

VIDEO GAMERS IN EUROPE 2010

Prepared for the Interactive Software Federation of Europe (ISFE) by GameVision Europe



Foreword

Dear gamer,

According to this study, there is a 25.4% chance that if you are an adult living in Europe, you can indeed be addressed as a gamer. To keep up with the continually evolving demographic of gamers, the definition of a gamer includes for the first time people that occasionally play but don't necessarily buy games. They may enjoy the occasional free game on their iPhone while waiting for the bus or spend time playing a game on Facebook during their lunch hour. 'Passing the time' is actually the main motivator for playing online or on handheld systems.

We believe this is now the broadest, most in-depth study of adult gamers and non-gaming parents in Europe. It gives some perspective on the user market size and the popularity of the different game platforms. But it also dives into the attitudes and the motivations of people who play games, looking at how games are perceived within the family, in comparison to other leisure activities and on the internet.

Of those that don't play games, 41% claim the main reason is because they 'don't have the time', which is understandable if you consider the hectic pace of European society. However, this and every other primary reason given for not playing seems to be rooted in a misunderstanding of what kind of games are on offer these days. Games are now played everywhere and by everyone. For every place, person, agenda and budget, there is a type of game available. The data in this study show the industry has risen to the challenge of broadening the market offering, both in terms of software and hardware. And I know there is much more still to come, but perhaps the next challenge is communicating it more efficiently to specific target groups.

On the subject of PEGI, it is heartening to see how much non-gaming parents in particular value the PEGI age classification system. 89% of them say they find it quite to extremely useful when choosing games for their children. That is exactly the purpose of PEGI. When you are not a gamer yourself (yet), a helping hand to choose games that are suitable for your children seems indispensable. For many people, PEGI already is that helping hand. Other results show that there is still work to be done to make the PEGI symbols more widely recognised, but I have good hopes that recent and future marketing efforts by us and the games industry will mean more and more people start to take note.

One thing is sure: with more than 95 million European¹ adults playing video games regularly and 253 million games sold at retail in 2009 (with a value of over 8 billion Euros) [Source: Screen Digest Dec 2009]², it is important that the industry and policy makers keep in mind the games' place in society.

Simon Little
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Interactive Software Federation of Europe

¹ Consisting of UK, France, Germany, Italy, Spain, Portugal, Belgium, Netherlands, Switzerland, Austria, Denmark, Sweden, Norway, Finland, Czech Republic, Poland, Hungary and Latvia

² The Software Unit Sales and Sales Value estimates are provided by Screen Digest (December 2009). They cover sales in Western Europe (UK, France, Italy, Germany, Spain, Portugal, Benelux, Scandinavia, Austria and Switzerland). These figures are based purely on Boxed products only. They therefore exclude; digital sales, online sales, online games subscriptions and second hand sales. They also exclude software sales on smart phones or mobile phones.

Executive Summary

Section 1 Market Size

The Numbers

- Across the 8 major European nations surveyed, 25.4% of adults have played a video game in the last 6 months
- This percentage varies from 38% in France to 17% in Italy and Poland
- Using this data we estimate there are 95.2 million adult Video Gamers across all 18 countries covered by the Gamer Survey
- Gaming is most popular among the young, however almost 30% of 30-49 year olds play video games
- 31% of males and 20% of females are Gamers; it is therefore not the male only preserve that it is often portrayed in the press

Gamer Commitment

- Since the launch of the new games consoles there has been a marked increase in the numbers of people enjoying gaming. However many of these new gamers are less dedicated to gaming and they commit less time and money to gaming
- 68% of all gamers in the 8 countries surveyed are in the three least dedicated gamer groups; Intermittent, Marginal and Dabbler Gamers (See section 1 for definitions)
- The most dedicated group, Committed Gamers, make up less than 7% of all gamers, but they buy many more games and play more hours than other groups
- Male and Younger Gamers are more likely to spending more time and money on gaming

Section 2 System Use

System Use

- Across Europe the PC remains the most used games system; it is the main system for 49% of Gamers aged 16-49
- The Wii and Mobile Phones are the next most popular systems used as main systems for gaming, used by 14% and 10% respectively
- A lot of DS/DS Lite/DSi systems are used as secondary gaming systems and the PS2 still has significant use as a secondary machine (used by 29% and 25% of Gamers)
- Mobile phones are important main systems in all regions outside the UK, France and Germany

Handhelds

- 54% of Gamers are playing a handheld gaming device
- 41% of Gamers mostly play games on handheld consoles at home, 26% mostly play while travelling and 17% mostly when waiting for someone

Multimedia Use

- Watching DVDs, listening to music, and watching films are the most popular secondary uses of games systems with multimedia capabilities
- 36% and 31% of Gamers use the Social networking and online chat services on their consoles

Hours of Gaming

- The inclusion in Spring 2010 of all Gamers has led to the identification of Intermittent Gamers who are not playing games regularly every week. 31% of people who play games do not play regularly for an hour or more each week
- The trend is towards less dedicated patterns of play; overall 76% of Gamers play for less than 5 hours a week

Games Purchase

- Almost 40% of people playing games have not bought or been given a game for themselves in the last 12 months, they are playing the games others have bought
- 14% of gamers are buying more than 3 games a year; together this group account for 56% of all games purchases
- Numbers of purchases are highest in the UFIGS countries, purchases range from 2.7 games each in the UK to 1.4 games each in North Eastern Europe

Section 3 Attitudes and Motivations for Video Gaming

Motivations for Playing Games

- The core motivations for playing games are fun (61%), relaxation (53%) and a positive way to pass time (53%)

Motivations for Playing on Handheld Systems

- Handhelds are for many time fillers; 'when I'm bored/to pass the time', is the main reason given for playing Handheld game systems by 52% of the Gamers that use them, and a further 8% say they see it as 'a good use of spare time'
- 'It's fun' is much less likely to be the main motivation for Gamers than when they play Console or online games (16%)

Reasons For Not Playing

- The main reason Non Gamers don't play games is that they do not consider the benefits sufficiently great and therefore do not make the time to play; 41% of Non Gamers say 'I don't have the time'
- The second main reason is a lack of interest in or understanding of games;
 - 23% say video games are boring
 - 9% say games are only for children
- 11% of Non Gamers do not believe they are worth the money saying they are too expensive
- Only 7% claim games are too violent as the reason they do not play them

Encouraging Non Gamers to Play

- Most of the reasons given for not gaming by non gamers are issues that are not so much matters of fact as of opinion or knowledge; they want to 'be able to play with my children', 'play for short periods of time' etc, things others believe games provide
- Therefore, the
 - motivations of Non Gamers are similar to many Gamers' motivations for playing games
 - barriers to play are more about Non Gamers disinterest and lack of appreciation of what games offer. More people may be encouraged to play if the ability of games to meet their interests can be communicated to them in effectively
 - The success in recent years of the new consoles and new games like Wii Fit, Guitar Hero and Dr Kawashima's Brain Training to attract new people to gaming demonstrate the possibilities for expanding further participation in games

Section 4 Video Games and the Family

Video Games as a Family Activity

- In Spring 2010 58% of all Gamers who are parents report playing games with their children
- The likelihood is related to how active a gamer the parent is; the more dedicated a gamer the more likely they are to play with their children

Motivations to Play with Children

- The three main reasons for Parents playing with their children are:
 - 'It's fun' (27%)
 - It allows the parent to spend time with their children (25%)
 - They do it because their children have asked them to (24%)
- The child's wish to play with their parents is much less likely to be the main motivation

Monitoring Children's Purchase and game Play

- Parents are becoming much less involved in their children's purchases
- Across almost all regions the consistent pattern is for Gaming Parents to be more involved in their children's games purchases than Non Gaming Parents; 31% of Gaming Parents and 42% of Non Gaming Parents never monitor the games that their children purchase
- There is less difference between the two groups of parents over whether children are present when games are bought; only 16% of parents buy their children's games either without their children or rarely with their children present
- 61% of Gaming parents have children present most/all of the time they buy games for them or allow children to buy their own games unsupervised; this figure is 70% for Non Gaming Parents

Section 5 Video Gamers Broader Activities and Interests

Gamers Other Leisure Interests

- In 2010 simple social activities, like chatting with friends are a universally popular pastime (92%)
- Shopping (78%) and eating out (77%) are also enormously popular
- Exercising outdoors has the highest proportion of people who claim this is their favourite activity both in absolute terms and in relation to the overall popularity of the activity

Time Spent on Leisure and Entertainment

- The broadening of the gaming audience is reflected in the fact that Gamers are now a group who have many diverse interests; they are as likely to be playing sport or reading books as gaming
- The dominant pastimes remain watching TV, socialising and spending time on the internet

The Benefits of Video Gaming and Other Media

- Despite the 2010 sample covering a broader group of Gamers, they believe that games are the best of the 3 media for keeping you mentally and physically fit
- More Gamers now agree that games:
 - keep you mentally fit (50% + 8%)
 - allow you to spend time with the family (35% + 6%)
 - keep you physically fit (18% + 7%)
- A lower proportion of Gamers identify Games as:
 - a fun way to spend time (55% - 17%)
 - stimulating your imagination (45% - 12%)

Section 6 Online Gaming

The Prevalence of Online Gaming

- 71% of Gamers played some form of Online game in the past 3 months
- Free online games make up a large volume of the online games played; 19% of Gamers are playing paid for Online games, 68% of Gamers are playing free Online games
- Free Games on Games Websites (55%) and Games of Social Network Sites (37%) are the most popular kinds of free games.
- Games you buy and then play free online is the most popular kind of paid for online gaming

Genre of Online Games

- Puzzle/Board/Game Show/Trivia/Card games are the most played Online Games; 58% of Gamers are playing these games online
- 26% of Gamers are playing MMO games

Who Gamers Play Online Games With

- The large increase in free online games now available via browsers and social networking sites, means that 37% of gamers now report playing games online on their own
- Among Gamers who do play games with others, 20% of Online Gamers play against people in the same room

Where Gamers Play Online

- 95% of Online Gamers play games online at home
- 21% play games online at friends houses
- Playing games online whilst travelling has increased to 9% in 2010, possibly a result of more online games being available for the handheld systems and mobile phones

Why Gamers Play Online

- 'It's fun' is the most quoted reason for playing gamers online (49%),
- To 'pass the time' is the main reason most often given by Gamers (29%), 'it's fun' (main reason 23%)
- Other important reasons include:
 - To relax/de-stress (40% - 19% as a main reason)
 - The challenge of the game (23% - 7%)

Section 7 Awareness and Perceptions of PEGI

Awareness of Rating Systems and Symbols

- Across Europe awareness of a video game age rating system is remarkably consistent among Gamers and Non Gaming Parents within each country
- Only in Italy and North Eastern Europe are Non Gaming Parents less aware

Awareness of PEGI

- 27% of Gamers and 16% of Non Gaming Parents recognise PEGI
- Non Gaming Parents are markedly less likely to be aware of PEGI in every region

Value of the PEGI System

- 76% of Gamers and 89% of Non Gaming Parents who are aware of the system find the PEGI age rating system 'quite/extremely' useful
- It is a pattern consistent across every region

Awareness and Understanding and Use of the PEGI Content Labels

- New to the survey in 2010 we have tested awareness and usefulness of the PEGI labels
- Gamers are consistently more likely to be 'aware of/have seen' the labels than Non Gaming Parents; average awareness across all the labels is 34% for Gamers and 22% for Non Gaming Parents
- The most recognised symbols are:
 - Violence (46% Gamers - 27% Non Gaming Parents)
 - Sex (38% - 29%) and
 - Gambling (38% - 25%)
 - which may in part reflect the use of the widely used symbols adopted rather than their specific use on games
- On average in 93% of cases Gamers aware of a label also claim to understand what a game carrying it would contain; Non Gaming Parents are almost as confident at 87%
- Both groups are least likely to be confident about 'Nudity' (83% Gamers - 78% Non Gaming Parents)
- Non Gaming Parents are less confident about 'Drugs' 80% and 'Online' 83%
- Clearly the descriptive word on each label contributes to the understanding of its meaning
- The labels perform equally well in all regions
- 58% of Gaming Parents and 59% of non Gaming Parents consider the labels are very/extremely useful in helping them to decide upon a games purchase

PEGI Online Symbol

- Only 11% of Gamers are aware of the PEGI online symbol
- 21% of all Gamers claim to understand the meaning of the symbol; this is more than the number who are aware of it, suggesting it communicates some meaning in a self explanatory manner. The survey did not test if this understanding was correct
- Of this small number of Gamers who claim to understand the symbol 47% score it 4/5 out of 5 for clarity

Awareness of the PEGI Website

- As yet few Gamers or Non Gaming Parents are aware of the PEGI website
- Slightly more feel confident that they know how they would file a complaint against a rating they disagree with

Section 8 The Socio-Demographics of Video Gaming Behaviour

System Use

- Females show a higher profile of users on the DS/DS Lite/DSi and the Wii than males
- Female users of the DS are more than double of the number of males at a ratio of 5:2
- All of the Sony platforms show a higher profile of Male users than female
 - PS3 has a male to female user ratio of 3:1
- Xbox 360 also shows a strongly male profile (5% of males are users and 3% of females)
- Males and Younger Gamers are more likely to spend longer gaming and buy more games
- Handheld gamers buy more games, phone gamers the least games
- Female Gamers are much less likely to buy discounted games

Attitudes and Motivations for Video Gaming

- Similar proportions of both genders emphasise the same main reasons for gaming, however there is greater diversity in the secondary reasons for playing: Males are more interested in:
 - passing the time (35% main - 27% other)
 - the challenge of the game (24%-14%)
 - playing with others (14%-7%)
- Females give fewer secondary reasons but are slightly more likely to emphasise 'relaxation/de-stressing'
- More committed gamers are more likely to emphasise positive game aspects, 'it's fun' or 'it's exciting', whereas less committed gamers emphasise non gaming motivations like 'filling time' or 'playing with friends'
- Reasons for not gaming also vary little by gender;
 - Males are more likely to say they 'lack the time to game' (43% main -39% other)
 - Females that games are too violent (9%- 5%)

Video Games in the Family

- Gamers that spend the most time gaming (Committed and Loyalist) also spend the most time playing games with their children (79% and 76%)
- Female Non Gaming Parents are the group least likely to buy their children's games; in contrast Female Gamers are the group most likely to always buy their children's games
- Females are more likely to 'always' monitor the games their child plays

Video Gamers Broader Activities and Interests

- Generally there is little to distinguish between Gamers in their other Leisure interests
- Female are more likely to prefer shopping more, Males more likely to prefer sports and exercise
- More dedicated gamers are also more interested in other entertainment like the movies, or going out for a dance or to a gig etc (though the differences are not large, they clearly disprove the view that Committed Gamers as a group focus only on gaming)

Online Gaming

- 16-19 year olds are most likely to play online (83% have played at least one type of online game in the last 3 months)
- 24% of Males are playing paid online games in comparison to 12% of Females
- PC gamers show the highest level of gaming activity by system user types
- Puzzle games are the most popular type of online games for females and ages 40-49

Awareness and Perception of PEGI

- More Male Gamers (58%) are aware of an age rating system for video games than Female Gamers (51%)
- Awareness of an age rating system for video games decreases with age among Gamers but increases among non gamers
- Awareness of the PEGI age rating system and recognition of the age labels is highest amongst Gamers aged 16-19 (38% and 86%)
- Awareness of the PEGI age rating system is higher among Male Gamers (31%) than Female Gamers (21%)
- Close to 50% of Non Gaming Parents aged 20-29 find the age rating system extremely useful

Contents

Foreword	2
Section 1: Market Size	14
1.1 European Market Profile	15
1.2 Market Size	16
1.3 Proportions of Gamers by Age and Gender	17
1.4 Gamer Commitment	18
Section 2 System Use	20
2.1 The Sample	21
2.2 System Use	23
2.3 Handheld Systems	26
2.4 Multimedia Console Use	27
2.5 Hours of Game Play	28
2.6 Purchase Behaviour	29
Section 3 Attitudes and Motivations for Video Gaming	30
3.1 Motivations for Playing Video Games	31
3.2 Motivations to play with Handhelds Systems	33
3.3 Reasons for Not Playing Video Games Amongst Non Gamers	34
3.4 Encouraging Non Gamers to Play Video Gamers	35
Section 4 Video Games in the Family	36
4.1 Video Games as a Family Activity	37
4.2 Motivations to Play with Children	38
4.3 Monitoring Children's Games Purchases and Play	39
Section 5 Video Gamers Broader Activities and Interests	42
5.1 Gamers Other Leisure Interests	43
5.2 Time spent by Gamers on Leisure and Entertainment	44
5.3 The Benefits of Video Gaming and Other Media	47
Section 6 Online Gaming and Multimedia	48
6.1 Prevalence of Online Gaming	49
6.2 Genre of Online Games Played	51
6.3 Who Online Games are Played With	52
6.4 Where Gamers Play Online	53

6.5	Why Gamers Play Online	54
Section 7 Awareness and Perceptions of PEGI		56
7.1	Awareness of Age Rating Systems	57
7.2	Value of the PEGI System	59
7.3	Awareness and Understanding and Use of the PEGI Content Labels	60
Section 8 The Socio-Demographics of Video Gaming Behaviour		64
8.1	System Use	65
8.2	Attitudes and Motivations for Video Gaming	67
8.3	Video Games in the Family	70
8.4	Video Gamers Broader Activities and Interests	72
8.5	Online Gaming	73
8.6	Awareness and Perceptions of PEGI	74
Section 9: Demographic Info		78

List of Figures

Figure 1 Omnibus Territories in 2010 Survey	15
Figure 2 European Video Gamers Spring 2010	16
Figure 3 Gamers by Country	16
Figure 4 Proportion of the Population that are Gamers by age and gender: Europe	16
Figure 5 Proportion of Population who are Gamers by age, gender and country	17
Figure 6 Gamer Commitment by Age and Gender	18
Figure 7 Gamer Commitment by Country	19
Figure 8 Countries Included in the Gamer Surveys 2007-2010	21
Figure 9 Number of Gamers (1,000's) 16-49 years old By Region	22
Figure 10 Reported Platform Use	23
Figure 11 Reported Platform Use by New Console Users (PS3, Xbox 360, Wii)	23
Figure 12 Reported Platform Use by PS3 Users	24
Figure 13 Reported Platform Use by Xbox 360 Users	24
Figure 14 Reported Platform Use by Wii Users	24
Figure 15 Three Most Popular Main Systems by Region	25
Figure 16 Proportion of Gamers Using Handheld Devices	26
Figure 17 Where Gamers Play With Their Handheld Games Systems	26
Figure 18 The Use of Consoles' Multimedia Capabilities	27
Figure 19 Hours of Video Gaming	28
Figure 20 Hours of Video Gaming by New Console Users	28
Figure 21 Numbers of Video Games Purchased	29
Figure 22 Type of Video Game Purchase	29
Figure 23 Gamers' Motivations for Playing Video Games	31
Figure 24 Three Main Motivations by Region	32
Figure 25 Handheld Gaming – Motivations for Players	33
Figure 26 Reasons for not Playing Video Games Amongst Non Gamers	34
Figure 27 Main Reasons for not Playing Video Games Amongst Non Gamers: By Region	34
Figure 28 Motivations to Encourage Non Gamers to Play Video Games	35
Figure 29 Proportion of Gaming Parents Who Play Games With Their Children	37
Figure 30 Gaming Parents' Motivations for Playing with their Children	38
Figure 31 Proportion of Occasions When Parents Buy their Children's Games	39
Figure 32 Proportion of Occasions Children are Present When their Parents Buy their Children's Games	39
Figure 33 Proportion of Occasions When Parents Monitor the Games Their Children are Playing	40
Figure 34 Leisure Activities Gamers Enjoy Most	43
Figure 35 Time Spent By Gamers on Selected Leisure Activities	44
Figure 36 Proportion of Gamers Spending More than 6 Hours a Week on Activity	45
Figure 37 Time Spent By Gamers on Selected Leisure Activities by All New Console Users	46
Figure 38 Proportion of Gamers Agreeing to the Benefits of Video Gaming and Other Media	47
Figure 39 Free Online Gaming Activity by Region	49
Figure 40 Paid For Online Gaming Activity by Region	50
Figure 41 Online Gaming Activity by Region	50
Figure 42 Genre of Online Games Played by Region	51
Figure 43 How Much Social Gameplay is there Online	52
Figure 44 Where Your Friends are Online	52
Figure 45 Where Online Gamers Play Online	53
Figure 46 Motivations for Playing Online Games	54
Figure 47 Awareness of an Age Rating System for Video Games	57
Figure 48 Awareness of an Age Rating System for Video Games by New Console Users	57
Figure 49 Recognition of the PEGI Age Rating Labels	58
Figure 50 Recognition of the PEGI Age Rating Labels by New Console Users	58
Figure 51 PEGI Age Labels Presented in the Research	58
Figure 52 The Usefulness of the Age Rating Symbols among those Who Recognise Them	59
Figure 53 The Usefulness of the Age Rating Symbols among those Who Recognise Them by New Console Users	59

Figure 54 Awareness of the PEGI Content Symbols	60
Figure 55 Awareness of the PEGI Content Symbols by Region	60
Figure 56 Awareness of the PEGI Content Symbols by All New Console Users	61
Figure 57 Understanding of the PEGI Content Labels	61
Figure 58 Understanding of the PEGI Content Labels by All New Console Users	61
Figure 59 Understanding of the PEGI Content Labels by Region	62
Figure 60 Clarity of the Symbols	63
Figure 61 Usefulness of Symbols in Deciding on a Game Purchase	63
Figure 62 Reported Use of Main System: Europe, By Gender	65
Figure 63 Handheld Gaming Activity By Age and Gender	65
Figure 64 Reported Hours of Play: Europe by Age, Gender and System	66
Figure 65 Numbers of Video Games Purchased: Europe by Age, Gender and System	66
Figure 66 Type of Video Game Purchase by Age, Gender and System	66
Figure 67 Motivations for Playing Video Games by Gender	67
Figure 68 Motivations for Playing Video Games by Gamer Commitment	68
Figure 69 Reasons for not Playing Video Games Amongst Non Gamers	68
Figure 70 Motivations to Encourage Non Gamers to Play Video Games	69
Figure 71 Proportion of Gaming Parents Who Play Games With Their Children – By Gamer Commitment	
Index	70
Figure 72 Proportion of Occasions When Parents Buy their Children’s Games – By Gender	70
Figure 73 Proportion of Occasions Children are Present When their Parents Buy their Children’s Games – By Gender	71
Figure 74 Proportion of Occasions When Parents Monitor the Games Their Children are Playing – By Gender	71
Figure 75 Proportion of Occasions When Parents Monitor the Games Their Children are Playing – By Age of Youngest Child	71
Figure 76 Leisure Activities Gamers Enjoy Most - Gamer Commitment Index	72
Figure 77 Leisure Activities Gamers Enjoy Most - Age	72
Figure 78 Online Gaming Activity by Age, Gender and System	73
Figure 79 Online Gaming – Genre of Online Games played by Age, Gender and System	73
Figure 80 Awareness of any Age Rating System for Video Games by Gamers/Non Gaming Parents, Age and Gender	74
Figure 81 Recognition of the PEGI Age Rating Symbols by Gamers/Non Gaming Parents, Age and Gender	75
Figure 82 The Usefulness of the Age Rating Symbols among those Who Recognise Them	75
Figure 83 Awareness of PEGI Symbols by Gamers/Non Gaming Parents and Gender	76
Figure 84 Profiling Gamers: Income	79
Figure 85 Profiling Gamers: Education	79
Figure 86 Profiling Gamers: Occupation	80

List of Tables

Table 1 National and Regional Samples	22
Table 2 Proportions of Gamers by Country Spending More than 6 Hours per Week on an Activity	45



Section 1: Market Size

The Shape of the European Gaming Market

1.1 European Market Profile

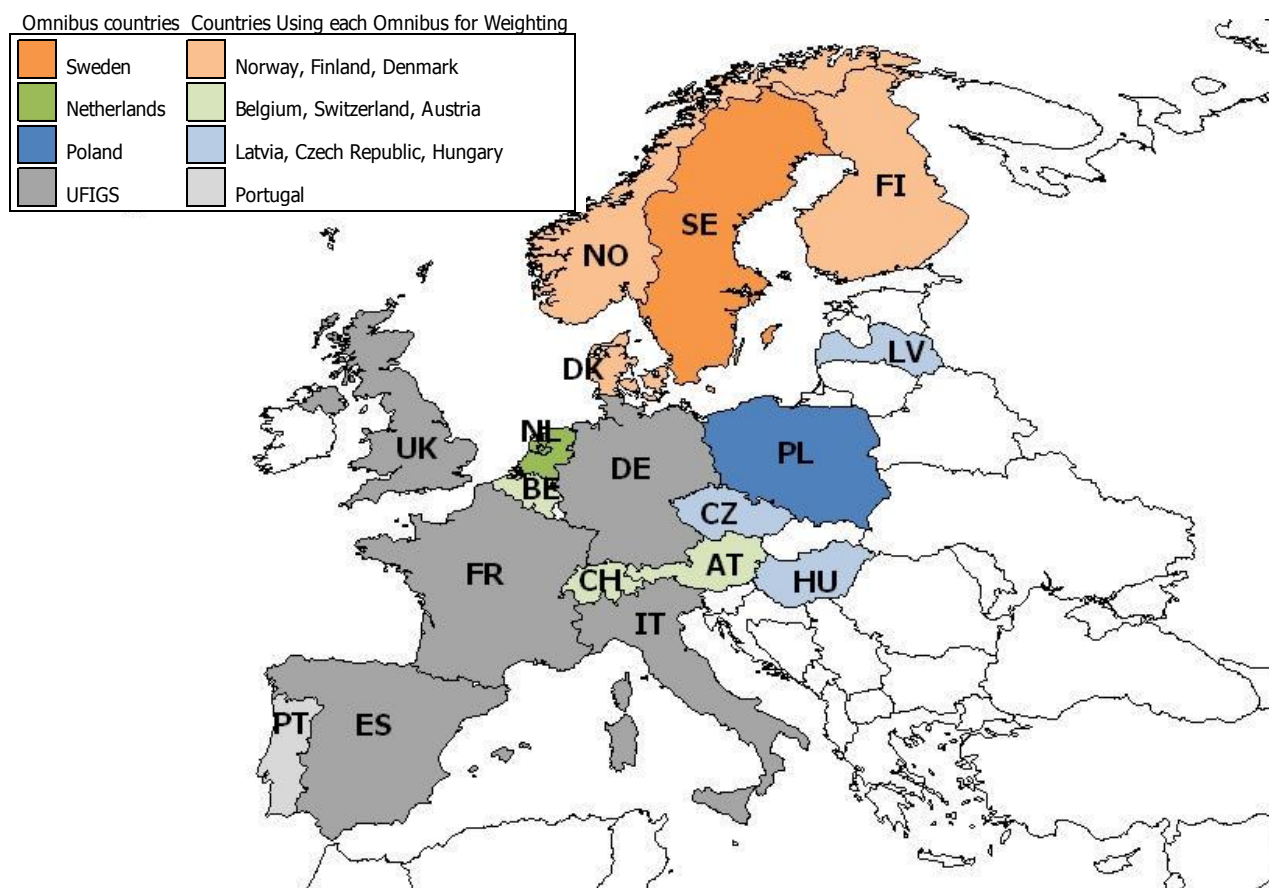
In this section we provide an estimate of the number of Video Gamers in 8 key European markets. Data on the five largest European territories UK, France, Italy, Germany and Spain (UFIGS) has been provided from the Game Vision European Market Sizing Study Spring 2010 which uses a Face to Face sample of 2000 16+ adults in each country.

Estimates in the other three countries are based on omnibus research commissioned specifically for this report. 1000 Face to Face interviews in Poland and 1000 CATI interviews in Sweden and Netherlands.

These studies measure the numbers of gamers, their hours of play and spend on video games. These latter two measures are an effective way of assessing a gamers' commitment to gaming, and are associated with many other gaming behaviours, like online play, ownership of games systems, and attitudes to gaming. We therefore use this data to weight the more extensive gamer surveys we have conducted in these countries and in other nations within their associated regions (as shown on the map).

Including this control of the online survey to the profile of gamers in each market is a new development for the ISFE survey which improves its representativeness. The net effect is likely to reduce the reported activity and dedication of Gamers compared to previous surveys.

Figure 1 Omnibus Territories in 2010 Survey



The definition of a Video Gamer has been expanded from 2008 when a Gamer needed to have both played and bought a video game in the last 6 months. This research includes all those who have played in the last 6 months regardless of whether or not they have bought a game. It is therefore a more complete picture of all those enjoying gaming.

Having made such a significant change to the sample, it would therefore be misleading to show any trend data from previous surveys.

1.2 Market Size

- On average across the 8 major European nations surveyed, 25.4% of adults have played video games in the last 6 months, a total of 79.2 million gamers. This percentage varies from 38% in France to 17% in Italy and Poland, but is substantial in every country
- Using this data we estimate there are 95.2 million adult Video Gamers across all 18 countries covered by the Gamer Survey
- Gaming is most popular among the young, however almost 30% of 30-49 year olds play video games

Figure 2 European Video Gamers Spring 2010

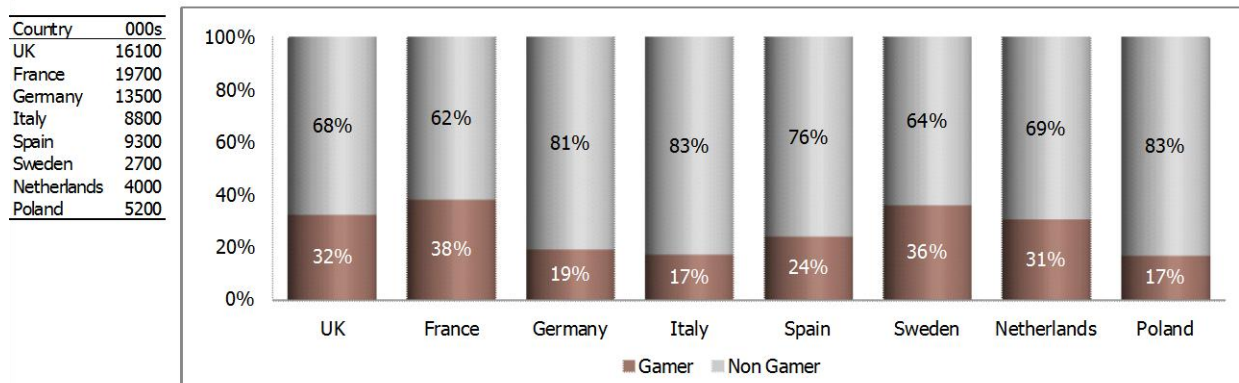


Figure 3 Gamers by Country

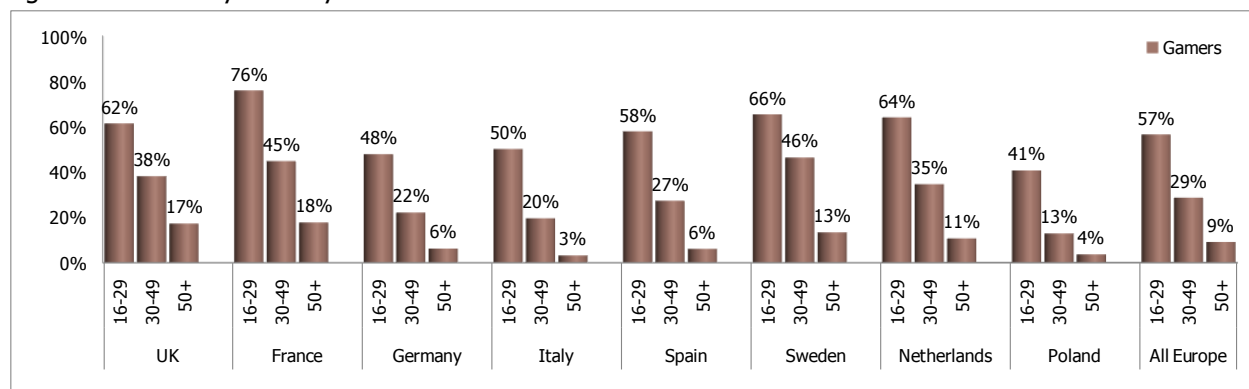
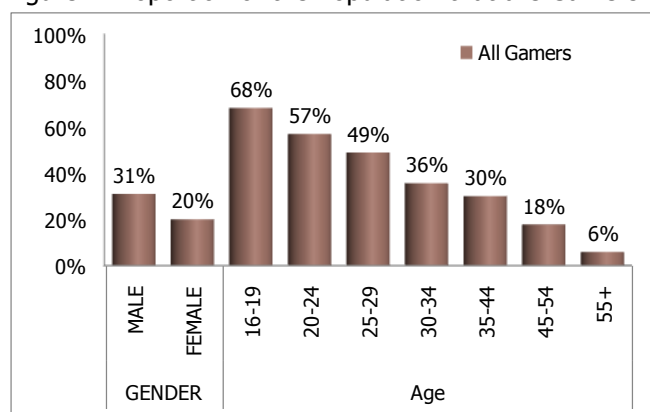


Figure 4 Proportion of the Population that are Gamers by age and gender: Europe



Base All Population 16+ (Sample: a combination of the GameVision Spring 2010 Market Sizing Survey (Sample 10,000 adults aged 16+ across 5 countries and ISFE Market Sizing Omnibus (3,000 adults 16+ across 3 countries) (weighted to 2010 government population data)

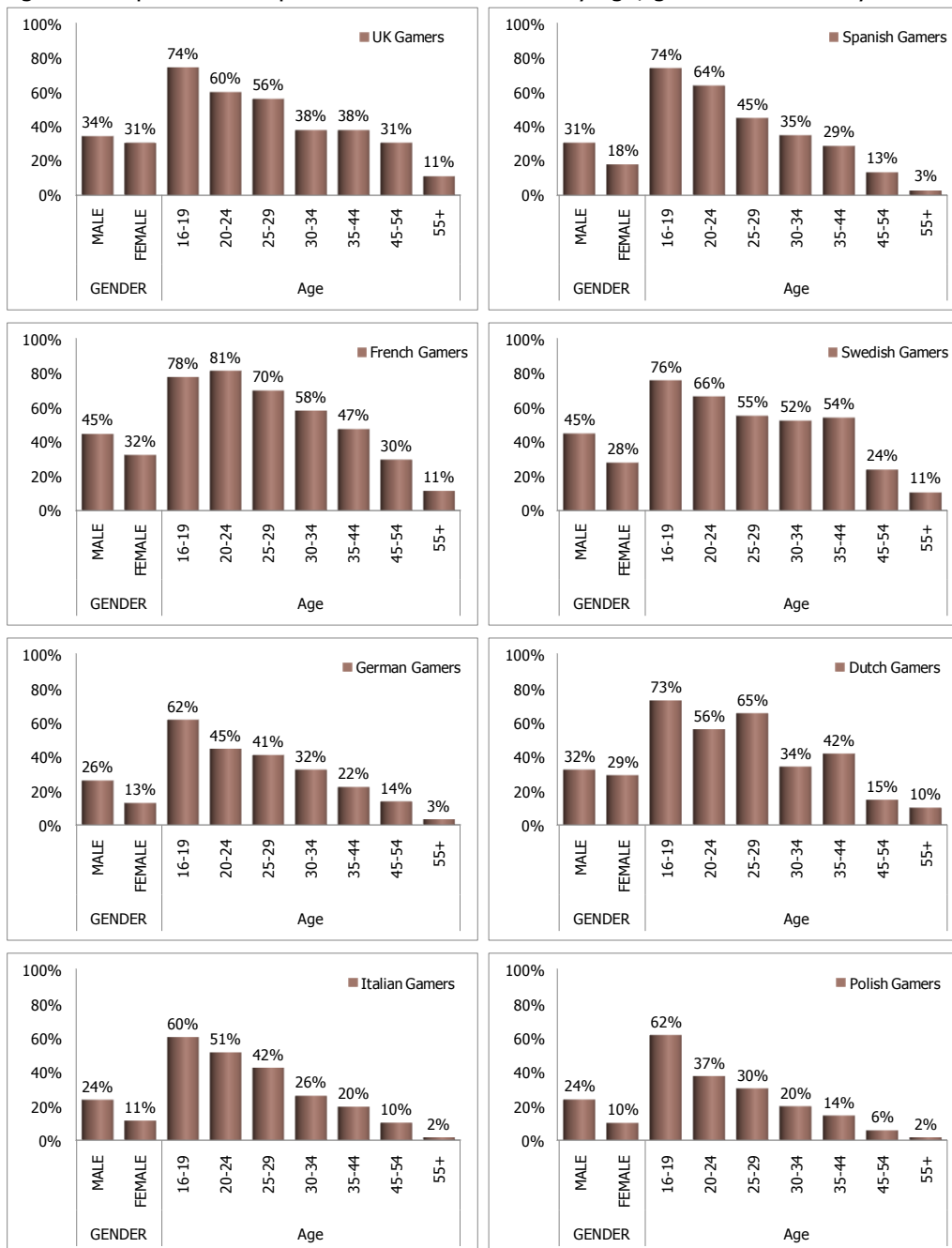
Q1 Which of the following best describes you? - I have played a video or computer game in the last 6 months

1.3 Proportions of Gamers by Age and Gender

Almost all countries show a consistent pattern of penetration by gender and age. However:

- There is a much closer gender balance in UK, France and Netherlands
- There are more gamers in the 25 to 44 age group in Sweden than other countries
- The proportion of gamers peaks at 20-24 in France, a little later than in other countries

Figure 5 Proportion of Population who are Gamers by age, gender and country



Base All Population 16+ (Sample: a combination of the GameVision Spring 2010 Market Sizing Survey (Sample 10,000 adults aged 16+ across 5 countries and ISFE Market Sizing Omnibus (3,000 adults 16+ across 3 countries) (weighted to 2010 government population data)

Q1 Which of the following best describes you? - I have played a video or computer game in the last 6 months

1.4 Gamer Commitment

The Gamer Commitment Index is a measure that combines the number of hours of play with the number of games bought in the last three months to provide an indication of a gamers' commitment to gaming. GameVision have provided this measure to the games industry for more than 7 years to track gamer behaviour.

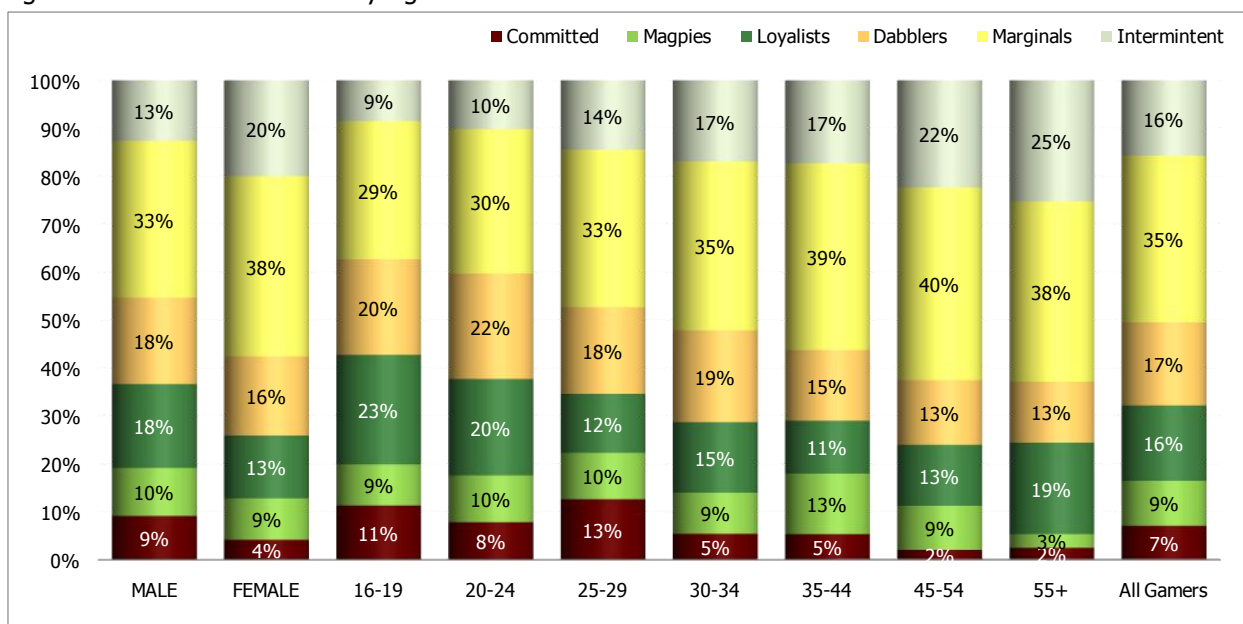
There are usually five levels of commitment that we use to explain gamers' behaviour. For this study because we are including a wider definition of gamers, we have extended the index to include a sixth group, 'Intermittent Gamers'. This group are players who are not putting aside regular time to play games every week, but have played in the last 6 months. This group have not bought or been gifted any games for their own use.

The figure opposite explains the segmentation.

		Number of games bought in the last 3		
		0 or 1 games	2 games	3 or more games
Average hours spent playing games	No regular play	Intermittent (16%)		
	Up to 1/2 an hour per day	Marginals (35%)	Dabblers	Magpies (9%)
	Up to one hour per day	Dabblers (17%)		
	One hour per day or more	Loyalists (16%)	Committed (7%)	

- Since the launch of the new games consoles the Gamer Commitment Index has reflected a marked increase in the numbers and proportion of Marginal and Dabbling Gamers, the two least dedicated gamer segments who regularly play games
- 68% of all gamers in the 8 countries surveyed are Intermittent, Marginal or Dabbling Gamers
- Two more committed groups are; Loyalists play longer hours but buy few games and Magpies who buy lots of games but have little time to play them. Together these groups account for 25% of gamers
- Finally Committed Gamers are a small proportion of gamers 7%, but they buy many more games and play more hours than other groups
- Male gamers are more dedicated to gaming than female gamers
- A higher proportion of younger people are Gamers and they are also more dedicated than older Gamers, spending more time and money on gaming

Figure 6 Gamer Commitment by Age and Gender

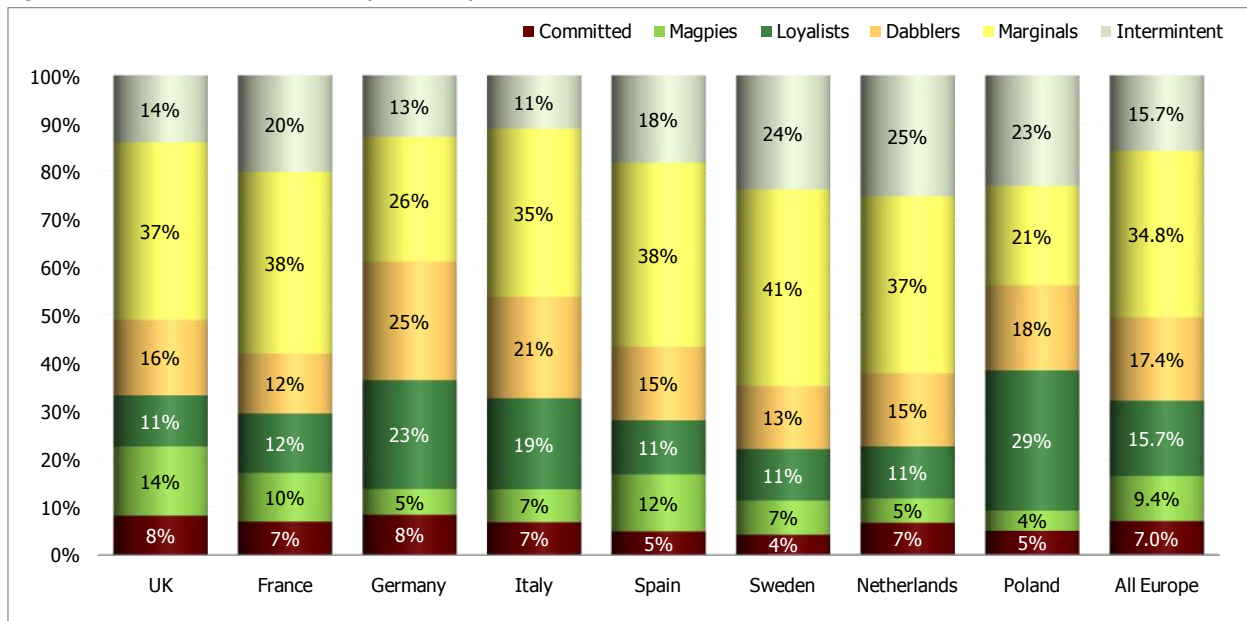


Base All Population 16+ (Sample: a combination of the GameVision Spring 2010 Market Sizing Survey (Sample 10,000 adults aged 16+ across 5 countries and ISFE Market Sizing Omnibus (3,000 adults 16+ across 3 countries) (weighted to 2010 government population data)

Question: Combination of data on average hours of video game play and numbers of games bought over the last 3 months.

- UK gamers are the most committed; a higher proportion of them are buying several games each quarter
- German, Italian and Polish gamers have a large proportion of Loyalists who spend time playing games but buy few games:
 - In Germany this is because of the large number of PC gamers who play long winded strategic games
 - In Poland and Italy it may be more a reflection of lower budgets for gaming

Figure 7 Gamer Commitment by Country



Base All Population 16+ (Sample: a combination of the GameVision Spring 2010 Market Sizing Survey (Sample 10,000 adults aged 16+ across 5 countries and ISFE Market Sizing Omnibus (3,000 adults 16+ across 3 countries) (weighted to 2010 government population data)

Question: Combination of data on average hours of video game play and numbers of games bought over the last 3 months.



Section 2 System Use

Systems in Use, Hours of Play and Spend on Games

2.1 The Sample

The remaining sections of this report are based on surveys of; Gamers, Non Gamers and Non Gaming Parents, conducted in 18 countries across Europe. This is the first time Non Gaming Parents have been included in the sample.

The sample in each country reflects the relative population of gamers in the country and covers those aged 16-49 years old. We will not keep repeating the age criteria in the text but it should be remembered that the sample does not include the many under 16s who are Gamers.

We have weighted the sample in each country to the relevant market omnibus and report results in the 8 countries/regions defined by the omnibus research. This approach gives a more robust sample of gaming behaviour and attitudes.

In many cases especially in the countries of Eastern Europe gaming remains a less 'mass market' activity. We therefore expect that over time as the market expands, mean activity rates among gamers will decline as interest in gaming widens in the population and more casual gamers become involved in video gaming.

As far as possible the questionnaire has been kept the same as in 2008 to allow comparability, however changes have been made where clarification was needed or technology and consumer options have moved on.

The definition of a video Gamer has been expanded from 2008 when a Gamer needed to have both played and bought a video game in the last 6 months. This research includes all those who have played in the last 6 months regardless of whether or not they have bought a game. It is therefore a more complete picture of all those enjoying gaming.

This inclusion of all Gamers in the sample and the introduction of a weighting to make the gamer sample representative of all levels of gaming commitment will reduce the knowledge and rates of gaming activity measured in the 2010 sample in comparison to previous surveys. Therefore it is not appropriate for comparison to earlier studies. Future studies will be based on this definition of a gamer and will enable comparative results.

Figure 8 Countries Included in the Gamer Surveys 2007-2010

Gamer Survey Countries

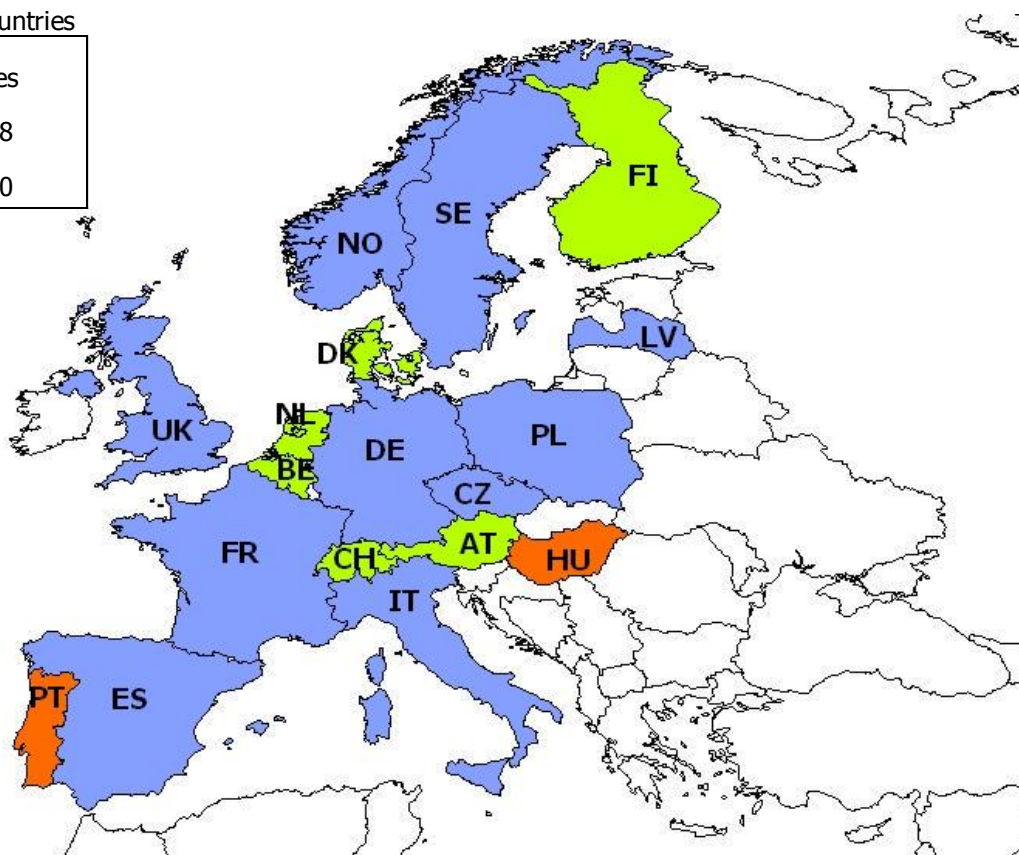
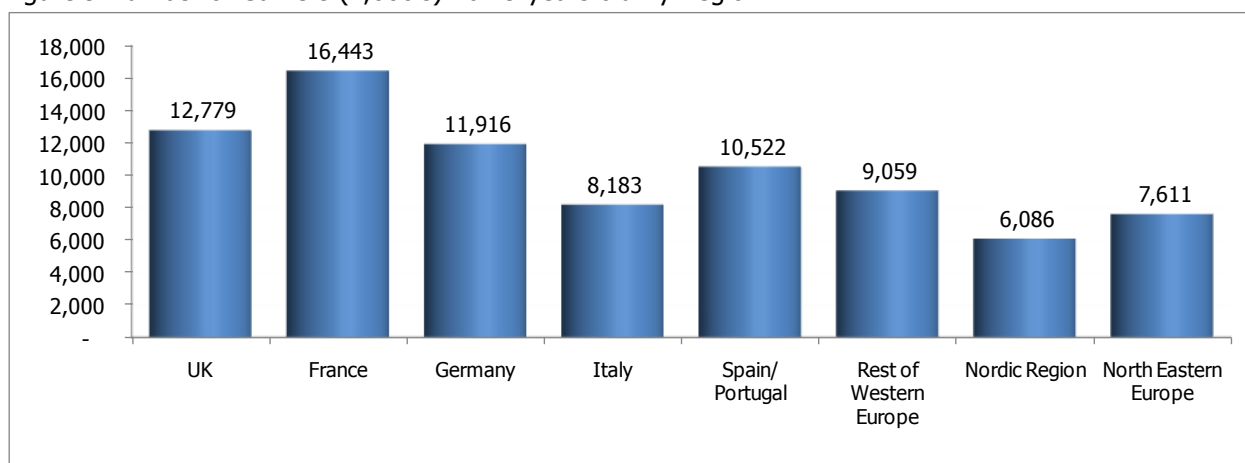


Table 1 National and Regional Samples

Region	Country	Gamer interviews	Non gaming parents	Non Gamers
UK	UK	600	300	200
France	France	600	300	200
Germany	Germany	600	300	200
Italy	Italy	600	300	200
Iberian Peninsula	Spain	600	300	200
	Portugal	200		
Rest of Western Europe	Belgium	150	400	200
	Netherlands	250		
	Switzerland	200		
	Austria	200		
Nordics	Denmark	200	400	200
	Sweden	200		
	Norway	200		
	Finland	200		
North Eastern Europe	Czech Republic	200	500	200
	Poland	400		
	Hungary	200		
	Latvia	200		
All Countries		5800	2800	1600

Figure 9 Number of Gamers (1,000's) 16-49 years old By Region



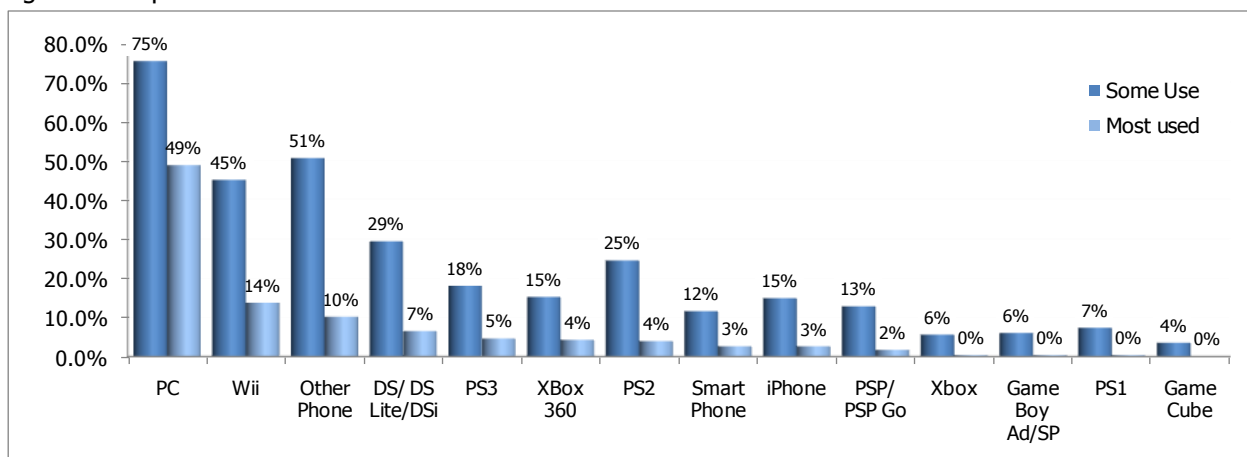
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)

2.2 System Use

In this section some charts show 'new console users'. This is defined as a user of at least one of the following consoles: Sony PlayStation 3, Microsoft Xbox 360, Nintendo Wii.

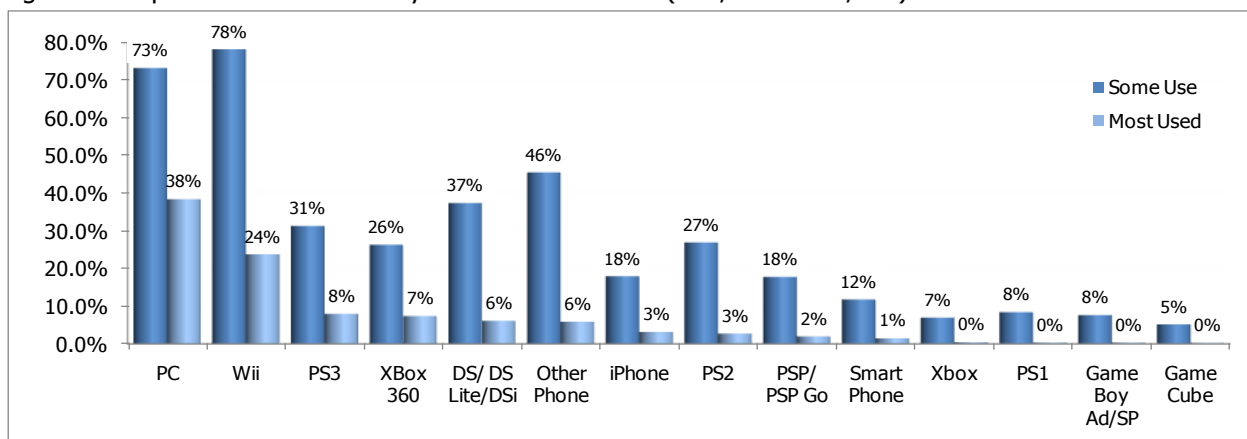
- Across Europe the PC remains the most used games system, (it is the main system for 49% of Gamers aged 16-49). It is particularly popular in Germany, 'Rest of Western Europe' and 'North Eastern Europe'
- The Wii and Mobile Phones are the next most popular systems used as main systems for gaming, (used by 14% and 10% respectively)
- A lot of DS/DS Lite/DSi systems are used as secondary gaming systems and the PS2 still has significant use as a secondary machine, (used by 29% and 25% of Gamers)
- If the survey were to cover under 16s we would expect to see many of this age group selecting handhelds like the DS as their main games system
- The top three main systems in each country show the dominance of PC across Europe
- We have included mobile phones, Smart Phones and iPhones as gaming systems for the first time in 2010 and have recorded substantial use of all these systems for gaming. Mobile phones are important main systems in all regions outside the UK, France and Germany
- North Eastern Europe is the only region in which the Wii has failed to win market share to date
- Many of the Gamers using the PS3, Xbox 360 or Wii as their main games system, also report making use of a PC and/or a mobile phone

Figure 10 Reported Platform Use



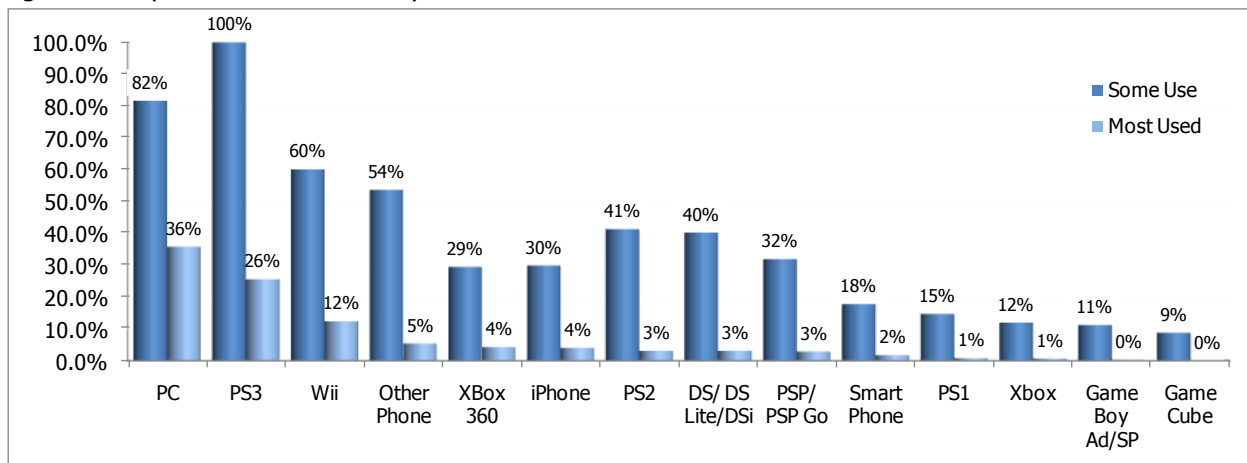
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

Figure 11 Reported Platform Use by New Console Users (PS3, Xbox 360, Wii)



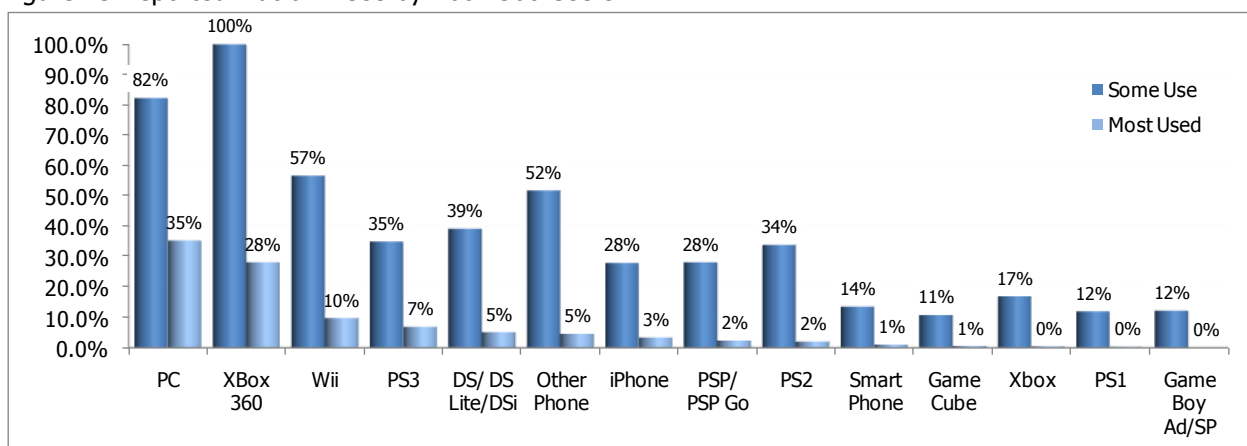
Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

Figure 12 Reported Platform Use by PS3 Users



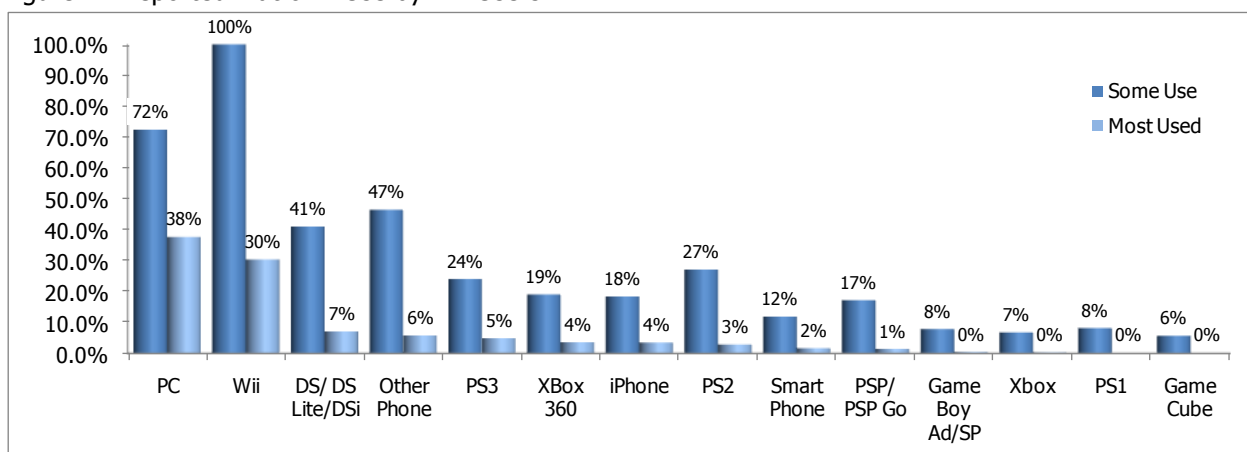
Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

Figure 13 Reported Platform Use by Xbox 360 Users



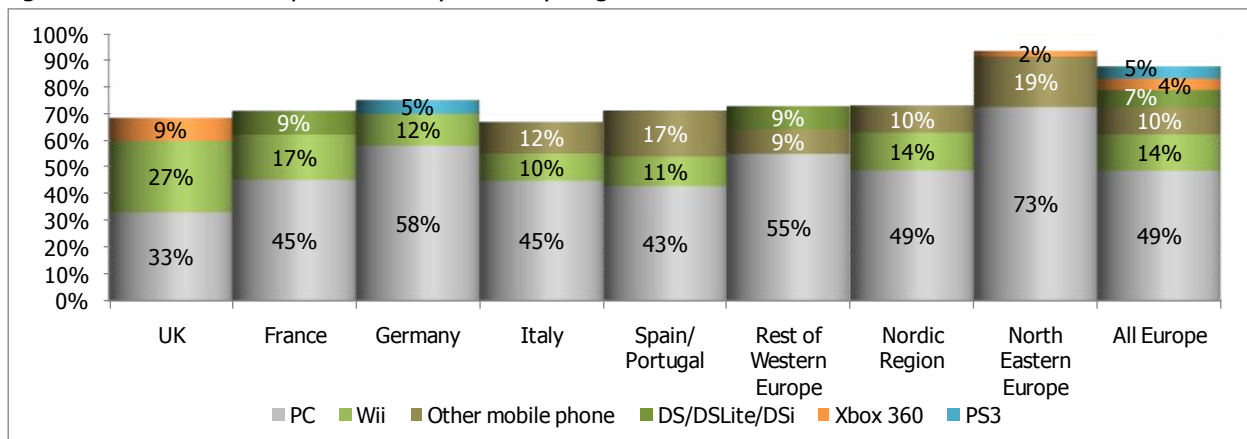
Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

Figure 14 Reported Platform Use by Wii Users



Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

Figure 15 Three Most Popular Main Systems by Region

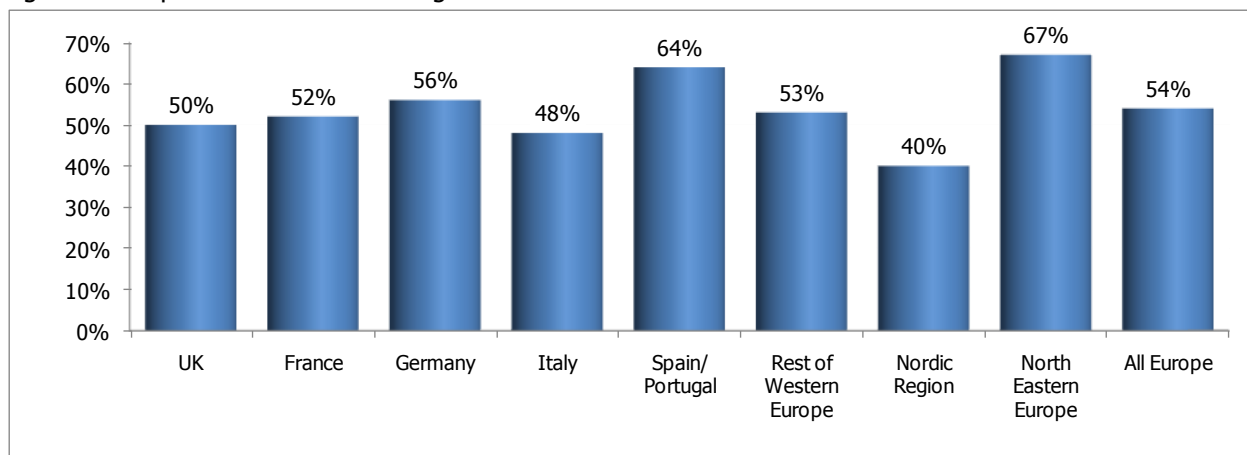


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q5 Which of these game systems do you use most often?

2.3 Handheld Systems

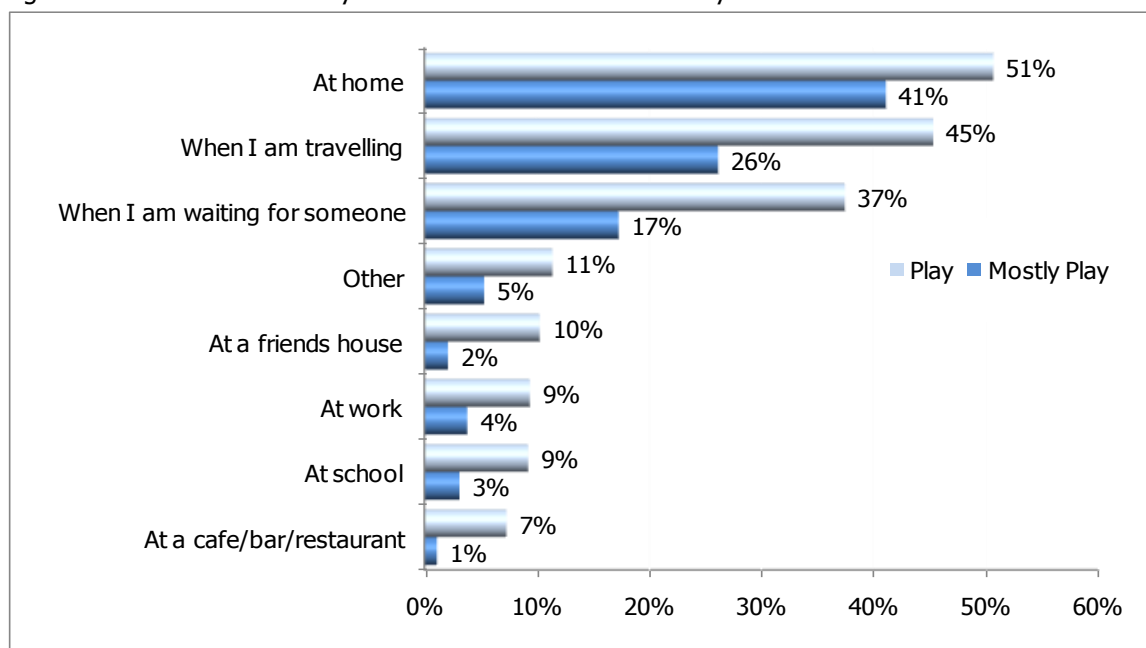
- 54% of Gamers are playing a handheld gaming device
- Handheld gaming is most prevalent in the North Eastern Europe Region and the Spain/Portugal Region
- Gaming activity in the Nordic Region is weaker than in the rest of Europe
- 41% of Gamers mostly play games on handheld consoles at home, 26% mostly play while travelling and 17% mostly when waiting for someone

Figure 16 Proportion of Gamers Using Handheld Devices



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q22 Do you play games on a portable device such as a mobile phone, PDA, Nintendo DS or Sony PSP?

Figure 17 Where Gamers Play With Their Handheld Games Systems



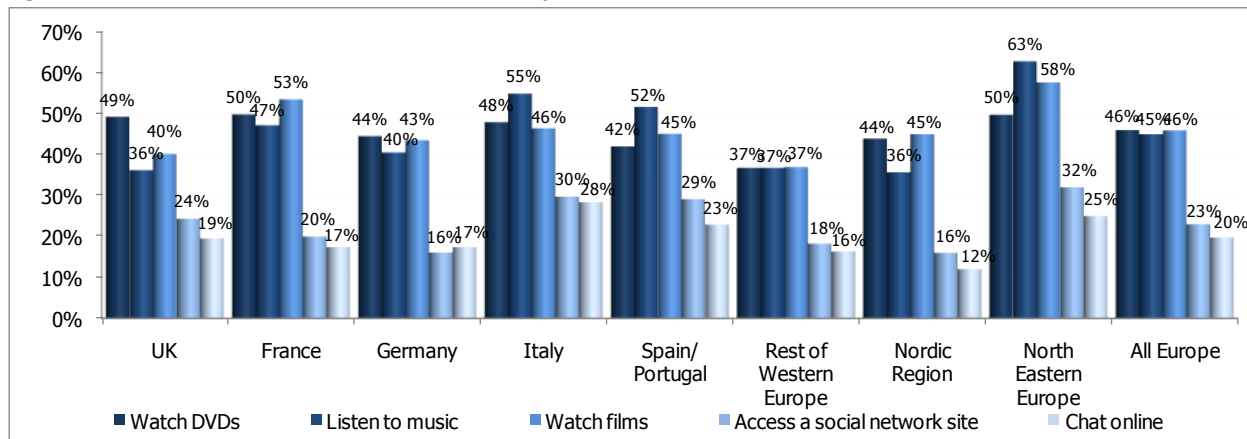
Base: All Video Gamers who play on a handheld system Spring 2010 aged 16-49 (3,577 video gamers weighted by age, sex, hours of play and gaming spend)

Q23 Where do you mostly play video games on a portable device?
 Q24 Where else do you play video games on a portable device?

2.4 Multimedia Console Use

- Watching DVDs, listening to music, and watching films are the most popular secondary uses of games systems with multimedia capabilities
- 23% and 20% of Gamers use the Social networking and online chat services on their consoles

Figure 18 The Use of Consoles' Multimedia Capabilities



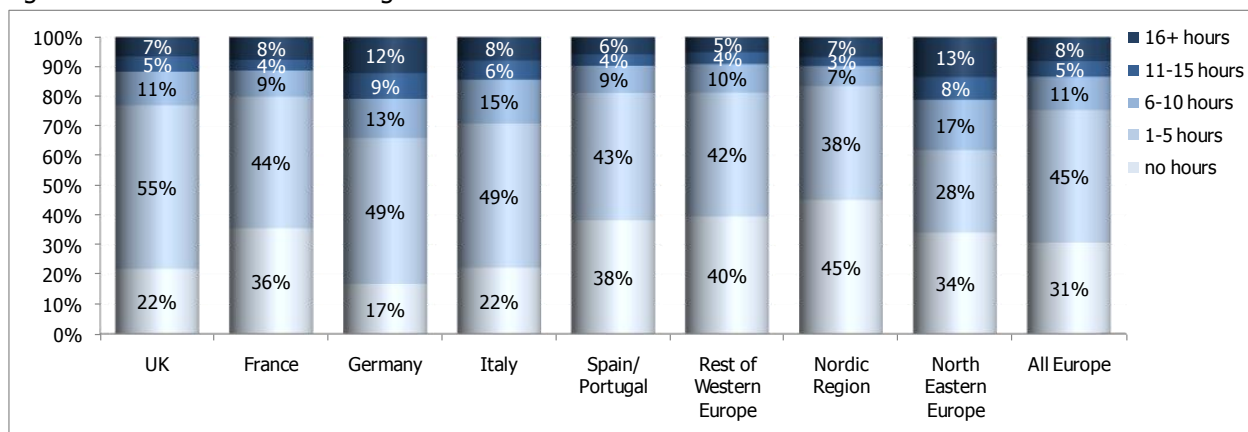
Base: All Video Gamers with access to a console with multimedia capabilities (PS2, PS3, PSP, Xbox, Xbox 360) Spring 2010 aged 16-49 (2,021 video gamers weighted by age, sex, hours of play and gaming spend)

Q28 Have you used your games systems (excluding PCs) as a multimedia device in the last 12 months to

2.5 Hours of Game Play

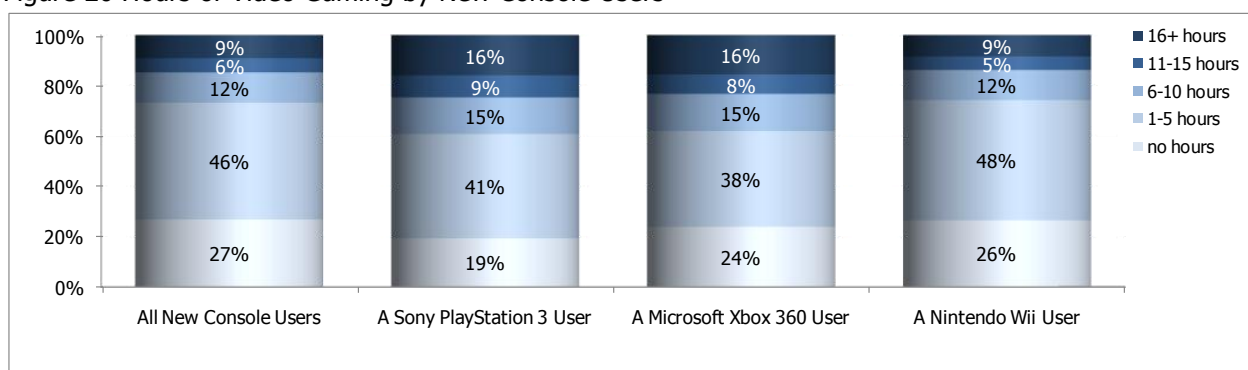
- The inclusion in Spring 2010 of all Gamers has led to the identification of Intermittent Gamers who are not playing games regularly every week. 31% of people who play games do not play regularly for an hour or more each week
- Other research shows a trend to less dedicated game play in the UFIGS countries (UK, France, Italy, Germany and Spain)³
- Overall 76% of Gamers play less than 5 hours a week. It is therefore no longer correct to view gaming as a pastime of a few highly committed participants
- Germans and North Eastern Gamers are the most likely to have long hours of play. This reflects the higher proportions of PC Gamers in these regions. These groups are more likely to play the strategic types of game that involve many hours of game play
- The pattern of play among Wii Gamers is very similar to the general profile across Europe, the only difference is that there are slightly fewer intermittent users
- PS3 and Xbox 360 Gamers are more likely to play for longer than the norm, 25% of Gamers on these systems play more than 10 hours a week.

Figure 19 Hours of Video Gaming



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q6 Thinking now about your use of video games, on average, how many hours per week have your spent playing video games over the last 3 months? (Include both online and off line play.) (Sense checks were included and where gamers found difficulty in answering this question they were asked to estimate play in time bands.)

Figure 20 Hours of Video Gaming by New Console Users



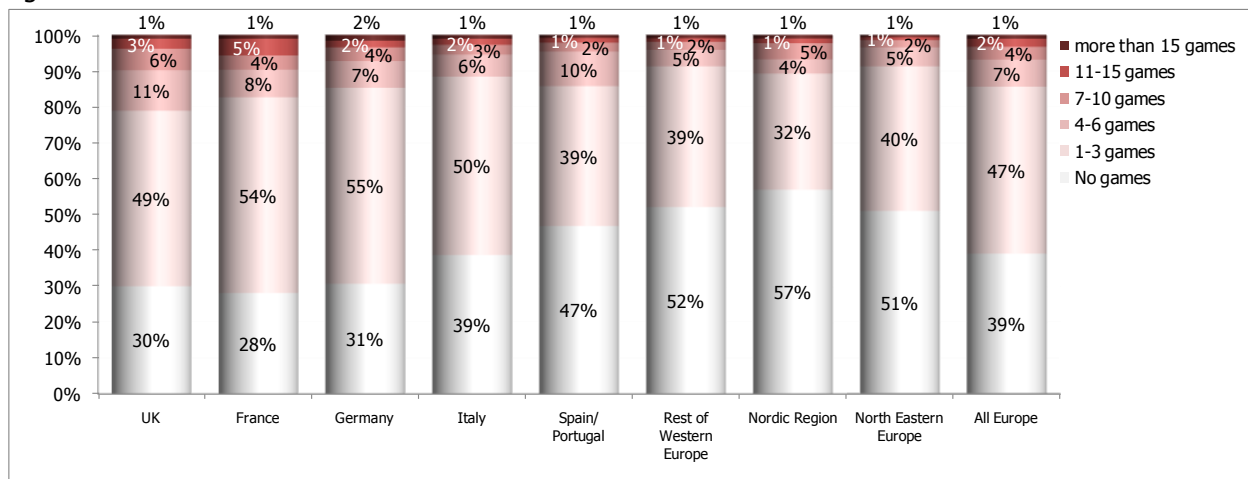
Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q6 Thinking now about your use of video games, on average, how many hours per week have your spent playing video games over the last 3 months? (Include both online and off line play.) (Sense checks were included and where gamers found difficulty in answering this question they were asked to estimate play in time bands.)

³ GVE Compass Report: The European Leisure and Software Industry Consumer Intelligence Report Spring 2010

2.6 Purchase Behaviour

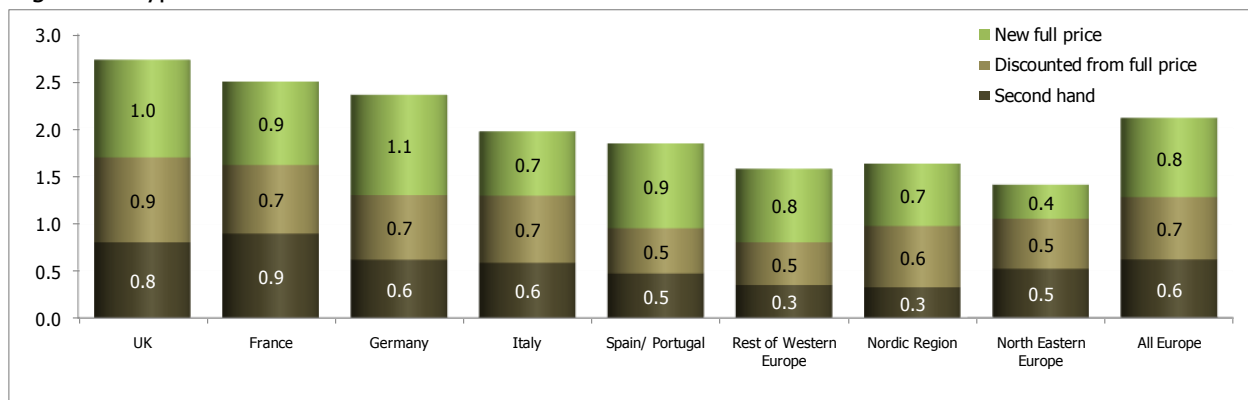
- Almost 40% of people playing games have not bought or been given a game for themselves in the last 12 months, they are playing the games others have bought
- 14% of Gamers are buying more than 3 games a year and together this group account for 56% of all games purchases
- Numbers of purchases are highest in the UFIGS countries:
 - These range from 2.7 games per gamer in the UK to 1.4 games per gamer in North Eastern Europe
- Only 40% of the games bought are bought new/at full price

Figure 21 Numbers of Video Games Purchased



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q9 How many games have you bought for yourself, or been given in the last 12 months? (Include online games.) (Options: second hand, discounted from full price, new full price.)

Figure 22 Type of Video Game Purchase



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q9 How many games have you bought for yourself, or been given in the last 12 months? (Include online games.) (Options: second hand, discounted from full price, new full price.)



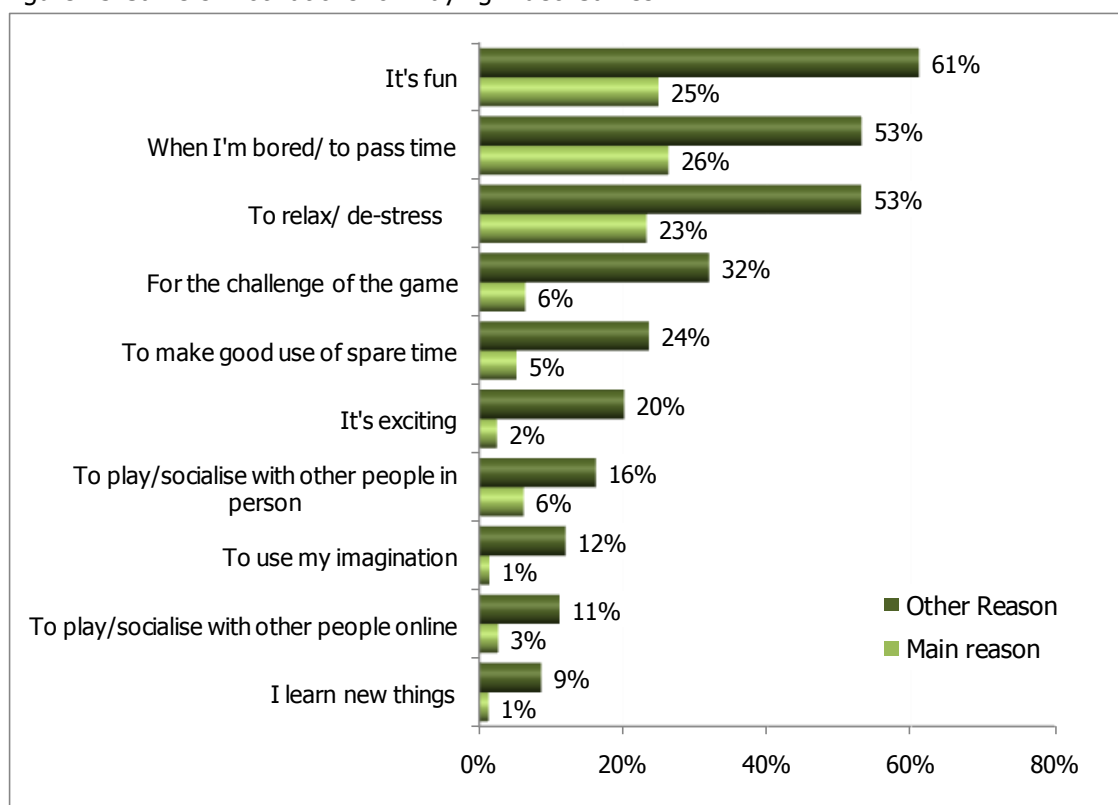
Section 3 Attitudes and Motivations for Video Gaming

Reasons for Gaming, Encouraging New Gamers

3.1 Motivations for Playing Video Games

- The core motivations for playing games are 'fun' (61%); 'relaxation' (53%); and 'a way to pass time' (53%), i.e. simple pleasures
- These motivations are:
 - consistent across all the regions
 - both the most popular reasons and the three main motivations for gaming (chosen as the main reason for playing by; 25%, 23% and 26% of Gamers respectively)
- Other reasons such as 'the challenge of the game' and 'excitement' motivate fewer Gamers to play video games
- Learning new things is the least selected motivation, though other research has shown it as an important motivation for some of the new entrants to the market⁴

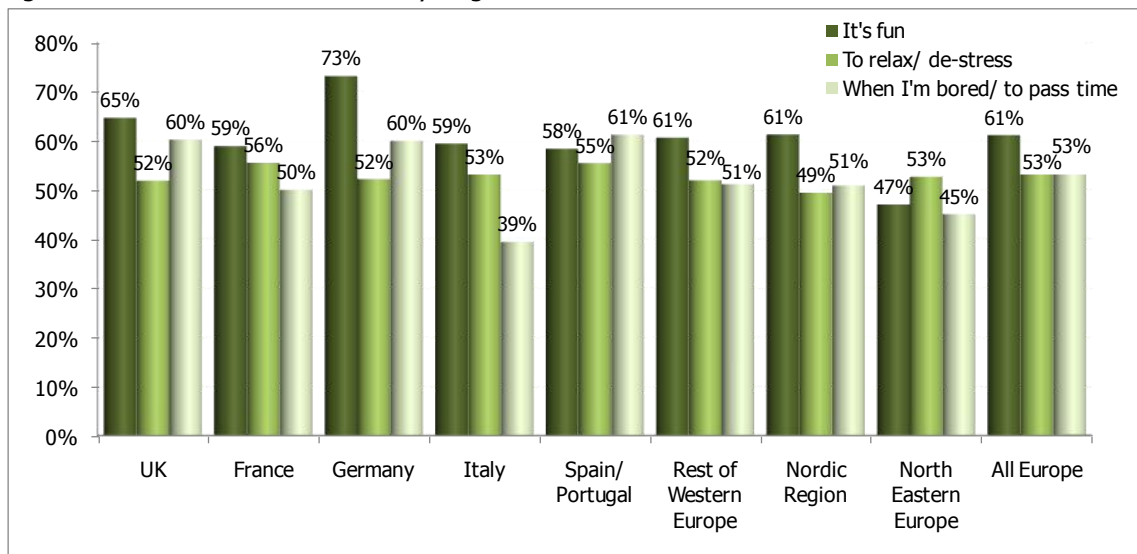
Figure 23 Gamers' Motivations for Playing Video Games



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q11 What is the main reason you play video games? Q12 What other reasons do you play video games for?

⁴ GVE runs a Gamer Market Segmentation system which identifies 7 groups of gamers. One group 'This Lifers' is 14.5% of the market and is motivated to play by experiences like; 'gives me an opportunity to do something creative' and 'develops my skills outside gaming'. Source: GVE Compass 2010.

Figure 24 Three Main Motivations by Region

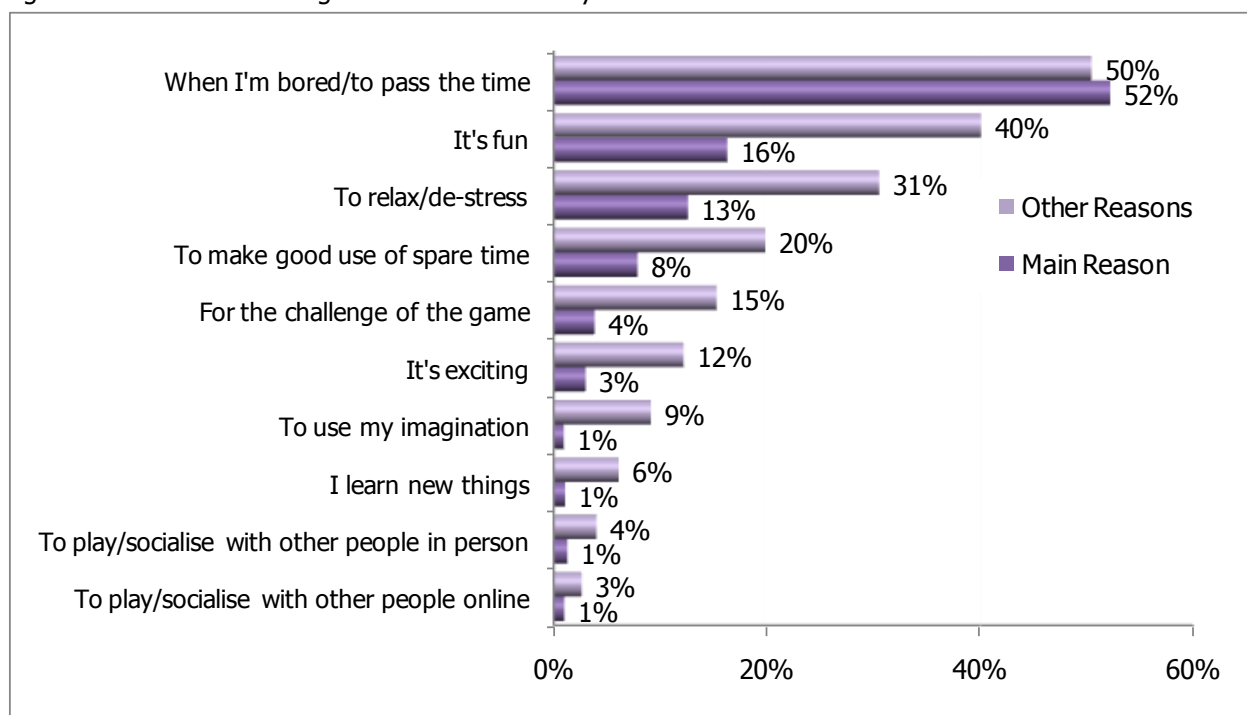


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q11 What is the main reason you play video games? Q12 What other reasons do you play video games for?

3.2 Motivations to play with Handhelds Systems

- Handhelds are for many time fillers; 'when I'm bored/to pass the time' is the main reason given for playing Handheld game systems by 52% of Gamers that use them, and a further 8% say they see it as a good use of spare time
- Relaxing and de-stressing is also an important motivation (13%)
- "It's fun" (16%) is much less likely to be the main motivation for Gamers than when they play Console or online games
- Handheld gaming is not seen as a way to socialise with other gamers in person or online

Figure 25 Handheld Gaming – Motivations for Players



Base: All Video Gamers who play on a handheld system Spring 2010 aged 16-49 (3,577 video gamers weighted by age, sex, hours of play and gaming spend)

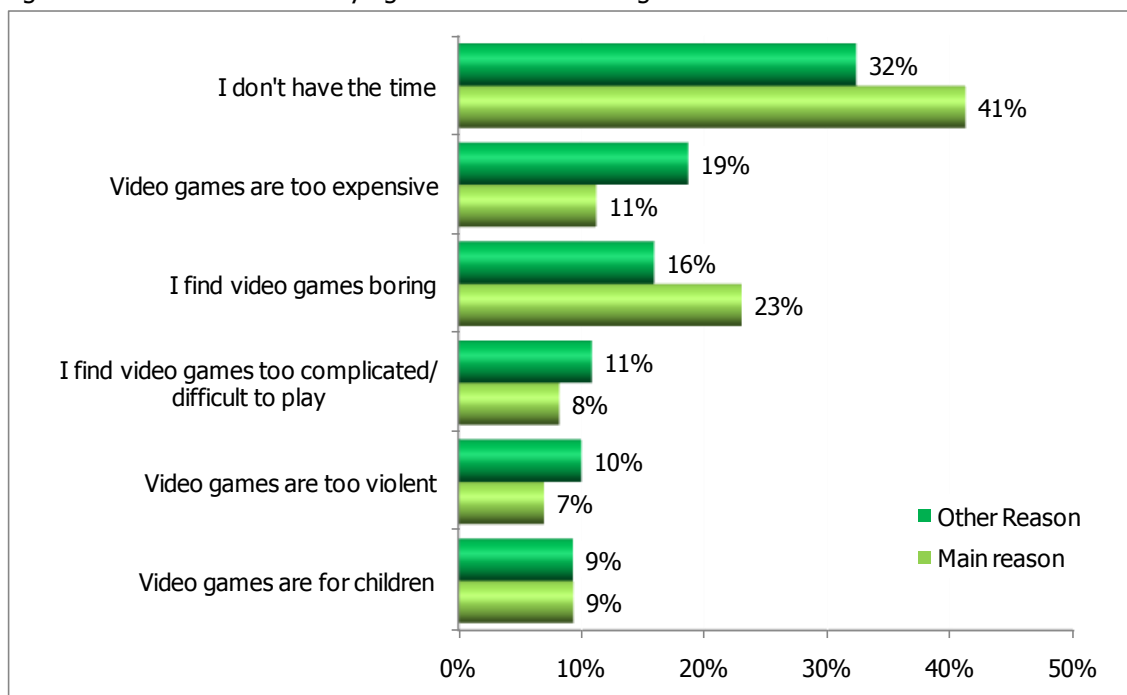
Q25 What is the main reason why you play video games on a portable device?

Q26 Why else do you play video games on a portable device?

3.3 Reasons for Not Playing Video Games Amongst Non Gamers

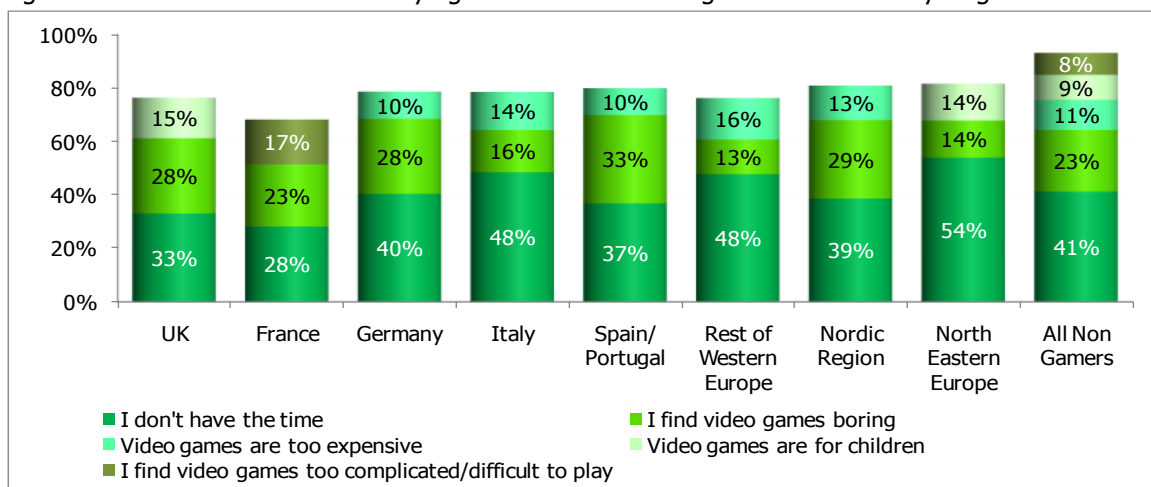
- The main reason Non Gamers don't play games is that they do not consider the benefits sufficiently great and therefore do not make the time to play; 41% of Non Gamers say "I don't have the time"
- The second main reason is a lack of interest in or understanding of games;
 - 23% say video games are boring
 - 9% say games are only for children
- 11% of Non Gamers do not believe they are worth the money saying they are too expensive
- Only 7% claim games are too violent as the reason they do not play them
- There is a good deal of agreement across the regions among Non Gamers, though in the UK, France and North Eastern Europe Non Gamers place less emphasis on the cost of games

Figure 26 Reasons for not Playing Video Games Amongst Non Gamers



Base: All Non Gamers Spring 2010 aged 16-60 (1,599 video gamers weighted by age and sex)
 NG1 What is the main reason why you don't play video games

Figure 27 Main Reasons for not Playing Video Games Amongst Non Gamers: By Region

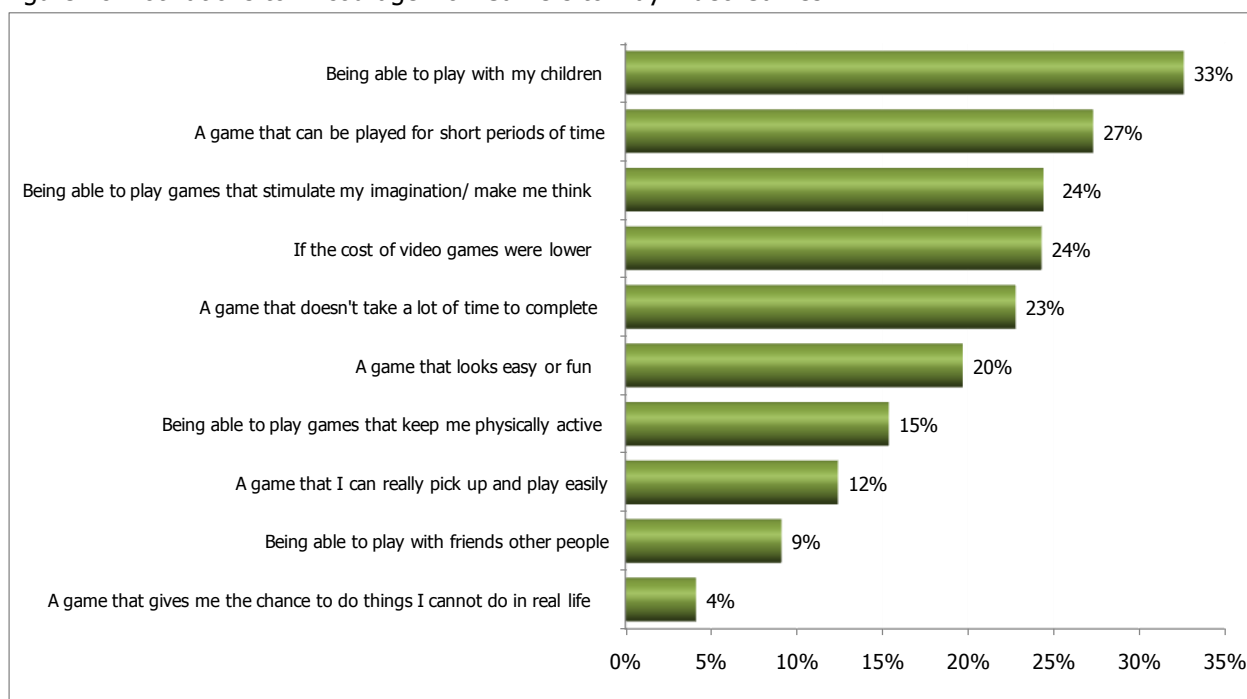


Base: All Non Gamers Spring 2010 aged 16-60 (1,599 video gamers weighted by age and sex)
 NG1 What is the main reason why you don't play video games

3.4 Encouraging Non Gamers to Play Video Gamers

- Most of the reasons given for not gaming by Non Gamers, are issues that are not so much matter of fact as of opinion or knowledge
 - 33% of Non Gamers say 'being able to play with my children' would motivate them to play. However, there are already many games others consider suitable to play with children
 - Non Gamers are attracted by games that can be played for short periods of time (27%), and there are increasing numbers of titles that can be played in this way
- Therefore, the conclusion is that:
 - the types of rewards that motivate Non Gamers are similar to many Gamers' motivations for playing games
 - the barriers of disinterest and lack of appreciation of gaming among Non Gamers must therefore be more significant deterrents to be overcome than the need for new game concepts
 - more people can be encouraged to play if the ability of games to meet their interests can be communicated to them effectively
- The success in recent years of the new consoles and new games like Wii Fit, Guitar Hero and Dr Kawashima's Brain Training to attract new people to gaming demonstrate the possibilities for expanding further participation in games

Figure 28 Motivations to Encourage Non Gamers to Play Video Games



Base: All Non Gamers Spring 2010 aged 16-60 (1,599 video gamers weighted by age and sex)
 NG3 What would make you more interested in playing video games?



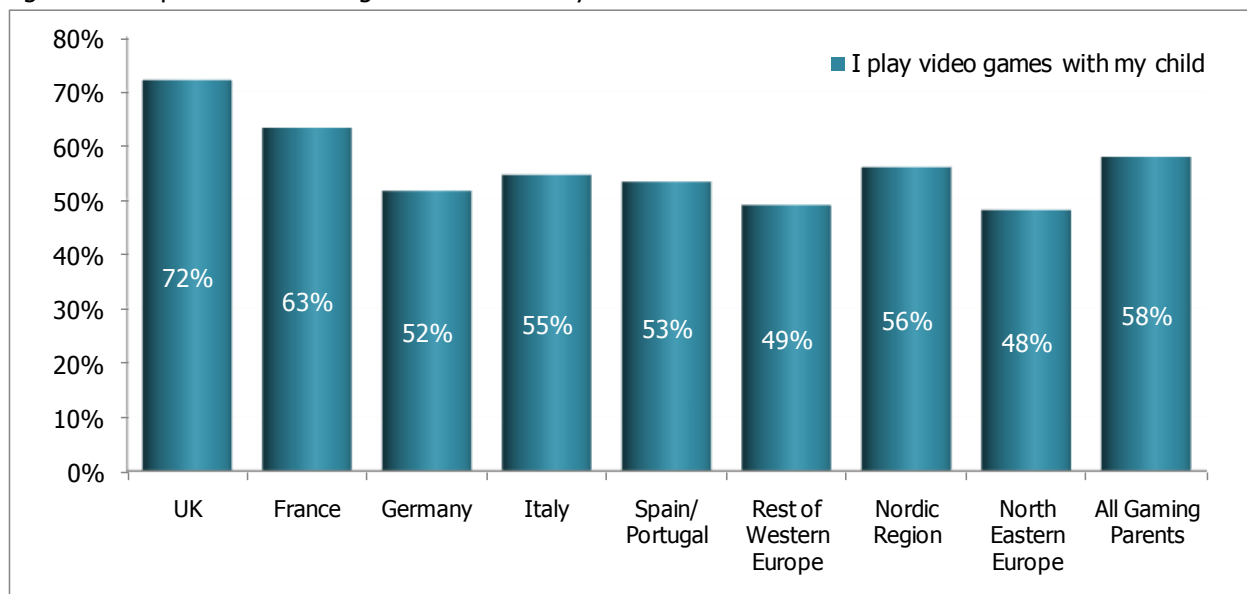
Section 4 Video Games in the Family

Playing with children and Parental Supervision of Gaming

4.1 Video Games as a Family Activity

- In Spring 2010 58% of all Gamers who are parents report playing games with their children
- The UK has the highest figure amongst Europe with 72% of all Gamers who are parents report playing games with their children
- The likelihood is related to how active a gamer the parent is; the more dedicated a gamer the more likely they are to play with their children

Figure 29 Proportion of Gaming Parents Who Play Games With Their Children



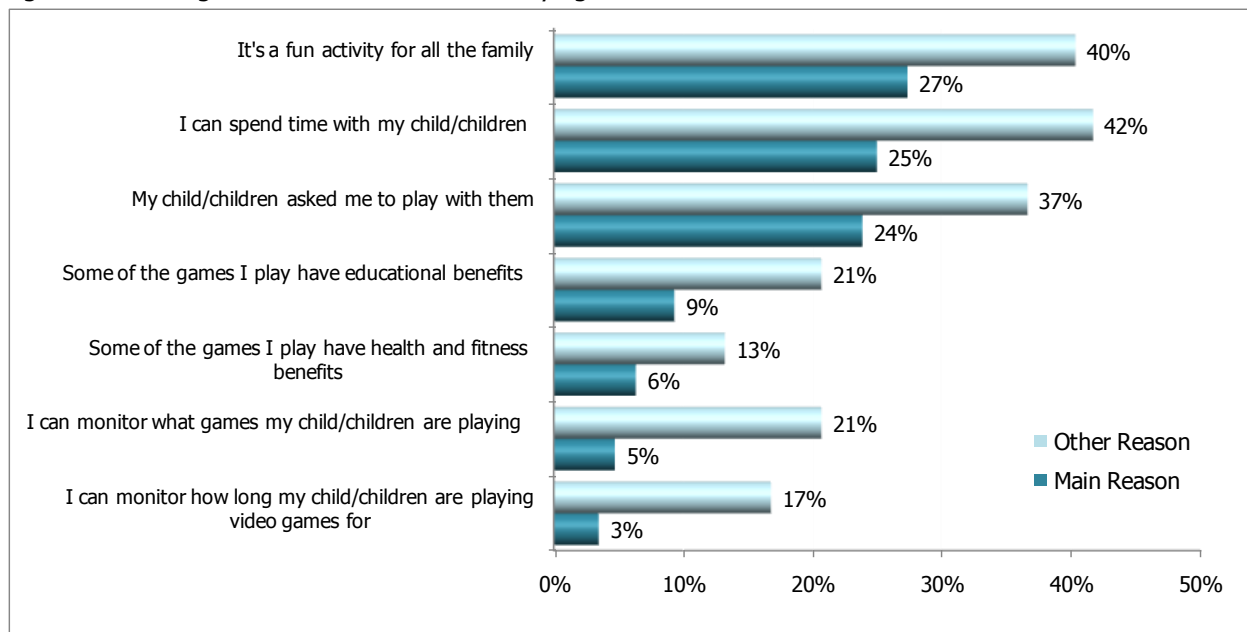
Base: All Gamers who are also Parents, Spring 2010, aged 16-49 (2,253 gamers, weighted by age, sex, hours of play and gaming spend)

Q30 Do you ever play video games with your child/children?

4.2 Motivations to Play with Children

- The three main reasons for Parents playing with their children are:
 - It's fun (27%)
 - It allows them to spend time with their children (25%)
 - They do it because their children have asked them to (24%)

Figure 30 Gaming Parents' Motivations for Playing with their Children



Base: All Gaming Parents who play games with their children, Spring 2010, aged 16-49 (1,507 gamers, weighted by age, sex, hours of play and gaming spend)

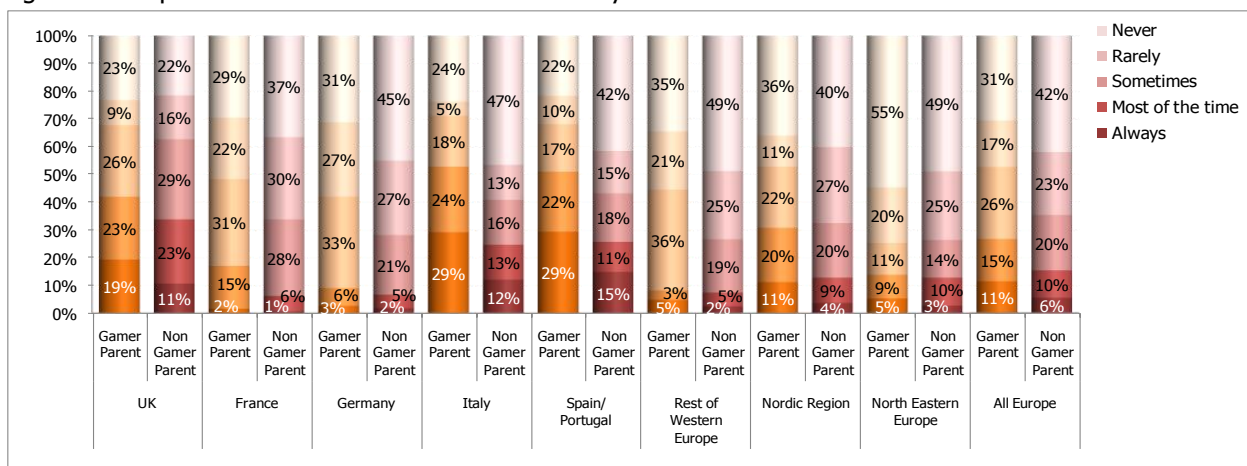
Q31 What is the main reason you play video games with your child/children?

Q32 Why else do you play video games with your child/children?

4.3 Monitoring Children’s Games Purchases and Play

- Many parents are not involved in their children’s purchases
- 31% of Gaming Parents and 42% of Non Gaming Parents never buy games for their children
- 14% of Gaming Parents and 17% of Non Gaming Parents never monitor the games that their children are playing
- Across almost all regions the consistent pattern is for Gaming Parents to be more involved in their children’s games purchases than Non Gaming Parents, only North Eastern Europe reverses this pattern
- North Eastern European Parents are the least likely to be ever involved in buying their children’s games
- UK Parents are the least likely to allow their children to buy their games unsupervised

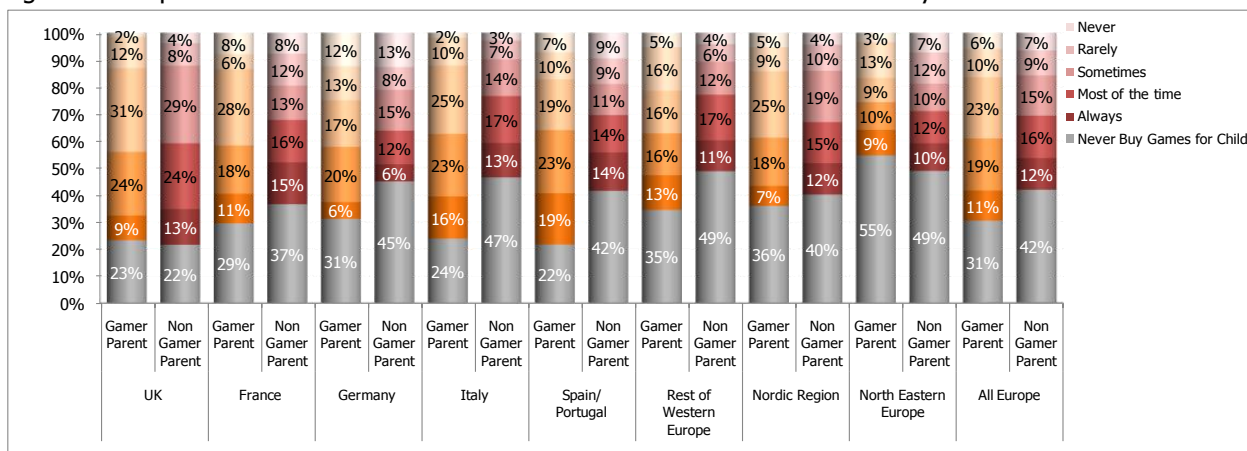
Figure 31 Proportion of Occasions When Parents Buy their Children’s Games



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
 Q33 Thinking about your youngest child, do you buy this child's games?

- There is less difference between the two groups of parents over whether children are present when games are bought
- Only 16% of parents buy their children’s games, either without their children or rarely with their children present
- German parents are most likely to be buying their children’s games without their children present

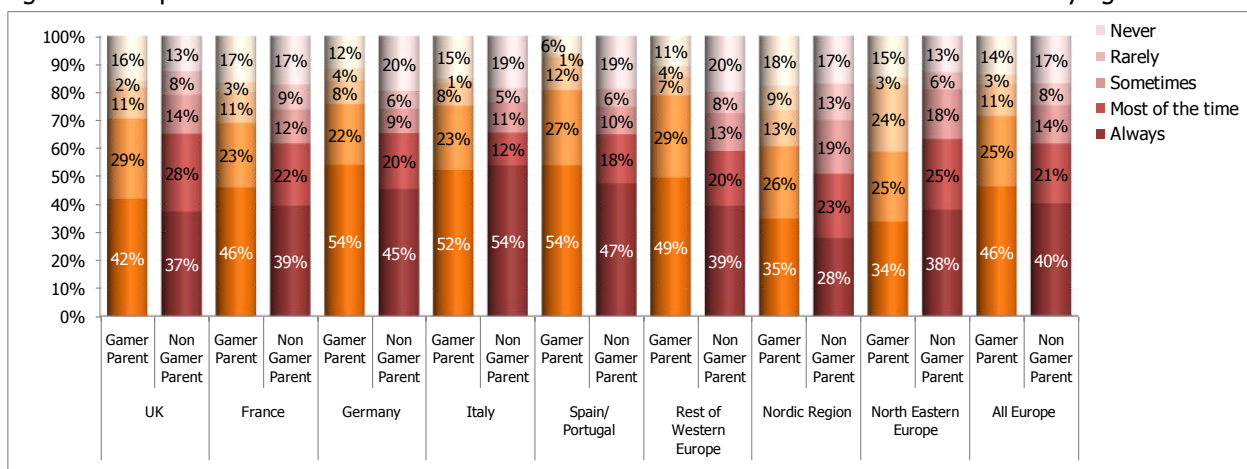
Figure 32 Proportion of Occasions Children are Present When their Parents Buy their Children’s Games



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
 Q34 When you buy games for your child is your child present?

- Gaming Parents are marginally more likely than Non Gaming Parents to monitor the games their children are playing
- Nordic parents are the least concerned about what their children are playing

Figure 33 Proportion of Occasions When Parents Monitor the Games Their Children are Playing



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2931 unweighted as no information exists on the age and sex profile of this group by region)
Q35 Do you monitor what video games your children are playing?



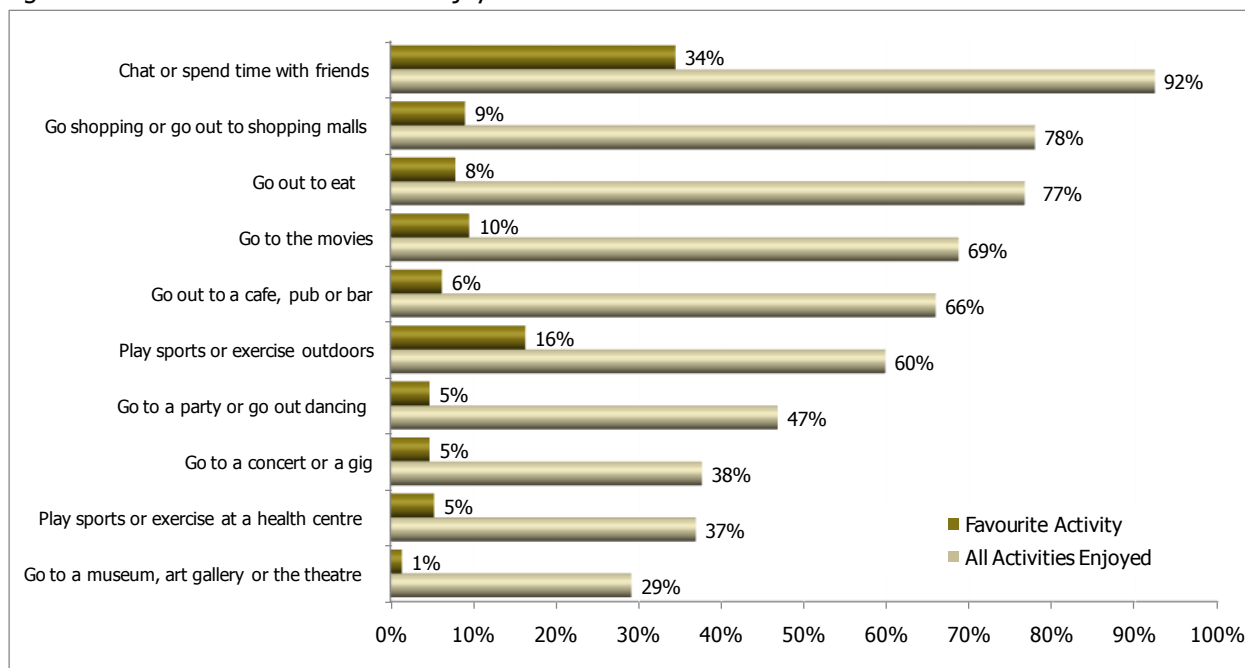
Section 5 Video Gamers Broader Activities and Interests

5.1 Gamers Other Leisure Interests

In this section some charts show 'new console users'. This is defined as a user of at least one of the following consoles: Sony PlayStation 3, Microsoft Xbox 360, Nintendo Wii.

- In 2010 simple social activities, like chatting with friends are a universally popular pastime (92%)
- Shopping (78%) and eating out (77%) are also enormously popular
- The data is a measure of the things Gamers like to do when they can, not monthly activity rates for each pastime
- Exercising outdoors has the highest proportion of people who claim this is their favourite activity both in absolute terms and in relation to the overall popularity of the activity

Figure 34 Leisure Activities Gamers Enjoy Most

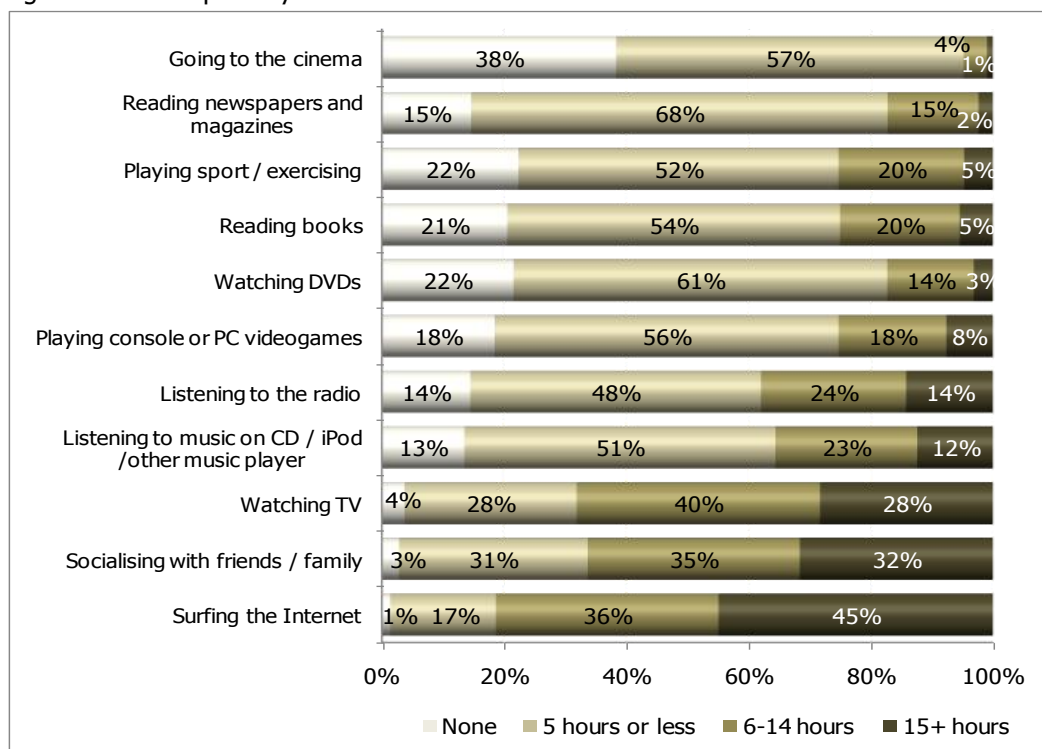


Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q36 If you had a few hours of spare time, what sort of leisure or entertainment-related activities do you usually do at least once a month, place each activity according to your preferences – Things I do/ Things I don't do?
 Q36a Please rank in order of preference, your three favourite activities.

5.2 Time spent by Gamers on Leisure and Entertainment

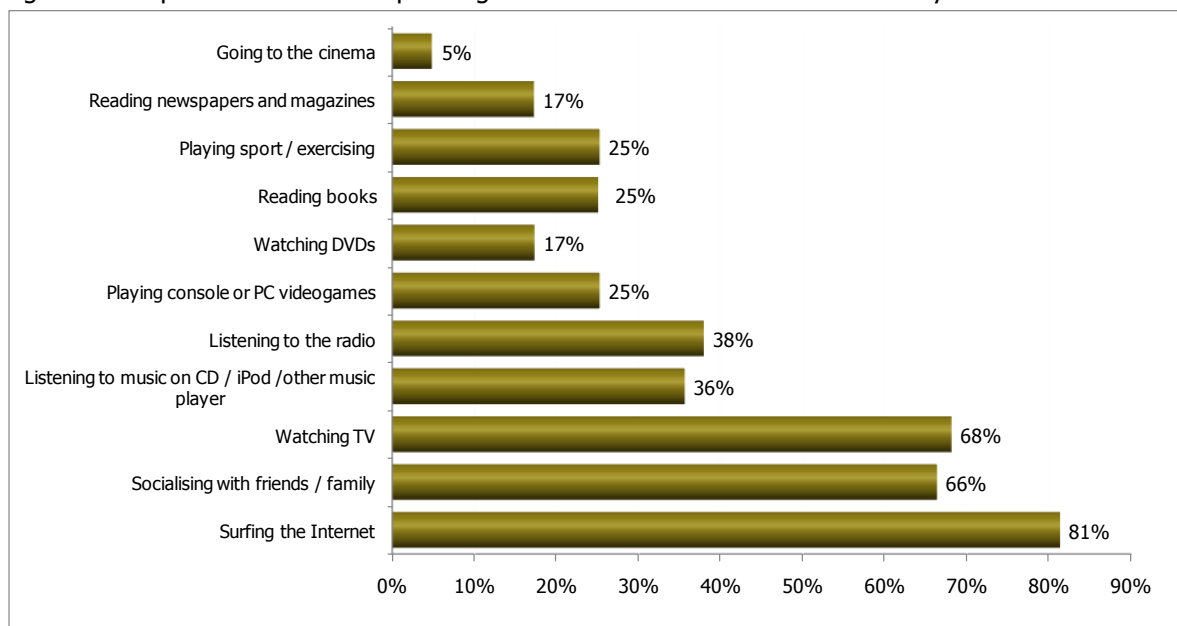
- Gamers are now a group who have many diverse interests; they are as likely to play sport or read books as game, this is true both of all Gamers and of those using the New Consoles.
- The dominant pastimes remain watching TV, socialising and spending time on the internet
- 45% of gamers' spend 15 or more hours a week surfing the internet
- There are broad similarities in the pattern of time spent on the reported activities across the regions, however each region has its own emphasis; for example the Germans are much more likely to socialise than the British and the French watch more TV than the Italians

Figure 35 Time Spent By Gamers on Selected Leisure Activities



Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q37 In an average week how much time would you say you spend on?

Figure 36 Proportion of Gamers Spending More than 6 Hours a Week on Activity



Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend), 2008 sample as reported in 2008

Q37 In an average week how much time would you say you spend on?

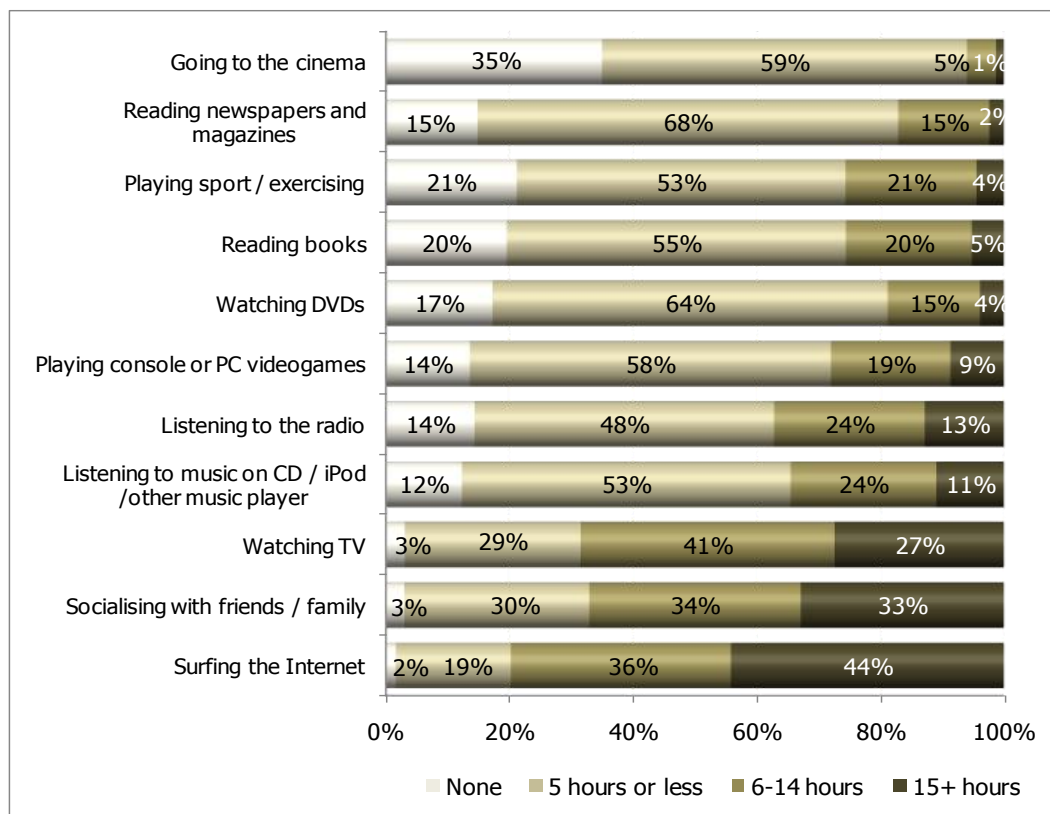
Table 2 Proportions of Gamers by Country Spending More than 6 Hours per Week on an Activity

	UK	France	Germany	Italy	Spain/ Portugal	Rest of Western Europe	Nordic Region	North Eastern Europe	All Gamers
Playing console or PC videogames	24%	23%	32%	30%	24%	20%	17%	31%	25%
Surfing the Internet	83%	84%	82%	84%	77%	78%	78%	82%	81%
Socialising with friends / family	54%	62%	74%	63%	73%	70%	70%	75%	66%
Watching TV	71%	78%	73%	57%	60%	69%	71%	54%	68%
Listening to music on CD / iPod / other music player	38%	30%	34%	35%	32%	37%	36%	49%	36%
Listening to the radio	34%	38%	39%	35%	35%	42%	36%	48%	38%
Watching DVDs	24%	16%	15%	17%	15%	15%	17%	20%	17%
Reading books	28%	20%	29%	28%	23%	27%	24%	23%	25%
Playing sport / exercising	22%	23%	25%	27%	22%	24%	31%	34%	25%
Reading newspapers and magazines	11%	15%	18%	21%	20%	22%	17%	18%	17%
Going to the cinema	5%	5%	4%	10%	7%	1%	1%	3%	5%

Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)

Q37 In an average week how much time would you say you spend on?

Figure 37 Time Spent By Gamers on Selected Leisure Activities by All New Console Users

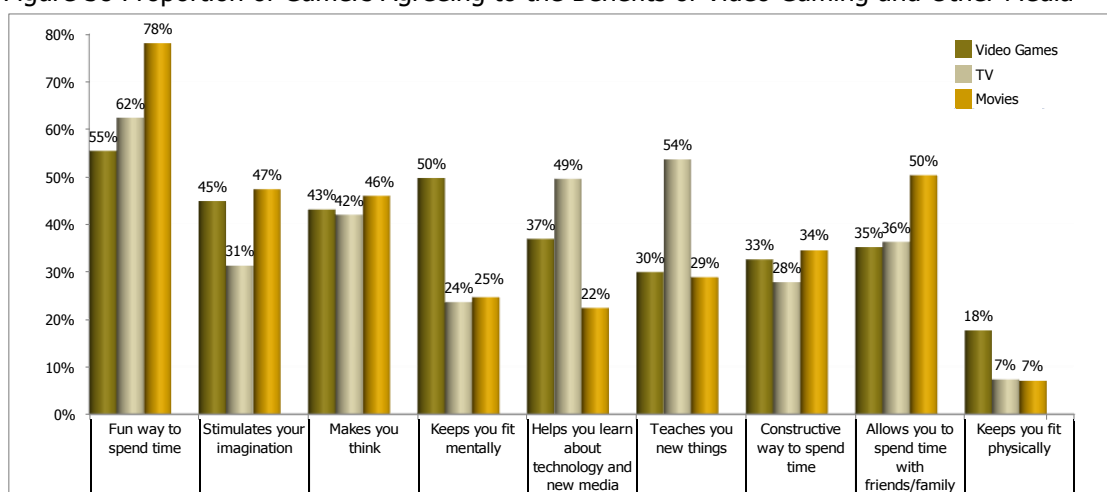


Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q37 In an average week how much time would you say you spend on?

5.3 The Benefits of Video Gaming and Other Media

- In 2010 Gamers believe that games are the best media for keeping you mentally and physically fit
- TV is the best media for:
 - Helping you learn about new technology (49% in 2010 – 12% higher than all other forms of media)
 - Teaching you new things (54% - 24%)
- Movies are the best media for:
 - Being a fun way to spend time (78% - 16%)
 - Stimulating your imagination (47% - 2%)
 - Making you think (46% - 3%)
 - Constructive way to spend time (34% - 1%)
 - Allowing you to spend time with the family (50% - 14%)
- Games are the best media for:
 - Keeping you mentally fit (50% - 25%)
 - Keeping you physically fit (18% - 11%)

Figure 38 Proportion of Gamers Agreeing to the Benefits of Video Gaming and Other Media



Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) (Agree = a score of 4 or 5)

Q13 Please indicate whether you agree with each statement using a 1-5 rating scale, where a 5 stands for agree strongly and a 1 stands for disagree strongly.

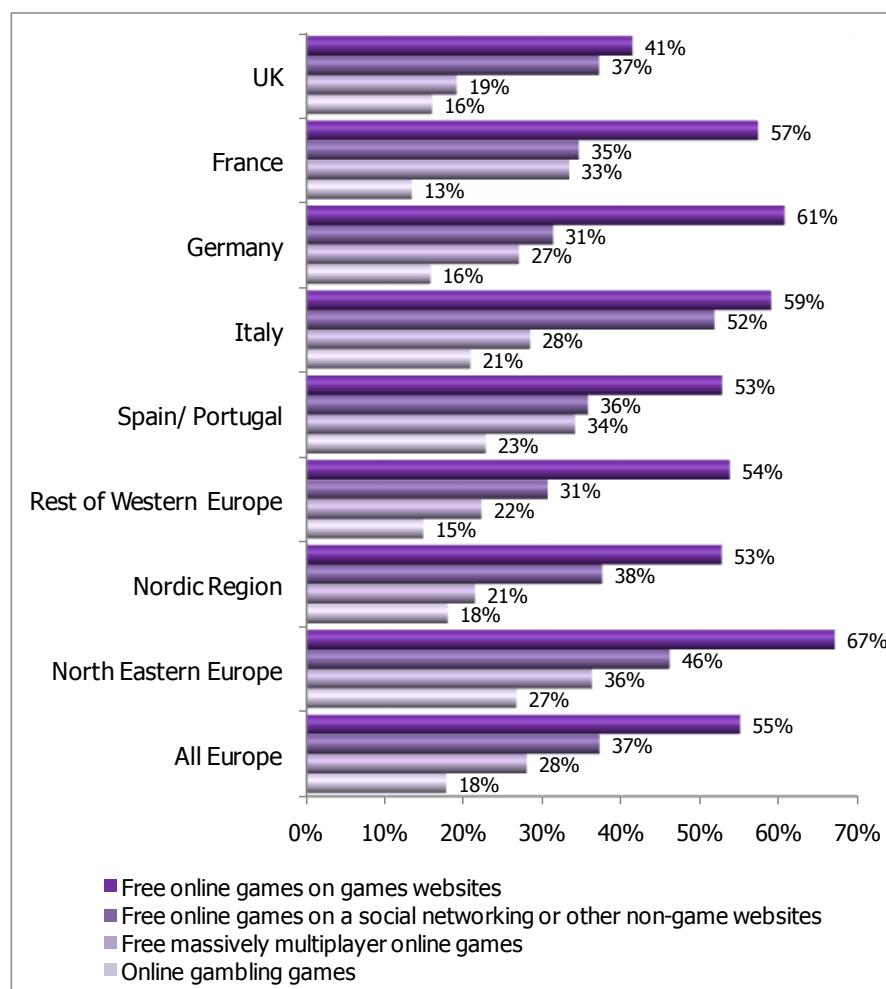


Section 6 Online Gaming and Multimedia

6.1 Prevalence of Online Gaming

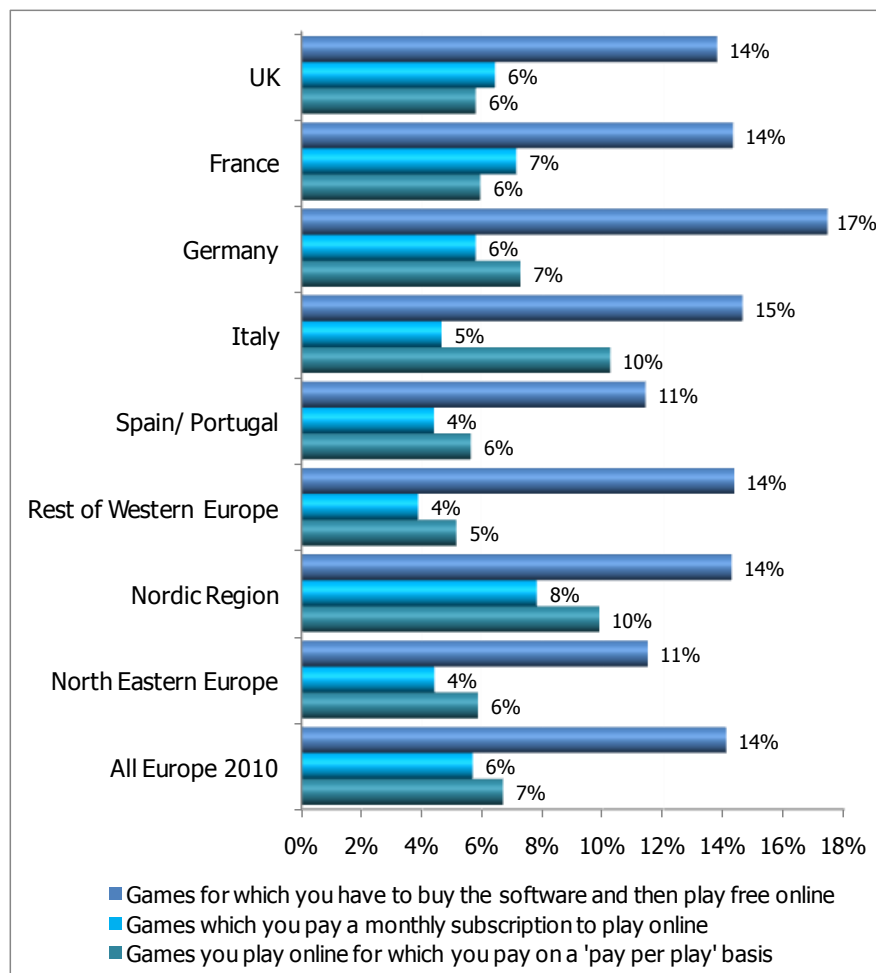
- 71% of Gamers played some form of Online game in the past 3 months
- Comparing the profile of free online gaming against paid for, free online games make up a large volume of online games played
- 19% of Gamers are playing paid for Online games (e.g. Subscription titles such as World of Warcraft; or pay to play online games) and 68% of Gamers are playing free Online games
- Free Games on Games Websites (55%) and Games of Social Network Sites (37%) are the most popular kinds of free games. Games you buy and then play free online is the most popular kind of paid for online gaming
- Free online gaming activity is strongest in North Eastern Europe, however it has the lowest level of activity for paid for online gaming
- The Nordic Region and Germany show the highest level of activity for paid for online gaming
- Playing Free online Gambling games is most common in Spain/Portugal
- More than half of all Italian Gamers (52%) play free online games on Social networking sites/non gaming websites
- Games which you have to buy the software and then play online is the most prevalent form of paid for online gaming; the highest level of activity is seen in Germany (17%)
- 8% of Nordic Gamers are playing online games for which you have to pay a monthly subscription, the highest in Europe
- Italy and the Nordic Region (10%) show the highest proportion for playing games on a “pay to play” basis

Figure 39 Free Online Gaming Activity by Region



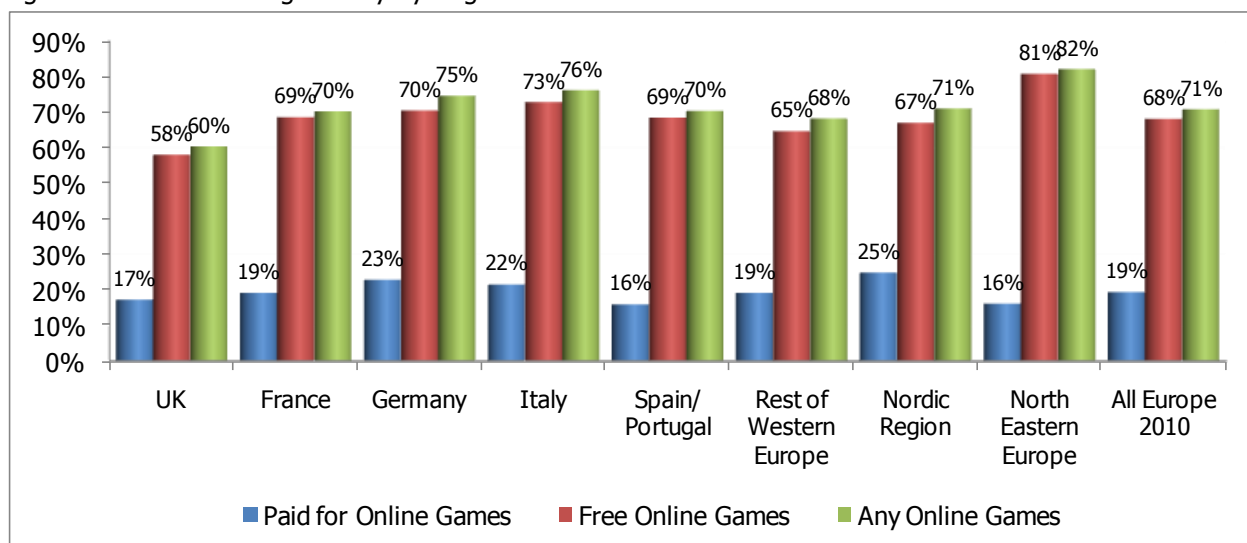
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q14 What kind of online or WiFi games have you played in the last 3 months (if any)?

Figure 40 Paid For Online Gaming Activity by Region



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q14 What kind of online or WiFi games have you played in the last 3 months (if any)?

Figure 41 Online Gaming Activity by Region

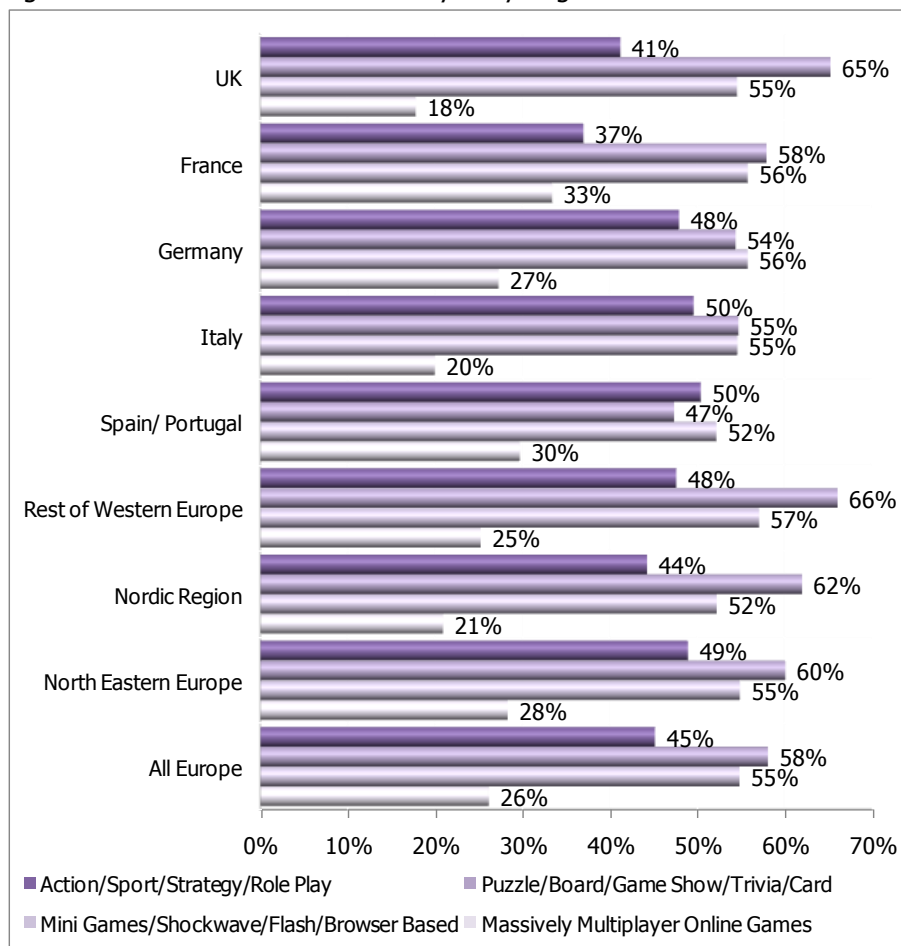


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q14 What kind of online or WiFi games have you played in the last 3 months (if any)?

6.2 Genre of Online Games Played

- Puzzle/Board/Game Show/Trivia/Card games are the most played Online Games
- 58% of Gamers are playing Puzzle/Board/Game Show/Trivia/Card games online; the Rest of Western Europe is the most active Region with two thirds of Gamers in the region playing
- 26% of Gamers are playing MMO games; they are most popular in France where a third of French Gamers play MMO games

Figure 42 Genre of Online Games Played by Region



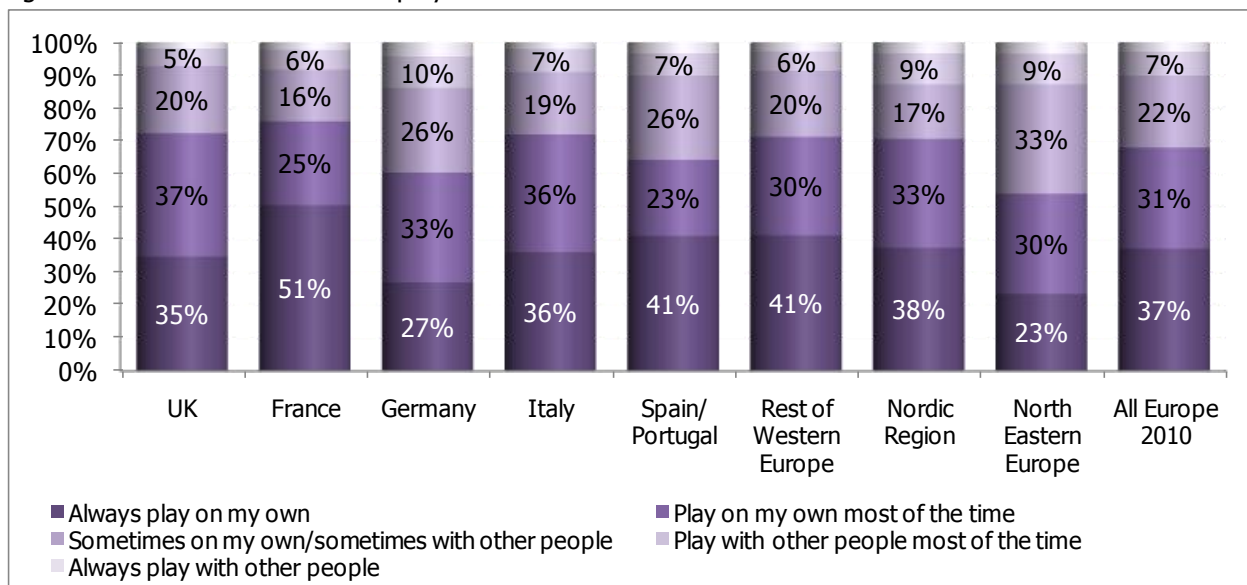
Base: All Video Gamers who play online Spring 2010 aged 16-49 (4,748 video gamers weighted by age, sex, hours of play and gaming spend)

Q15 What kind of games do you play online?

6.3 Who Online Games are Played With

- Playing online is a largely solitary activity; 68% play all/most of the time online alone
- Over half of French Gamers play online on their own
- Among Gamers who do play with others,
 - 20% of Online Gamers play against people in the same room
- UK Gamers are most likely to play online games with other gamers physically present in the same room (27%), this figure is only 9% in the 'Rest of Western Europe'

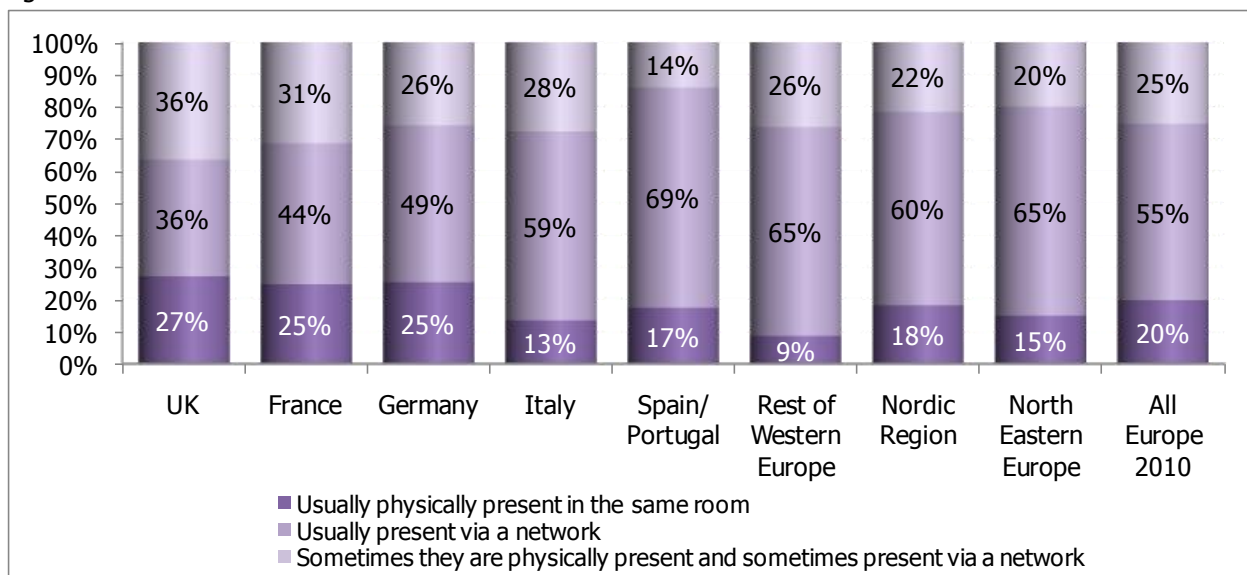
Figure 43 How Much Social Gameplay is there Online



Base: All Video Gamers who play online Spring 2010 aged 16-49 (4,748 video gamers weighted by age, sex, hours of play and gaming spend)

Q16 Do you generally play games online by yourself or with/against other people?

Figure 44 Where Your Friends are Online



Base: All Video Gamers who play online against other gamers Spring 2010 aged 16-49 (481 video gamers weighted by age, sex, hours of play and gaming spend)

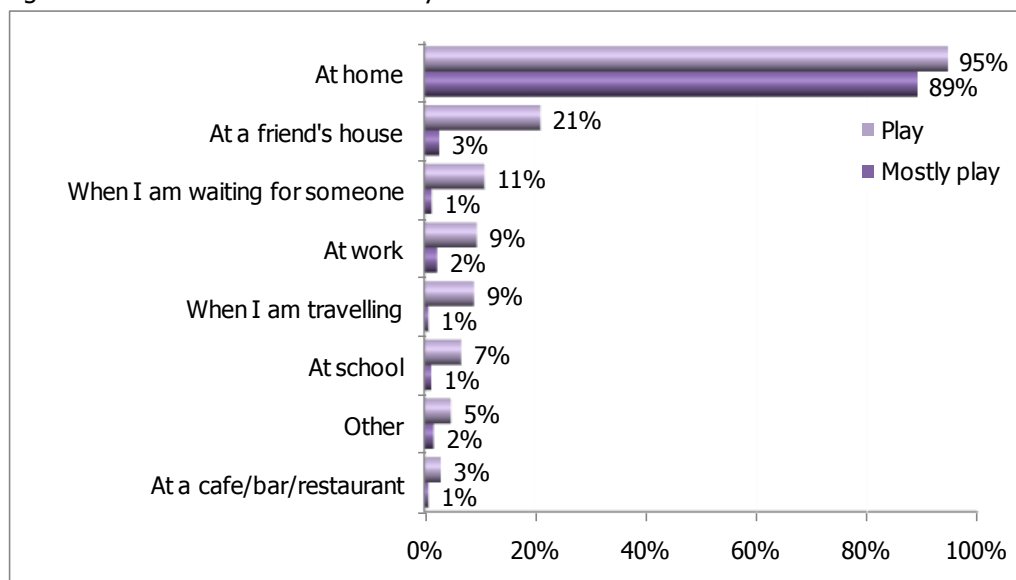
Q16 Do you generally play games online by yourself or with/against other people?

Q17 When you play games online against other people are they usually physically present in the same room or present via a network?

6.4 Where Gamers Play Online

- 95% of Online Gamers play games online at home
- 21% play games online at friends houses
- 9% of Gamers who play online do so whilst travelling; this has only become possible via WiFi and the online capabilities of the new handhelds

Figure 45 Where Online Gamers Play Online



Base: All Video Gamers who play online Spring 2010 aged 16-49 (4,748 video gamers weighted by age, sex, hours of play and gaming spend)

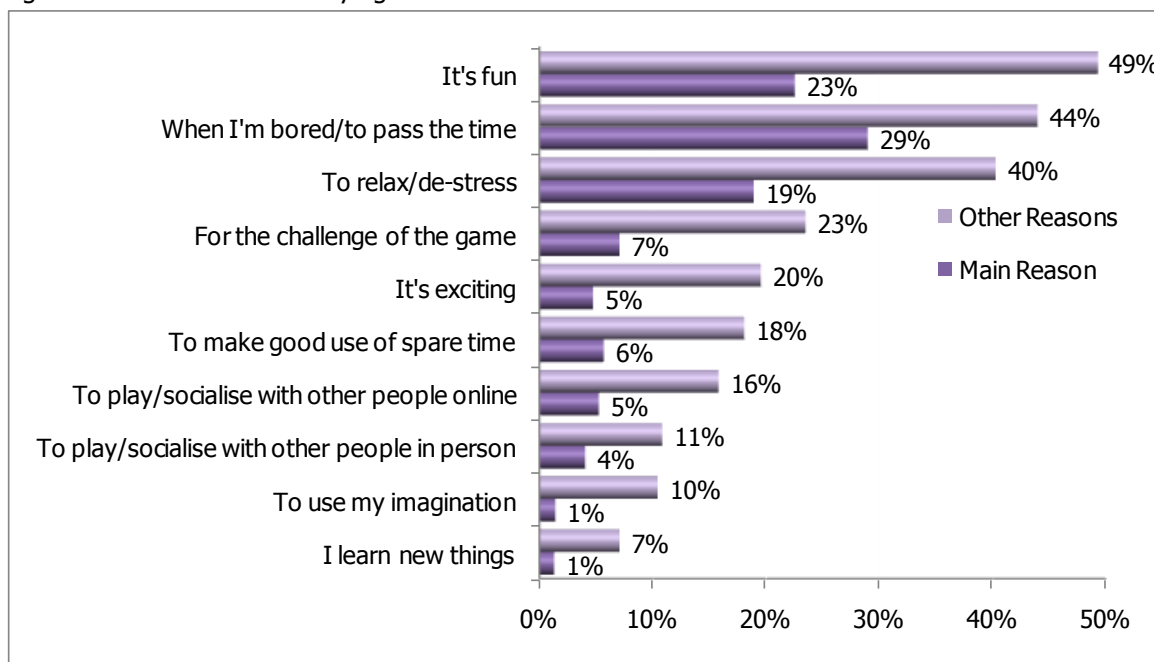
Q18 Where do you mostly play video games online?

Q19 Where else do you play video games online?

6.5 Why Gamers Play Online

- 'It's fun' is the most quoted reason for playing gamers online (49%), but 'to pass the time' is the main reason most often given by Gamers (29%)
- Other important reasons include:
 - To relax/de-stress (40% - 19% as a main reason)
 - The challenge of the game (23% - 7%)

Figure 46 Motivations for Playing Online Games



Base: All Video Gamers who play online Spring 2010 aged 16-49 (4,748 video gamers weighted by age, sex, hours of play and gaming spend)

Q20 What is your main reason for playing video games online?

Q21 What other reason do you have for playing online video games?



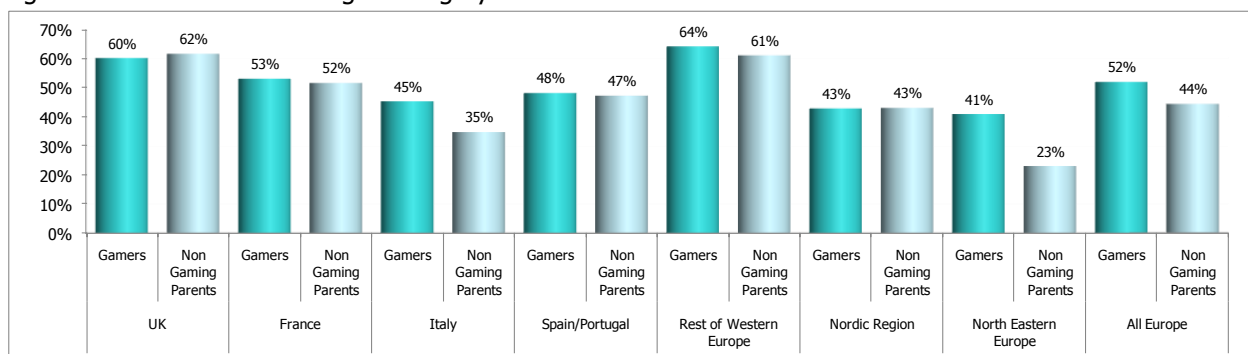
Section 7 Awareness and Perceptions of PEGI

7.1 Awareness of Age Rating Systems

In this section some charts show 'new console users'. This is defined as a user of at least one of the following consoles: Sony PlayStation 3, Microsoft Xbox 360, Nintendo Wii.

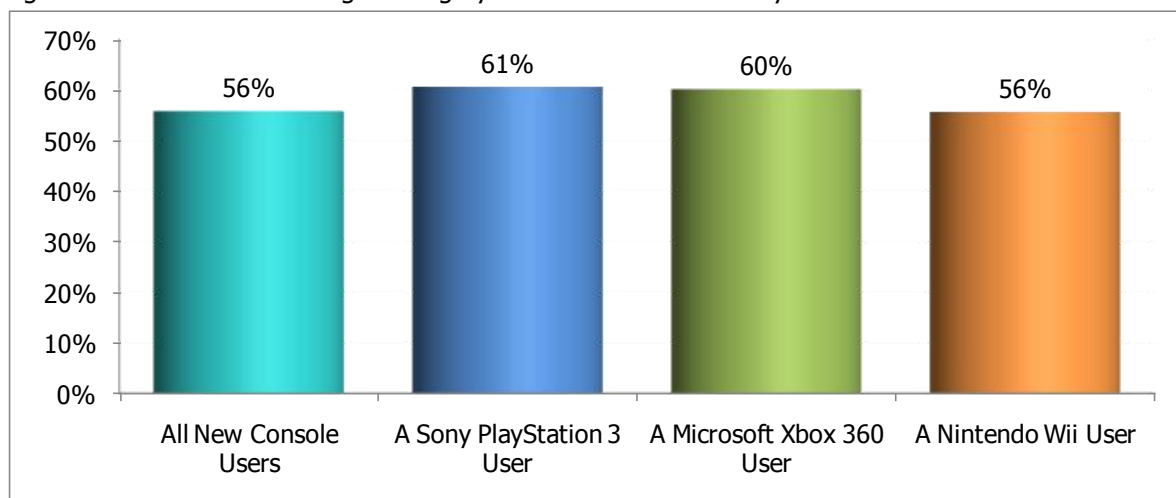
- Across Europe awareness is remarkably consistent among Gamers and Non Gaming Parents within each country
- Only in Italy and North Eastern Europe are Non Gaming Parents less aware
- Awareness is strongest in UK and the 'Rest of Western Europe' (NL, B, CH, AUT)
- There is little differentiation by console, awareness is highest amongst PS3 users at 61%

Figure 47 Awareness of an Age Rating System for Video Games ⁵



Base: All Video Gamers Spring 2010 aged 16-49 (5,685 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
Q38/NG8 As I am sure you know, DVDs and videos have age ratings applied to them. Are you aware of or have you heard of a European age ratings system for video games?

Figure 48 Awareness of an Age Rating System for Video Games by New Console Users ⁶



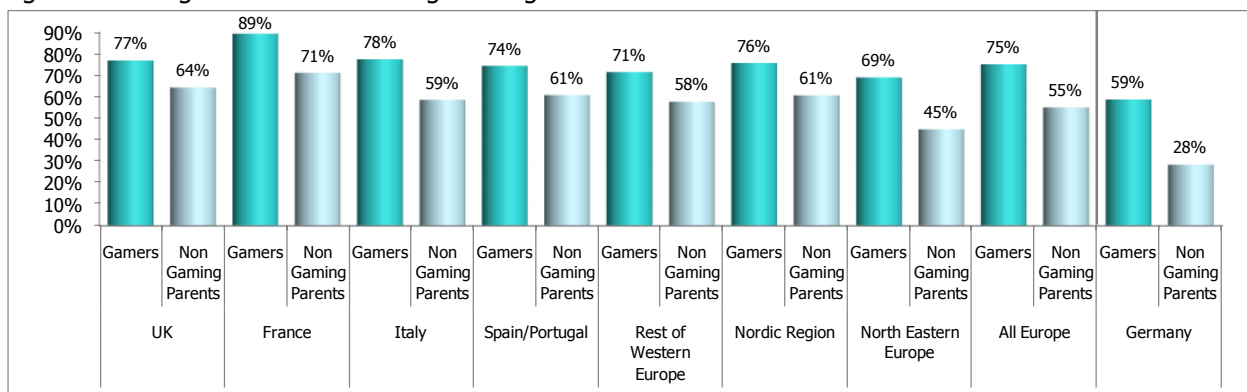
Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
Q38 As I am sure you know, DVDs and videos have age ratings applied to them. Are you aware of or have you heard of a European age ratings system for video games?

⁵ Germany is not included in this figure as it has its own national and well established age classification system for video games, and therefore does not contribute to the total figures for all Europe.

⁶ Germany is not included in this figure as it has its own national and well established age classification system for video games.

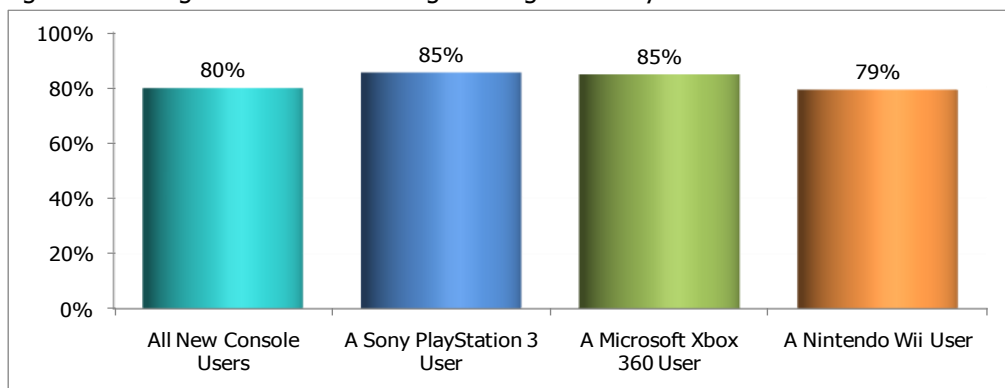
- While there is less awareness of the age rating scheme and of PEGI there is much higher recognition of the PEGI age rating labels, presumably helped by their consistency with other rating systems for films etc. Therefore there is a practical understanding of the system of rating even if there is less awareness of the details or management of the system
- Awareness is in most regions 15-20 percentage points lower among Non Gaming Parents than Gamers; the largest gaps are in Germany (31%) and North Eastern Europe (24%)
- Fewer Germans recognise the labels than people in any other region; this is because they are more likely to see their own national system
- New console users are more likely to be aware of the PEGI age ratings than other Gamers, 85% of PS3 and Xbox 360 users are aware of the PEGI age rating labels

Figure 49 Recognition of the PEGI Age Rating Labels ⁷



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
Q40 Are you aware or have you ever seen the following symbols on games or games boxes?

Figure 50 Recognition of the PEGI Age Rating Labels by New Console Users



Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
Q40 Are you aware or have you ever seen the following symbols on games or games boxes?

Figure 51 PEGI Age Labels Presented in the Research



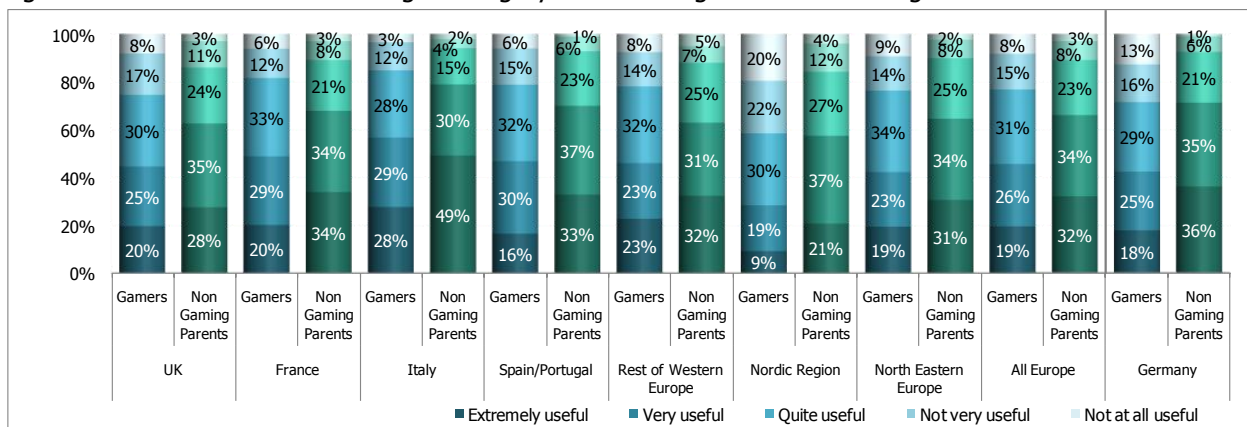
NB. Portugal uses different age classifications and Portuguese respondents saw an adapted set of symbols

⁷ Although PEGI is not used in Germany, it still may appear on some of the packaging and is therefore included in this figure.

7.2 Value of the PEGI System

- 76% of Gamers and 89% of Non Gaming Parents who are aware of the system find the PEGI age rating system quite-extremely useful
- The difference is even more marked among those finding the system very/extremely useful (45%-66%), reflecting the greater assistance it provides to those less familiar with the games
- It is a pattern consistent across every region
- Italians are keenest on the system
- New Console users tend to share the general view, that the PEGI system is useful

Figure 52 The Usefulness of the Age Rating Symbols among those Who Recognise Them ⁸

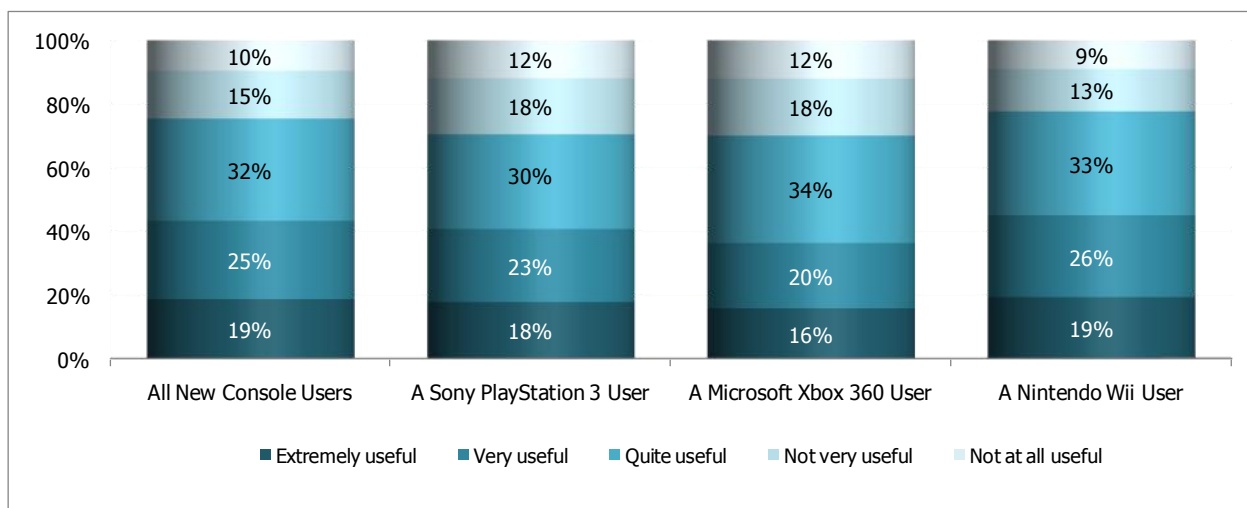


Base: All Video Gamers Spring 2010 aged 16-49 who recognise the PEGI Age symbols (5,429 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ who recognise the PEGI Age 1,612 unweighted as no information exists on the age and sex profile of this group by region)

Q41 To what degree would you say that these symbols are useful in deciding whether to buy a video game?

NG11 - Thinking about your youngest child, to what degree would you say that these symbols are useful in deciding whether to buy a video game for your child?

Figure 53 The Usefulness of the Age Rating Symbols among those Who Recognise Them by New Console Users



Base: All Video Gamers Spring 2010 aged 16-49 who recognise the PEGIA Age symbols (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)

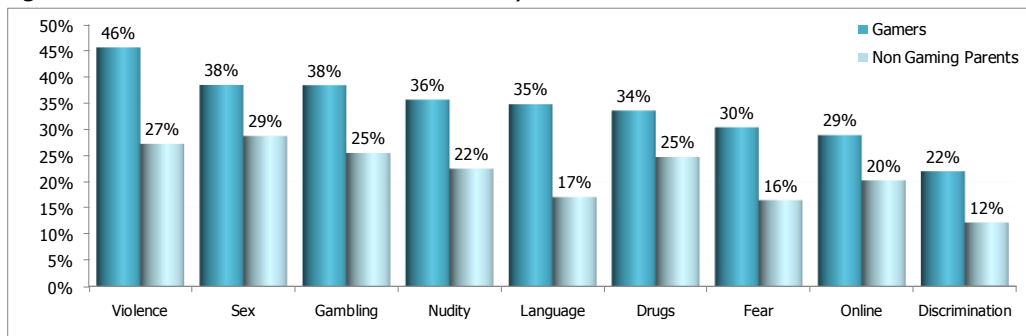
Q41 To what degree would you say that these symbols are useful in deciding whether to buy a video game?

⁸ Although PEGI is not used in Germany, it still may appear on some of the packaging and is therefore included in this figure.

7.3 Awareness and Understanding and Use of the PEGI Content Labels

- Averages awareness across all the labels is 34% for Gamers and 22% for Non Gaming Parents
- Violence (46%-27%), Sex (38%-29%) and Gambling (38%-25%) are the most recognised labels, which may in part reflect the use of the widely used symbols adopted rather than their specific use on games
- UK, Germany and the Nordics had the lowest awareness of the labels; Italy and North Eastern Europe the greatest awareness

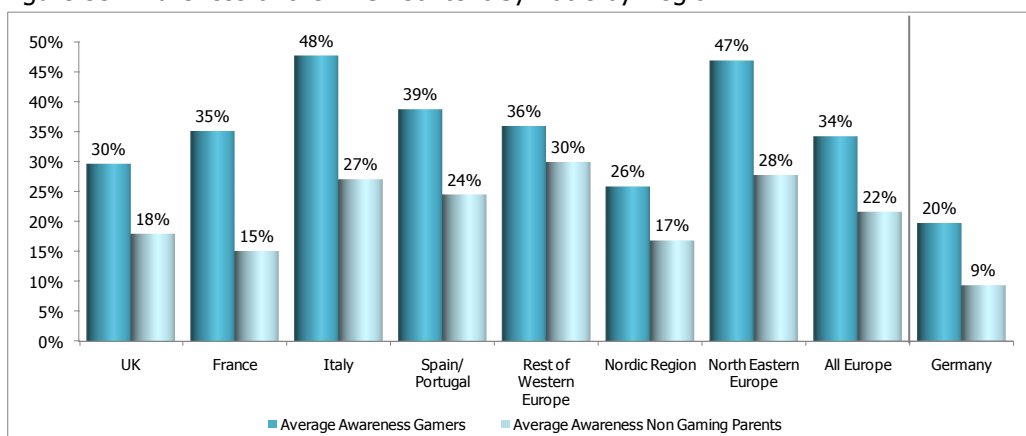
Figure 54 Awareness of the PEGI Content Symbols



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)

Q47/NG14 Are you aware, or have you ever seen the following symbols?

Figure 55 Awareness of the PEGI Content Symbols by Region ⁹



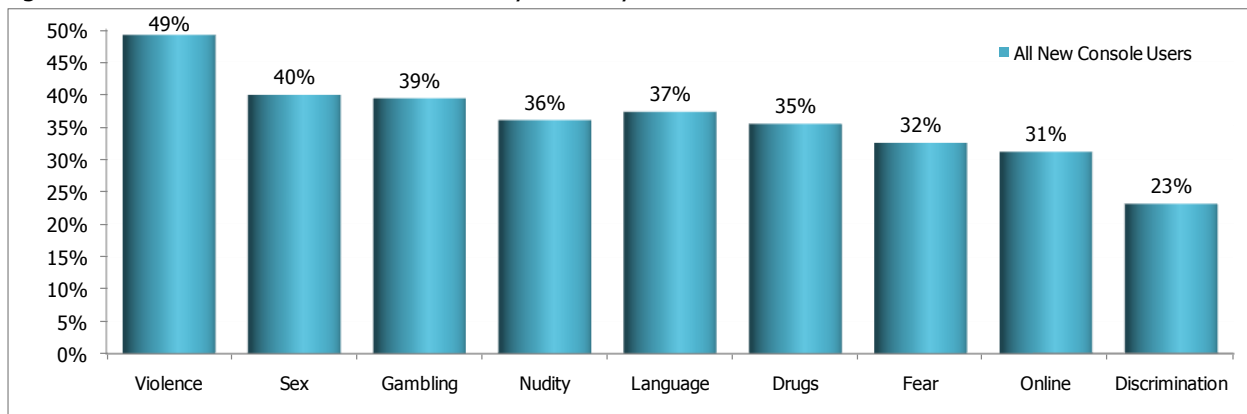
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)

Q47/NG14 Are you aware, or have you ever seen the following symbols?



⁹ Although PEGI is not used in Germany, it still may appear on some of the packaging and is therefore included in this figure.

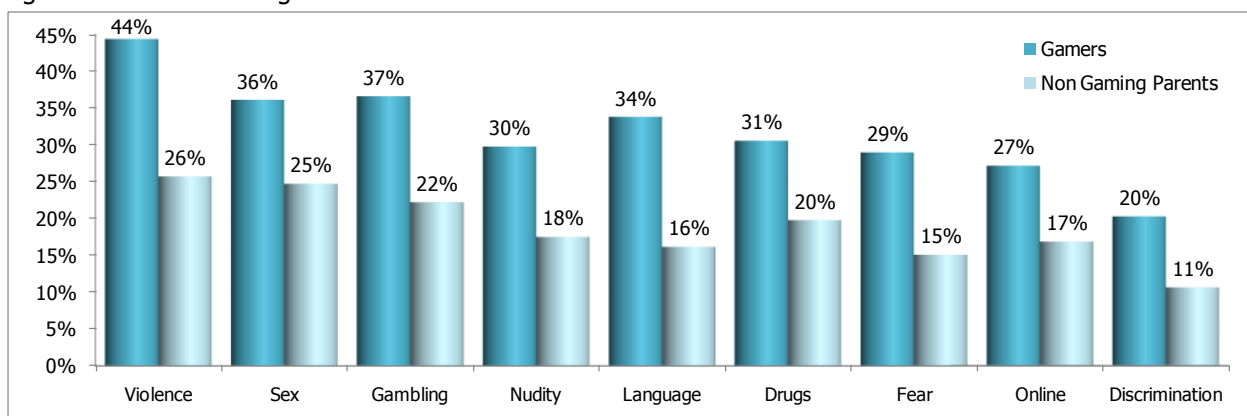
Figure 56 Awareness of the PEGI Content Symbols by All New Console Users



Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q47 Are you aware, or have you ever seen the following symbols?

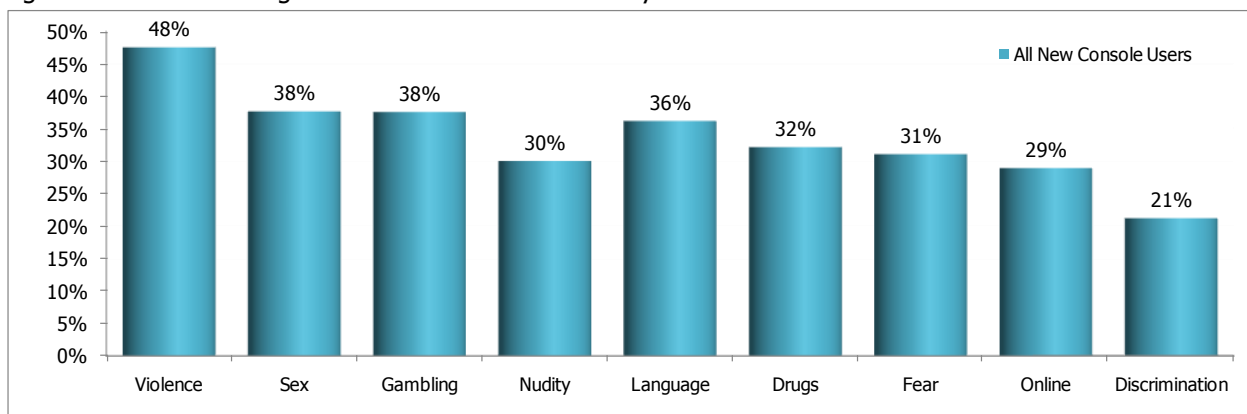
- On average in 93% of cases Gamers aware of a symbol also claim to understand what a game carrying it would contain
- Non Gamers are almost as confident at 87%
- Both groups are least likely to be confident about 'Nudity' (83% and 78%)
- Non Gamers are less confident about 'Drugs' 80% and 'Online' 83%
- Clearly the descriptive word on each label contributes to the understanding of its meaning

Figure 57 Understanding of the PEGI Content Labels



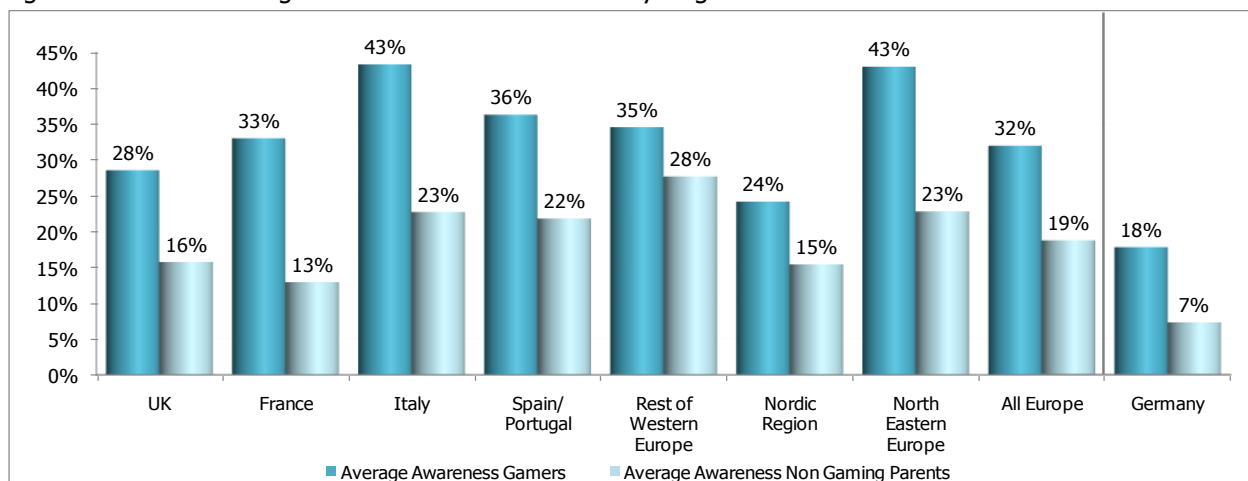
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region) (Data is presented as base of all respondents though only those aware of each symbol were asked about their understanding of it).
 Q48/NG15 Do you understand what a game carrying these symbols would include?

Figure 58 Understanding of the PEGI Content Labels by All New Console Users



Base: All Video Gamers Spring 2010 aged 16-49 (3,814 video gamers who use a PS3, Xbox 360 and Wii as main console)
 Q48 Do you understand what a game carrying these symbols would include?

Figure 59 Understanding of the PEGI Content Labels by Region ¹⁰

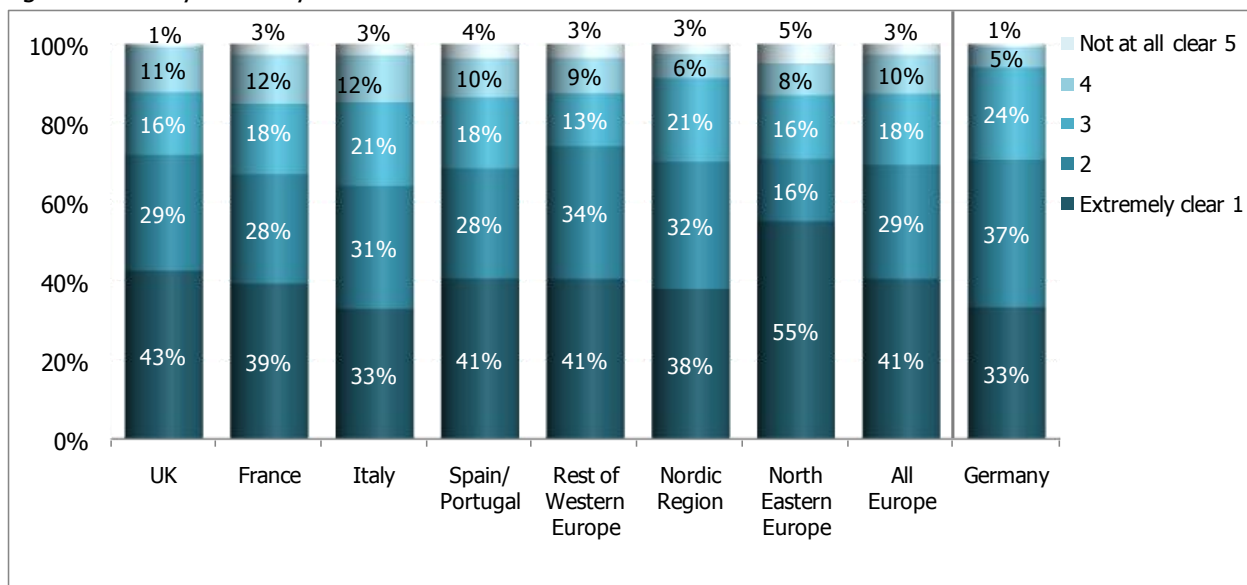


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region) (Data is presented as base of all respondents though only those aware of each symbol were asked about their understanding of it. Q48/NG15 Do you understand what a game carrying these symbols would include?)

¹⁰ Although PEGI is not used in Germany, it still may appear on some of the packaging and is therefore included in this figure.

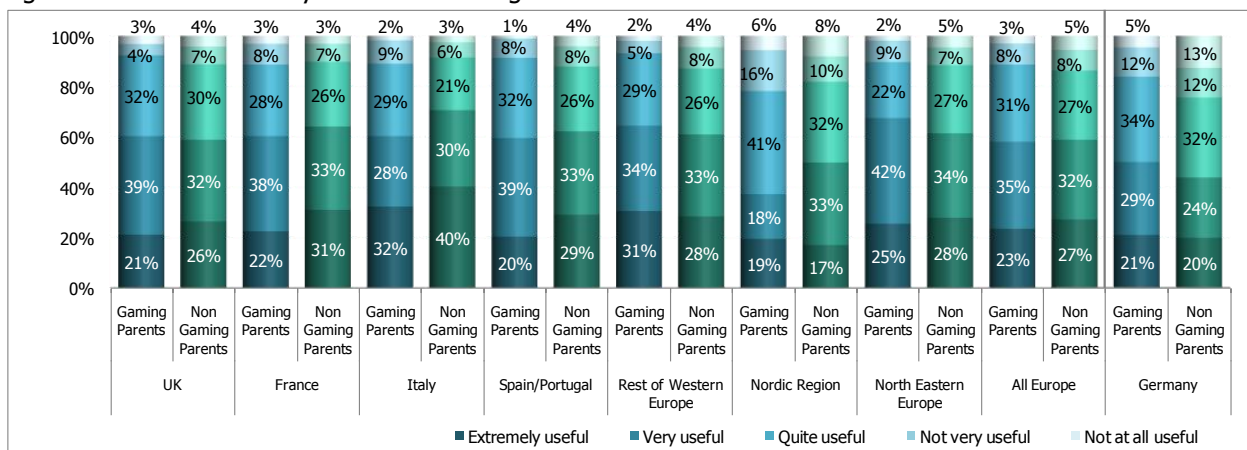
- Although the vast majority of Gamers claimed they understood the symbols only 70% scored them as very or extremely clear
- The symbols perform equally well in all regions
- 58% of Gaming Parents and 59% of non Gaming Parents consider the labels are very/extremely useful in helping them to decide upon a games purchase
- The Nordic Region is least interested in the PEGI content labels (37% - 50%), Italians the most (62% - 71%)

Figure 60 Clarity of the Symbols ¹¹



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q49 Thinking about whether it is clear what these symbols mean, on a scale of 1-5 where 1 is extremely clear and 5 is not clear at all, how clear is the meaning of these symbols?

Figure 61 Usefulness of Symbols in Deciding on a Game Purchase ¹¹



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
 Q50/NG16 To what degree would you say that these symbols are useful in deciding whether to buy a video game for your children?

¹¹ & ¹⁰ Although PEGI is not used in Germany, it still may appear on some of the packaging and is therefore included in this figure.



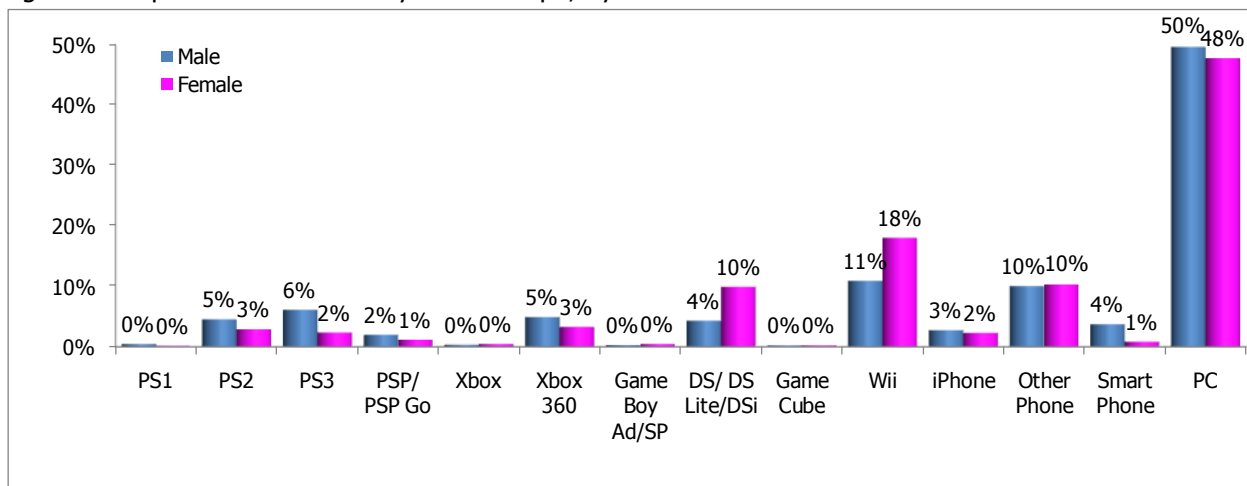
Section 8 The Socio-Demographics of Video Gaming Behaviour

This section incorporates additional insight into Gamer behaviour based on an analysis of age, sex, and system ownership. Only those tables that add additional understanding have been included.

8.1 System Use

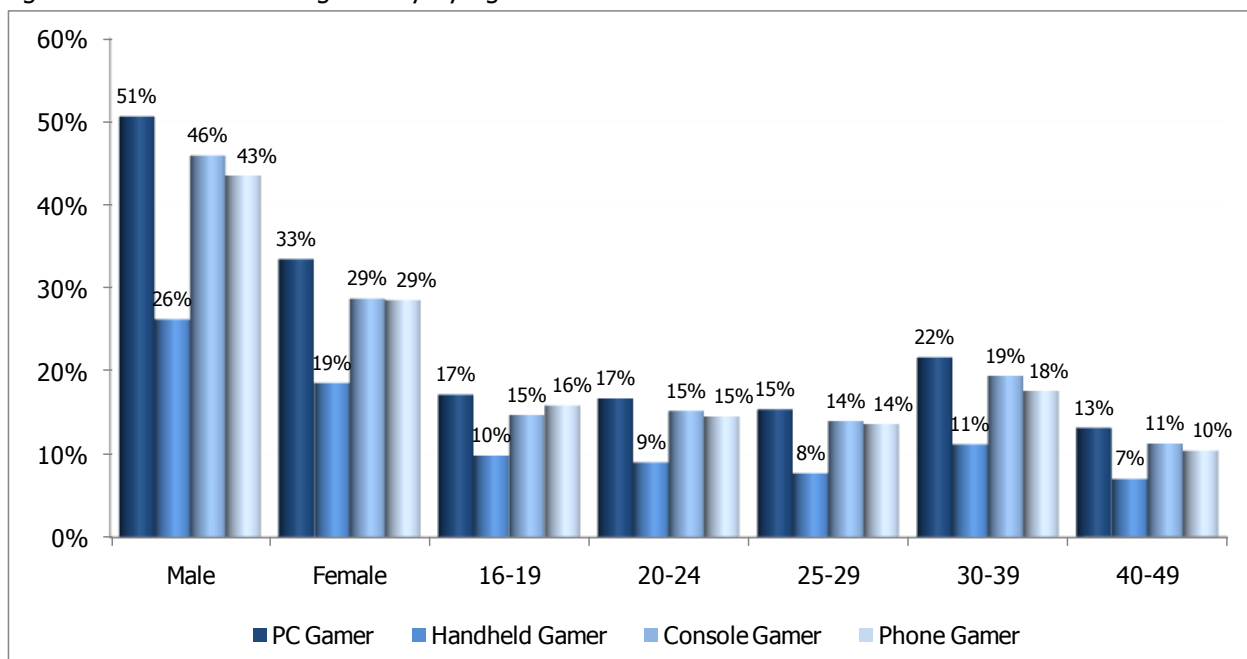
- Females show a higher profile of users on the DS/DS Lite/DSi and the Wii than males
- Female users of the DS is more than double the number of males at a ratio of 5:2
- All of the Sony platforms show a higher profile of Male users than female
- PS3 has a male to female user ratio of 3:1
- Xbox 360 also shows a strongly male profile (5% of males are users and 3% of females)
- Phones and the PC are evenly split by gender

Figure 62 Reported Use of Main System: Europe, By Gender



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q4 Have you played a video or computer game in the last 6 months on any of the following games systems?
 Q5 Which of these game systems do you use most often?

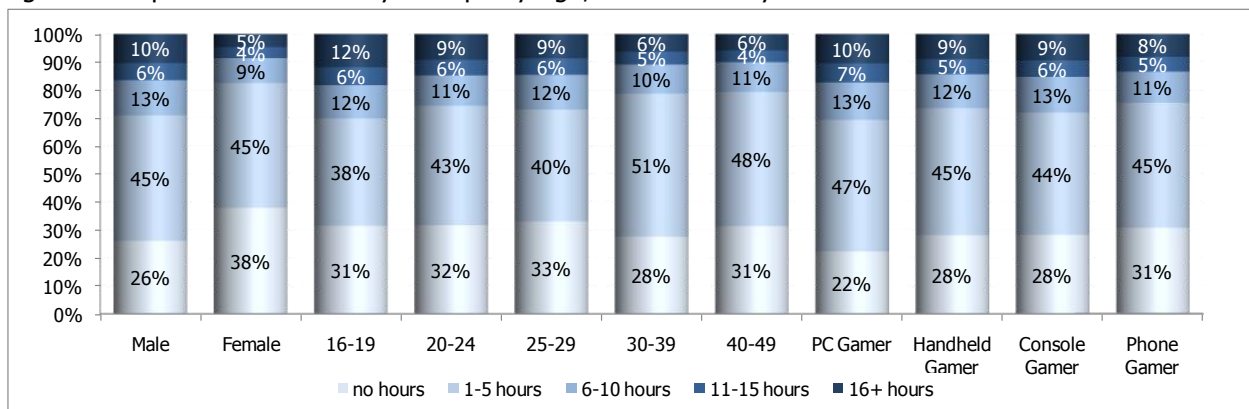
Figure 63 Handheld Gaming Activity By Age and Gender



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q22 Do you play games on a portable device such as a mobile phone, PDA, Nintendo DS or Sony PSP?

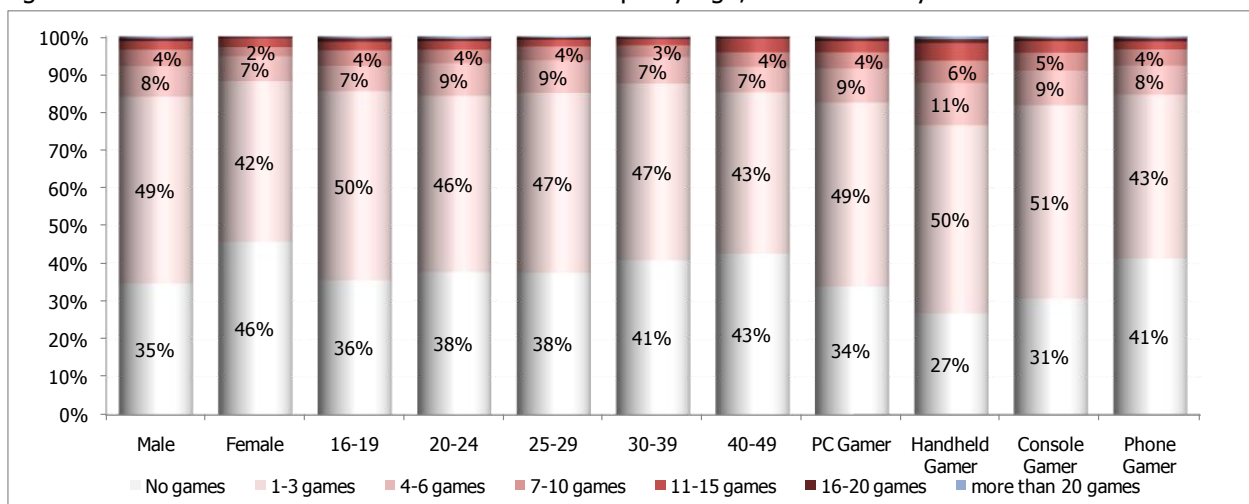
- Males and Younger Gamers are more likely to spend longer gaming and buy more games
- Handheld gamers buy more games, phone gamers the least games
- Female Gamers are much less likely to buy discounted games

Figure 64 Reported Hours of Play: Europe by Age, Gender and System



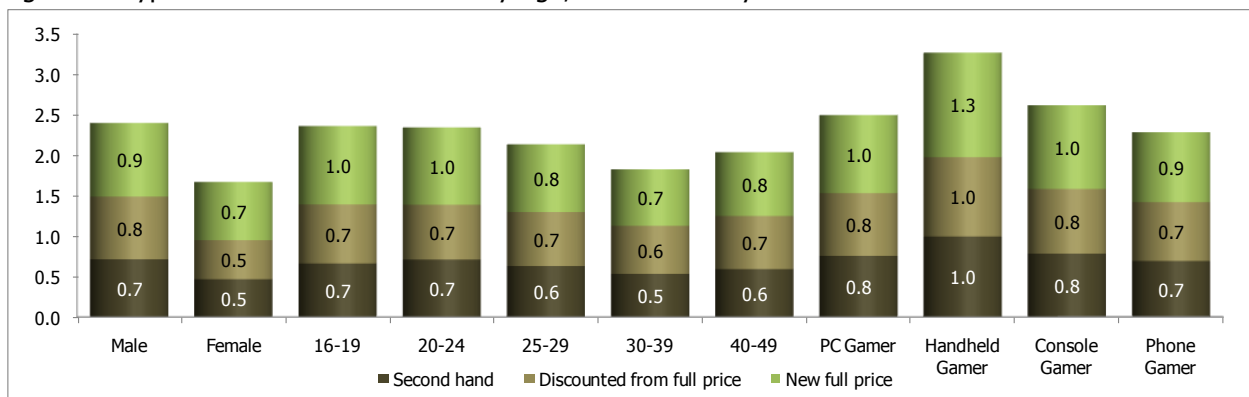
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q6 Thinking now about your use of video games, on average, how many hours per week have you spent playing video games over the last 3 months? (Include both online and off line play.) (Sense checks were included and where gamers found difficulty in answering this question they were asked to estimate play in time bands.)

Figure 65 Numbers of Video Games Purchased: Europe by Age, Gender and System



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q9 How many games have you bought for yourself, or been given in the last 12 months? (Include online games.) (Options: second hand, discounted from full price, new full price.)

Figure 66 Type of Video Game Purchase by Age, Gender and System

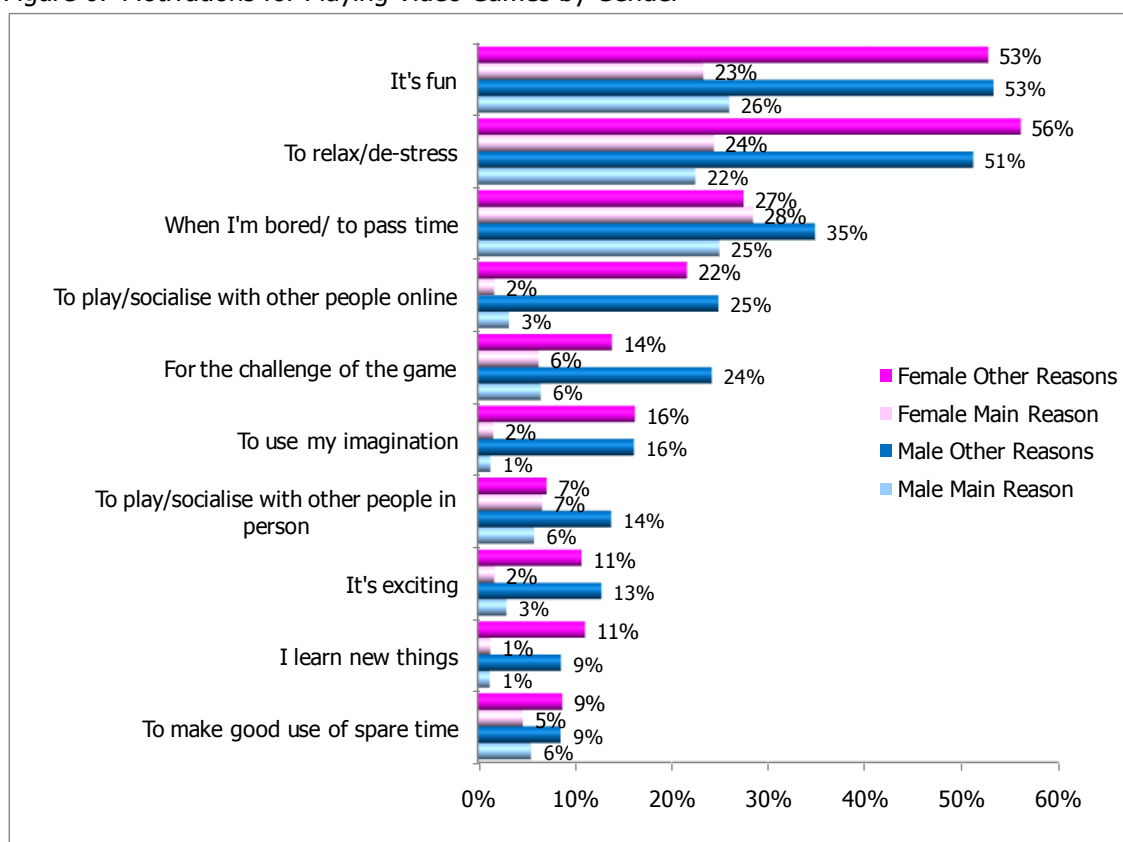


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q9 How many games have you bought for yourself, or been given in the last 12 months? (Include online games.) (Options: second hand, discounted from full price, new full price.)

8.2 Attitudes and Motivations for Video Gaming

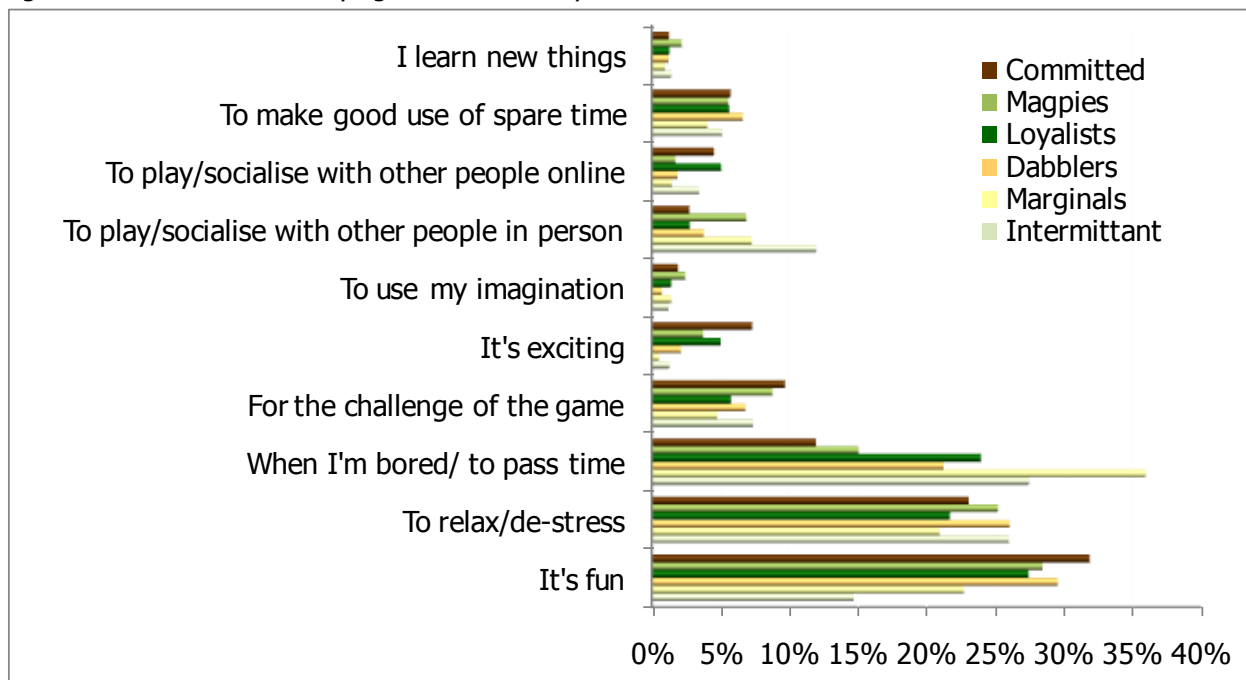
- Similar proportions of both genders emphasise the same main reasons for gaming though there is greater diversity in the secondary reasons for playing.
- Males are more interested in:
 - passing the time (35% main - 27% other)
 - the challenge of the game (24% - 14%)
 - playing with others (14% - 7%)
- Females give fewer secondary reasons but are slightly more likely to emphasise 'relaxation/de-stressing'
- Older gamers are also likely to place more emphasis on de-stressing – whereas younger gamers want to fill the time when they are bored
- More Committed gamers are more likely to emphasise positive game aspects, 'its fun' or 'it's exciting', whereas less committed gamers emphasise non gaming motivations like 'filling time' or 'playing with friends'
- Reasons for not gaming also vary little by gender:
 - Males are more likely to say they 'lack the time to game' (43% main - 39% other)
 - Females that games are too violent (9% - 5%)
- Females give more ideas about what would encourage them to game, but the priorities are similar to Males. Females want games that:
 - 'stimulate their imagination' (36% - 29%)
 - 'play for short periods of time' (30% - 25%)
 - 'look easy or fun' (26% - 19%)
 - 'pick up and play easily' (22% - 16%)

Figure 67 Motivations for Playing Video Games by Gender



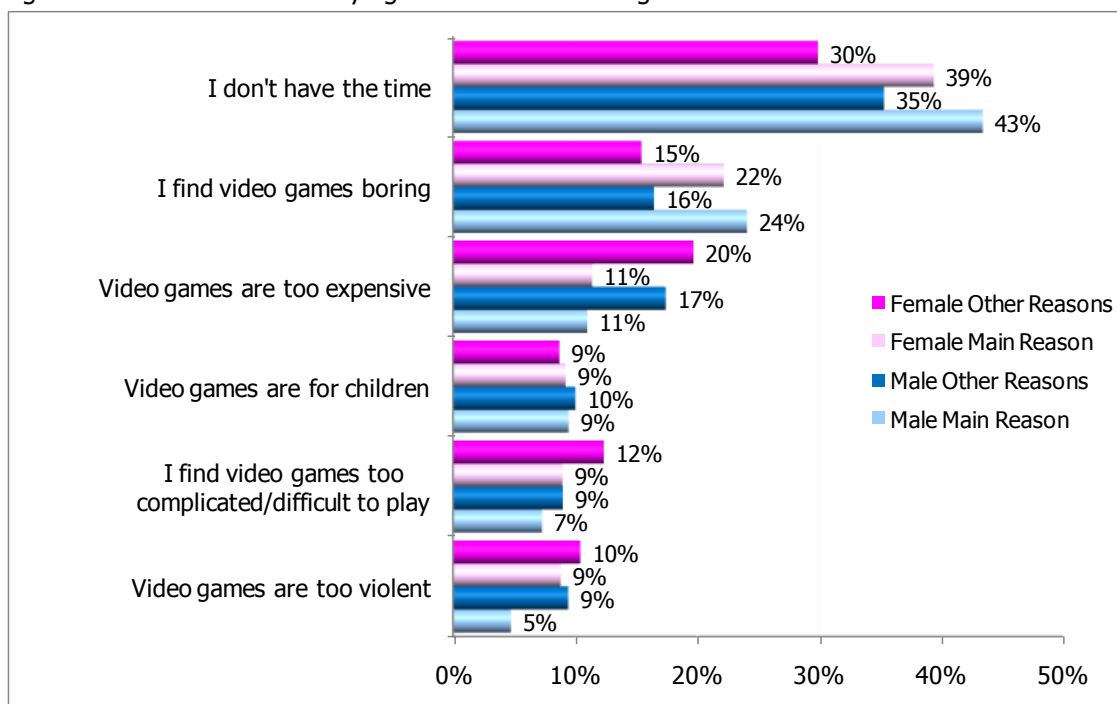
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q11 What is the main reason you play video games? Q12 What other reasons do you play video games for?

Figure 68 Motivations for Playing Video Games by Gamer Commitment



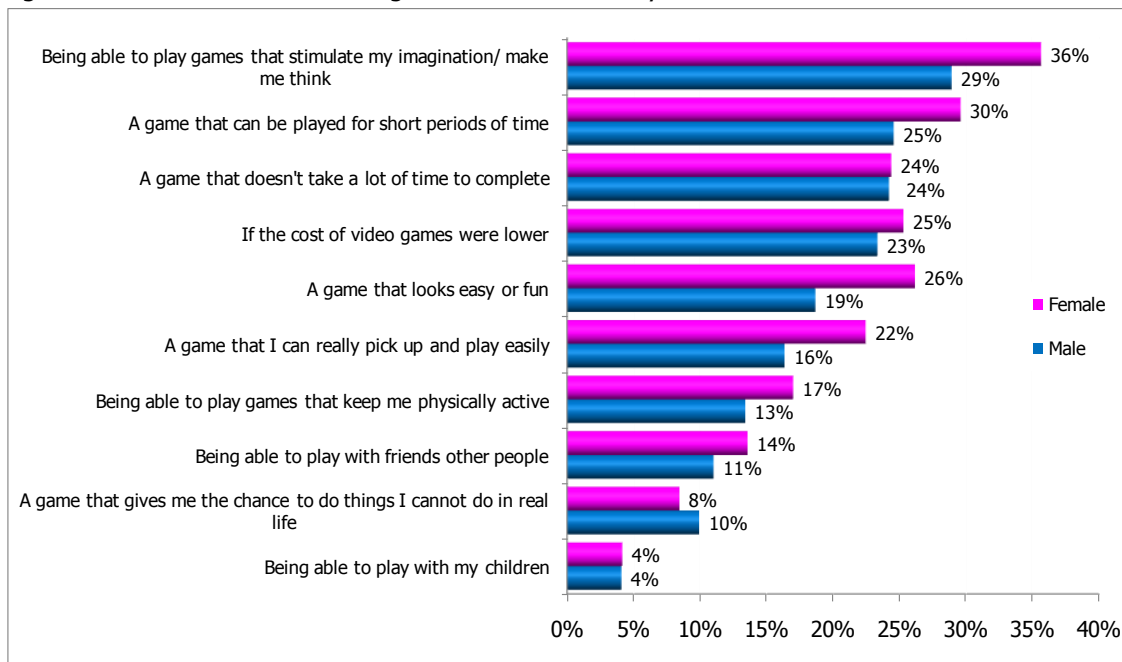
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q11 What is the main reason you play video games? Q12 What other reasons do you play video games for?

Figure 69 Reasons for not Playing Video Games Amongst Non Gamers



Base: All Non Gamers Spring 2010 aged 16-60 (1,599 video gamers weighted by age and sex)
 NG1 What is the main reason why you don't play video games?

Figure 70 Motivations to Encourage Non Gamers to Play Video Games

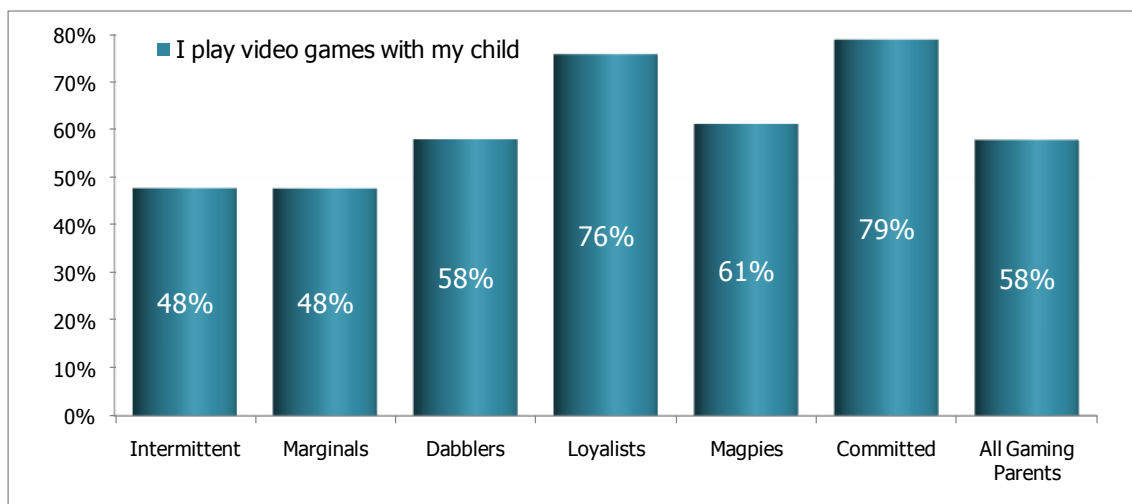


Base: All Non Gamers Spring 2010 aged 16-60 (1,599 video gamers weighted by age and sex)
 NG3 What would make you more interested in playing video games?

8.3 Video Games in the Family

- Gamers that spend the most time gaming (Committed and Loyalist) also spend the most time playing games with their children (79% and 76%)
- Female Non Gaming Parents are the group least likely to buy their children’s games; in contrast Female Gamers are the group most likely to always buy their children’s games
- Females are more likely to ‘always’ monitor the games their child plays
- Whether parents are Gamers or Non Gamers, attitudes towards monitoring a child playing games is near identical
- Approximately 80% of Parents monitor games played by 4-7 year olds, this drops as the age of the child gets older; 50% (Gamer Parents) and 37% (Non Gaming Parents) monitor games played by their children aged 16-17
- Gamer Parents are clearly more aware of the content that can appear in games and therefore are more likely to monitor to an older age than Non Gaming parents

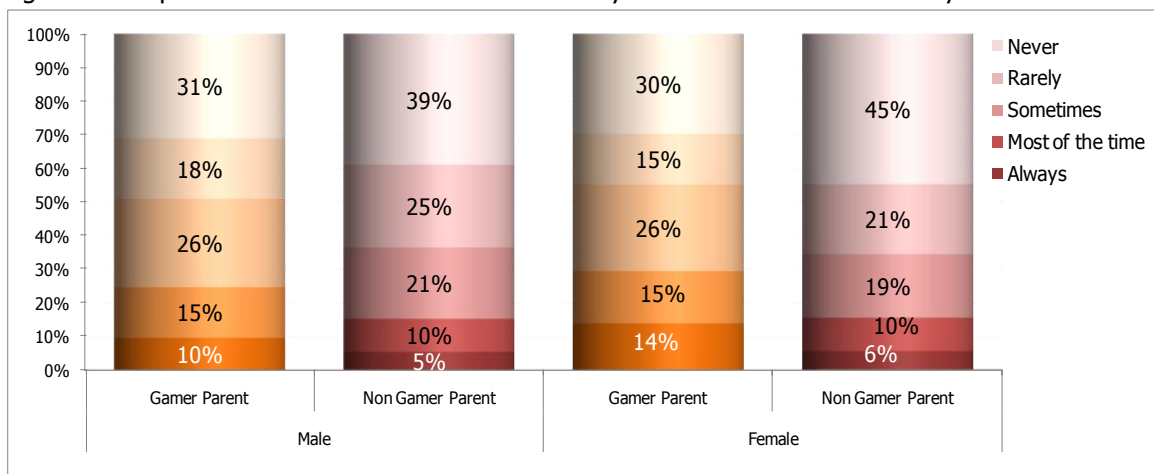
Figure 71 Proportion of Gaming Parents Who Play Games With Their Children – By Gamer Commitment Index



Base: All Gamers who are also Parents, Spring 2010, aged 16-49 (2,253 gamers, weighted by age, sex, hours of play and gaming spend)

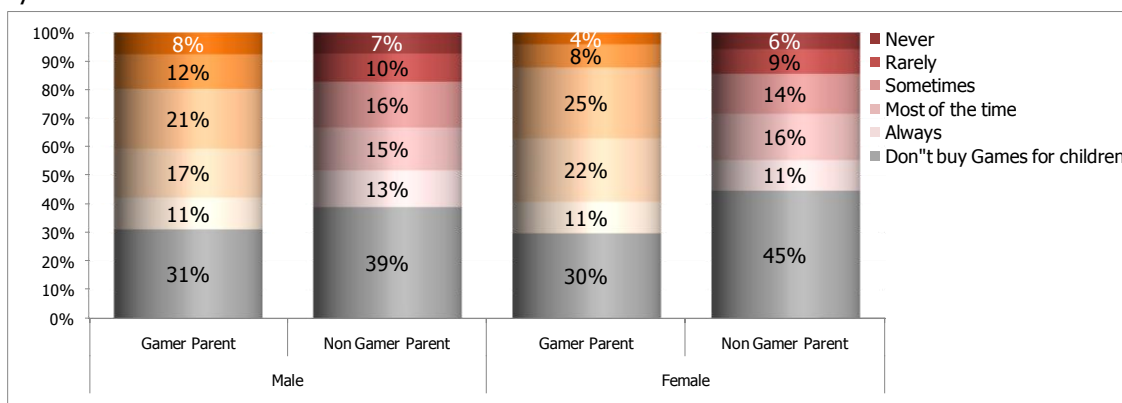
Q30 Do you ever play video games with your child/ children?

Figure 72 Proportion of Occasions When Parents Buy their Children’s Games – By Gender



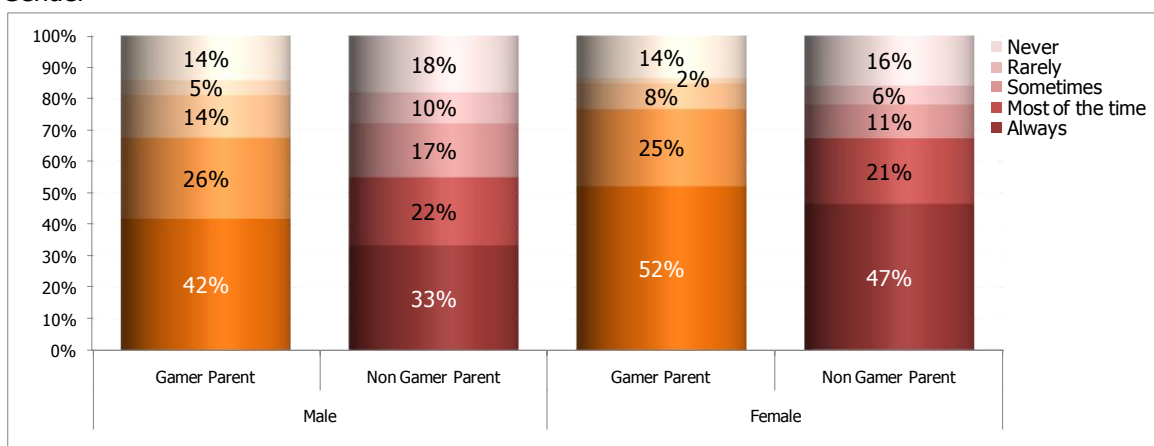
Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
 Q33/NG5 Thinking about your youngest child, do you buy this child’s games?

Figure 73 Proportion of Occasions Children are Present When their Parents Buy their Children’s Games – By Gender



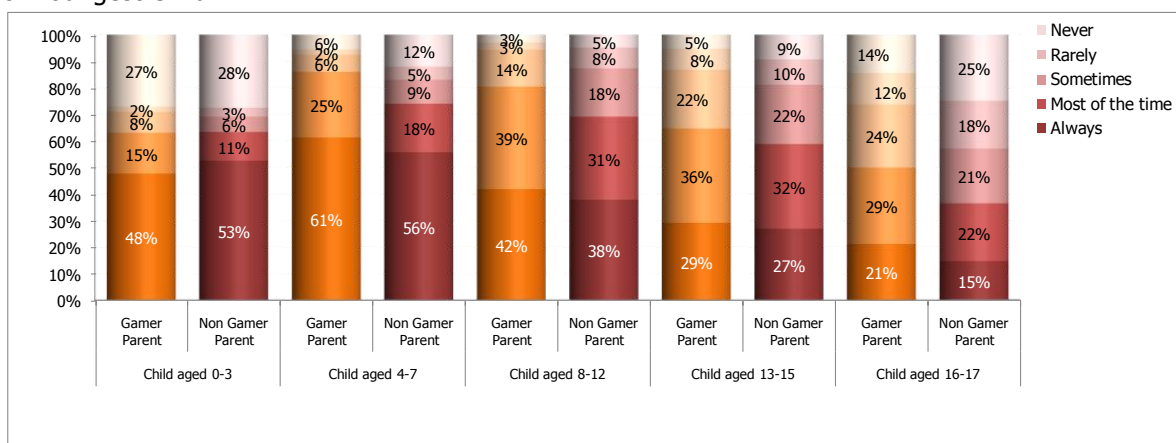
Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region) Q34/NG6 When you buy games for your child is your child present?

Figure 74 Proportion of Occasions When Parents Monitor the Games Their Children are Playing – By Gender



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region) Q35/NG7 Do you monitor what video games your children are playing?

Figure 75 Proportion of Occasions When Parents Monitor the Games Their Children are Playing – By Age of Youngest Child



Base: All Parents, Spring 2010, (Gaming Parents aged 16-49- 2,253, weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region) Q35/NG8 Do you monitor what video games your children are playing?

8.4 Video Gamers Broader Activities and Interests

- Generally there is little to distinguish between Gamers in their other Leisure interests
- Females are more likely to prefer shopping more, Males more likely to prefer sports and exercise
- More dedicated gamers are also more interested in other entertainment like the movies, or going out for a dance or to a gig etc (though the differences are not large, they clearly disprove the view that Committed Gamers as a group focus only on gaming)
- Differences are even not large by age; older Gamers are more likely to like museums/theatre etc, eating out and shopping, younger gamers dancing and the movies

Figure 76 Leisure Activities Gamers Enjoy Most - Gamer Commitment Index

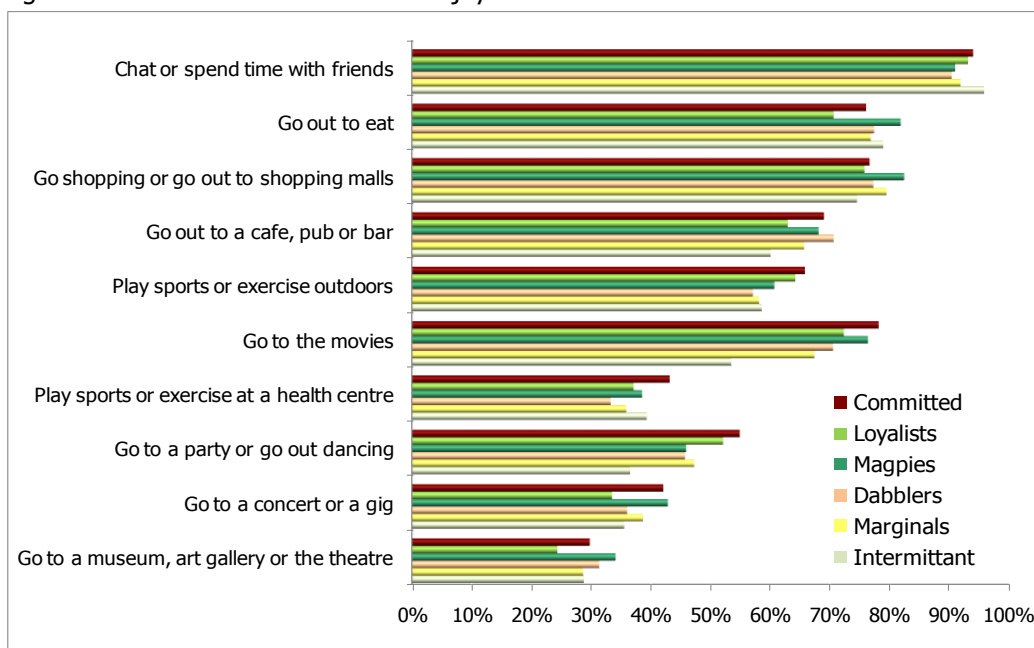
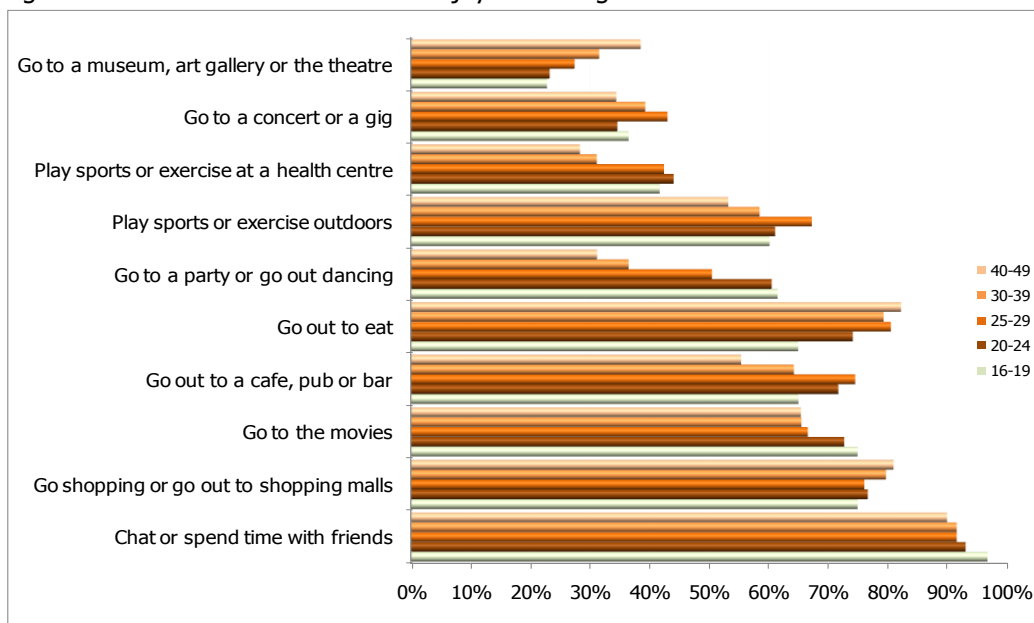


Figure 77 Leisure Activities Gamers Enjoy Most - Age

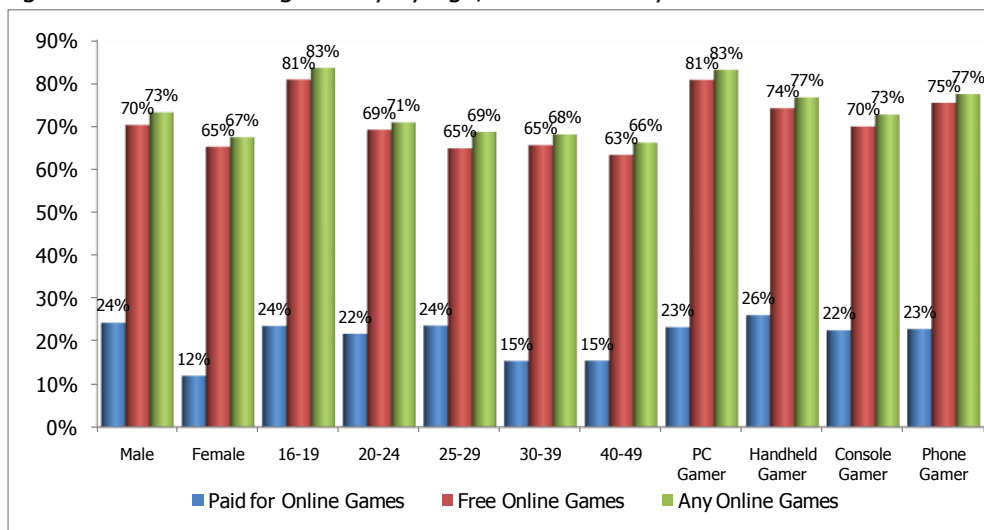


Base: All Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q36 If you had a few hours of spare time, what sort of leisure or entertainment-related activities do you usually do at least once a month, place each activity according to your preferences – Things I do/ Things I don't do?
 Q36a Please rank in order of preference, your three favourite activities.

8.5 Online Gaming

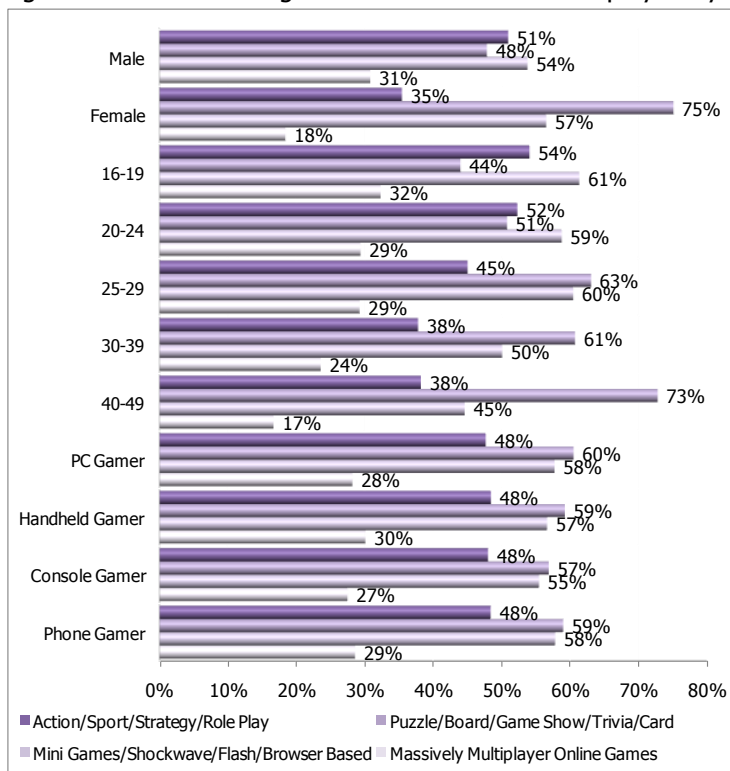
- 16-19 year olds are most likely to play online (83% have played at least one type of online game in the last 3 months)
- 24% of Males are playing paid online games in comparison to 12% of Females
- PC gamers show the highest level of gaming activity by system user types
- Handheld gamers are the most active on paid for online games; this is likely due to multiple ownership of different systems and using other systems like the PC to play paid for online games
- Puzzle games are the most popular type of online games for females and ages 40-49

Figure 78 Online Gaming Activity by Age, Gender and System



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q14 What kind of online or WiFi games have you played in the last 3 months (if any)?

Figure 79 Online Gaming – Genre of Online Games played by Age, Gender and System

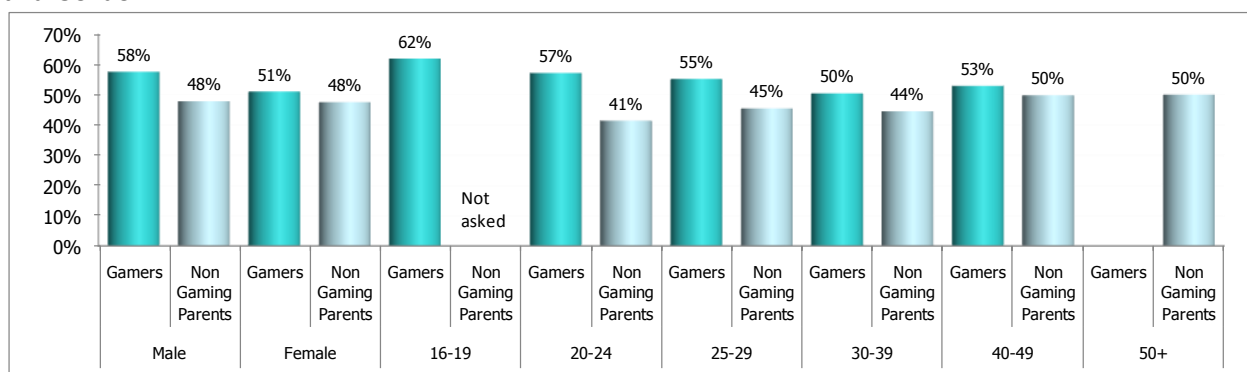


Base: All Video Gamers who play online Spring 2010 aged 16-49 (4,748 video gamers weighted by age, sex, hours of play and gaming spend)
 Q15 What kind of games do you play online?

8.6 Awareness and Perceptions of PEGI

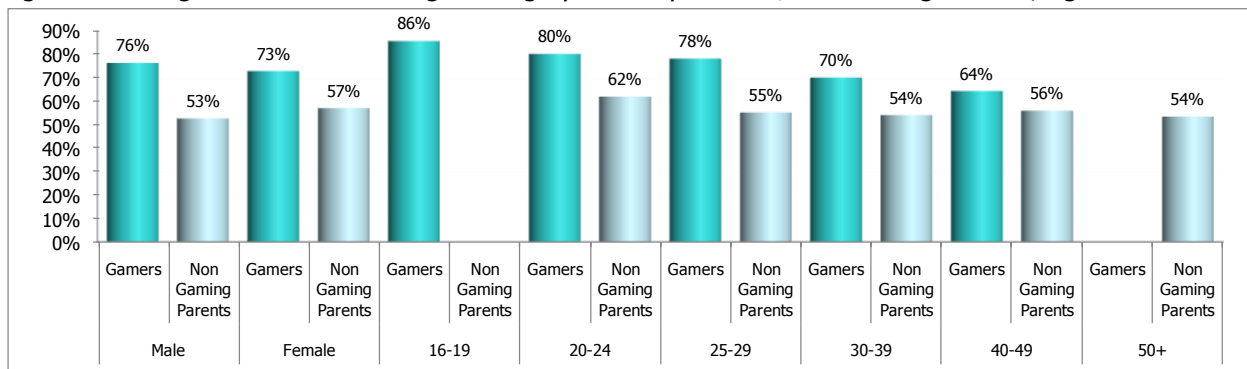
- Male Gamers (58%) are more aware of an age rating system for video games than Female Gamers (51%)
- Awareness of an age rating system for video games decreases with age among Gamers but increases among non gamers
- Awareness of the PEGI age rating system and recognition of the age labels is highest amongst Gamers aged 16-19 (38% and 86%)
- Awareness of the PEGI age rating system is higher among Male Gamers (31%) than Female Gamers (21%)
- Close to 50% of Non Gaming Parents aged 20-29 find the age rating system extremely useful
- Very few find the age rating system “not useful at all”, however more Gamers find it not useful, than Non Gaming Parents

Figure 80 Awareness of any Age Rating System for Video Games by Gamers/Non Gaming Parents, Age and Gender



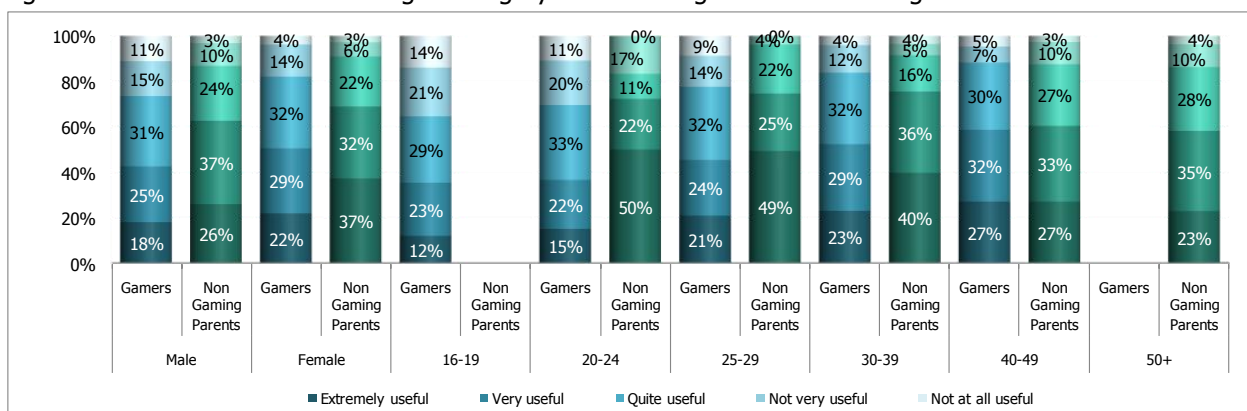
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
Q38/NG8 As I am sure you know, DVDs and videos have age ratings applied to them. Are you aware of or have you heard of a European age ratings system for video games?

Figure 81 Recognition of the PEGI Age Rating Symbols by Gamers/Non Gaming Parents, Age and Gender



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
 Q40/NG10 Are you aware or have you ever seen the following symbols on games or games boxes?

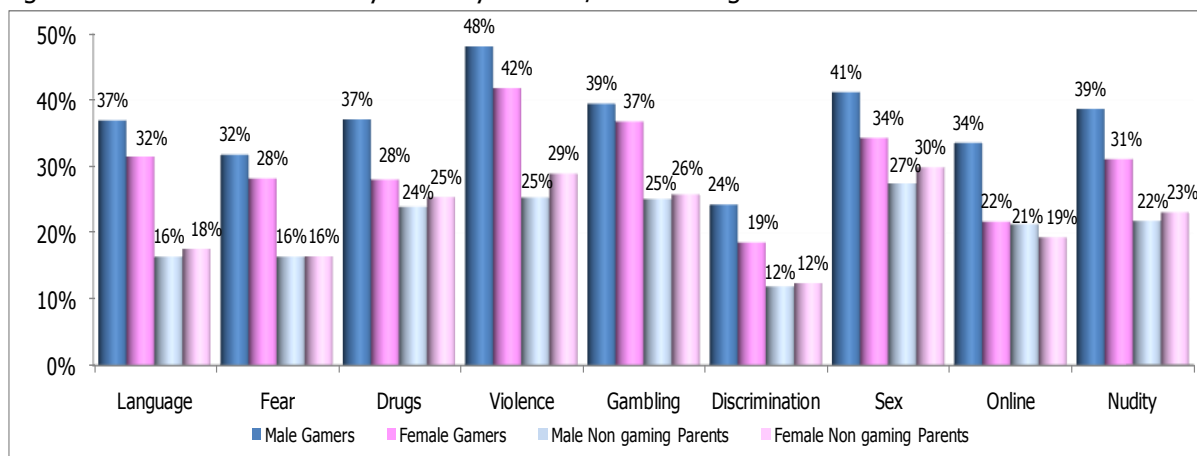
Figure 82 The Usefulness of the Age Rating Symbols among those Who Recognise Them



Base: All Video Gamers Spring 2010 aged 16-49 who recognise the PEGI Age symbols (5,429 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ who recognise the PEGI Age 1,612 unweighted as no information exists on the age and sex profile of this group by region)
 Q41/NG11 To what degree would you say that these symbols are useful in deciding whether to buy a video game?

- Awareness of the violence is highest amongst both Males and Females
- Both Gaming and Non Gaming Parents are most aware of the symbol for sex

Figure 83 Awareness of PEGI Symbols by Gamers/Non Gaming Parents and Gender

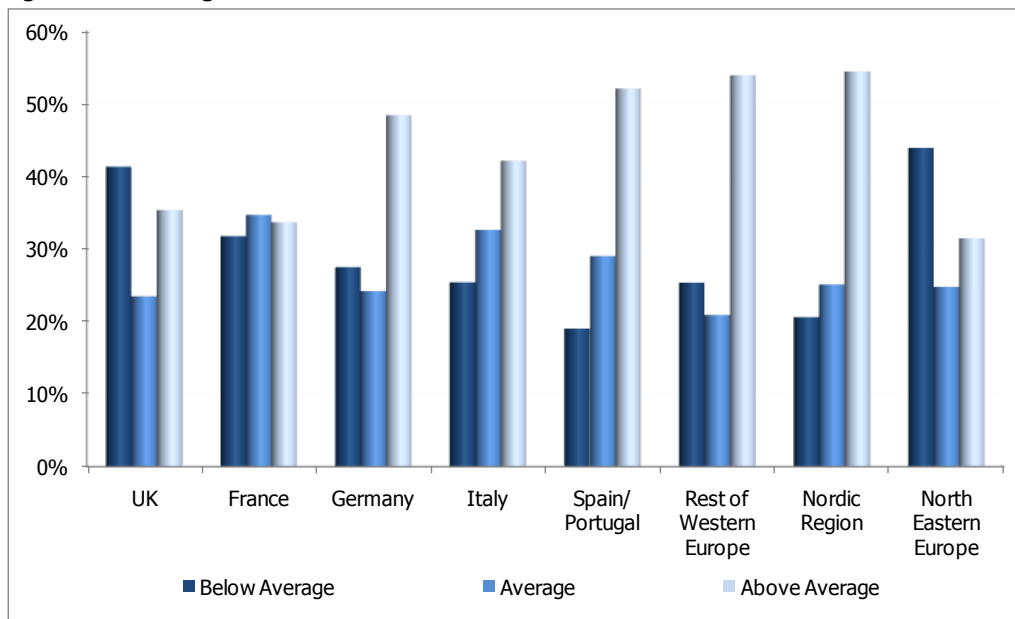


Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend) and (Non Gaming parents aged 16+ 2,931 unweighted as no information exists on the age and sex profile of this group by region)
Q47/NG14 Are you aware, or have you ever seen the following symbols?



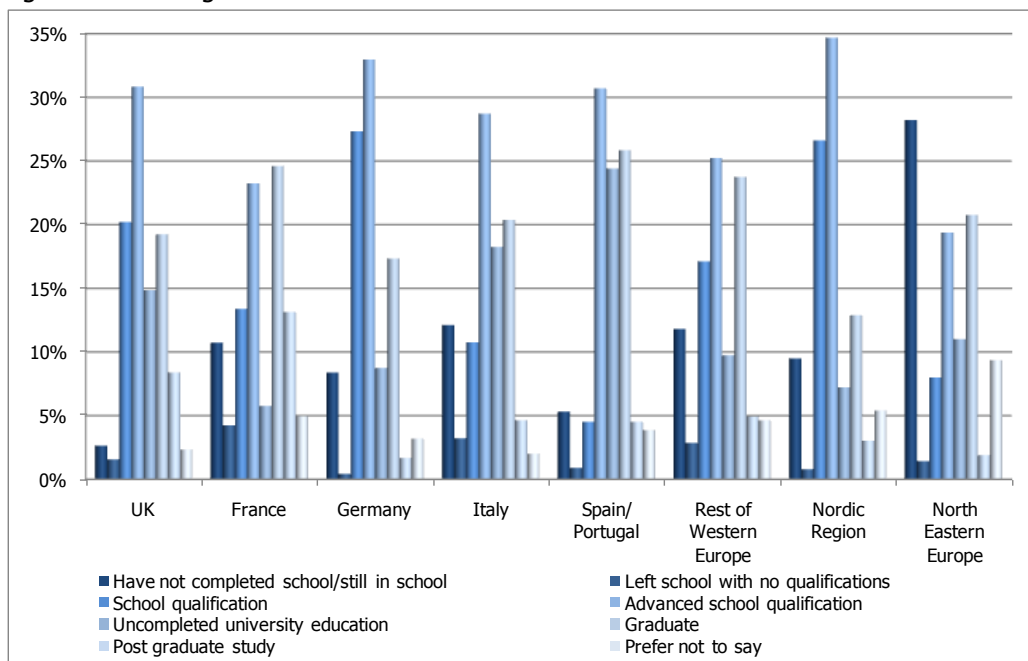
Section 9: Demographic Info

Figure 84 Profiling Gamers: Income



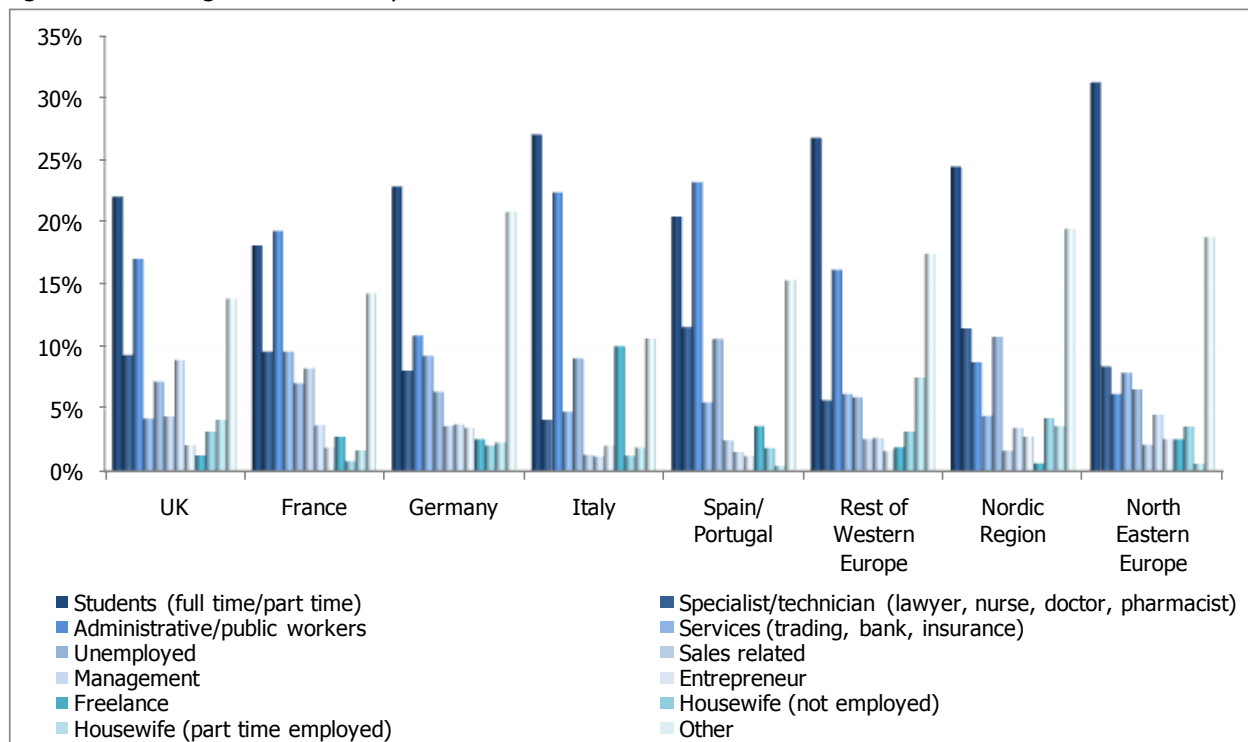
Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q51 In which of the following brackets does your annual household income (before taxes) fall? Average calculated for each country

Figure 85 Profiling Gamers: Education



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q52 What was the last level of education you completed?

Figure 86 Profiling Gamers: Occupation



Base: All Video Gamers Spring 2010 aged 16-49 (6,629 video gamers weighted by age, sex, hours of play and gaming spend)
 Q53 What is your current occupation?

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