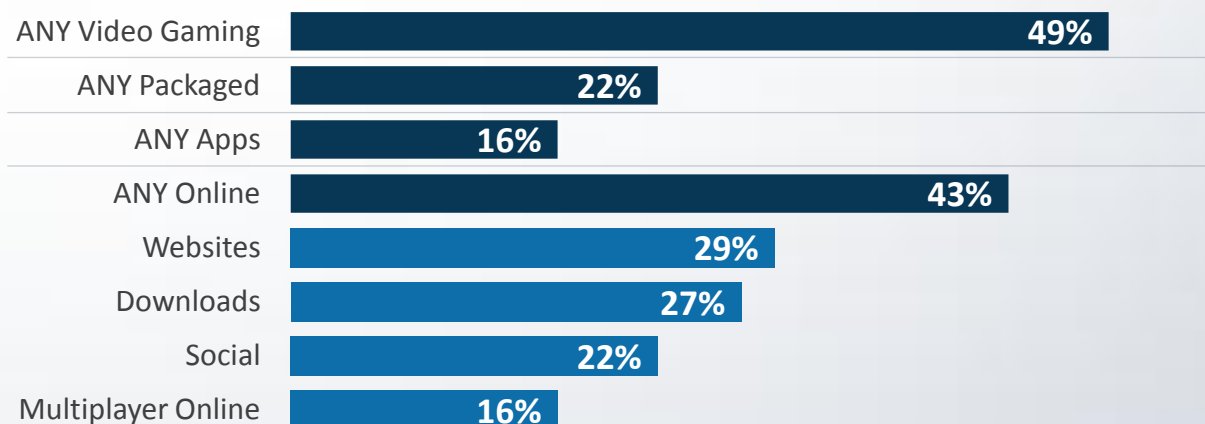
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)



TOP 5 REASONS FOR NOT GAMING

1	Not interested in them	52%
2	No time to play them	42%
3	More interested in other hobbies	38%
4	Don't have a console at home	17%
5	Too old to play them	12%

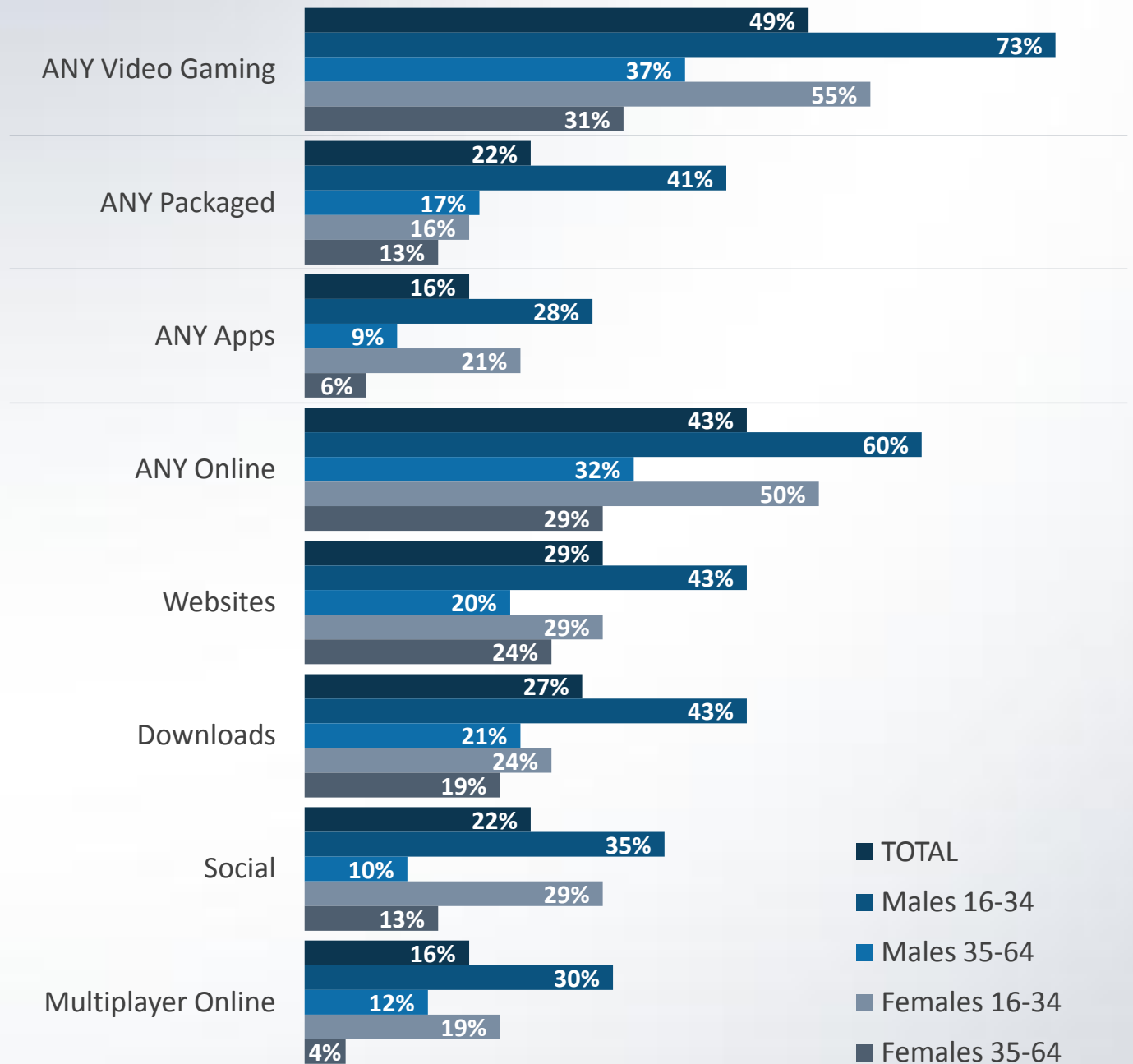
TYPES OF GAMES PLAYED (ALL ONLINE RESPONDENTS)



Around **1 in 4** adults are playing games on a weekly basis. For non-gamers, a lack of interest in the category is the main barrier.

ONLINE is the most popular form of gaming amongst the online population in Poland.

TYPES OF GAMES PLAYED: BY AGE AND GENDER



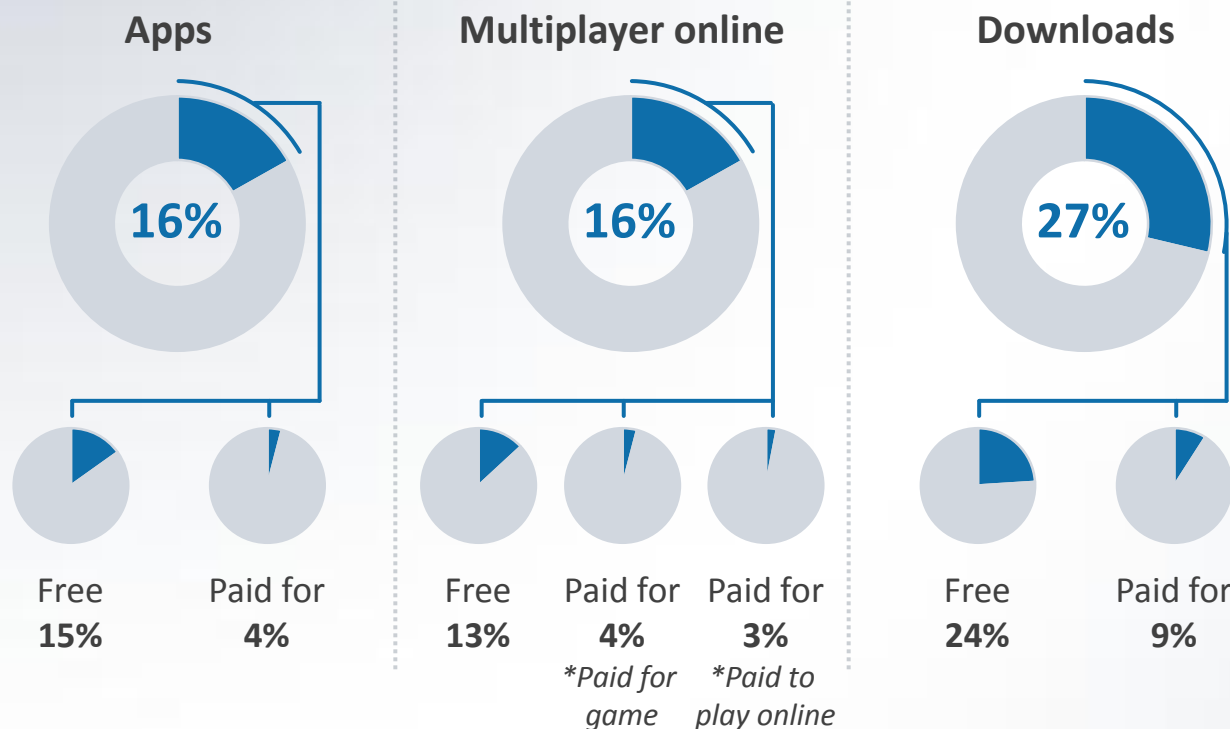
Across all categories gamers are most commonly **MALES AGED 16-34**, with the dominance most pronounced in Packaged gaming (41% vs. 22% Total).

FEMALES 16-34 are generally more active gamers than older males (55% vs. 37% Overall). They also have above average levels of incidence in app and social gaming.



GAMES PLAYED: FREE OR PAID FOR (ALL ONLINE RESPONDENTS)

% of the online population playing each type of game



TYPES OF VIDEOGAMES PURCHASED IN THE LAST 12 MONTHS (ALL ONLINE RESPONDENTS)

35%

Have bought
a game

- 14% New games on disc or cartridge
- 7% Online games (download/subscription/extras)
- 6% Secondhand games on disc or cartridge
- 4% Games apps
- 10% Don't know

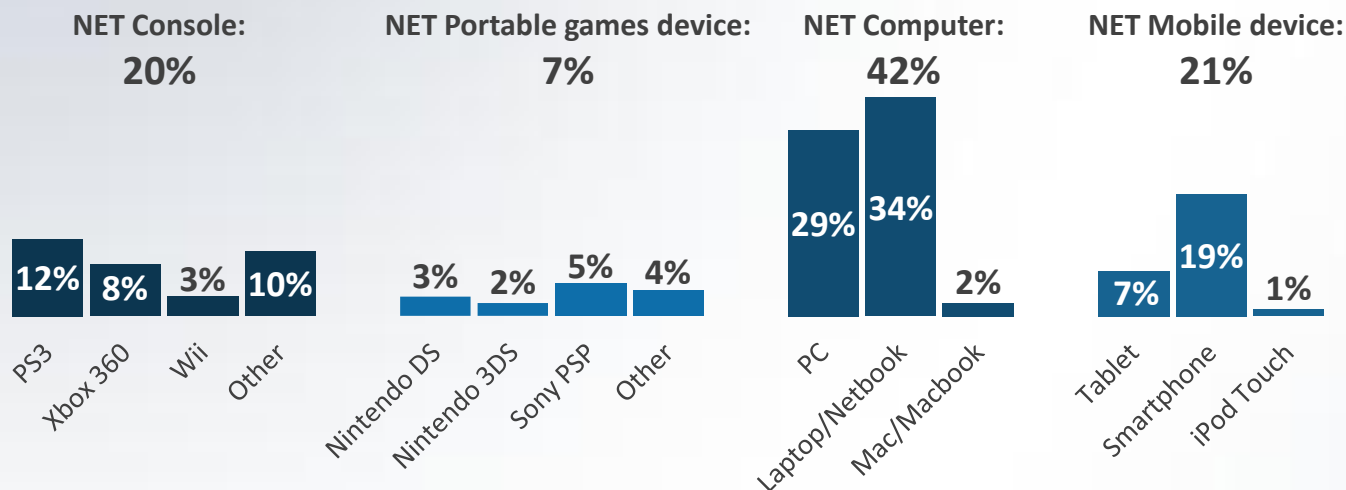
For **APPS**, 1 in 4 of those active in the category are playing games that have been paid for.

Similarly for Multiplayer Online and Downloads, the majority are playing free games.

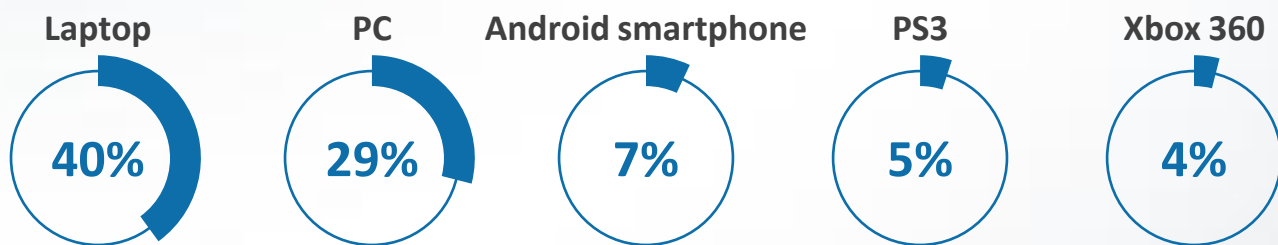
A **THIRD** of the online population have bought a game in the last 12 months.



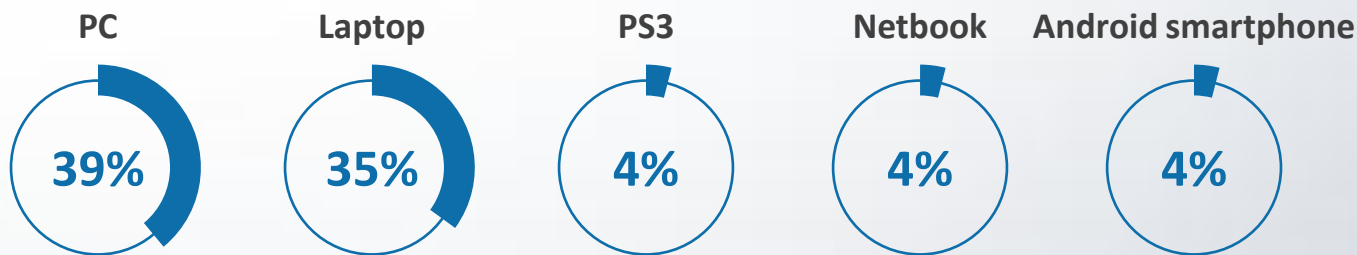
DEVICES USED TO PLAY GAMES (ALL ONLINE RESPONDENTS)



MOST USED (ALL GAMERS)



MOST USED (AMONGST PARENTS WHO PLAY GAMES WITH THEIR CHILDREN)



COMPUTERS (laptops and PCs) are by far the most commonly used devices for gaming.

1 in 5 have used a **SMARTPHONE** to play a game in the past 12 months.



84%

of gamers play games online

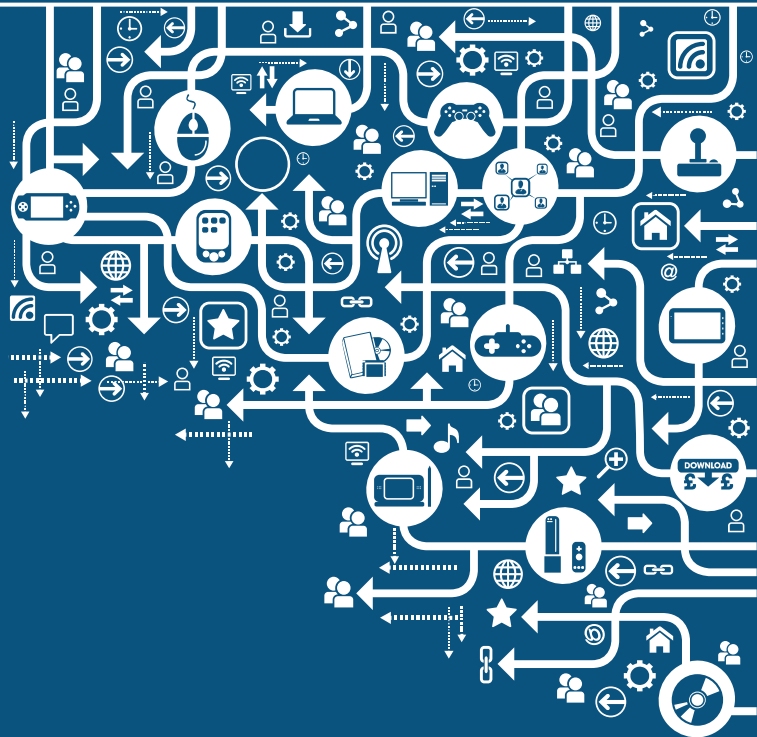
WHEN PLAYING CONNECTED TO THE INTERNET, WHO DO YOU PLAY WITH? (ALL GAMERS)

- 23%** Always play on my own
- 27%** Play on my own most of the time
- 22%** Sometimes on my own/sometimes with other online players
- 10%** Play with other online players most of the time
- 3%** Always play with other online players
- 10%** Never play games online

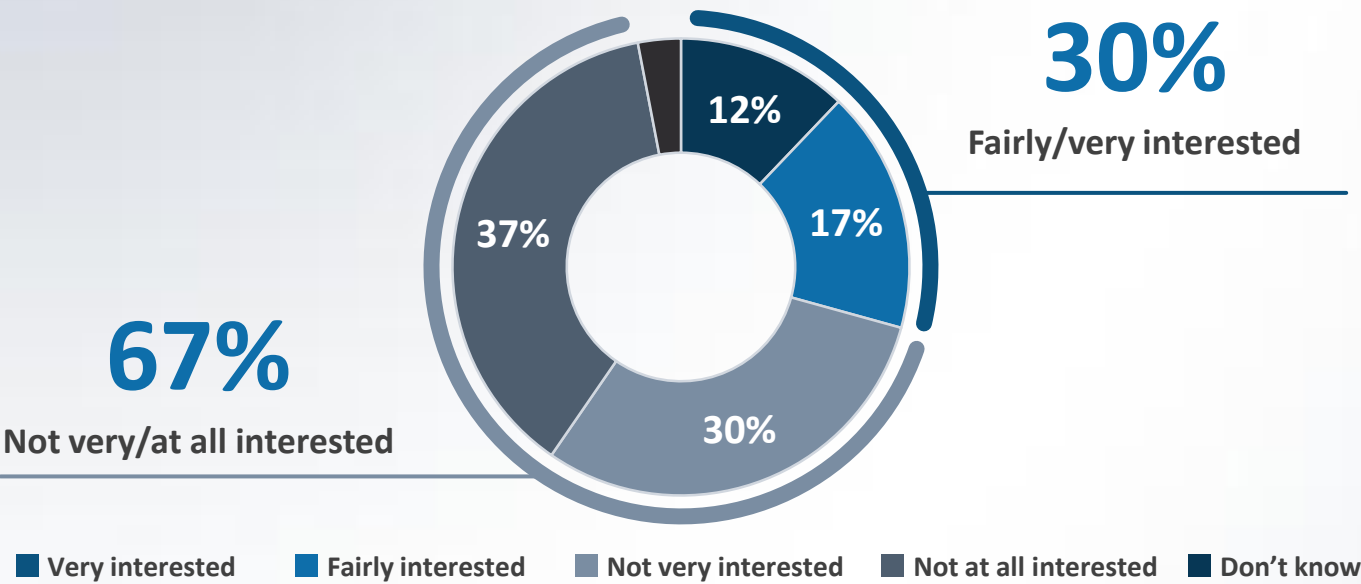
WHEN PLAYING WITH OTHERS ONLINE, WHO ARE THE OTHERS?

- 49%** Online strangers
- 29%** Friends (met in real life)
- 25%** Family/relatives
- 24%** Friends (not met in real life)

PERCEPTIONS OF GAMING



INTEREST IN GAMING (ALL ONLINE RESPONDENTS)



WORDS ASSOCIATED WITH GAMING: TOP 5 SELECTED

		ALL ONLINE	GAMERS
1	Immersive	41%	53%
2	Fun	38%	53%
3	Entertaining	36%	52%
4	Good at providing escapism	31%	42%
5	Competitive	28%	40%

30% of the online population say they are very or fairly interested in gaming.

Gaming is perceived as a **FUN**, **IMMERSIVE** and **ENTERTAINING** activity by the majority of gamers.

BROADER MEDIA AND ACTIVITIES INTEREST: (FAIRLY/VERY INTERESTED)

■ All
 ■ Males 16-34
 ■ Males 35-64
 ■ Females 16-34
 ■ Females 35-64



News/current affairs

85% 79% 91% 84% 86%



Music

82% 80% 81% 88% 80%



Film

80% 80% 69% 94% 77%



Internet

78% 84% 79% 96% 55%



Travelling

72% 71% 73% 65% 78%



Television

70% 68% 68% 68% 74%



Literature/art

59% 44% 65% 60% 68%



The latest technology

49% 62% 67% 40% 27%



Sport (taking part)

49% 54% 51% 43% 46%



News about celebs/famous

38% 28% 33% 43% 46%



Going out to bars/clubs

34% 50% 19% 55% 11%



Gaming

30% 51% 22% 19% 25%



BROADER MEDIA AND ACTIVITIES INTEREST: DIFFERENCE BETWEEN GAMERS AND NON-GAMERS



A higher percentage of gamers than non-gamers are interested in most of the activities.

There is a strong interest in browsing the **INTERNET** amongst gamers (92% vs. 65% non-gamers).

Gamers are also more likely to be interested in **TECHNOLOGY** (61% vs. 38% non-gamers) and **FILM** (89% vs. 71% non-gamers).

WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

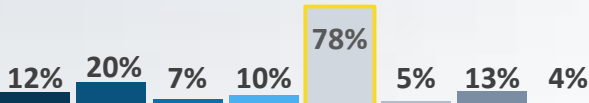
(ALL ONLINE RESPONDENTS)

Entertaining Immersive
Informative/educational Fun

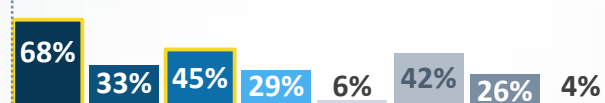
Good at providing escapism Sociable
Family orientated Competitive



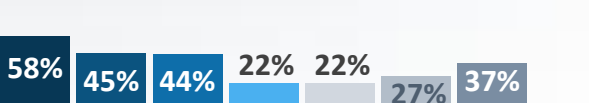
News/current affairs



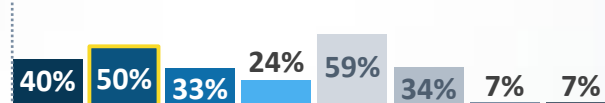
Music



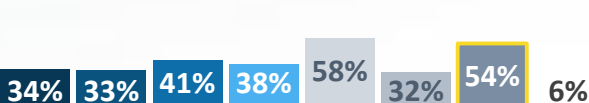
Film



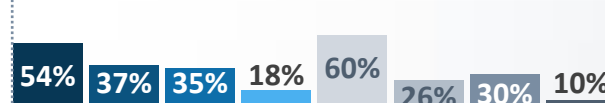
Internet



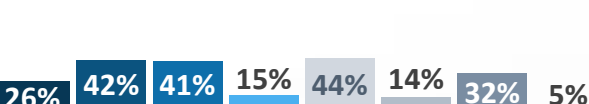
Travelling



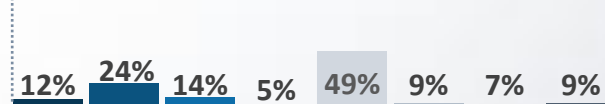
Television



Literature/art



The latest technology



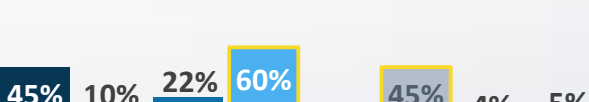
Sport (taking part)



News about celebs/famous



Going out to bars/clubs



Gaming

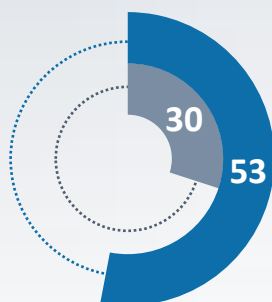


Most commonly selected category for each word

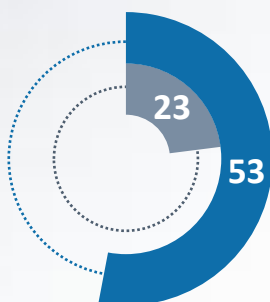


WORDS ASSOCIATED WITH GAMING: DIFFERENCE BETWEEN GAMERS AND NON-GAMERS

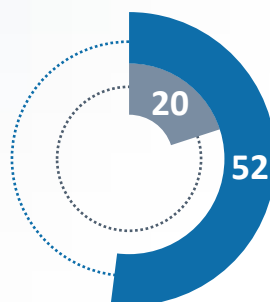
■ Gamers ■ Non-gamers



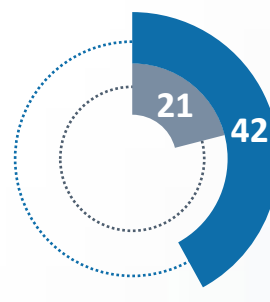
Immersive



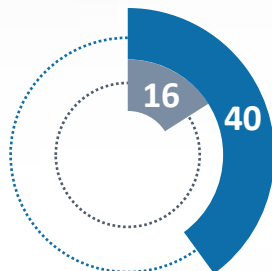
Fun



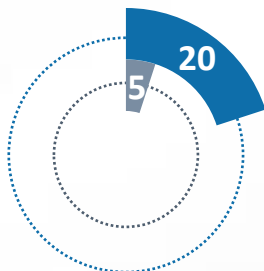
Entertaining



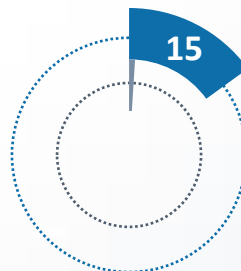
Good at providing
escapism



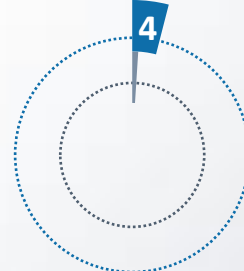
Competitive



Sociable



Family orientated

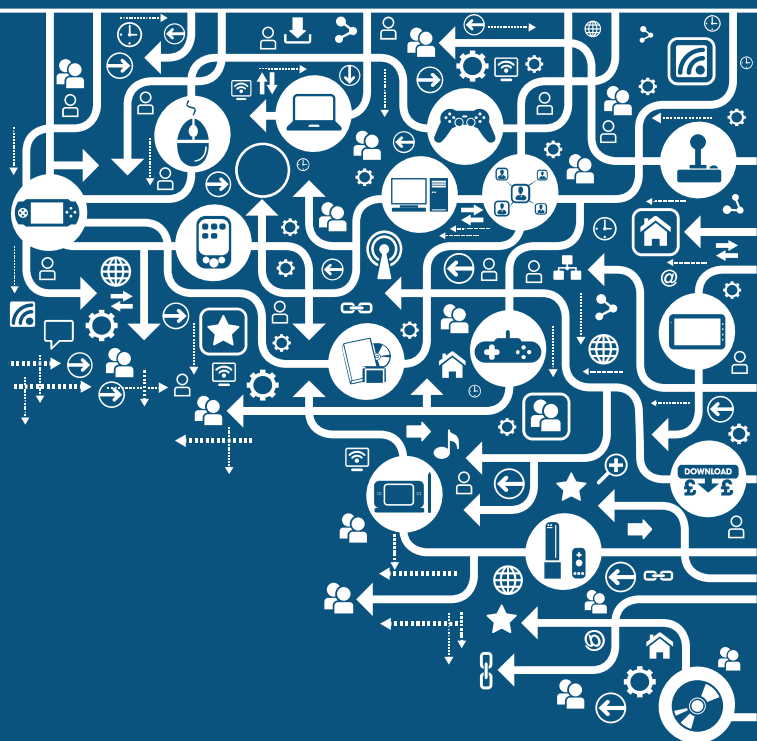


Informative/
educational

1 in 5 non-gamers describe gaming as **ENTERTAINING**, and a further 23% agree that gaming is **FUN**.

1 in 5 gamers describe gaming as a **SOCIABLE** activity, compared to just 1 in 20 non-gamers.

GAMING AND THE FAMILY

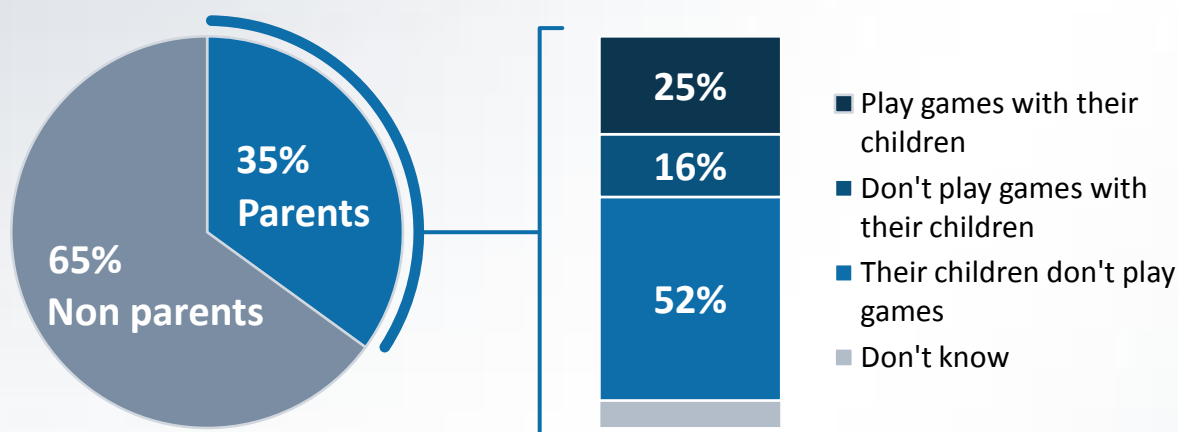




PARENTS AND CHILDREN WHO PLAY GAMES (ALL ONLINE RESPONDENTS)

41%

of parents have children who play games



REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN

To monitor how long they play for

36%

It's a fun activity for all the family

30%

To spend time with them

30%

Educational benefits

30%

They ask me to

29%

I enjoy playing with them

27%

To monitor what games they play

26%

Health and fitness benefits

8%

41% of parents have children that play games. Of these, around 6 in 10 play with their children (43% parents play games with their children vs. 17% don't).

The most common reason parents play games with children is to **MONITOR** how long they play for.

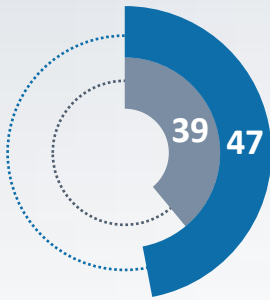
3 in 10 parents playing games with their children do so for the **EDUCATIONAL** benefits.

WORDS ASSOCIATED WITH GAMING:

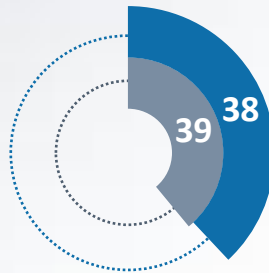
DIFFERENCE BETWEEN PARENTS OF CHILDREN WHO PLAY GAMES AND NON-PARENTS

■ Parents of children who play games

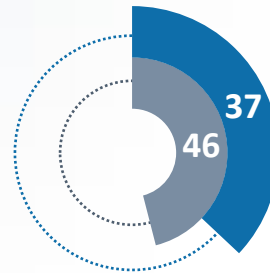
■ Non-parents



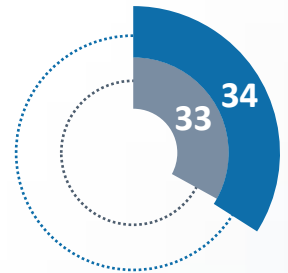
Fun



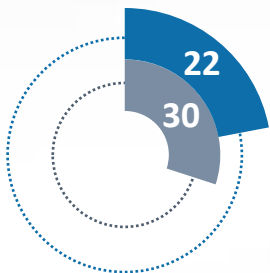
Entertaining



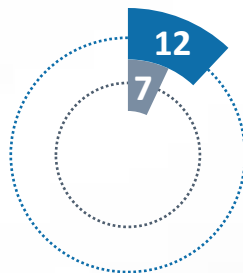
Immersive



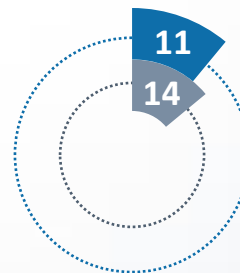
Good at providing
escapism



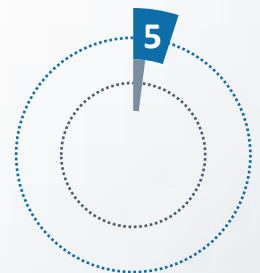
Competitive



Family orientated



Sociable



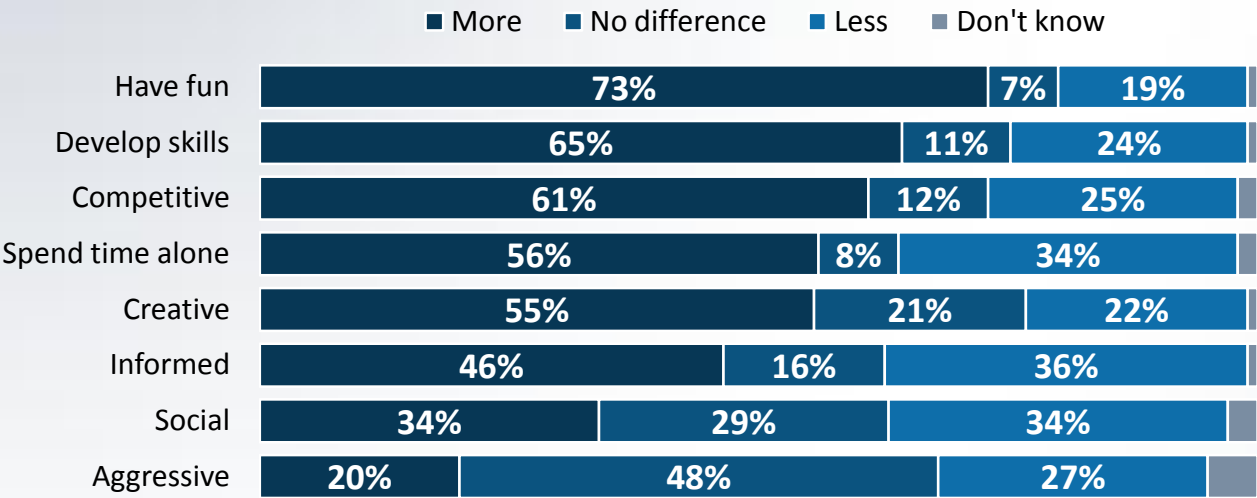
Informative/
educational

Parents of children who play games are more likely to describe gaming as **FUN** than non-parents. They are less likely to describe it as a **COMPETITIVE** activity.

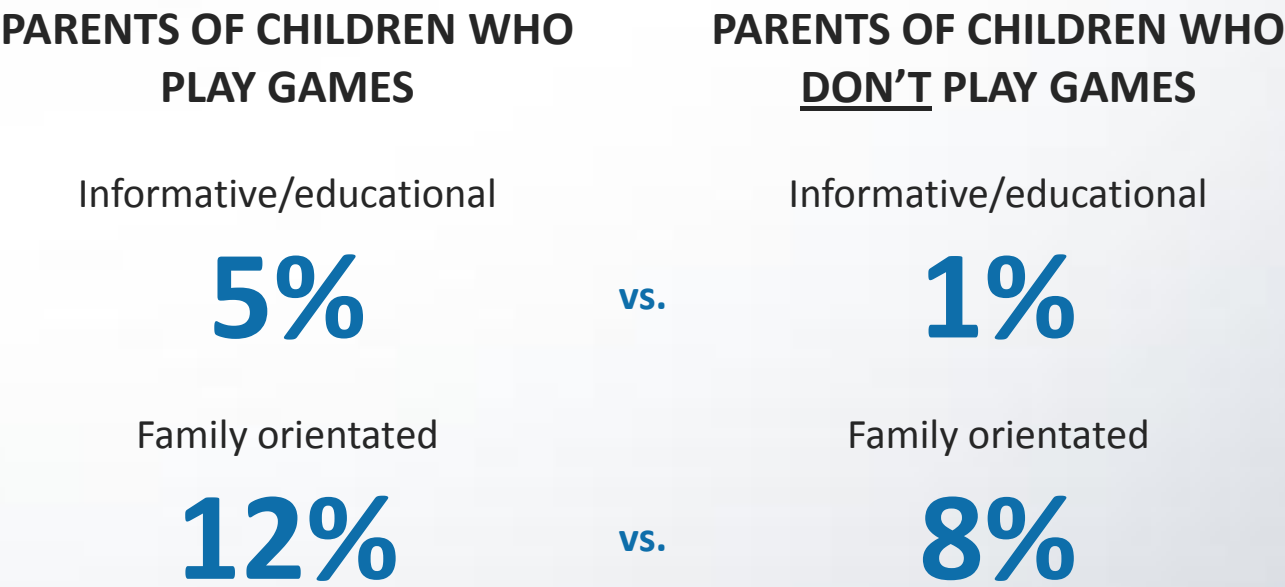
They are also more likely to describe gaming as a **FAMILY ORIENTATED** activity.

EFFECT OF GAMES ON CHILDREN:

(PARENTS OF CHILDREN WHO PLAY GAMES)



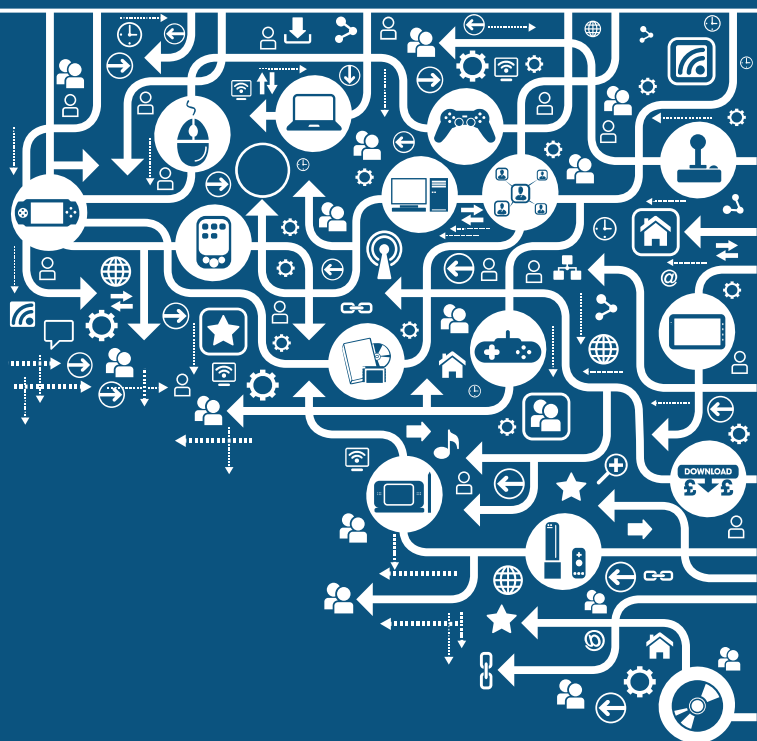
WORDS ASSOCIATED WITH GAMING:



Many parents see gaming as having a positive impact on their child(ren). Two thirds believe gaming encourages their child to **DEVELOP THEIR SKILLS** more.

55% believe it encourages their children to be more **CREATIVE**, although a similar proportion believe it encourages them to spend more **TIME ALONE** (56%).

SUPERVISION

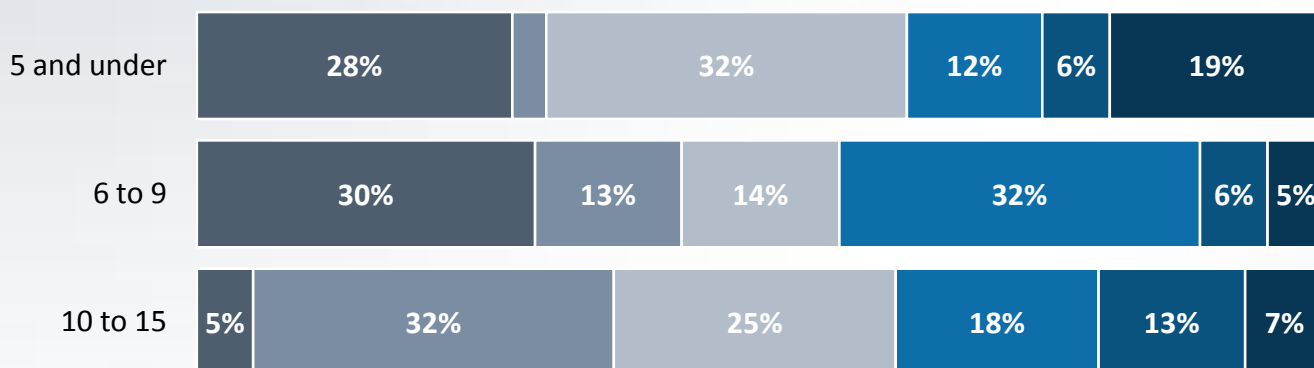




WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES

- Never (+child doesn't buy/receive)
- Sometimes
- Never (but child does buy/receive)
- Most of the time
- Rarely
- Always

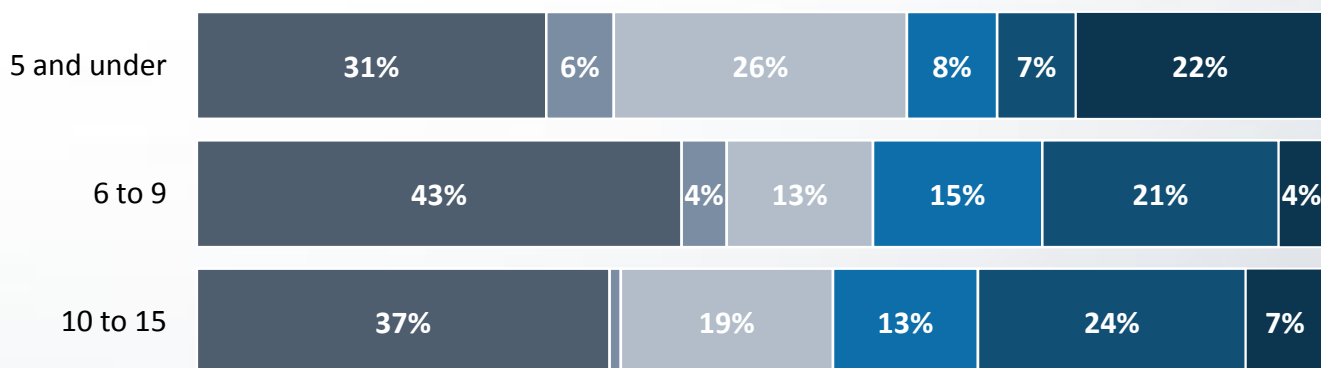
AGE OF CHILD*



WHETHER THE CHILD IS PRESENT DURING PURCHASE

- Don't buy games for youngest child
- Sometimes
- Never
- Most of the time
- Rarely
- Always

AGE OF CHILD*



*Parents were asked in reference to their YOUNGEST child only

95% of children aged 10-15 are buying or receiving games.

A **THIRD** of parents of children aged 10-15 never buy that child's games, with a further 25% 'rarely' doing so.

WHETHER CHILD BUYS THEIR OWN GAMES

- Never (child doesn't receive games)

Never (but do receive games)

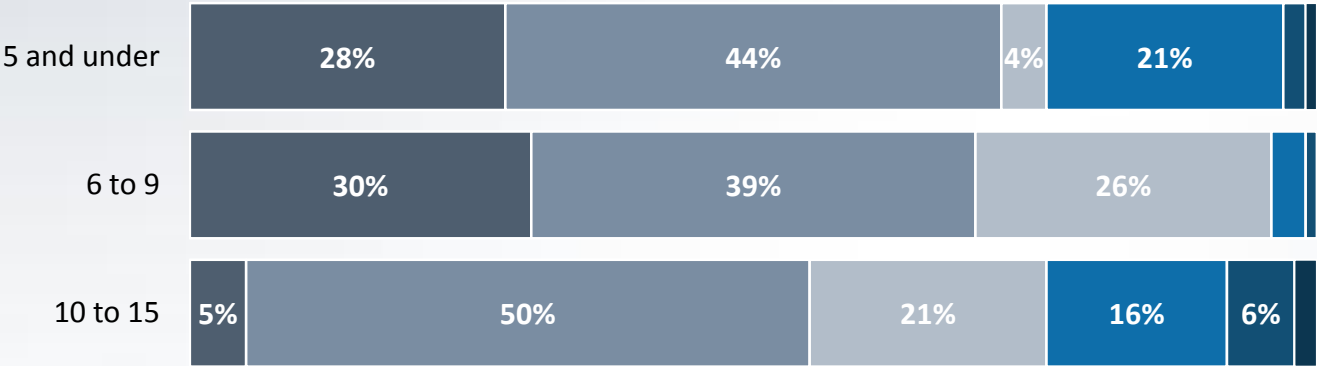
Rarely

Sometimes

Most of the time

Always

AGE OF CHILD*



HOW KNOWLEDGEABLE PARENTS ARE ABOUT THE GAMES THEIR CHILD PLAYS

- Child doesn't play

Don't know

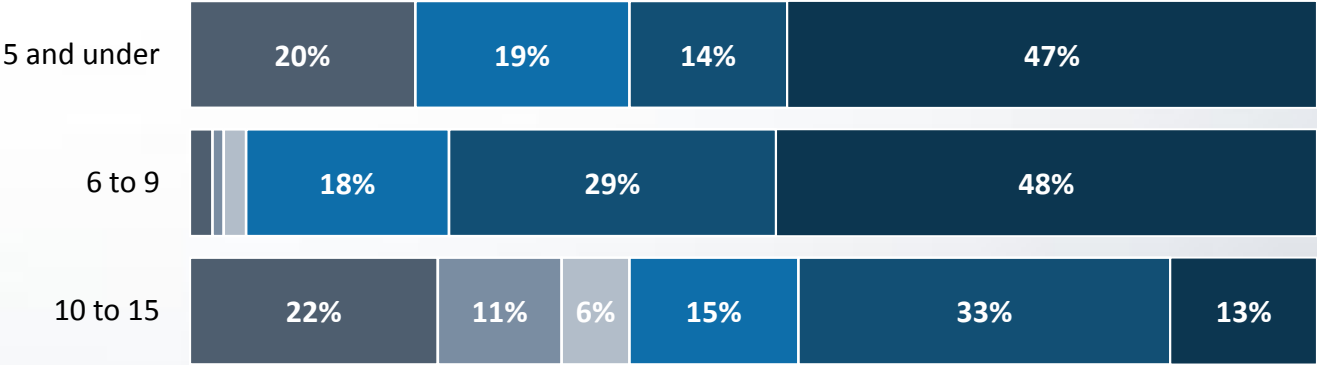
Not at all

Not very

Quite

Very

AGE OF CHILD*



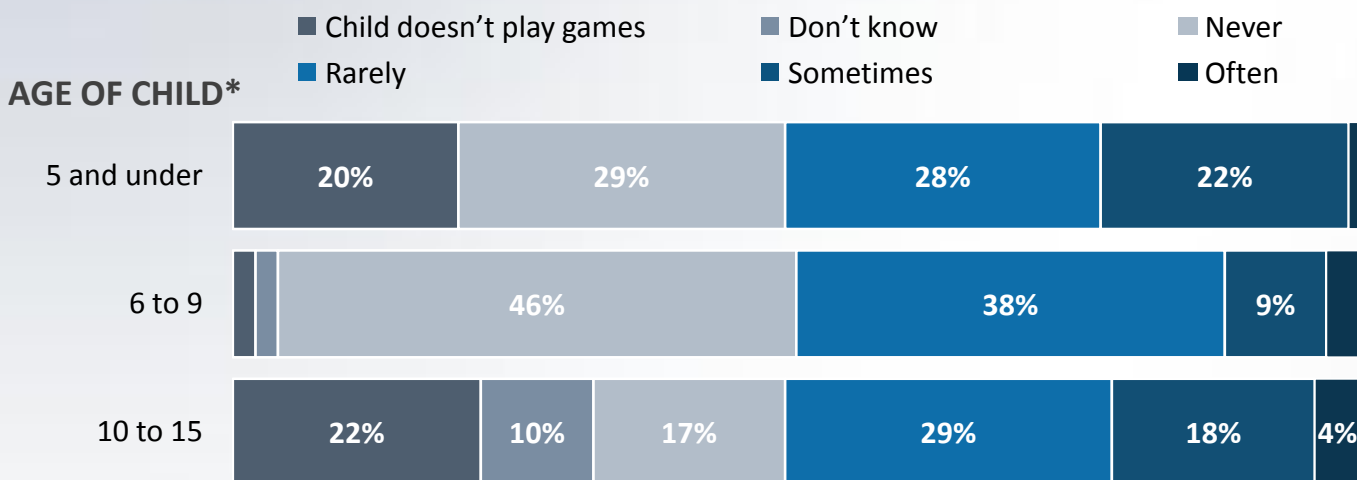
**Parents were asked in reference to their YOUNGEST child only*

45% children aged 10-15 have bought a game for themselves, compared to 3 in 10 children aged 6-9.

1 in 5 parents of children aged 6 and above describe themselves as 'not at all' or 'not very' knowledgeable about the games that child plays.



WHETHER CHILD PLAYS GAMES WITH A HIGHER AGE RATING THAN THEIR AGE

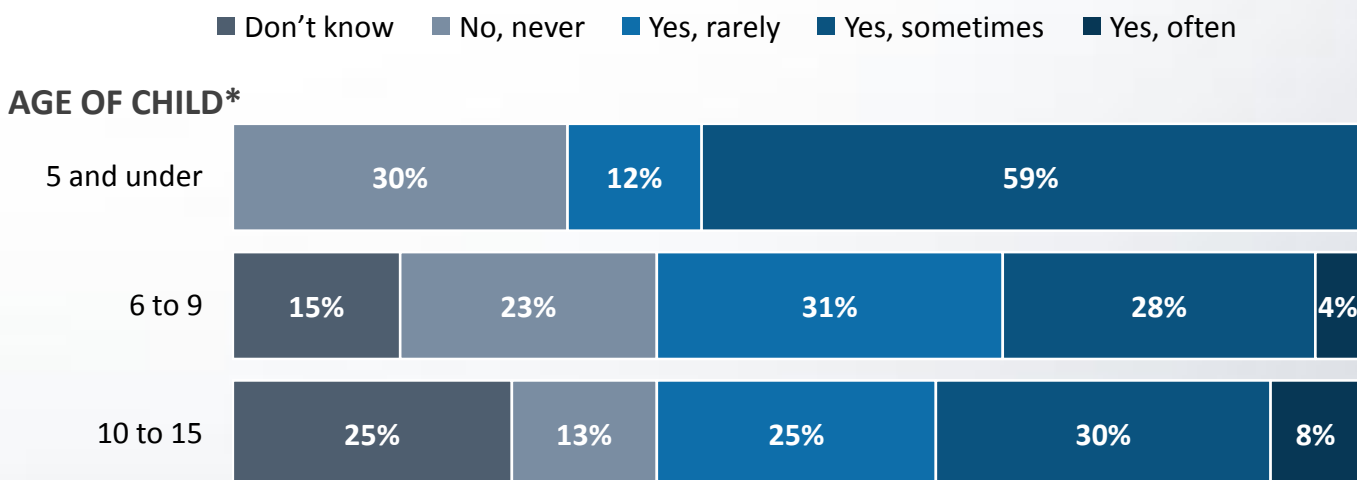


WHETHER CHILD PLAY GAMES WITH HIGHER AGE RATING THAN THEIR AGE AT A FRIEND'S HOME **

5% Aged 5 and under play games at a friend's home

19% Aged 6-9 play games at a friend's home

40% Aged 10-15 play games at a friend's home



*Parents were asked in reference to their YOUNGEST child only

**Note low base sizes for this question (n < 50)

Across all ages, **HALF** of all parents believe their child has played a game with a higher age rating than their age.

2 in 5 children aged 10-15 are playing games at a friend's house.

USE OF PARENTAL CONTROLS (PARENTS OF CHILDREN WHO PLAY GAMES)

FOR CHILDREN AGED 5 OR UNDER

38%

use parental control settings to limit what their youngest child can access on their games consoles

WHAT RESTRICTED

- 31%** Games played by age rating
- 25%** Amount of play time
- 22%** Online access through the console

47%

use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

FOR CHILDREN AGED 6-9

40%

use parental control settings to limit what their youngest child can access on their games consoles

WHAT RESTRICTED

- 31%** Amount of play time
- 31%** Games played by age rating
- 9%** Online access through the console

56%

use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

FOR CHILDREN AGED 10-15

38%

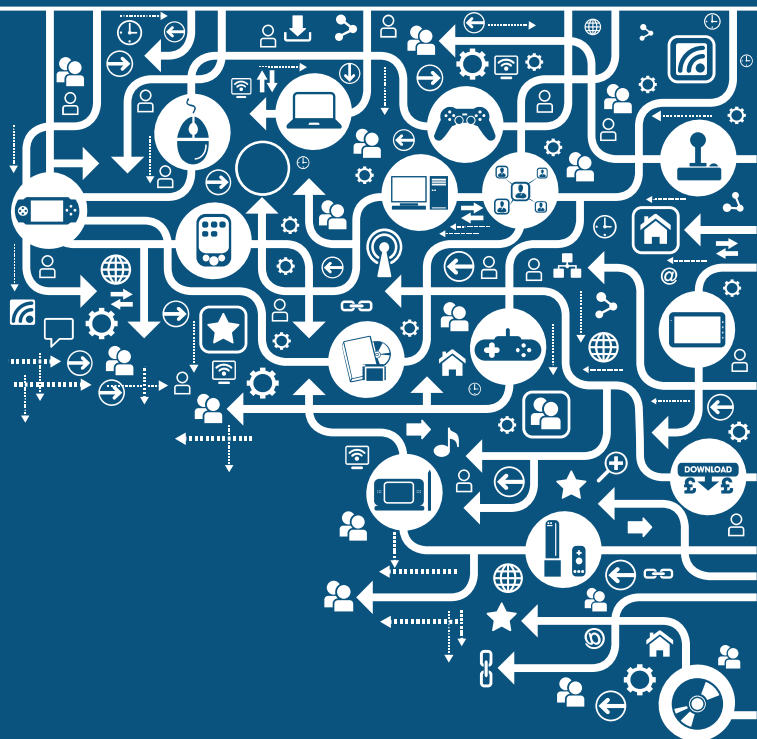
use parental control settings to limit what their youngest child can access on their games consoles

WHAT RESTRICTED

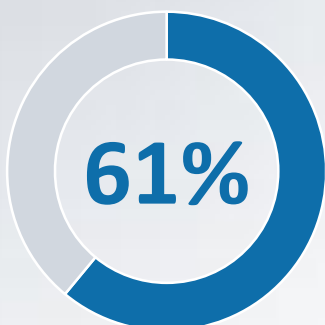
- 22%** Amount of play time
- 16%** Games played by age rating
- 9%** Online access through the console

43%

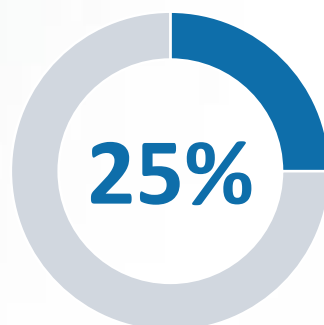
use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites



AWARENESS OF RATING SYSTEMS (ALL ONLINE RESPONDENTS)



aware of **ANY** age rating system for videogames

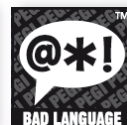


aware of **PEGI** age rating system for videogames



56%

aware of PEGI age rating symbols



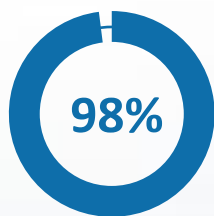
30%

aware of PEGI content symbols

EXTENT TO WHICH THE SYMBOLS ARE...

PEGI AGE RATING SYMBOLS

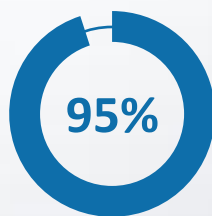
PEGI CONTENT SYMBOLS



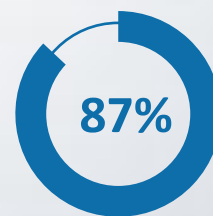
Clear



Useful



Clear



Useful

■ % NET Fairly/Very

Clear: Amongst those aware of symbols

Useful: Amongst parents of children who game

61% are aware of an age rating system for games, but only 1 in 4 are aware of PEGI ratings.

Awareness of the PEGI age ratings increases to 56% after prompting with images.

The vast majority of respondents agree that both sets of symbols are CLEAR and USEFUL.



SHOULD THE PEGI RATING SYSTEM ALSO APPLY TO APP AND SOCIAL GAMES? (ALL ONLINE RESPONDENTS)

70%

agree PEGI ratings should apply to
app games

70%

agree PEGI ratings should apply to
games on social network sites

HOW THE AGE RATING SYSTEM FOR VIDEOGAMES SHOULD COMPARE TO MOVIES (ALL ONLINE RESPONDENTS)

% AGREE WITH STATEMENT THE MOST

- 23%** The age rating system for videogames should be stricter overall than that used for movies
- 46%** The age rating system for videogames and movies should be the same
- 4%** The age rating system for movies should be stricter overall than that used for videogames
- 27%** Don't know/none of these

7 in 10 agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.

23% believe that the age rating system for games should be stricter than movies, although twice as many (46%) believe the same level of strictness should be applied to both.

