



VIDEOGAMES IN EUROPE: CONSUMER STUDY

European Summary Report

November 2012

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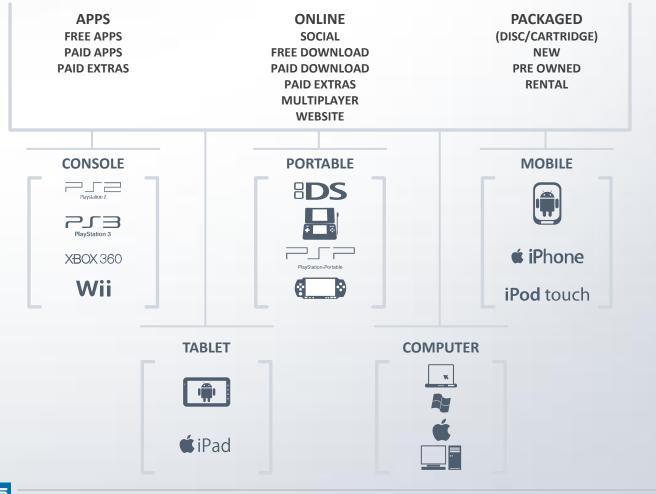
RESEARCH OVERVIEW

The European Consumer Study is a multicountry 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 total 15,142 respondents completed an online survey over a two week period in October 2012.

This report provides a summary of the key results across all markets; individual country reports are available for more indepth analysis of all results.

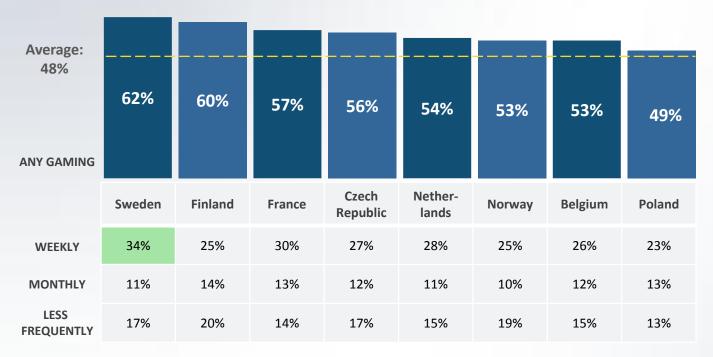
GAMING FORMATS AND DEVICES COVERED



GAMING: WHO, WHAT AND HOW?



FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)



Average: 48%								
ANY GAMING	45%	42%	42%	41%	41%	40%	40%	40%
	Denmark	Germany	Austria	Italy	Switzer- land	Great Britain	Spain	Portugal
WEEKLY	26%	23%	20%	25%	21%	24%	24%	23%
MONTHLY	7%	10%	11%	7%	12%	7%	8%	8%
LESS FREQUENTLY	13%	10%	12%	9%	8%	9%	9%	9%



TYPE OF GAMES PLAYED (ALL ONLINE RESPONDENTS)

Average: 48%	62%	60%	57%	56%	54%	53%	53%	49%
ANY GAMING								
	Sweden	Finland	France	Czech Republic	Nether- lands	Norway	Belgium	Poland
ANY PACKAGED	31%	27%	28%	26%	27%	27%	26%	22%
ANY APPS	33%	24%	24%	20%	25%	34%	15%	16%
ANY ONLINE	45%	48%	44%	48%	39%	39%	41%	43%
DOWNLOADS	30%	31%	20%	29%	23%	25%	23%	27%
SOCIAL	23%	20%	17%	22%	18%	17%	22%	22%
Average: 48%								
ANY GAMING	45%	42%	42%	41%	41%	40%	40%	40%
	Denmark	Germany	Austria	Italy	Switzer- land	Great Britain	Spain	Portugal
ANY PACKAGED	16%	23%	21%	18%	15%	28%	21%	17%
ANY APPS	22%	14%	20%	20%	19%	18%	20%	17%
ANY ONLINE	35%	32%	34%	34%	33%	29%	31%	34%
ANY ONLINE	35% 19%	32% 21%	34% 24%	34% 19%	33% 19%	29% 16%	31% 17%	34% 20%

Í S F E

DEVICES USED TO PLAY (ALL ONLINE RESPONDENTS)

Average: 48%	62%	60%	57%	56%	54%	53%	53%	49%
	Sweden	Finland	France	Czech Republic	Nether- lands	Norway	Belgium	Poland
CONSOLE	37%	29%	33%	16%	28%	29%	28%	20%
PORTABLE GAMES DEVICE	11%	7%	20%	8%	15%	11%	20%	7%
COMPUTERS	47%	47%	45%	49%	41%	38%	42%	42%
MOBILE DEVICE	38%	31%	31%	25%	30%	37%	19%	21%

Average: 48%								
ANY GAMING	45%	42%	42%	41%	41%	40%	40%	40%
	Denmark	Germany	Austria	Italy	Switzer- land	Great Britain	Spain	Portugal
CONSOLE	17%	21%	25%	24%	20%	28%	26%	21%
PORTABLE GAMES DEVICE	6%	11%	10%	15%	13%	15%	17%	12%
COMPUTERS	36%	34%	36%	34%	33%	30%	31%	33%
MOBILE DEVICE	26%	18%	24%	25%	30%	22%	25%	20%



PLAYING GAMES ONLINE (ALL GAMERS)

Euro Average: 81%

CZECH REPUBLIC90%31% Always play on their ownSWITZERLAND89%51% Play with othersPOLAND84%62% Play with othersPOLAND84%23% Always play on their ownPORTUGAL84%49% Play with others90%33% Always play on their ownPORTUGAL84%59% Play with others36% Always play on their own59% Play with others90%83%59% Play with others31% Always play on their own59% Play with others32% Always play on their own59% Play with others31% Always play on their own31% Always play on their ownGREAT BRITAIN80%33% Always play on their ownGREAT BRITAIN80%33% Always play on their ownGREAT BRITAIN79%53% Play with others35% Always play on their own35% Always play on their ownGERMANY79%25% Always play on their ownBELGIUM78%32% Always play on their ownNORWAY77%48% Play with others35% Play with others33% Always play on their ownSWEDEN76%32% Always play on their ownGREAT BRITAIN77%44% Play with others36% Always play on their own25% Always play on their ownGREAT BRITAIN77%44% Play with others37% Always play on their own35% Always pla		_	58% Play with others
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FRANCE 76% 30% Always play on their own AUSTRIA 75%	SWEDEN	/0%	25% Always play on their own
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AUSTRIA 75%	FRANCE	/0%	30% Always play on their own
24% Always play on their own	ΔΙΙζΤΟΙΑ	75.0/	50% Play with others
	AUSTRIA	/5%	24% Always play on their own



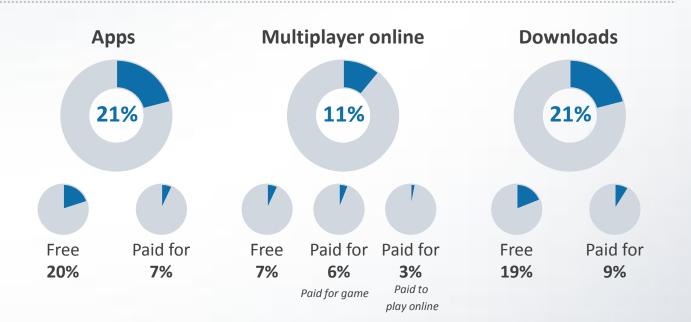
When you play video games whilst connected to the internet, do you play by yourself or with other online players? Ipsos MediaCT

EURO AVERAGES

PROFILE OF GAMERS (ALL GAMERS)

	Age breakdown					
Gender breakdown	16-19 12%					
55% Male	20-24 14% 51% Under 35					
	25-34 26%					
	35-44 23%					
45% Female	45-54 15% 49% 35 and over					
	55-64 11%					

GAMES PLAYED: FREE vs. PAID (ALL ONLINE RESPONDENTS)



PURCHASED IN PAST 12 MONTHS (ALL ONLINE RESPONDENTS)

35%	19%	New packaged				
JJ /0	8%	Online games				
Have bought	8%	Secondhand packaged				
a game	7%	Games apps				



Which of the following types of free or paid for video games do you personally play? Which of the following types of games have you bought/paid for either for yourself or others, in the last 12 months? Ipsos MediaCT

GAMES PURCHASED IN PAST 12 MONTHS (1/2)

(ALL ONLINE RESPONDENTS)

AUSTRIA

36%

Have bought a game 17% New packaged
8% Online games
7% Secondhand packaged
7% Games apps

BELGIUM

38% Have bought

a game

21% New packaged10% Secondhand packaged8% Online games

6% Games apps

CZECH REPUBLIC

37%19%New packaged**11%**Online gamesHave bought
a game7%Secondhand packaged**6%**Games apps

DENMARK

30% Have bought a game 14% New packaged
12% Online games
11% Games apps
4% Secondhand packaged

FINLAND

32% Have bought a game 20% New packaged
10% Online games
8% Secondhand packaged
7% Games apps

FRANCE

38% Have bought a game

20% New packaged
13% Secondhand packaged
8% Online games
6% Games apps

GERMANY

29% Have bought a game 18% New packaged9% Secondhand packaged5% Online games4% Games apps

GREAT BRITAIN

34% Have bought a game

23% New packaged
13% Secondhand packaged
7% Online games
7% Games apps



GAMES PURCHASED IN PAST 12 MONTHS (2/2)

(ALL ONLINE RESPONDENTS)

ITALY

28%

Have bought a game

17% New packaged 9% Secondhand packaged 6% Games apps 4% **Online** games

NETHERLANDS

35% Have bought a game

35%

Have bought

a game

21% 8% 8%

POLAND

14%

7%

6%

4%

New packaged Secondhand packaged **Online** games

New packaged

Online games

Games apps

Secondhand packaged

7% Games apps

NORWAY

24% 41% New packaged 16% Games apps Have bought 13% **Online** games a game 6% Secondhand packaged

PORTUGAL

33% Have bought a game

18% New packaged 8% **Online** games 6% Secondhand packaged 3% Games apps

SPAIN

35% Have bought a game

20% New packaged 10% Secondhand packaged 5% **Online** games 3% Games apps

SWEDEN

42% Have bought a game

25% New packaged 14% **Online** games 11% Games apps 10% Secondhand packaged

SWITZERLAND

37% Have bought a game

18% New packaged 12% Games apps 6% Secondhand packaged 6% Online games





PERCEPTIONS OF GAMING

INTEREST IN GAMING (ALL ONLINE RESPONDENTS)

Not very/at all interested

I S F E

Fairly/very interested

Euro Average: 68%

Euro Average: 31%

57%	NETHERLANDS	43%
56%	PORTUGAL	42%
61%	SWEDEN	39%
64%	CZECH REPUBLIC	34%
65%	FRANCE	33%
67%	GERMANY	32%
69%	FINLAND	30%
69%	BELGIUM	30%
69%	POLAND	30%
69%	GREAT BRITAIN	30%
71%	DENMARK	29%
3%	SWITZERLAND	26%
3%	SPAIN	26%
%	NORWAY	24%
5%	AUSTRIA	24%
5%	ITALY	23%

MOST COMMONLY ASSOCIATED WORD WITH GAMING (ALL ONLINE RESPONDENTS - EURO AVERAGE)

36% "ENTERTAINING"

How interested are you in each of the following? (Video games/computer games) Which of the following words and phrases do you think particularly apply to video games/computer games?

BROADER MEDIA AND ACTIVITIES INTEREST:

(FAIRLY/VERY INTERESTED) (ALL ONLINE RESPONDENTS - EURO AVERAGE)



BROADER MEDIA AND ACTIVITIES INTEREST:

(DIFFERENCE BETWEEN GAMERS AND NON-GAMERS - EURO AVERAGE)



WORDS ASSOCIATED WITH MEDIA/ACTIVITIES (ALL ONLINE RESPONDENTS - EURO AVERAGE) Entertaining Immersive Informative/educational Fun Entertaining Sociable Informative/educational Fun



Most commonly selected category for each word

GAMING AND THE FAMILY



PARENTS AND CHILDREN WHO PLAY GAMES

(ALL PARENTS)

Play games with children

Don't play games with children Child

Children don't play games

Don't know

56	%		14%	28%		
555		15% 27%				
52%	I		14% 3			
47%			16%		35%	
45%			18%		35%	
44%			21%		34%	
43%	1	17%		38%		
39%	39%				39%	
37%		249	%		36%	
36%		22%			40%	
35%	7%	5	55%			
31%	17	%		43%		9%
30%	20)%		47	%	
29%	22	2%		439	6	6%
28%	16%			43%		13%
25%	16%		52%			7%
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TOP REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN (EURO AVERAGE)

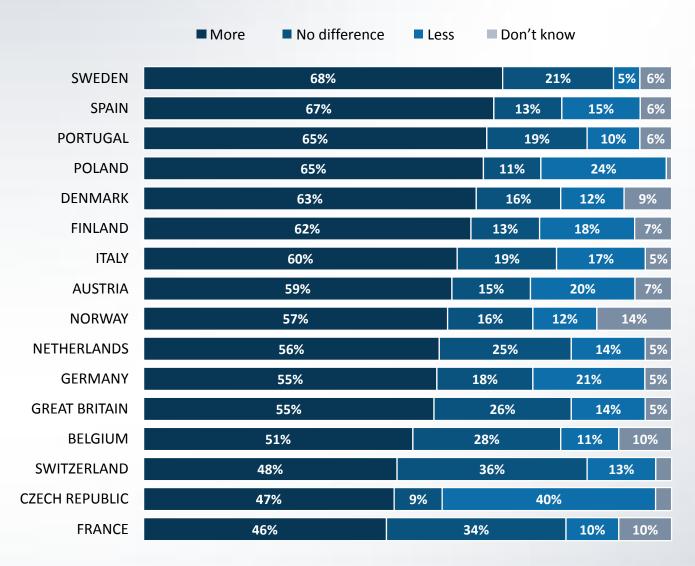


EFFECT OF GAMES ON CHILDREN (1/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to...

DEVELOP SKILLS



Euro Average:



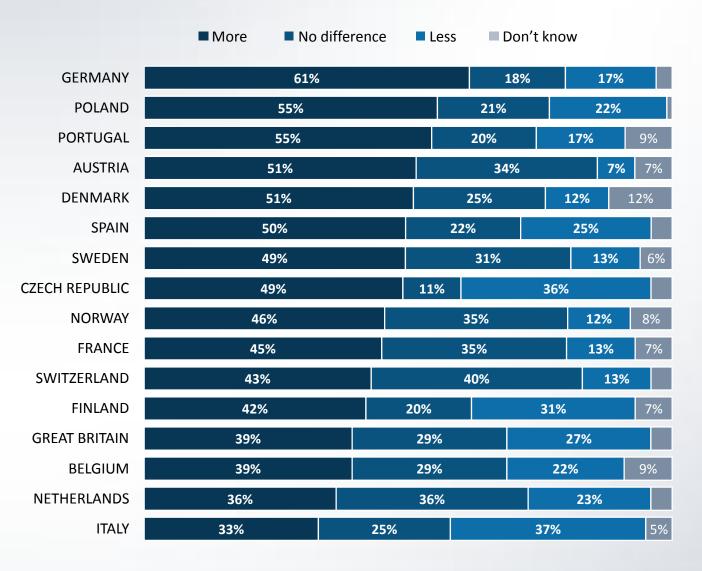


EFFECT OF GAMES ON CHILDREN (2/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be...

CREATIVE



Euro Average:

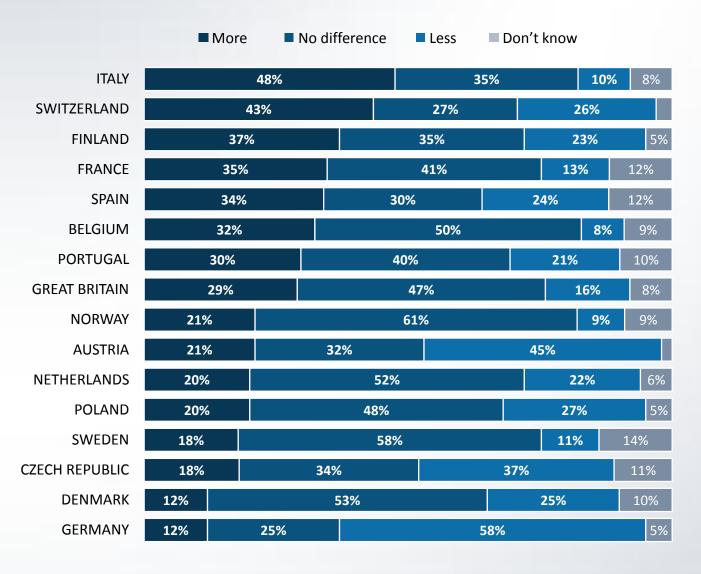


EFFECT OF GAMES ON CHILDREN (3/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be...

AGGRESSIVE



Euro Average:

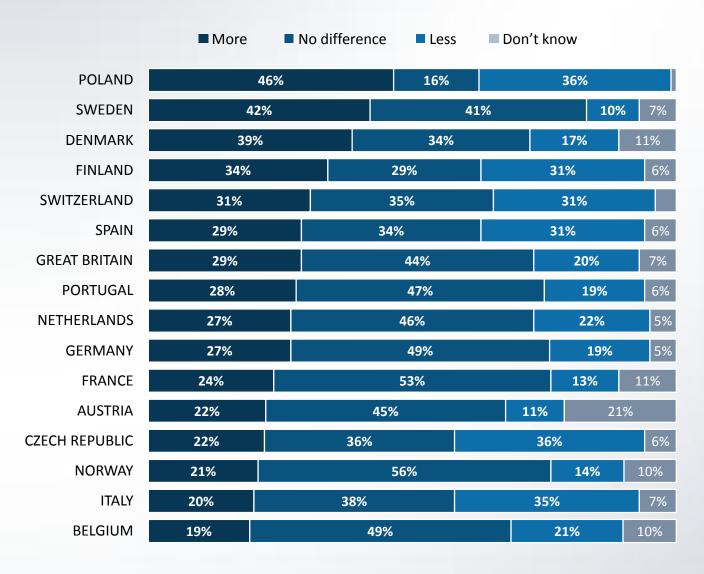


EFFECT OF GAMES ON CHILDREN (4/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be...

INFORMED



Euro Average:



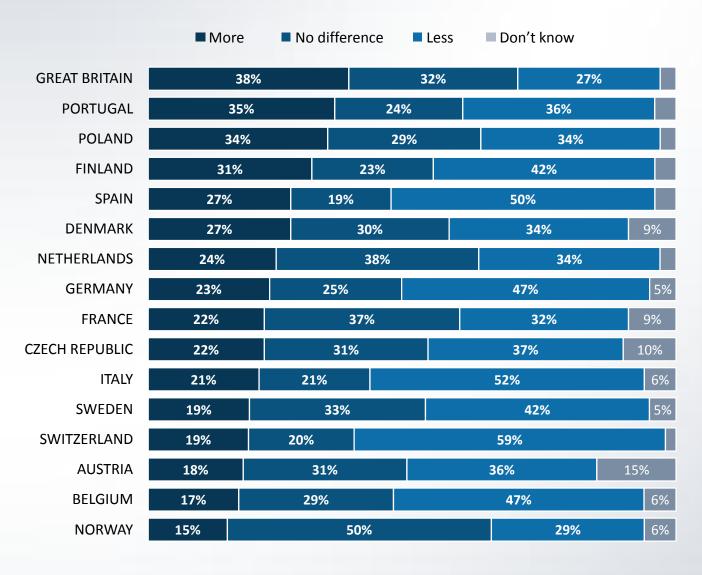
I S F E

EFFECT OF GAMES ON CHILDREN (5/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be...

SOCIAL



Euro Average:









WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES (1/2)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 6-9

- Never (+child <u>doesn't buy/receive</u>)
- Sometimes

- Never (but child <u>does</u> buy/receive)
- Most of the time



AUSTRIA	13%	15%	1	L 8%	51%							
BELGIUM	11%	11%	21%		34%				10%	139	%	
CZECH REPUBLIC		33%	5 11%			34%	6		19%			
DENMARK	7% 1	.4% 4%		35%	6	28%			12%			
FINLAND	17%	8%	13%		21%		17%		25%			
FRANCE	7%	16%	2	8%			39%	6		7%	6	
GERMANY	6% 119	%	359	%		19	%	10%	6	18%		
GREAT BRITAIN	15%	7%	14%	L4% 23%			20%			21%		
ITALY	10%		32%				43%			8%		
NETHERLANDS	21%	,		30%			30%	6	(5% 9	9%	
NORWAY	5% 15	5%	24%			36	%			20%		
POLAND		30%	13	3%	14%		3	2%		6%	5%	
PORTUGAL	20%		17%		30)%			27%		4%	
SPAIN	11%	19%		14%		25%			29%	6		
SWEDEN	6% 10%	6	28%		20)%	13	%	Ż	22%		
SWITZERLAND	2	1%	17%			40%	6		1	5%	5%	
	100/								/		o/	

EURO AVERAGE

12%

11%

21%

30%

12%

14%

WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES (2/2)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 10-15

- Never (+child <u>doesn't</u> buy/receive)
- Sometimes

C

- Never (but child <u>does</u> buy/receive)
- Most of the time

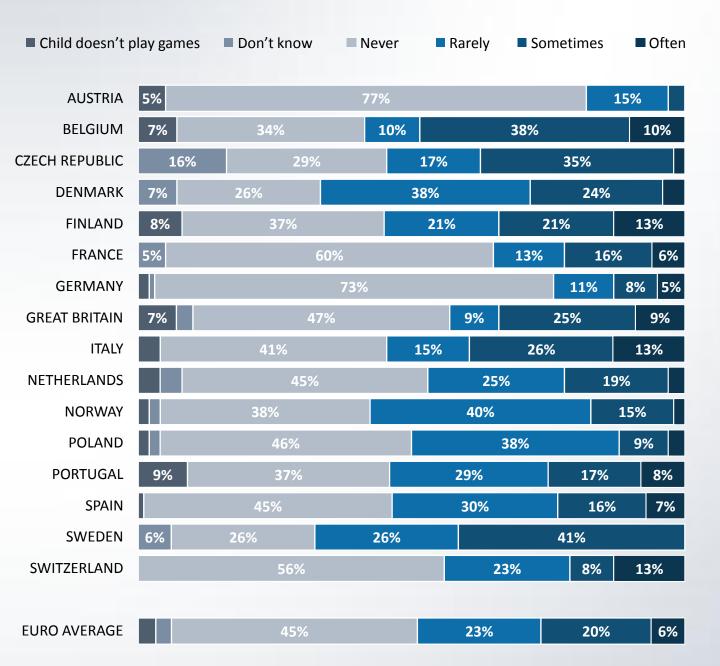


AUSTRIA	9%		57%			23%				6%
BELGIUM	11%	15%	5	25%			34%		8%	7%
CZECH REPUBLIC	17%	5	18%		31%			24%		9%
DENMARK	15	5%	14%		27%		28%	,	1	.3%
FINLAND	12%		32%		14%	6	27%		1	4%
FRANCE	7%	269	%		28%		26%		10%	5%
GERMANY		339	%		30%		2	.1%	10	%
GREAT BRITAIN	12	%	16%		31%		2	6%		11%
ITALY	2	3%		29%			29%		16%	
NETHERLANDS	8%	20%		16%		31%		189	%	7%
NORWAY	1	.8%		31%			36%		8	%
POLAND	5%	32	2%		25%		18%	1	L 3%	7%
PORTUGAL	1	5%		41%			22%		14%	
SPAIN	11%	10%	16%		30%	6	17	7%	16	%
SWEDEN	5% 1	.4%	11%	17%		25%		2	9%	
SWITZERLAND			55%	6		8%	:	24%		7%

EURO AVERAGE 5% 20% 26% 25% 15% 8%

WHETHER CHILD PLAYS GAMES WITH A HIGHER AGE RATING THAN THEIR AGE (1/2) (PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 6-9

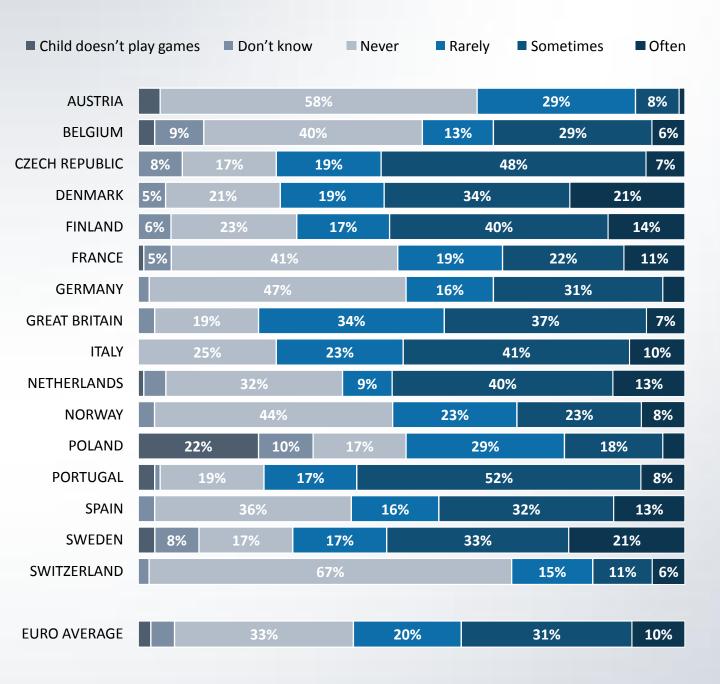


WHETHER CHILD PLAYS GAMES WITH A HIGHER AGE RATING **THAN THEIR AGE (2/2)** (PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 10-15

[28]

SUPERVISION





USE OF PARENTAL CONTROLS

(PARENTS OF CHILDREN WHO PLAY GAMES)

% of parents using parental control settings to limit what their youngest child can access on their games consoles

	CHILDREN AGED 5 OR UNDER	CHILDREN AGED 6-9	CHILDREN AGED 10-15
AUSTRIA	26%	22%	45%
BELGIUM	15%	19%	16%
CZECH REPUBLIC	9%	35%	24%
DENMARK	7%	9%	7%
FINLAND	7%	17%	17%
FRANCE	18%	23%	36%
GERMANY	16%	40%	37%
GREAT BRITAIN	31%	41%	29%
ITALY	35%	27%	34%
NETHERLANDS	22%	15%	12%
NORWAY	25%	16%	12%
POLAND	38%	40%	38%
PORTUGAL	28%	60%	33%
SPAIN	15%	29%	38%
SWEDEN	2%	18%	11%
SWITZERLAND	28%	60%	49%
EURO AVERAGE	20%	29%	27%



PEGI RATING SYSTEM



Ipsos MediaCT

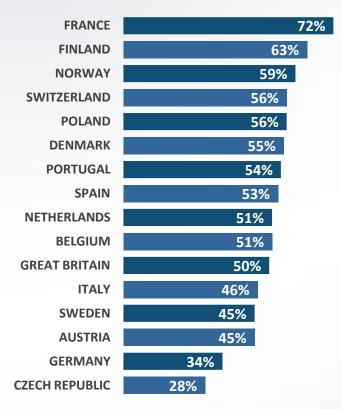
I S F E

AWARENESS OF PEGI SYMBOLS (ALL ONLINE RESPONDENTS)



Aware of PEGI age rating symbols

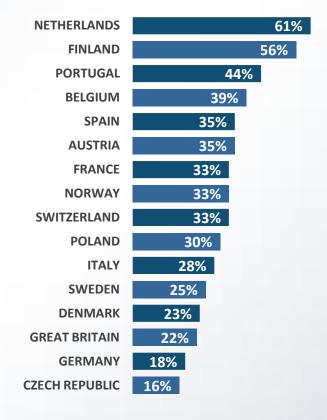
Euro Average: 51%



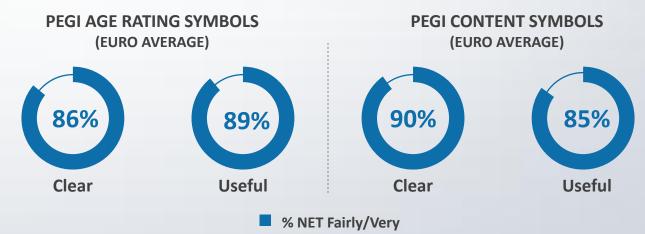


Aware of PEGI content symbols

Euro Average: 33%



EXTENT TO WHICH THE SYMBOLS ARE...



Í S F E

CCOL

% AGREE THAT PEGI RATING SYSTEM SHOULD APPLY TO...

(ALL ONLINE RESPONDENTS)

APP GAMES

SOCIAL NETWORK GAMES

Euro Average: 66%		Euro Average: 66%
75%	FINLAND	75%
74%	ITALY	74%
72%	FRANCE	74%
71%	GREAT BRITAIN	71%
71%	NORWAY	71%
70%	POLAND	70%
69%	SPAIN	70%
68%	PORTUGAL	70%
68%	NETHERLANDS	68%
62%	GERMANY	61%
62%	DENMARK	60%
62%	SWITZERLAND	59%
59%	BELGIUM	61%
60%	AUSTRIA	60%
56%	SWEDEN	57%
56%	CZECH REPUBLIC	54%

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

% AGREE WITH STATEMENT THE MOST

- **24%** The age rating system for videogames should be stricter overall than that used for movies
- **48%** The age rating system for videogames and movies should be equally strict
 - **4%** The age rating system for movies should be stricter overall than that used for videogames
- 23% Don't know/none of these

Do you think the PEGI rating system should also apply to games available as apps or on social network sites? Can you indicate which of the following statements on age ratings you agree with most?



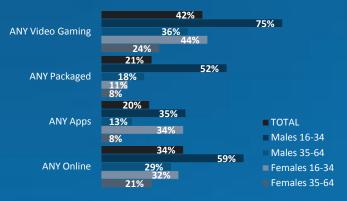
[33]

APPENDIX: MARKET SUMMARY INFOGRAPHICS



OVERVIEW OF GAMING 42% of the online population aged 16 to 64 years old in Austria have played a game in the past 12 months 56%

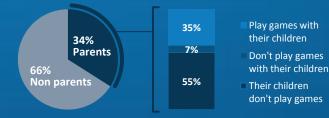
TYPES OF GAMES PLAYED: BY AGE AND GENDER



GAMING AND THE FAMILY

42%

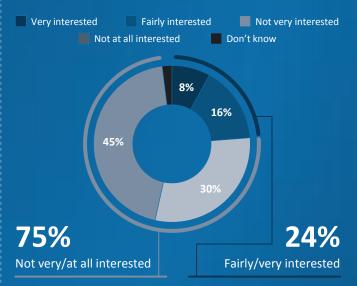
of parents have children who play games



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

	More	No difference	Less	5 Doi	n't know
Have fun		94%	5		<mark>2</mark> %
Competitive			23%	9%	
Develop skills		15	% 20)%	
Creative		3	4%	7%	
Spend time alone	30%	22%		42%	
Informed	22%	45%	45%		
Aggressive	21%	32%		45%	
Social	18%	31%	36	5%	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Fun	36%	55%
2	Entertaining	31%	51%
3	Good at providing escapism	30%	39%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

60%

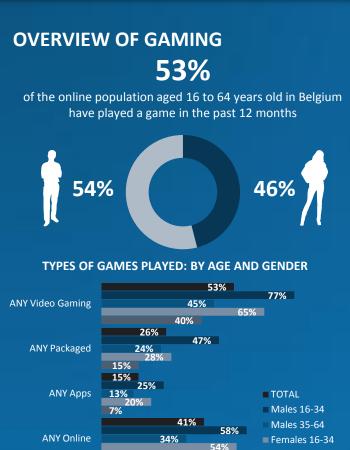
agree PEGI ratings should apply to app games

60%

agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

25%	The age rating system for videogames should be stricter overall than that used for movies
51%	The age rating system for videogames and movies should be equally strict
4%	The age rating system for movies should be stricter overall than that used for videogames
20%	Don't know

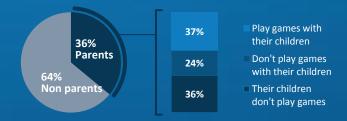


GAMING AND THE FAMILY 62%

31%

of parents have children who play games

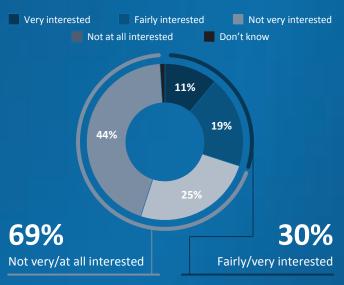
Females 35-64



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

	More	🗆 No di	fference	Less	D	on't kr	างพ
Have fun	66%				18%	9%	
Competitive		53%		29	%	8%	
Spend time alone		51%		31%		119	6
Develop skills	51%			28%		11%	
Creative	3	39%		29%		22%	
Aggressive	32%	32%		50%		8%	
Informed	19%		49%		21	L%	
Social	17%	29%	6	4	17%		

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	35%	56%
2	Fun	33%	58%
3	Competitive	31%	42%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

59%

agree PEGI ratings should apply to app games

61%

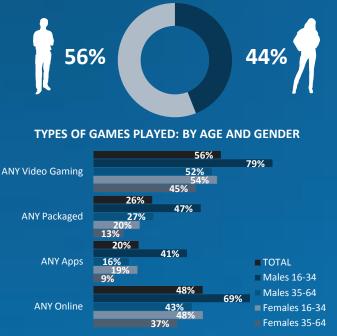
agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

21%	The age rating system for videogames should be stricter overall than that used for movies
47%	The age rating system for videogames and movies should be equally strict
5%	The age rating system for movies should be stricter overall than that used for videogames
	Don't know



OVERVIEW OF GAMING 56% of the online population aged 16 to 64 years old in Czech Republic have played a game in the past 12 months



GAMING AND THE FAMILY

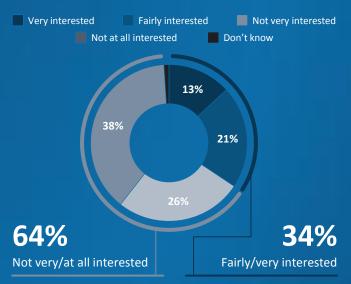
of parents have children who play games



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

	More	No c	lifferenc	e 🗖	Less	■ Don't k	now
Have fun	78%				2%		
Competitive	58%				11%	27%	
Creative	49%		11%	36%			
Develop skills	47%			9%	40%		
Spend time alone	33%		23%	8%		35%	
Informed	22%		36%			36%	
Social	22%		31%		3	7%	
Aggressive	18%	3	84%		37	7%	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

ALL ONLINE	GAMERS
39%	52%
34%	44%
30%	38%
	34%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

56%

agree PEGI ratings should apply to app games

54%

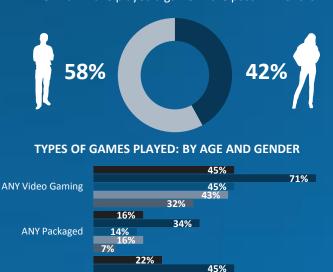
agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

24%	The age rating system for videogames should be stricter overall than that used for movies
43%	The age rating system for videogames and movies should be equally strict
4%	The age rating system for movies should be stricter overall than that used for videogames
28%	Don't know

45%

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



ANY Apps 17% **TOTAL** 27% Males 16-34 12% 35% Males 35-64 47% 35% 38% **ANY Online** Females 16-34

26%

GAMING AND THE FAMILY 70%

of parents have children who play games

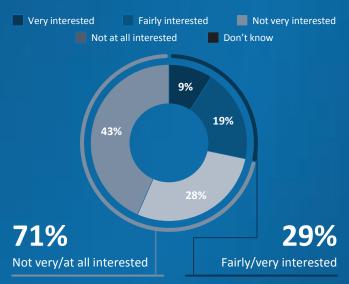
Females 35-64



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

	■ More ■ N	o diffe	erence	Le	SS	■ Do	on't k	now
Have fun	78%						14%	
Develop skills	63%				16%		12%	
Competitive	55%				28%			
Creative	519		25%		1	2%		
Informed	39%		34%		17	7%		
Spend time alone	38%		31%			20%		
Social	27% 3		30%		3	34%		
Aggressive	12% 53		%			25%	6	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

ALL ONLINE	GAMERS	
50%	46%	
38%	38%	
29%	28%	
	50% 38%	38% 38% 29% 28%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

62%

agree PEGI ratings should apply to app games

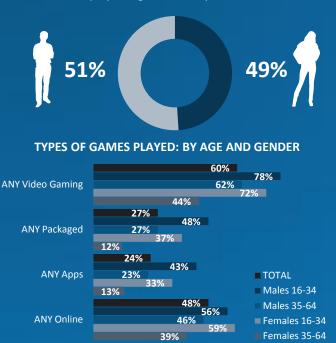
60%

agree PEGI ratings should apply to games on social network sites

15%	The age rating system for videogames should be stricter overall than that used for movies
50%	The age rating system for videogames and movies should be equally strict
4%	The age rating system for movies should be stricter overall than that used for videogames
31%	Don't know

OVERVIEW OF GAMING 60%

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



GAMING AND THE FAMILY **67%**

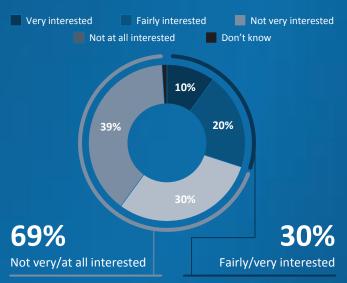
of parents have children who play games



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

	■ More No d	ifference	Less	Don't know
Have fun	7	0%		15% 11%
Develop skills	629	%	13%	18%
Spend time alone	58%	58%		
Competitive	58%	58%		
Creative	42%	20%		31%
Aggressive	37%	35%	6	23%
Informed	34%	29%		31%
Social	31%	23%	42	2%

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	42%	58%
2	Good at providing escapism	36%	46%
3	Immersive	36%	51%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

75%

agree PEGI ratings should apply to app games

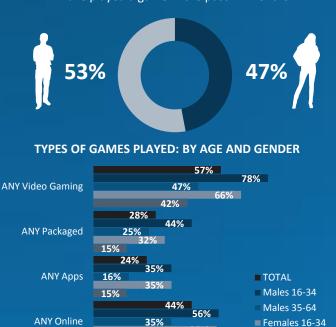
75%

agree PEGI ratings should apply to games on social network sites

26%	The age rating system for videogames should be stricter overall than that used for movies
50%	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
20%	Don't know



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



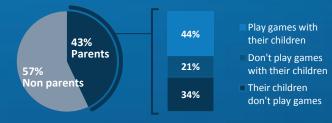
GAMING AND THE FAMILY 65%

34%

of parents have children who play games

55%

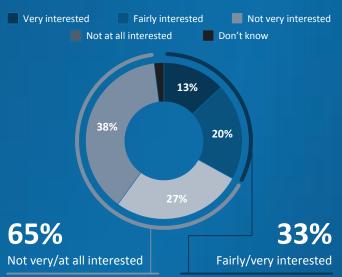
Females 35-64



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

	More	No di	fference		Less	D	on't k	now
Have fun		71%			20%			<mark>4%</mark>
Spend time alone		54%			31%			%
Competitive	51%				32%		7%	
Develop skills	46	46%			34%		10%	
Creative	45	45%			35%		13%	6
Aggressive	35%			41%		1	.3%	
Informed	24%	% 53		3%			13%	
Social	22%		37%			32%		

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAIMERS
1	Entertaining	41%	58%
2	Immersive	19%	28%
3	Good at providing escapism	17%	25%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

72%

agree PEGI ratings should apply to app games

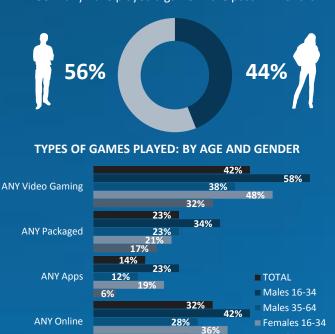
74%

agree PEGI ratings should apply to games on social network sites

26%	The age rating system for videogames should be stricter overall than that used for movies
49%	The age rating system for videogames and movies should be the same
6%	The age rating system for movies should be stricter overall than that used for videogames
20%	Don't know

42%

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

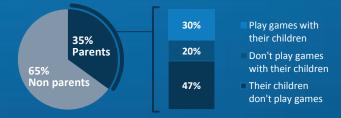


GAMING AND THE FAMILY **50%**

of parents have children who play games

26%

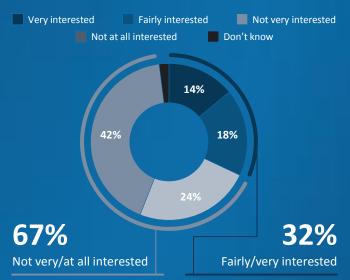
Females 35-64



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

	More		lo diff	erenc	e	Les	5 🔳 D	on't kno	w
Have fun		91% 4%8%							
Competitive		67% 12% 18%							
Creative	61% 189						18%	17%	
Develop skills		5	5%			18	%	21%	
Informed	27% 49%				49%			19%	
Spend time alone	23% 2		25%	%		48%			
Social	23% 2		25	%		47%			
Aggressive	12% 25%					58	%		

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Fun	33%	53%
2	Entertaining	29%	49%
3	Good at providing escapism	29%	33%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

62%

agree PEGI ratings should apply to app games

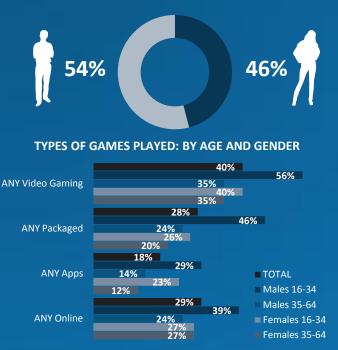
61%

agree PEGI ratings should apply to games on social network sites

28%	The age rating system for videogames should be stricter overall than that used for movies
48%	The age rating system for videogames and movies should be the same
5%	The age rating system for movies should be stricter overall than that used for videogames
19%	Don't know



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



GAMING AND THE FAMILY **61%**

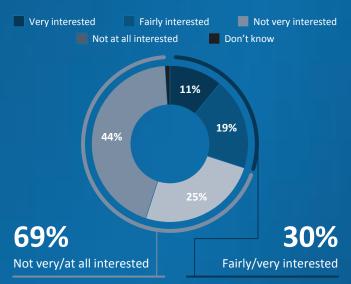
of parents have children who play games



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

	More No	differen	ce 🗖 L	ess	Do	on't kn	ow
Have fun		70%			22	% (<mark>5%</mark>
Competitive	6	2%			31%	6	<mark>5%</mark>
Develop skills	55%			26%		14%	
Spend time alone	46%		32%		16%		
Creative	39%		29%		27%		
Social	38%		32%		27%		
Informed	29%		44%		20%		
Aggressive	29%	47%		16%			

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	35%	56%
2	Fun	33%	58%
3	Competitive	31%	42%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

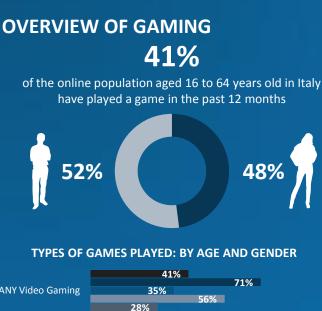
71%

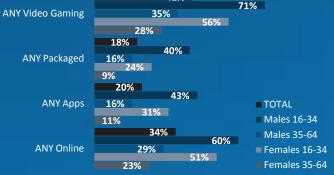
agree PEGI ratings should apply to app games

71%

agree PEGI ratings should apply to games on social network sites

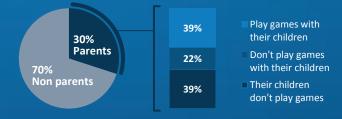
21%	The age rating system for videogames should be stricter overall than that used for movies
55%	The age rating system for videogames and movies should be equally strict
3%	The age rating system for movies should be stricter overall than that used for videogames
21%	Don't know





GAMING AND THE FAMILY 61%

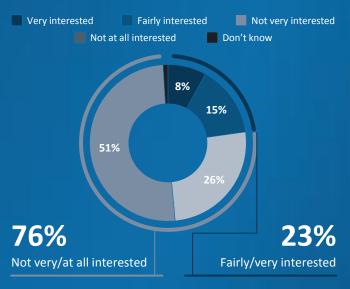
of parents have children who play games



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

	■ More	No d	ifferend	ce 🗖 L	ess 🔳 D	on't kno	w
Have fun	63%				17%	17%	
Competitive		629	%		18%	14%	
Develop skills	60%				19%	17%	
Spend time alone	58%				23%	15%	
Aggressive	48%				35%	10%	
Creative	33%		25	%	37%		
Social	21%	21% 21%			52%		
Informed	20%	20% 38%			35%	5	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

ALL ONLINE	GAMERS	
31%	50%	
22%	33%	
21%	33%	
	31% 22% 21%	22% 33%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

74%

agree PEGI ratings should apply to app games

74%

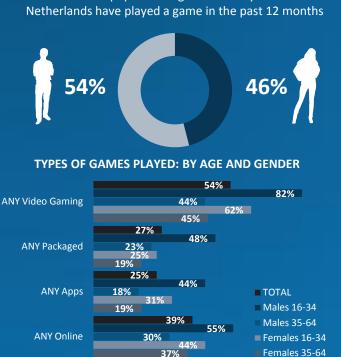
agree PEGI ratings should apply to games on social network sites

35%	The age rating system for videogames should be stricter overall than that used for movies
44%	The age rating system for videogames and movies should be the same
5%	The age rating system for movies should be stricter overall than that used for videogames
17%	Don't know

nds

OVERVIEW OF GAMING **54%**

of the online population aged 16 to 64 years old in



GAMING AND THE FAMILY 63%

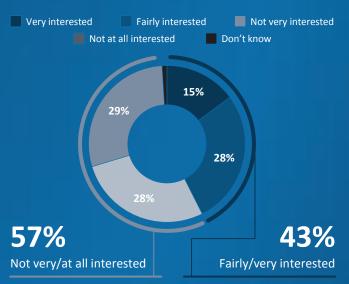
of parents have children who play games



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

	More No difference Less			Do	Don't know	
Have fun		67%		249	% <mark>6%</mark>	
Develop skills	:	56%	2	5%	14%	
Competitive	48%		349	6	14%	
Spend time alone	43%		39%		14%	
Creative	36%		36%		23%	
Informed	27%	27% 46			22%	
Social	24%	38%	5	34	%	
Aggressive	20% 52%		%	2	2%	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL UNLINE	GAIVIERS
1	Entertaining	38%	51%
2	Fun	30%	43%
3	Good at providing escapism	27%	37%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

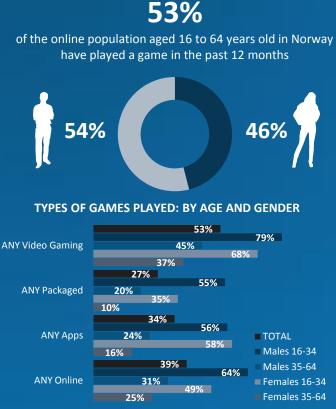
68%

agree PEGI ratings should apply to app games

68%

agree PEGI ratings should apply to games on social network sites

15%	The age rating system for videogames should be stricter overall than that used for movies
58%	The age rating system for videogames and movies should be the same
3%	The age rating system for movies should be stricter overall than that used for videogames
24%	Don't know



GAMING AND THE FAMILY **70%**

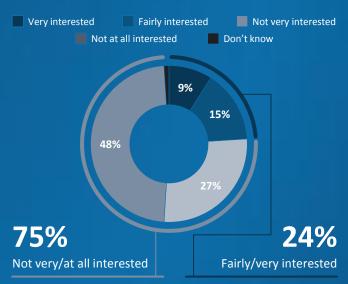
of parents have children who play games



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

	■ More			Dor	on't know	
Have fun	69%				15%	10%
Develop skills	57%		16%		12%	6
Creative	46%		35%			12%
Competitive	42%			41%		8%
Spend time alone	38%			49%		<mark>6%</mark>
Informed	21%		56%		14	%
Aggressive	21%		61%			9%
Social	15%	50%	5		29%	;

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAIVIERS	
1	Entertaining	38%	61%	
2	Good at providing escapism	30%	49%	
3	Competitive	29%	42%	
2	Good at providing escapism	30%	49%	

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

71%

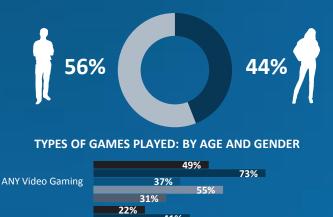
agree PEGI ratings should apply to app games

71%

agree PEGI ratings should apply to games on social network sites

28%	The age rating system for videogames should be stricter overall than that used for movies
49%	The age rating system for videogames and movies should be the same
5%	The age rating system for movies should be stricter overall than that used for videogames
19%	Don't know

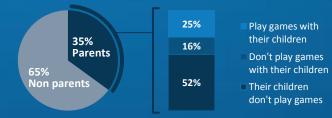
of the online population aged 16 to 64 years old in Poland have played a game in the past 12 months





GAMING AND THE FAMILY **41%**

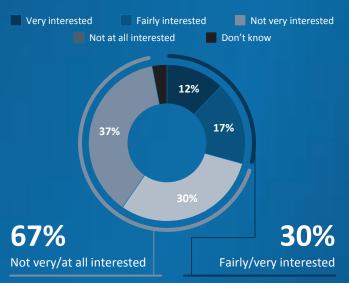
of parents have children who play games



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

	More	🗆 No di	fference	L	ess 🛛	Don	't know		
Have fun		73%				7%	19%		
Develop skills		65%			11%	1% 24%			
Competitive		61%			12%	2	25%		
Spend time alone		56%		8%	6	34%			
Creative		55%			21%		22%		
Informed	4	46% 16		16%		36%			
Social	34% 29		%			;			
Aggressive	20%	20% 48%			27%		6		

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

ALL ONLINE	GAMERS
41%	53%
38%	53%
36%	52%
	38% 36%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

70%

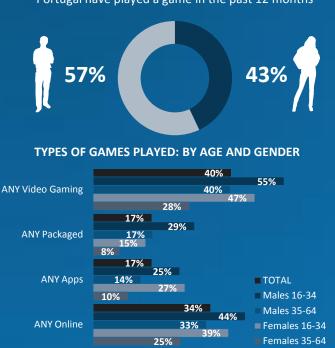
agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social network sites

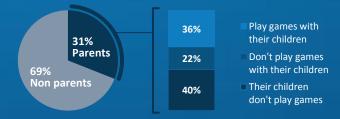
23%	The age rating system for videogames should be stricter overall than that used for movies
46%	The age rating system for videogames and movies should be the same
4%	The age rating system for movies should be stricter overall than that used for videogames
27%	Don't know

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



GAMING AND THE FAMILY **58%**

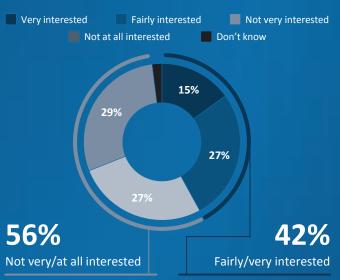
of parents have children who play games



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

	■ More ■ No	difference	Les	is 🔳 D	on't k	now	
Have fun		83%			8%		
Develop skills		65%		19%	10	%	
Creative	55	%	20	%	17%	9%	
Competitive	549	54%			1	17%	
Spend time alone	52%	6	26	5%	15%		
Social	35%	24%		36	%		
Aggressive	30%	40%	6	2	1%	10%	
Informed	28%	47	1%		19%		

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	43%	61%
2	Good at providing escapism	43%	58%
3	Fun	37%	53%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

68%

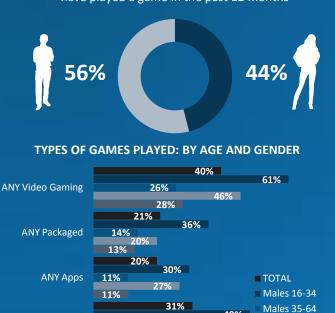
agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social network sites

30%	The age rating system for videogames should be stricter overall than that used for movies
43%	The age rating system for videogames and movies should be equally strict
4%	The age rating system for movies should be stricter overall than that used for videogames
23%	Don't know

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



GAMING AND THE FAMILY 50%

18%

21%

ANY Online

of parents have children who play games

36%

49%

Females 16-34

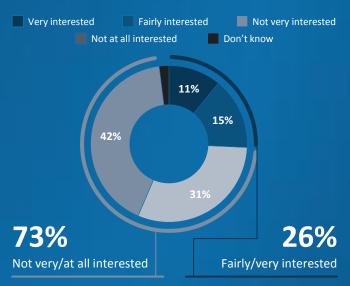
Females 35-64



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

	More No	o differenc	e 🗖 L	ess 🗖	Don't know
Have fun		82%			6% <mark>8%</mark>
Develop skills		67%		13%	6 15%
Competitive	58		20%	18%	
Spend time alone	57	1	16%	23%	
Creative	50%	5	22	%	25%
Aggressive	34%		0% 2		4%
Informed	29% 34%		% 31		31%
Social	27% 19%			50%	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	40%	59%
2	Immersive	38%	50%
3	Fun	34%	55%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

69%

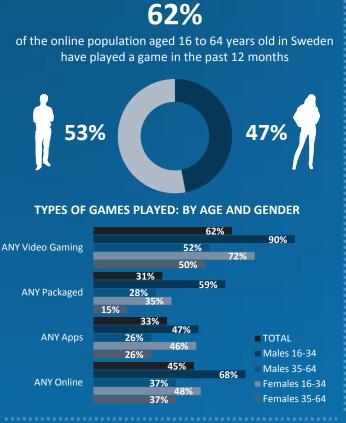
agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social network sites

28%	The age rating system for videogames should be stricter overall than that used for movies
50%	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
18%	Don't know





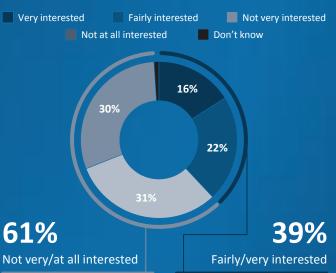
GAMING AND THE FAMILY 64%

of parents have children who play games



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

	More	No differe	ence	Less	Do	on't	know
Have fun		70%			20	%	7%
Develop skills		68%			21% <mark>5%</mark>		<mark>5%</mark>
Spend time alone		53%		34	%		10%
Competitive	52%		35	5%		7%	
Creative		49%		31%		13	%
Informed	4	2%		41%		10	0%
Social	19%	33%			4 2 %		
Aggressive	18%		58%		11	.%	



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	38%	54%
2	Fun	33%	48%
3	Competitive	32%	41%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

56%

agree PEGI ratings should apply to app games

57%

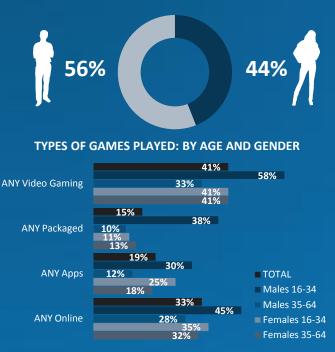
agree PEGI ratings should apply to games on social network sites

17%	The age rating system for videogames should be stricter overall than that used for movies
45%	The age rating system for videogames and movies should be equally strict
2%	The age rating system for movies should be stricter overall than that used for videogames
36%	Don't know



OVERVIEW OF GAMING **41%**

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



GAMING AND THE FAMILY **43%**

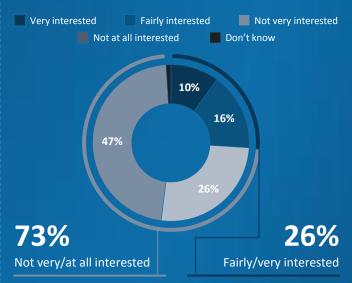
of parents have children who play games



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

	More	No	differen	ice 🗖 I	Less	Doi	n't know
Competitive			72%			18	% <mark>6%</mark>
Have fun		e	57%		79	6 2	24%
Spend time alone		59	%		16%	5 2	21%
Develop skills		48%			36%		13%
Aggressive	4	13%		27%	6	2	6%
Creative	4	13%		4	40%		13%
Informed	31%	5	3	85%		31	%
Social	19%	209	%		59%	6	

PERCEPTIONS OF GAMING



TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL UNLINE	GAIVIERS
1	Good at providing escapism	31%	46%
2	Entertaining	30%	52%
3	Fun	21%	42%

PEGI RATING SYSTEM





aware of PEGI age rating symbols

aware of PEGI content symbols

62%

agree PEGI ratings should apply to app games

59%

agree PEGI ratings should apply to games on social network sites

28%	The age rating system for videogames should be stricter overall than that used for movies
45%	The age rating system for videogames and movies should be the same
6%	The age rating system for movies should be stricter overall than that used for videogames
21%	Don't know

ALSO AVAILABLE FROM ISFE AND IPSOS MEDIACT:



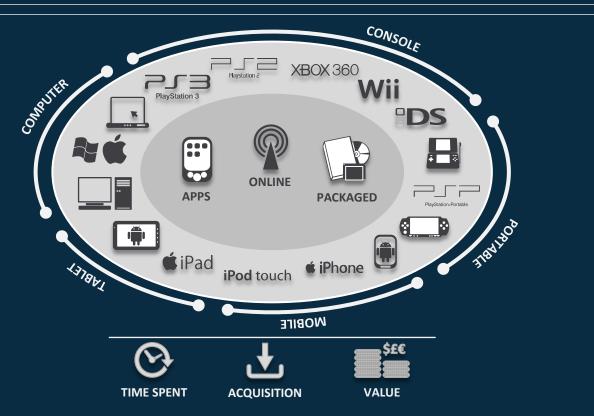
GameTrack is a multi-country tracking survey that provides companies and organisations with a complete view of the video games market.

GameTrack includes all devices that might be used for playing video games – from PCs and laptops, games consoles and portable games devices through to smartphones and tablets, as well as currently niche devices such as smart TVs.

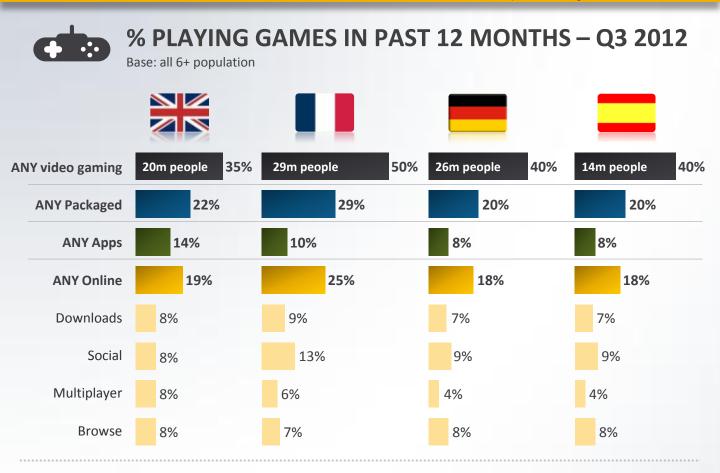
Similarly, it includes all types of games – from packaged (new, pre-owned and rental) to apps (paid and free) to online games (including downloads, subscriptions, browser games and games on social network sites).

GameTrack reports each quarter and is based on a nationally representative sample of over 6,000 individuals aged 6+ in each country for each wave, providing a reliable and robust true measure on how the games market is shifting and the underlying dynamics of the industry.





LATEST GAMETRACK DATA



GameTrack provides a complete view of the videogames market - from overall incidence of gaming to time, volume and value breakdown of specific devices and types of games.

	MER	3			🖓 🧛 🗒 🦽 土 🌉
Plays	station 2		Avera TIME avera Total time gamin	ng time age 12 hours per weel age 1 hour per week g g IOURS (of which PS2	aming on PS2
GENDER	PS2	ALL GAMERS	57 MILLION I	io eno for which o	
Males % 11-14 % 15-24 % 25-34 % 35-44 % 45+	61% 15% 16% 11% 11% 9%	55% 6% 16% 12% 9% 12%	AVera VALUE Total value	d age £24 in quarter age £1 in quarter on P: (of which PS2= 4%)	PS2 gamers – value spent on all gaming Online S2 games
Females % 11-14 % 15-24 % 25-34	39% 10% 11% 8% 6%	45% 5% 11% 8% 9%	TOP DEVICES (sha	are of hours)	size 5%
% 35-44 % 45+	4%	12%	PC/laptop	22%	11+population = 3m people 14%
Household	58%	47%	PS3	12%	of all gamers
Any kids No kids	42%	53%	PS2	11%	3%

I S F E GAMETRACK

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FOR MORE INFORMATION

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Ipsos MediaCT The Media, Content and Technology Research Specialists