

European Summary Report

November 2012

The Media, Content and Technology Research Specialists

CONTENTS

INTRODUCTION

Research overview	3
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Gaming formats and devices covered	3
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GAMING: WHO, WHAT AND HOW?

Frequency, type and devices used for gaming	5
---	---

Incidence of gaming by age and gender	8
---------------------------------------	---

Online gaming	10
---------------	----

Gaming profiles and Free vs. Paid	11
-----------------------------------	----

Purchasing games	12
------------------	----

PERCEPTIONS OF GAMING

Interest in gaming	15
--------------------	----

Broader media and activities interest	16
---------------------------------------	----

Words associated with different media/activities	18
--	----

GAMING AND THE FAMILY

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

Effect of games on children	21
-----------------------------	----

SUPERVISION

How children acquire games	27
----------------------------	----

Children and age ratings	29
--------------------------	----

Use of parental controls	31
--------------------------	----

PEGI RATING SYSTEM

Awareness, usefulness and clarity of rating systems	33
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How rating systems should be applied	34
--------------------------------------	----

APPENDIX

Market summary infographics	36
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RESEARCH OVERVIEW

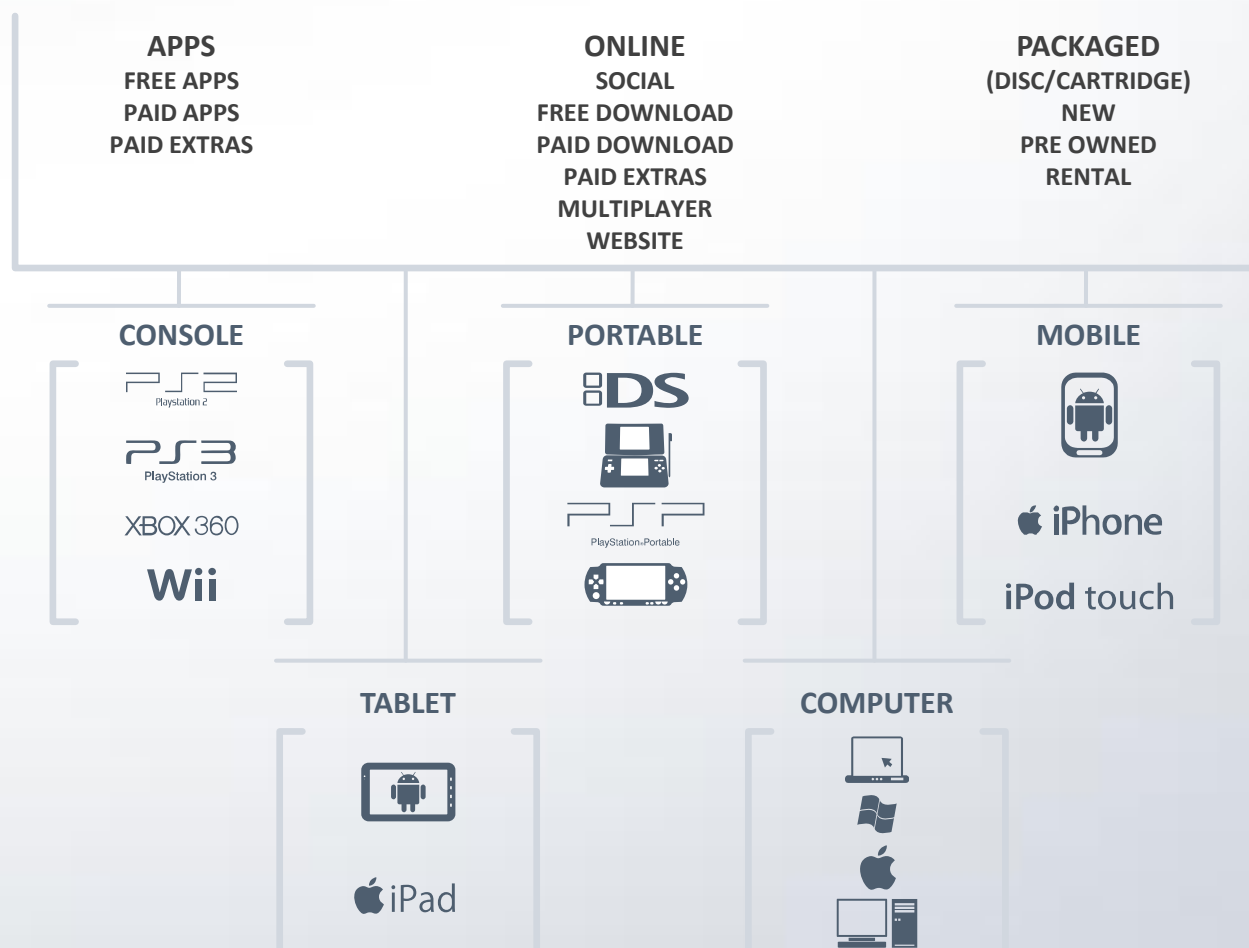
The European Consumer Study is a multi-country survey run by Ipsos MediaCT, in partnership with the Interactive Software Federation of Europe (ISFE). It is designed to provide a better understanding of the societal context in which games are being played today in 16 European countries. The study used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

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

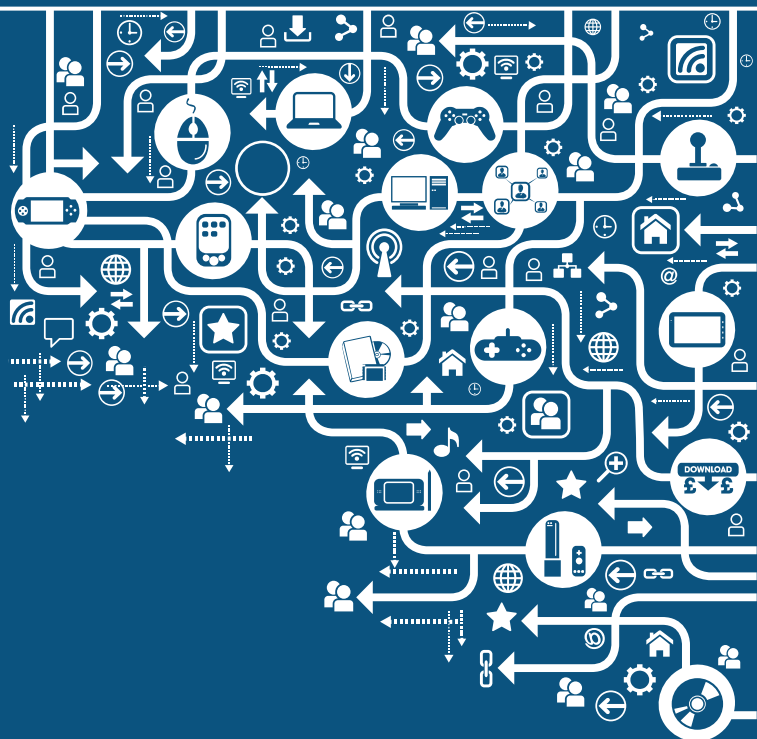
In total 15,142 respondents completed an online survey over a two week period in October 2012.

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

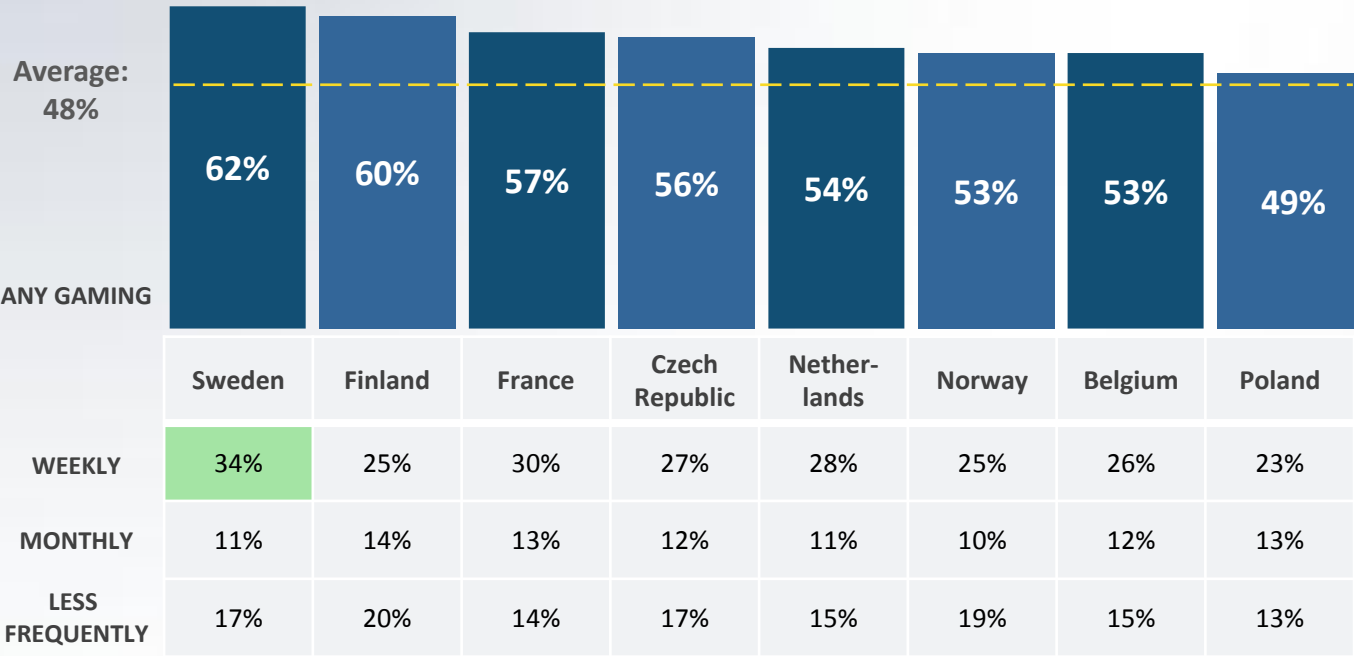
GAMING FORMATS AND DEVICES COVERED



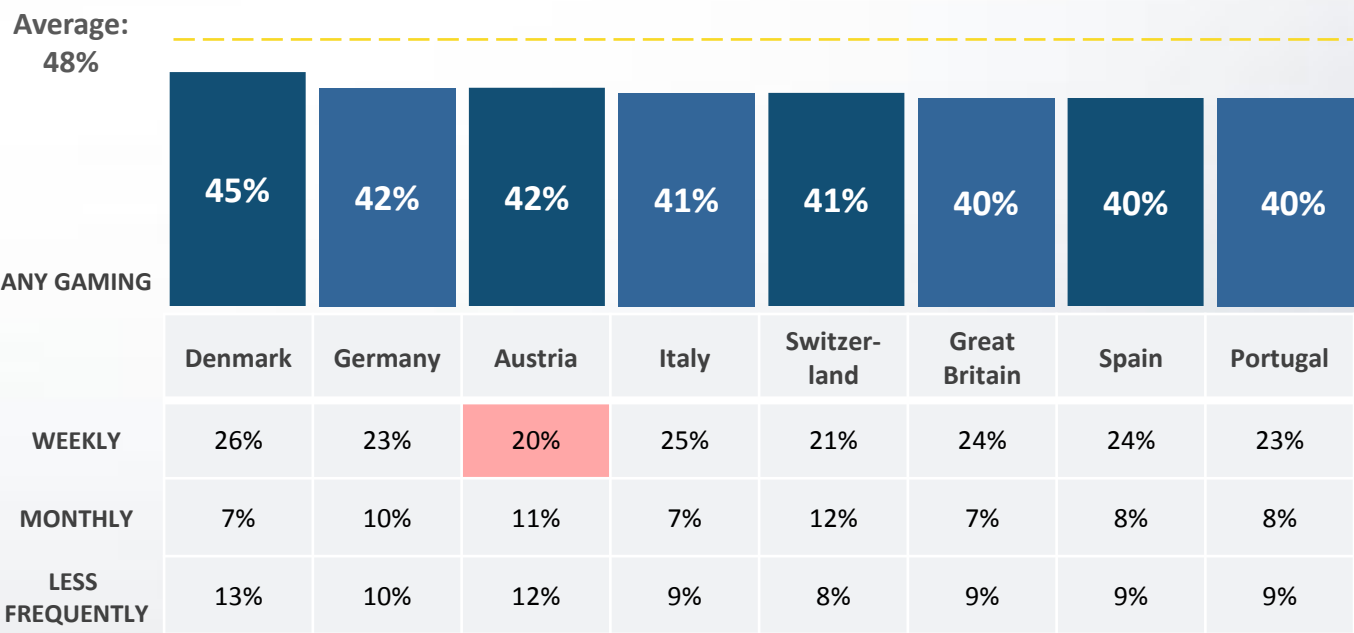
GAMING: WHO, WHAT AND HOW?



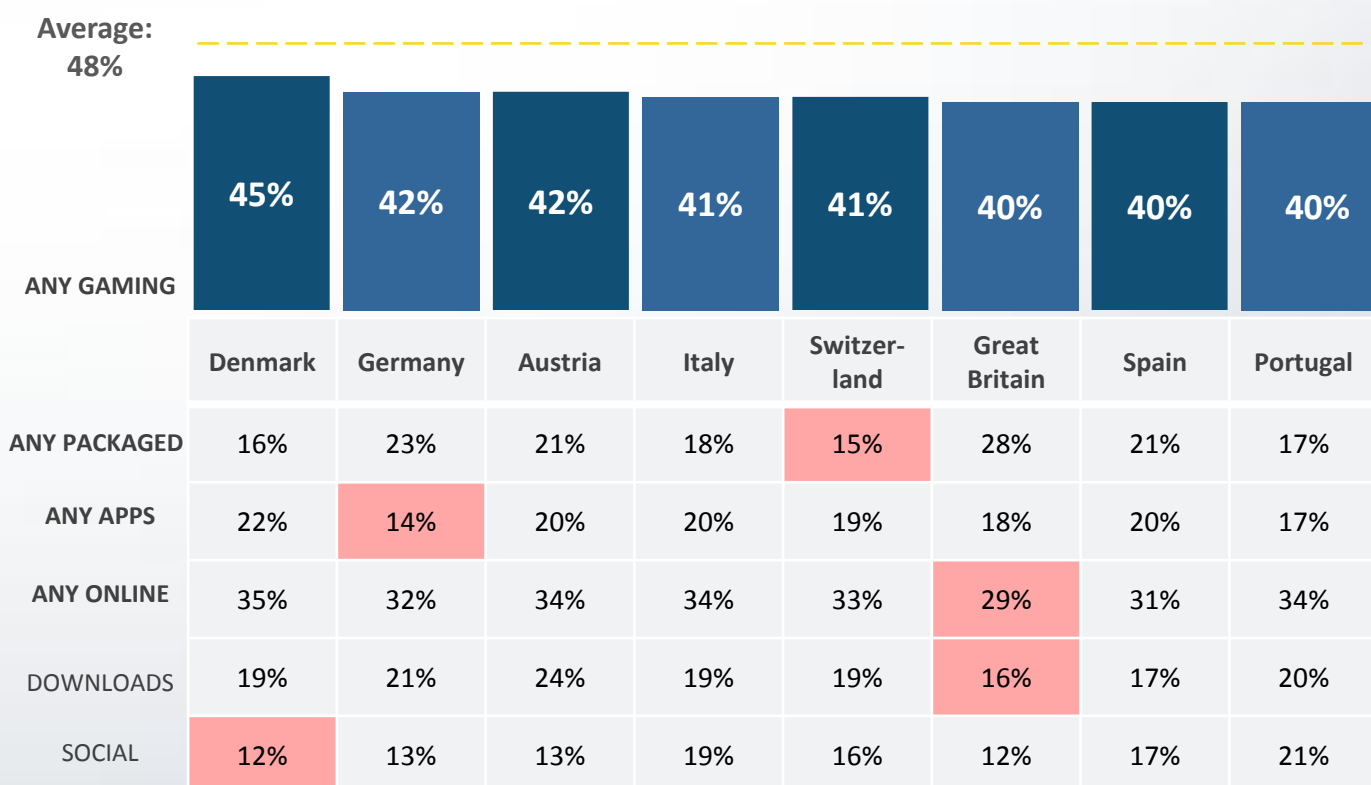
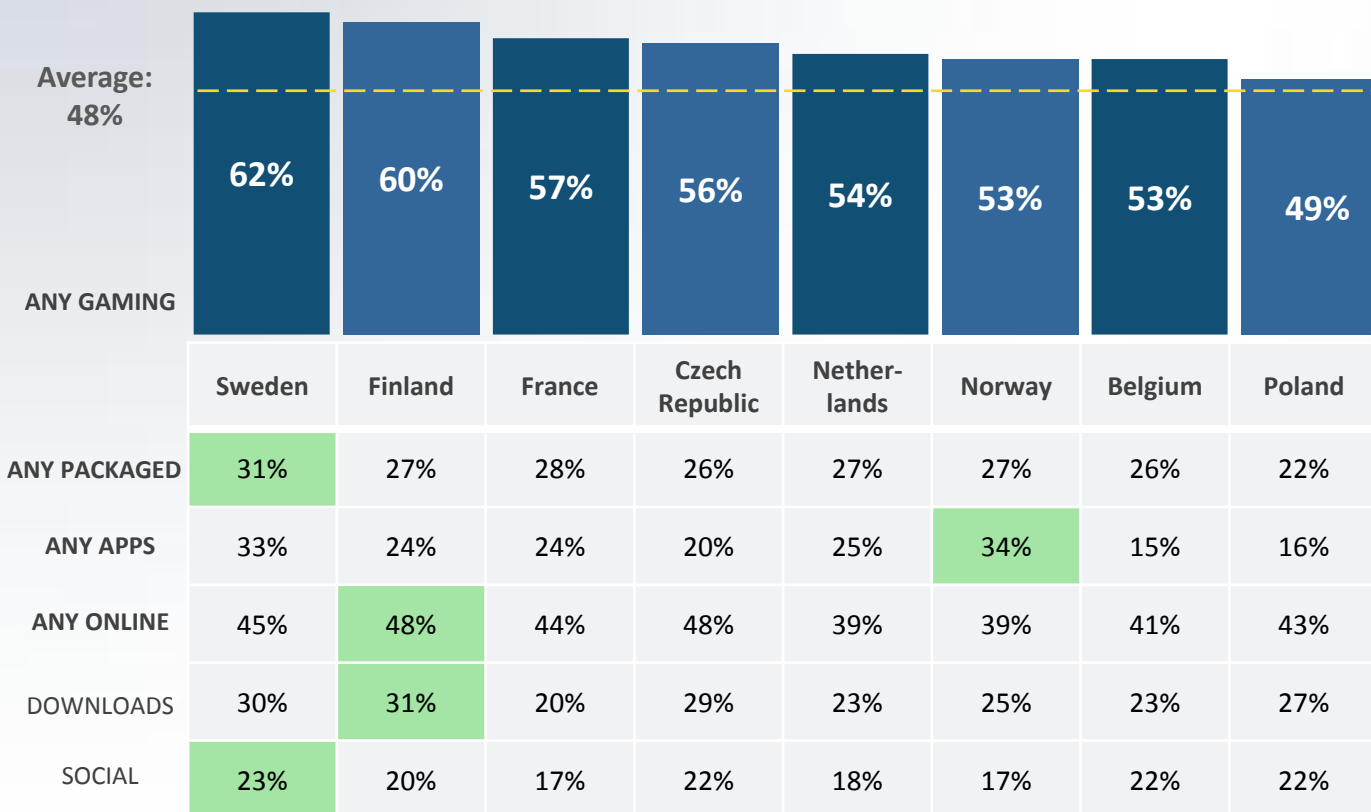
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)



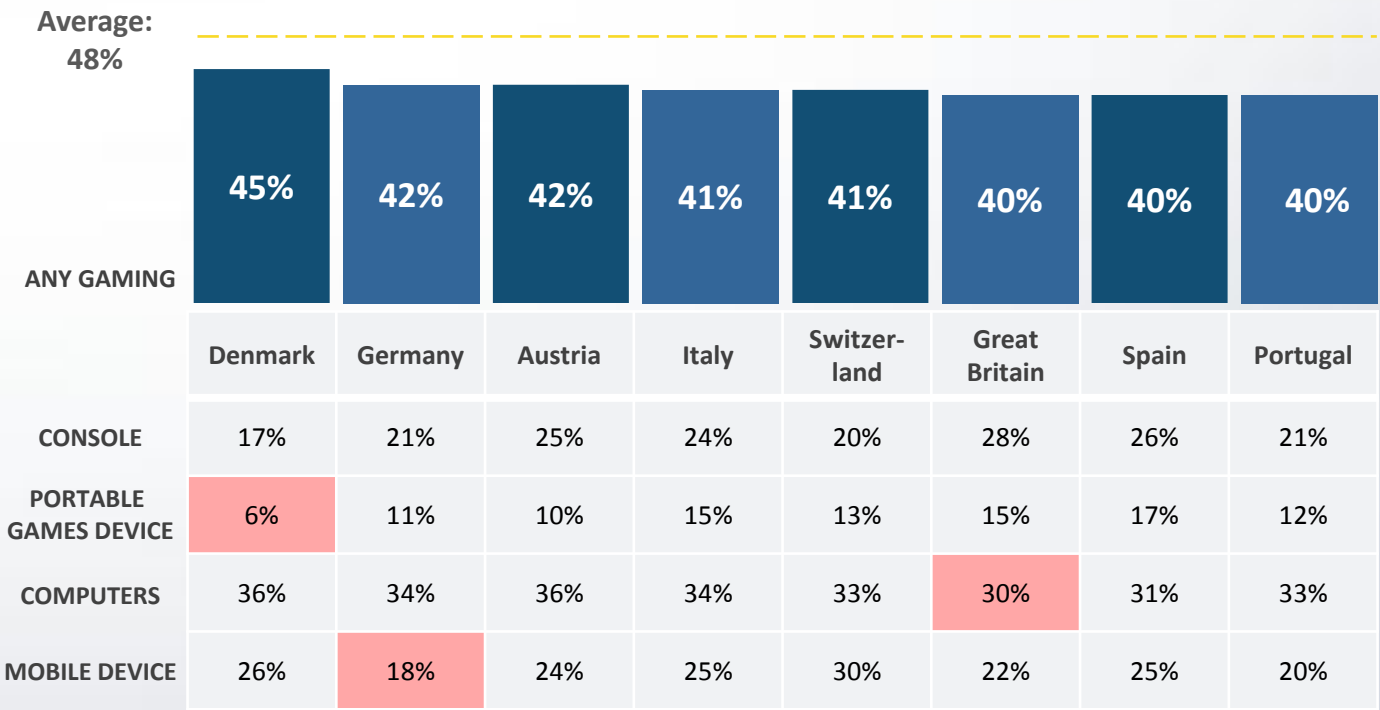
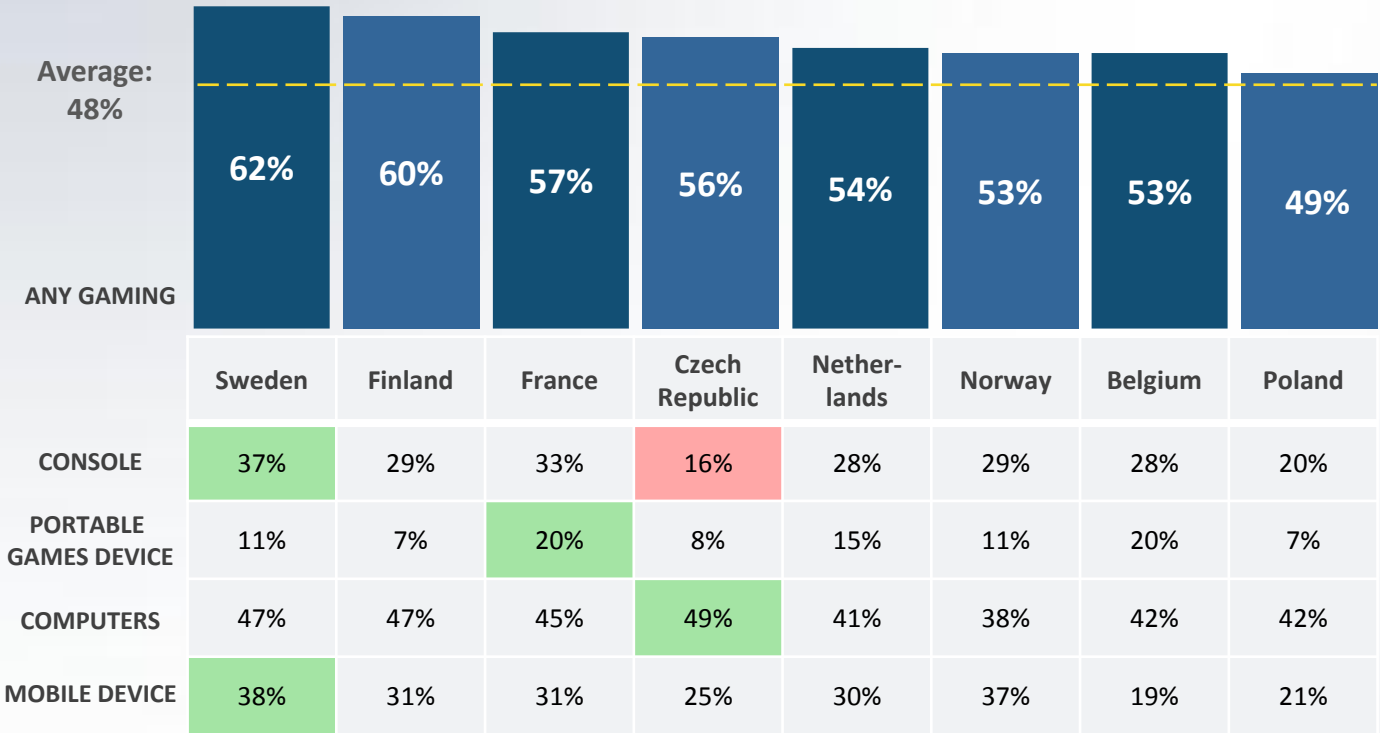
Euro Average: 25% Play games at least once a week



TYPE OF GAMES PLAYED (ALL ONLINE RESPONDENTS)



DEVICES USED TO PLAY (ALL ONLINE RESPONDENTS)



INCIDENCE OF GAMING BY AGE AND GENDER (1/2)

EURO AV	TOTAL	16-24	25-34	35-44	45-54	55-64
MALES	54%	80%	67%	55%	40%	28%
FEMALES	43%	61%	49%	44%	34%	27%

AUSTRIA

53%	AGE	32%
89%	16-24	42%
80%	25-34	45%
57%	35-44	28%
27%	45-54	20%
21%	55-64	28%

BELGIUM

57%	AGE	49%
89%	16-24	71%
69%	25-34	62%
57%	35-44	48%
49%	45-54	41%
27%	55-64	28%

CZECH REPUBLIC

64%	AGE	48%
83%	16-24	60%
70%	25-34	46%
67%	35-44	49%
55%	45-54	40%
37%	55-64	33%

DENMARK

55%	AGE	36%
65%	16-24	50%
64%	25-34	39%
59%	35-44	49%
53%	45-54	32%
28%	55-64	21%

FINLAND

67%	AGE	54%
81%	16-24	76%
75%	25-34	66%
79%	35-44	56%
60%	45-54	44%
47%	55-64	35%

FRANCE

61%	AGE	53%
85%	16-24	74%
72%	25-34	59%
59%	35-44	45%
40%	45-54	45%
37%	55-64	34%

GERMANY

46%	AGE	38%
68%	16-24	58%
50%	25-34	38%
41%	35-44	40%
33%	45-54	38%
43%	55-64	15%

GREAT BRITAIN

43%	AGE	37%
67%	16-24	48%
46%	25-34	34%
50%	35-44	40%
34%	45-54	39%
18%	55-64	25%

INCIDENCE OF GAMING BY AGE AND GENDER (2/2)

EURO AV	TOTAL	16-24	25-34	35-44	45-54	55-64
MALES	54%	80%	67%	55%	40%	28%
FEMALES	43%	61%	49%	44%	34%	27%

ITALY

46%	AGE	36%
89%	16-24	59%
60%	25-34	54%
50%	35-44	37%
28%	45-54	24%
24%	55-64	20%

NETHERLANDS

57%	AGE	51%
87%	16-24	76%
77%	25-34	50%
50%	35-44	47%
46%	45-54	46%
33%	55-64	39%

NORWAY

61%	AGE	45%
84%	16-24	73%
83%	25-34	57%
67%	35-44	49%
46%	45-54	34%
30%	55-64	17%

POLAND

55%	AGE	43%
78%	16-24	60%
68%	25-34	50%
51%	35-44	48%
38%	45-54	21%
22%	55-64	19%

PORTUGAL

43%	AGE	38%
70%	16-24	37%
44%	25-34	55%
58%	35-44	38%
25%	45-54	36%
21%	55-64	18%

SPAIN

43%	AGE	37%
73%	16-24	56%
53%	25-34	40%
35%	35-44	34%
23%	45-54	17%
13%	55-64	25%

SWEDEN

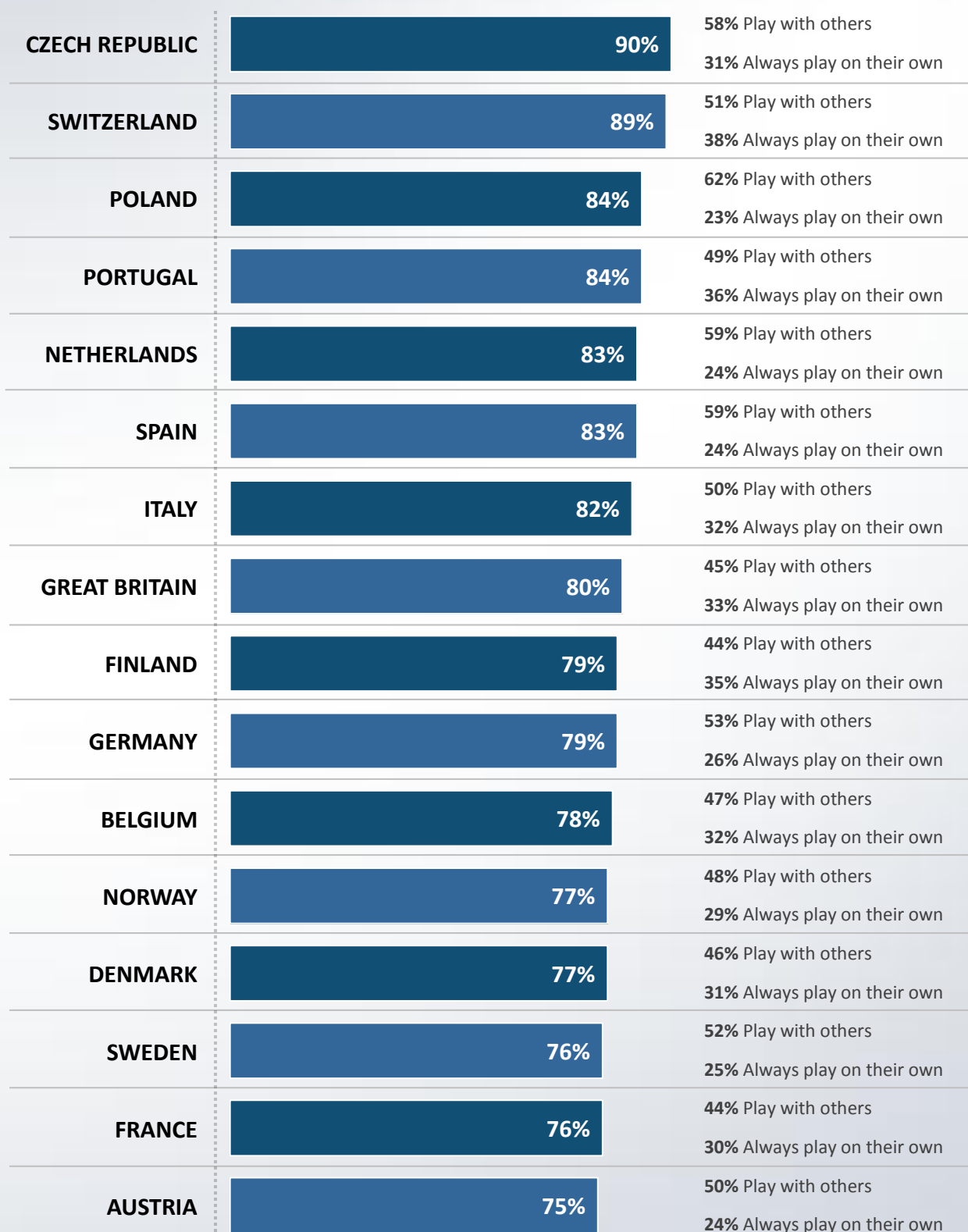
66%	AGE	57%
89%	16-24	81%
88%	25-34	63%
71%	35-44	71%
58%	45-54	49%
26%	55-64	29%

SWITZERLAND

43%	AGE	38%
69%	16-24	55%
58%	25-34	31%
33%	35-44	38%
18%	45-54	22%
18%	55-64	18%

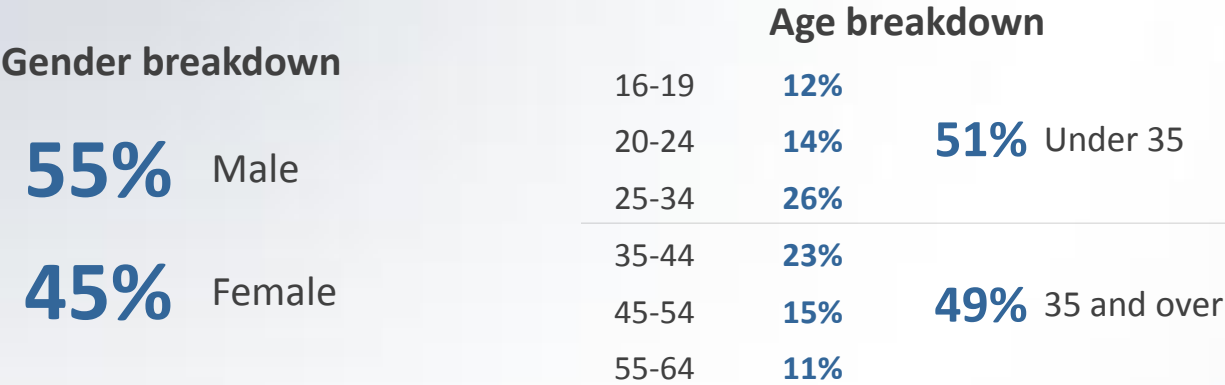
PLAYING GAMES ONLINE (ALL GAMERS)

Euro Average: 81%

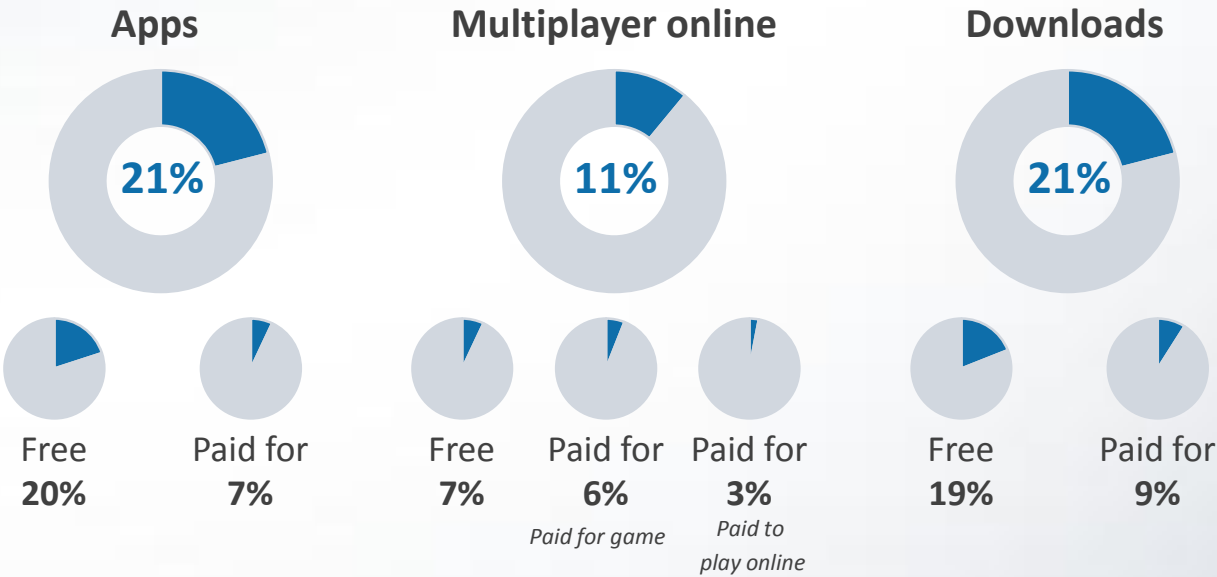


EURO AVERAGES

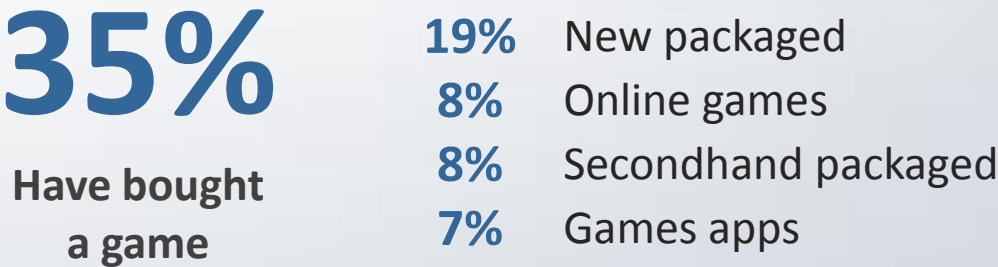
PROFILE OF GAMERS (ALL GAMERS)



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



PURCHASED IN PAST 12 MONTHS (ALL ONLINE RESPONDENTS)



GAMES PURCHASED IN PAST 12 MONTHS (1/2)

(ALL ONLINE RESPONDENTS)

AUSTRIA

36%

Have bought
a game

17%	New packaged
8%	Online games
7%	Secondhand packaged
7%	Games apps

BELGIUM

38%

Have bought
a game

21%	New packaged
10%	Secondhand packaged
8%	Online games
6%	Games apps

CZECH REPUBLIC

37%

Have bought
a game

19%	New packaged
11%	Online games
7%	Secondhand packaged
6%	Games apps

DENMARK

30%

Have bought
a game

14%	New packaged
12%	Online games
11%	Games apps
4%	Secondhand packaged

FINLAND

32%

Have bought
a game

20%	New packaged
10%	Online games
8%	Secondhand packaged
7%	Games apps

FRANCE

38%

Have bought
a game

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

GERMANY

29%

Have bought
a game

18%	New packaged
9%	Secondhand packaged
5%	Online games
4%	Games apps

GREAT BRITAIN

34%

Have bought
a game

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

GAMES PURCHASED IN PAST 12 MONTHS (2/2)

(ALL ONLINE RESPONDENTS)

ITALY

28%

Have bought
a game

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

NETHERLANDS

35%

Have bought
a game

21%	New packaged
8%	Secondhand packaged
8%	Online games
7%	Games apps

NORWAY

41%

Have bought
a game

24%	New packaged
16%	Games apps
13%	Online games
6%	Secondhand packaged

POLAND

35%

Have bought
a game

14%	New packaged
7%	Online games
6%	Secondhand packaged
4%	Games apps

PORTUGAL

33%

Have bought
a game

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

SPAIN

35%

Have bought
a game

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

SWEDEN

42%

Have bought
a game

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

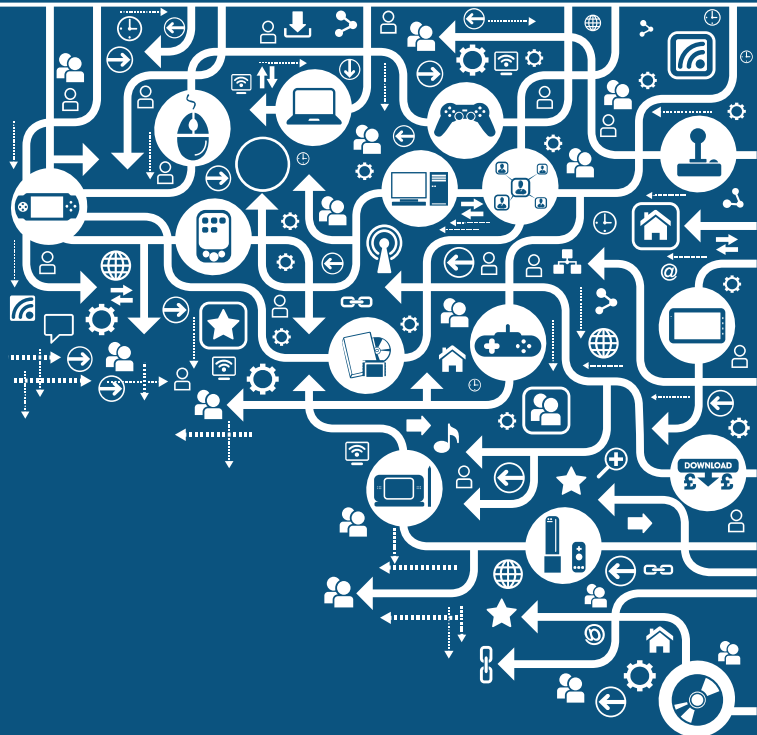
SWITZERLAND

37%

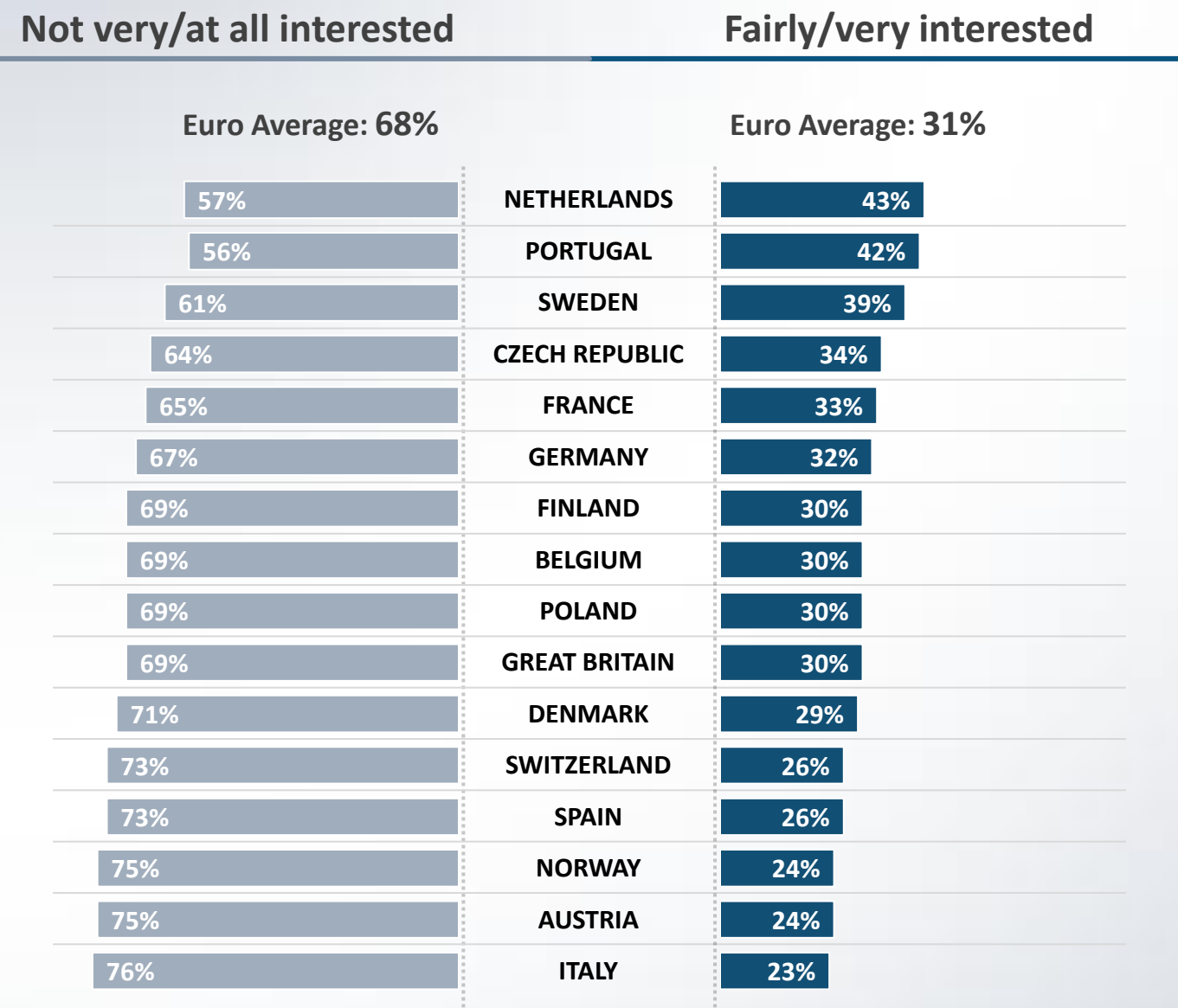
Have bought
a game

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

PERCEPTIONS OF GAMING



INTEREST IN GAMING (ALL ONLINE RESPONDENTS)



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

36%

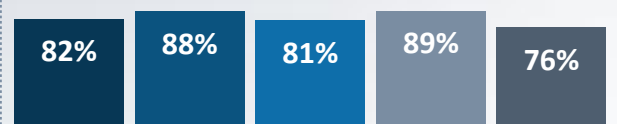
“ENTERTAINING”

BROADER MEDIA AND ACTIVITIES INTEREST: (FAIRLY/VERY INTERESTED) (ALL ONLINE RESPONDENTS - EURO AVERAGE)

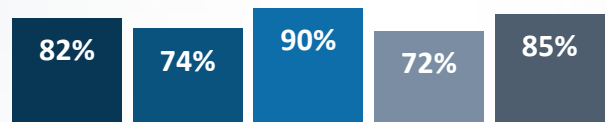
■ All ■ Males 16-34 ■ Males 35-64 ■ Females 16-34 ■ Females 35-64



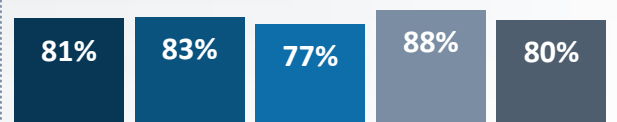
Internet



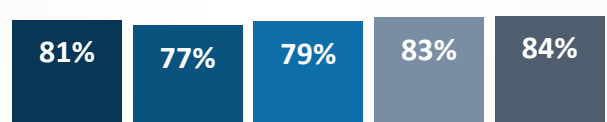
News/current affairs



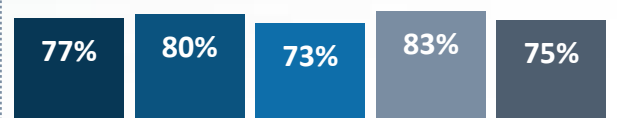
Music



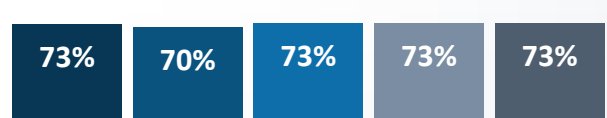
Travelling



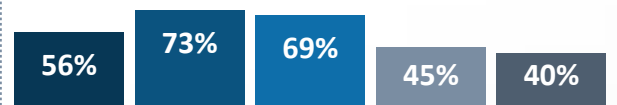
Film



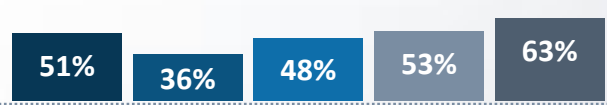
Television



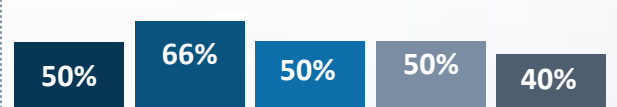
The latest technology



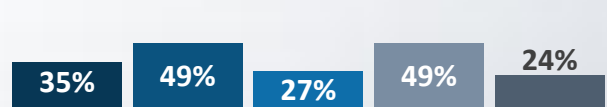
Literature/art



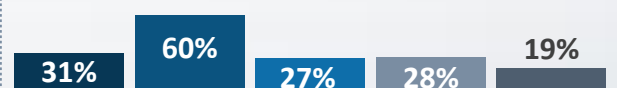
Sport (taking part)



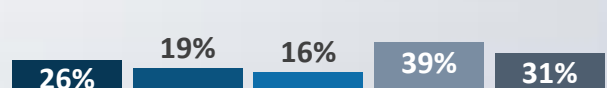
Going out to bars/clubs



Gaming



News about celebs/famous



BROADER MEDIA AND ACTIVITIES INTEREST: (DIFFERENCE BETWEEN GAMERS AND NON-GAMERS - EURO AVERAGE)

■ All ■ Gamers ■ Non-gamers



Internet

82%

90%

75%



News/current affairs

82%

79%

84%



Music

81%

85%

78%



Travelling

81%

81%

81%



Film

77%

84%

70%



Television

73%

76%

70%



The latest technology

56%

69%

45%



Literature/art

51%

50%

53%



Sport (taking part)

50%

57%

44%



Going out to bars/clubs

35%

41%

29%



Gaming

31%

55%

8%



News about celebs/famous

26%

29%

23%

WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

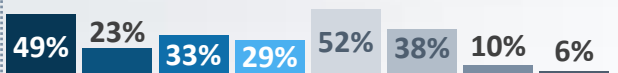
(ALL ONLINE RESPONDENTS - EURO AVERAGE)

Entertaining Immersive
Informative/educational Fun

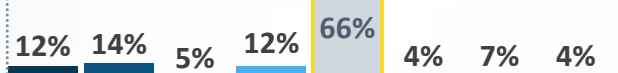
Good at providing escapism Sociable
Family orientated Competitive



Internet



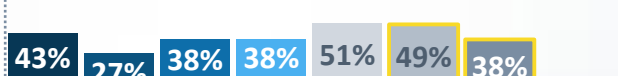
News/current affairs



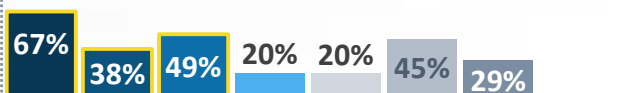
Music



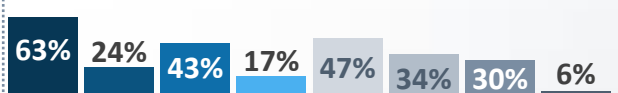
Travelling



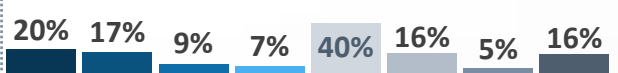
Film



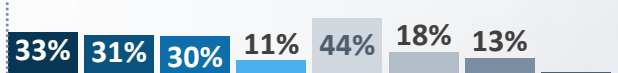
Television



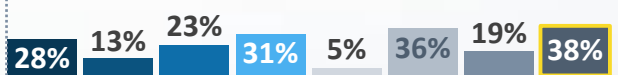
The latest technology



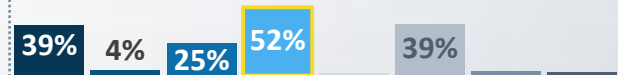
Literature/art



Sport (taking part)



Going out to bars/clubs



Gaming

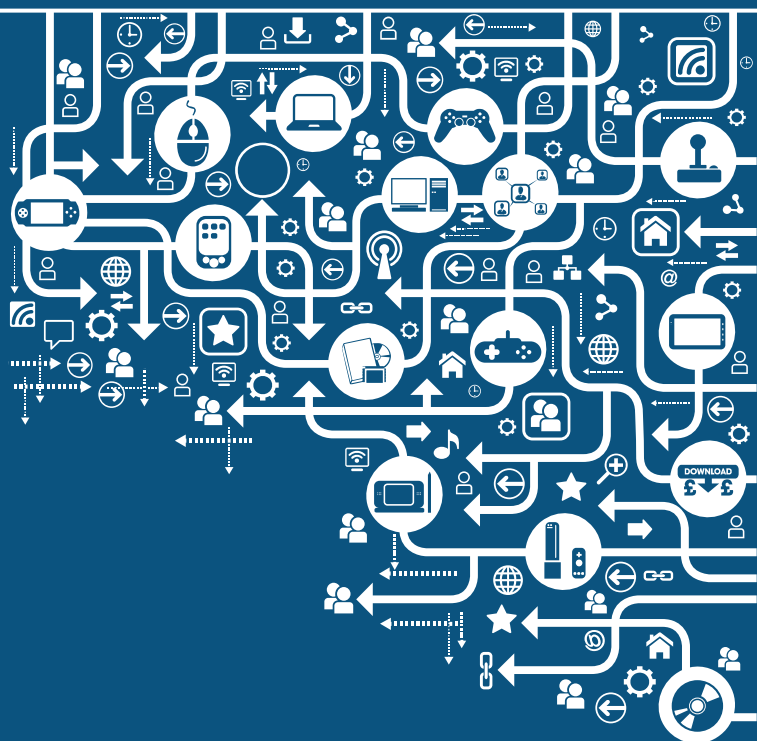


News about celebs/famous



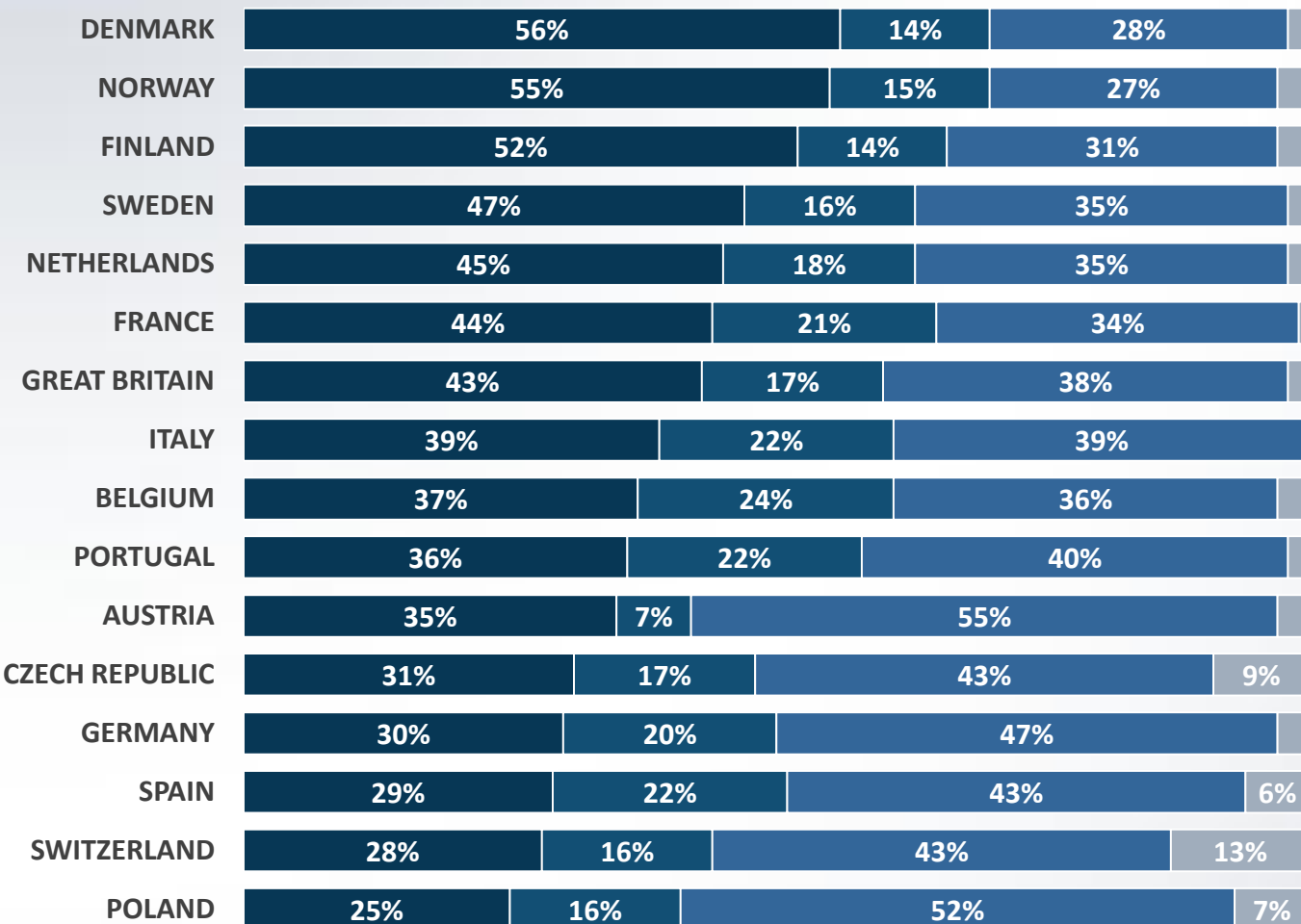
Most commonly selected category for each word

GAMING AND THE FAMILY



PARENTS AND CHILDREN WHO PLAY GAMES (ALL PARENTS)

■ Play games with children ■ Don't play games with children ■ Children don't play games ■ Don't know



TOP REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN (EURO AVERAGE)

1

40%

“They ask me to”

2

36%

“To spend time
with them”

3

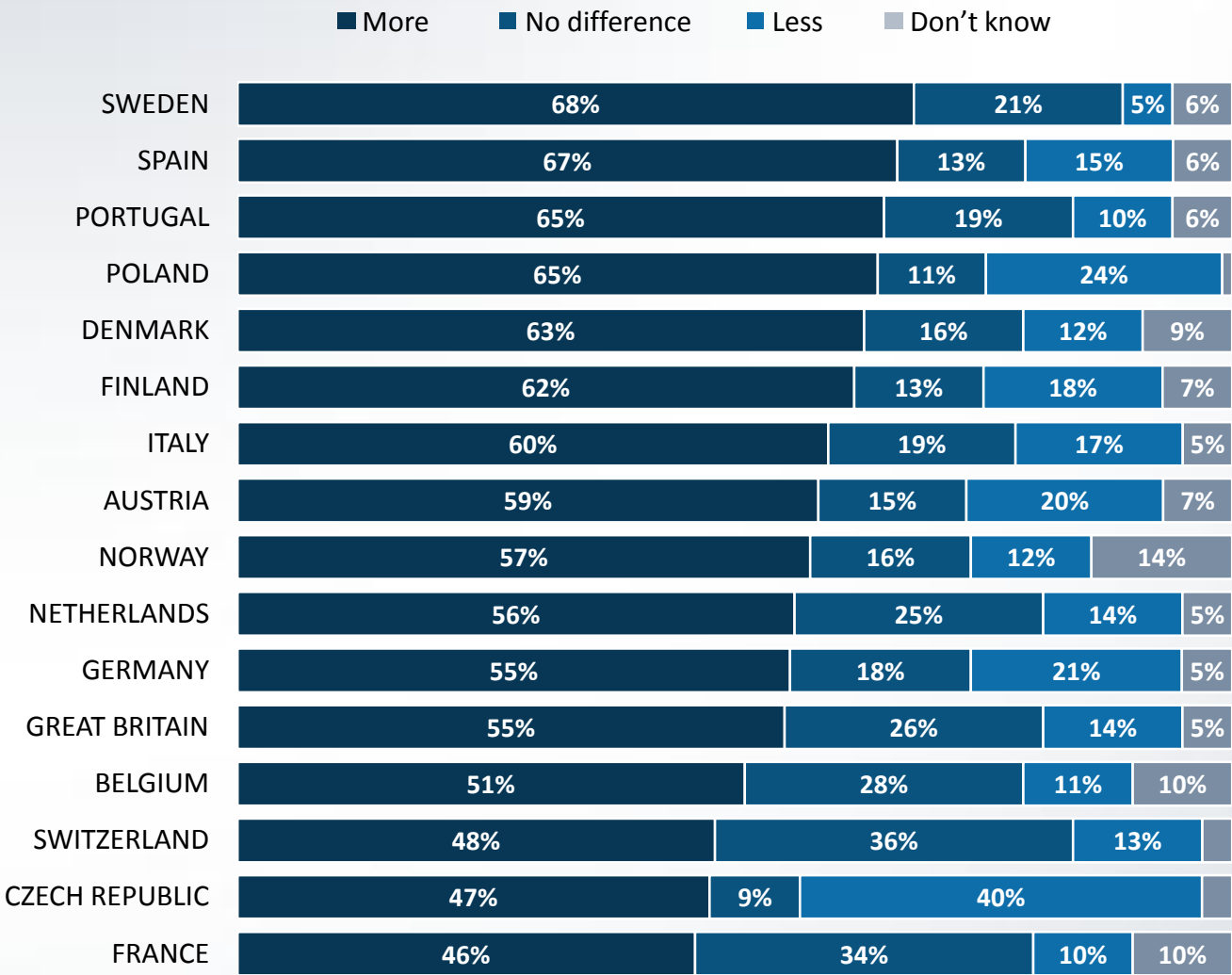
34%

“It’s a fun activity for
all the family”

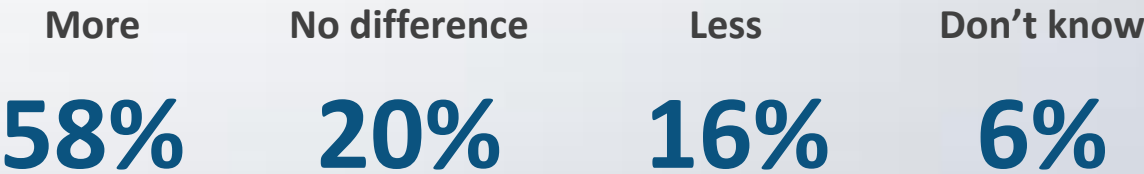
EFFECT OF GAMES ON CHILDREN (1/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to... DEVELOP SKILLS



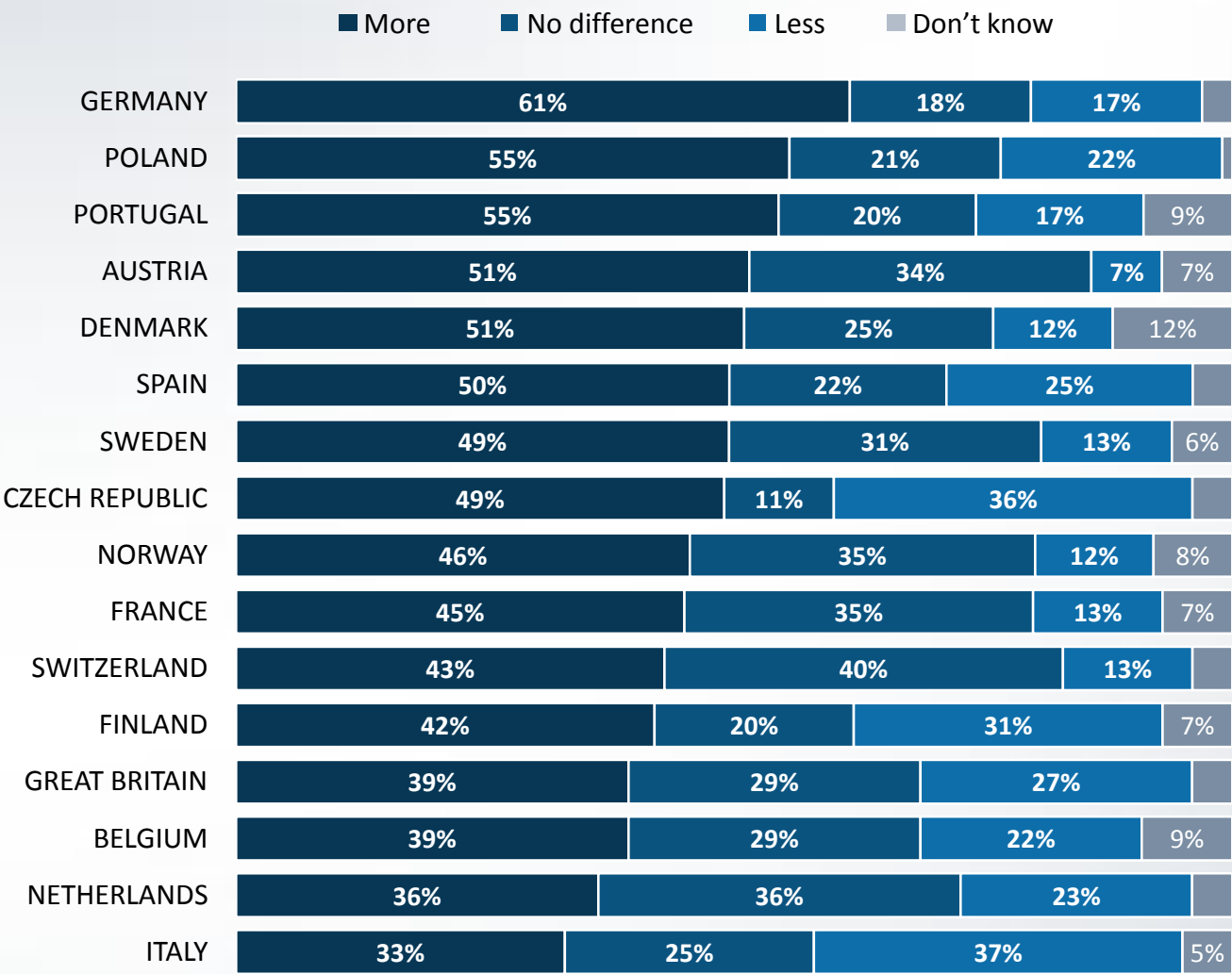
Euro Average:



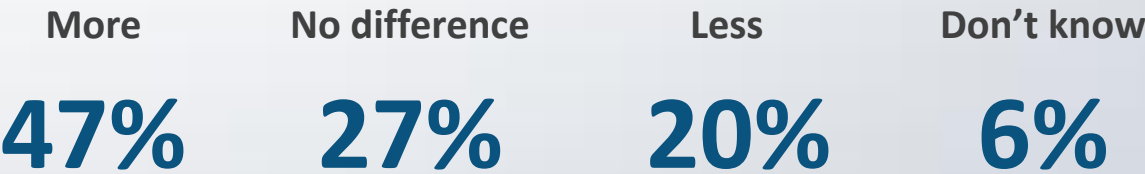
EFFECT OF GAMES ON CHILDREN (2/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be... CREATIVE



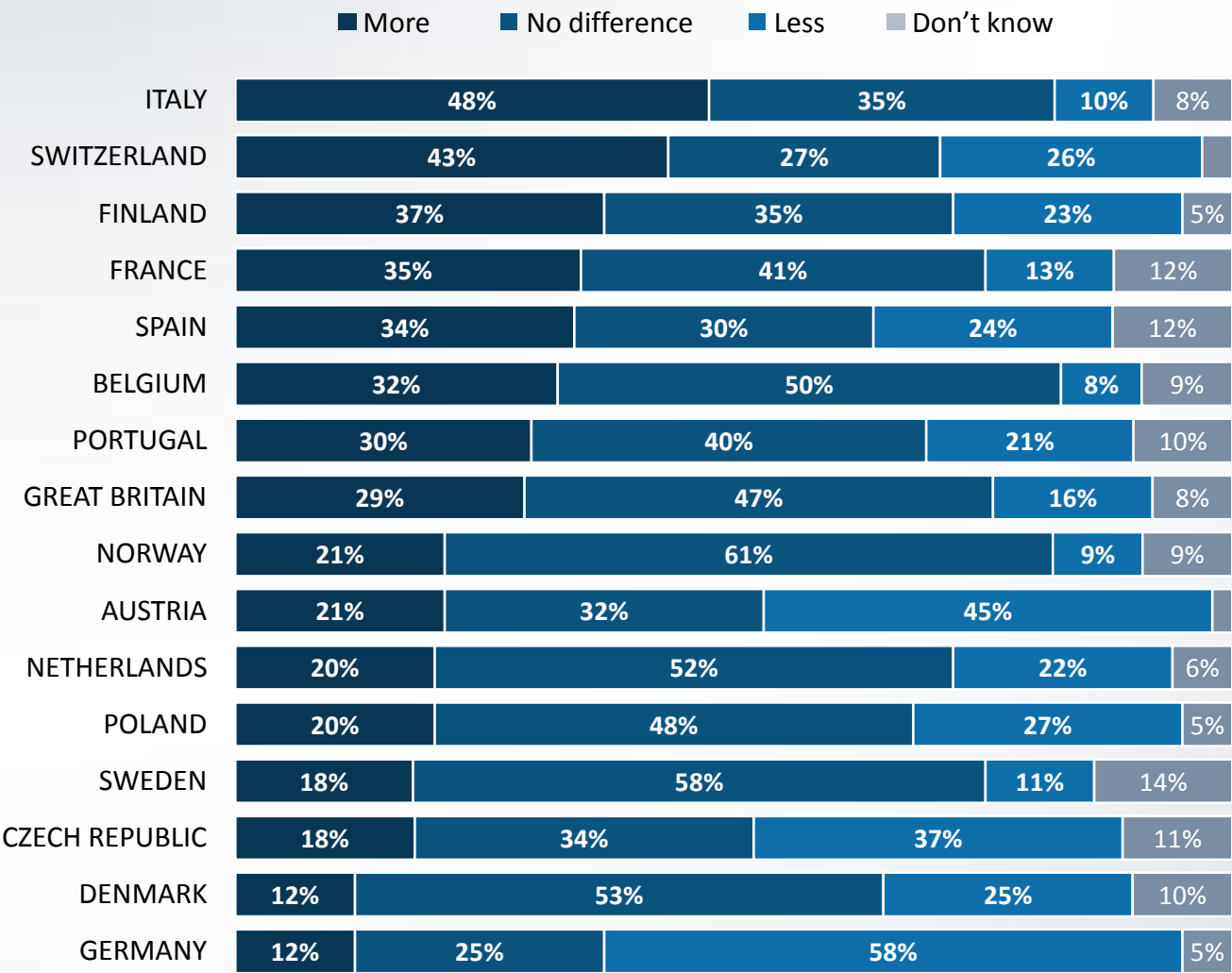
Euro Average:



EFFECT OF GAMES ON CHILDREN (3/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be... **AGGRESSIVE**



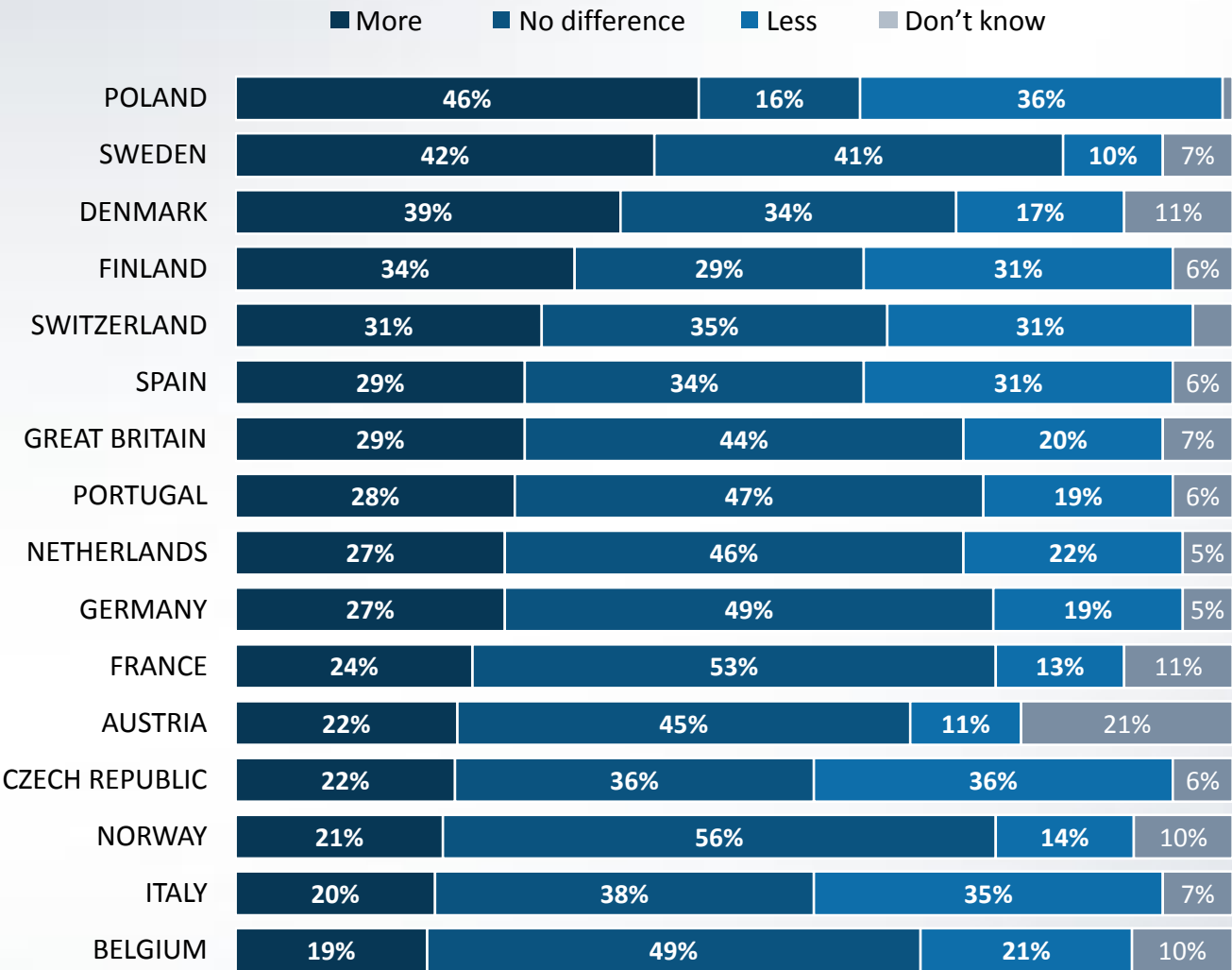
Euro Average:



EFFECT OF GAMES ON CHILDREN (4/5)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be... INFORMED



Euro Average:

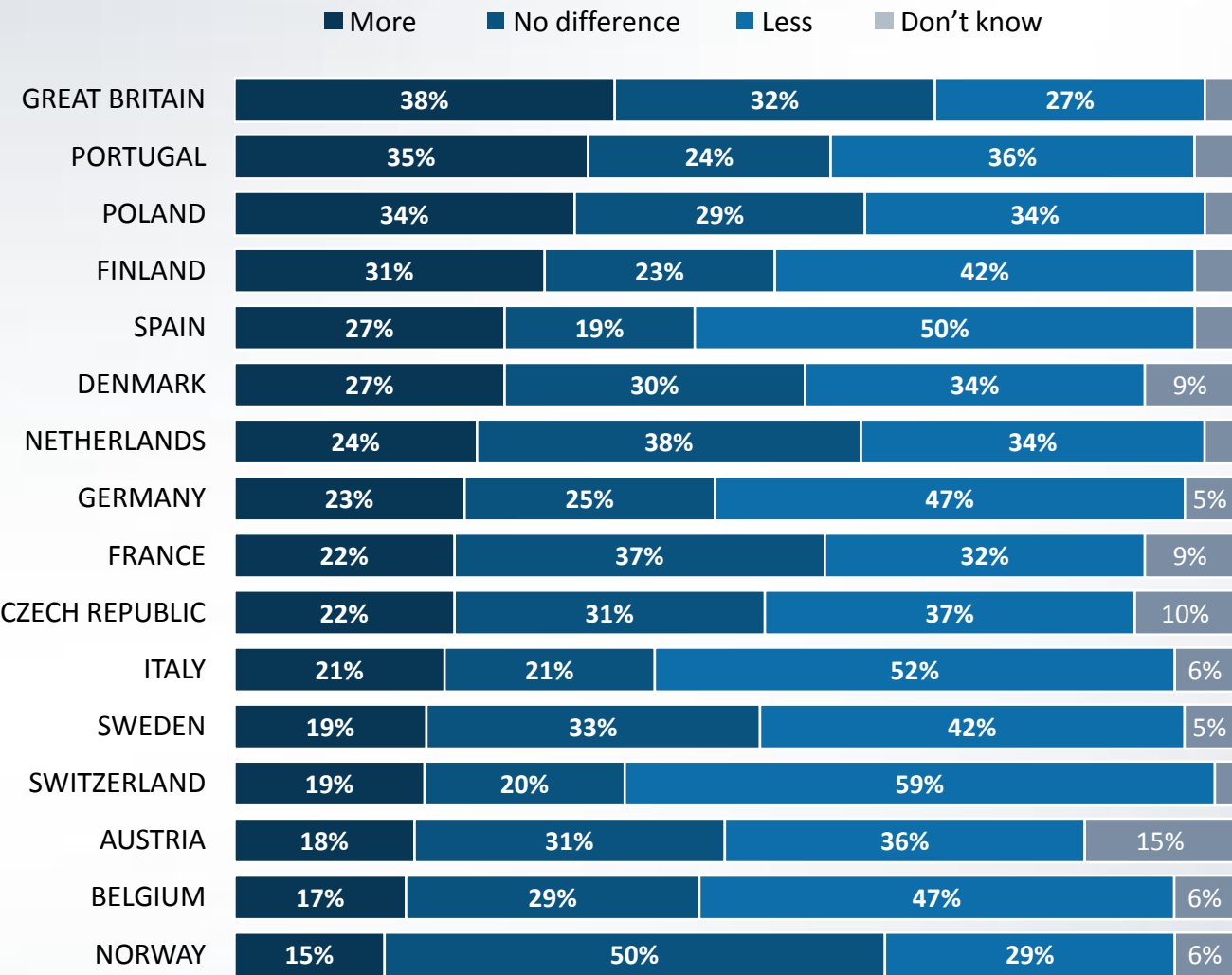


EFFECT OF GAMES ON CHILDREN (5/5)

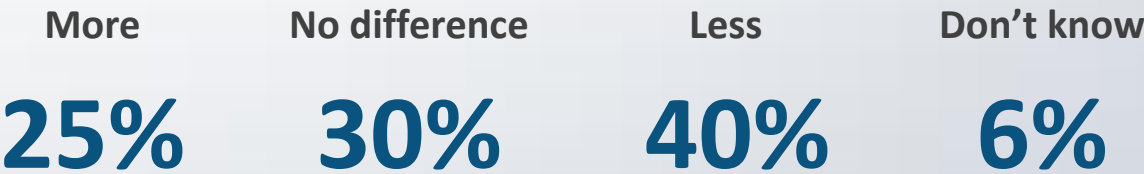
(PARENTS OF CHILDREN WHO PLAY GAMES)

Videogames encourage children to be...

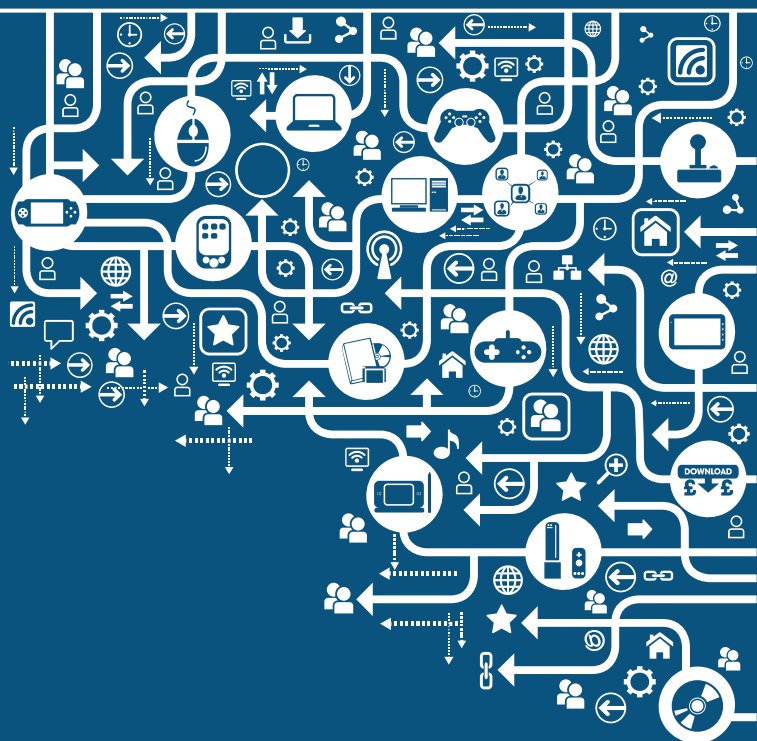
SOCIAL



Euro Average:



SUPERVISION

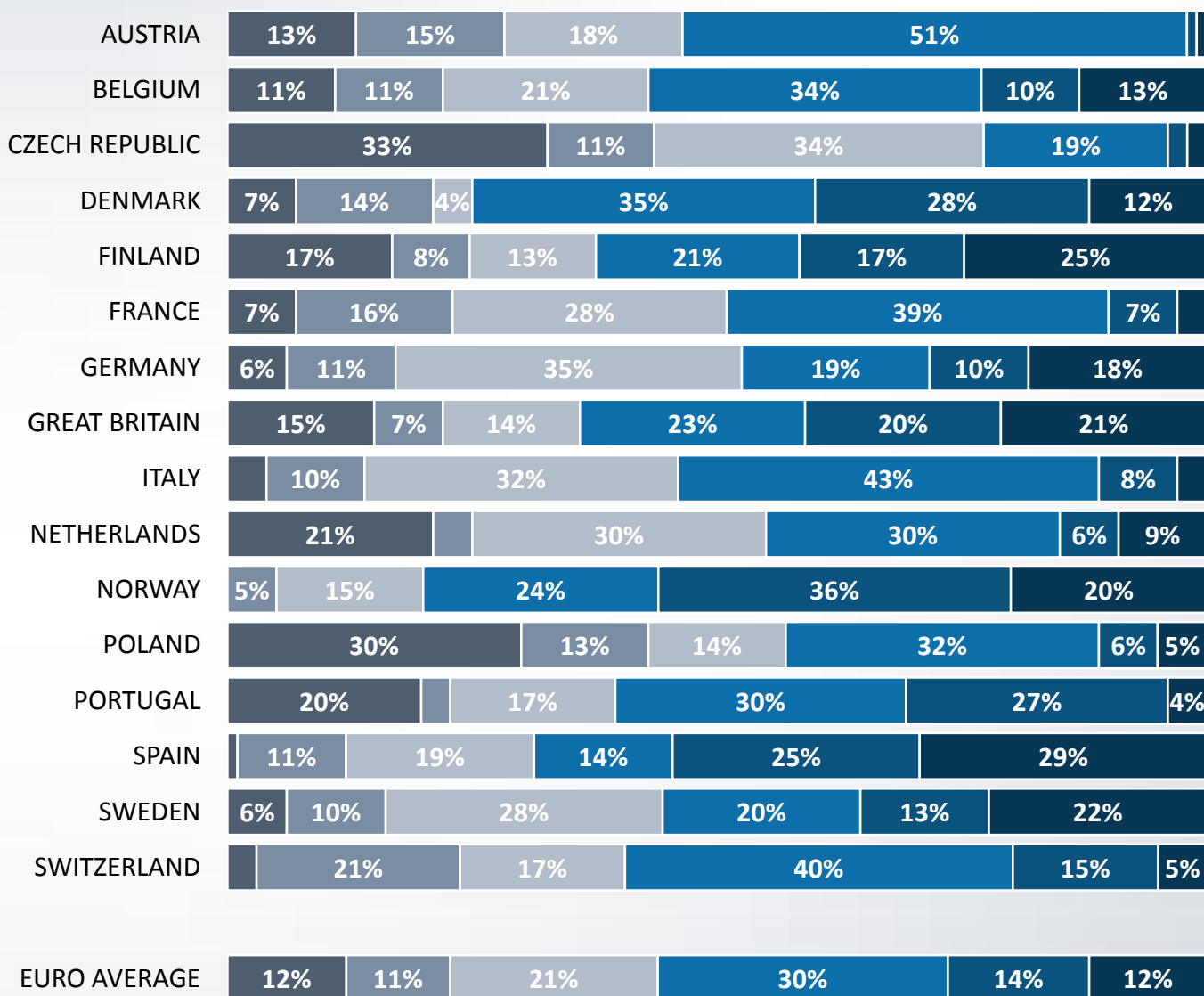


WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES (1/2)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 6-9

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

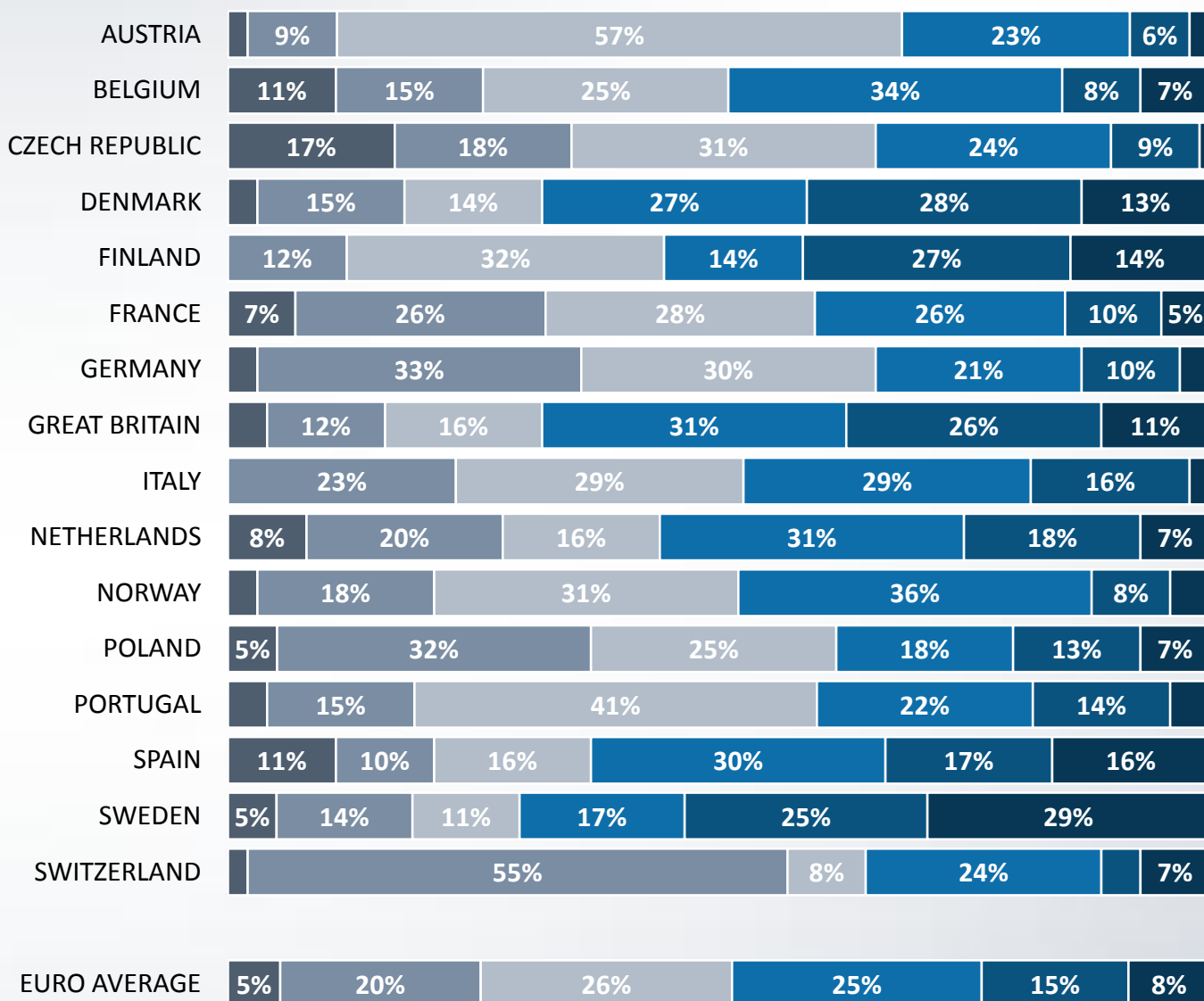


WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES (2/2)

(PARENTS OF CHILDREN WHO PLAY GAMES)

Youngest child aged 10-15

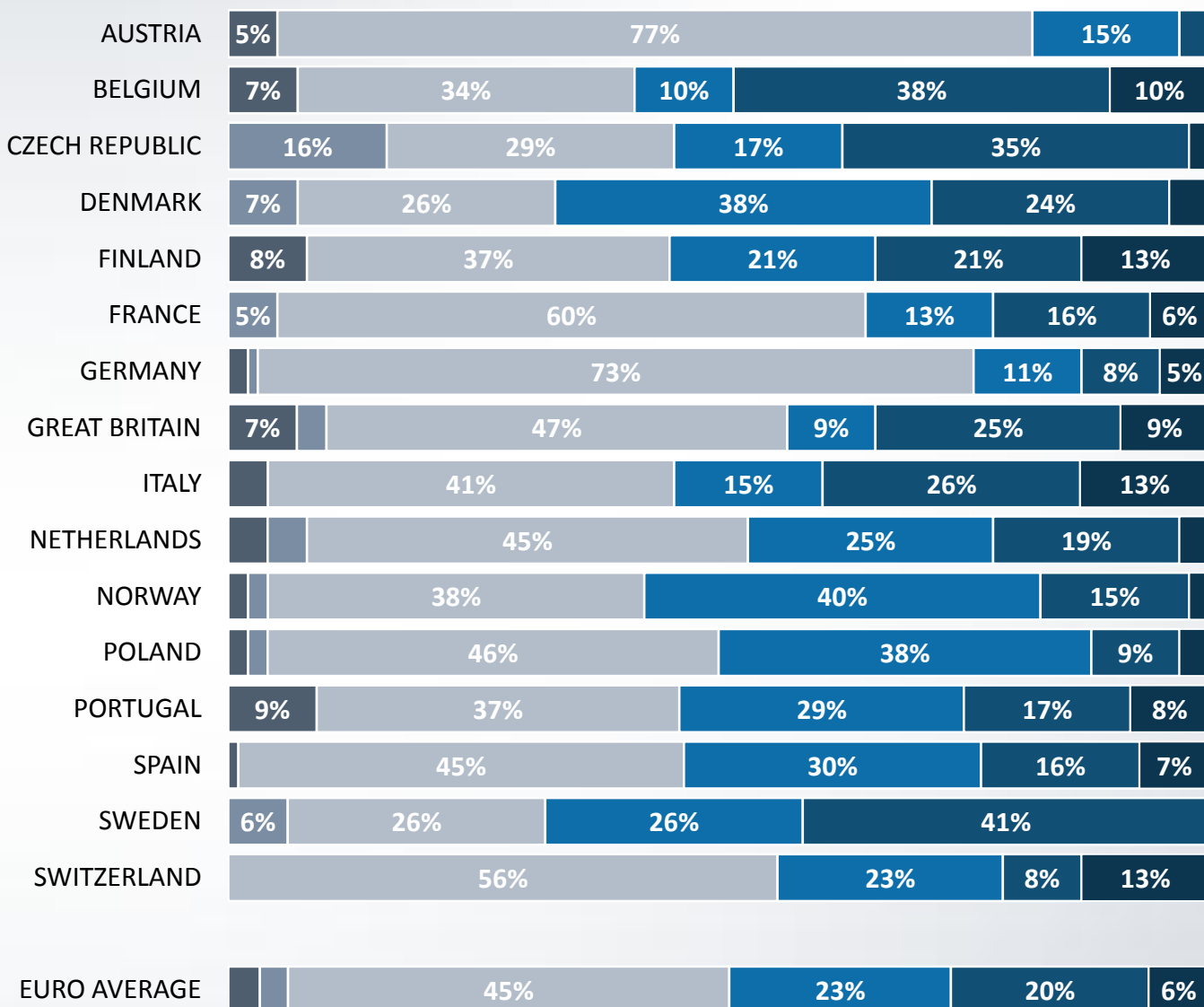
■ Never (+child doesn't buy/receive) ■ Never (but child does buy/receive) ■ Rarely
 ■ Sometimes ■ Most of the time ■ Always



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

Youngest child aged 6-9

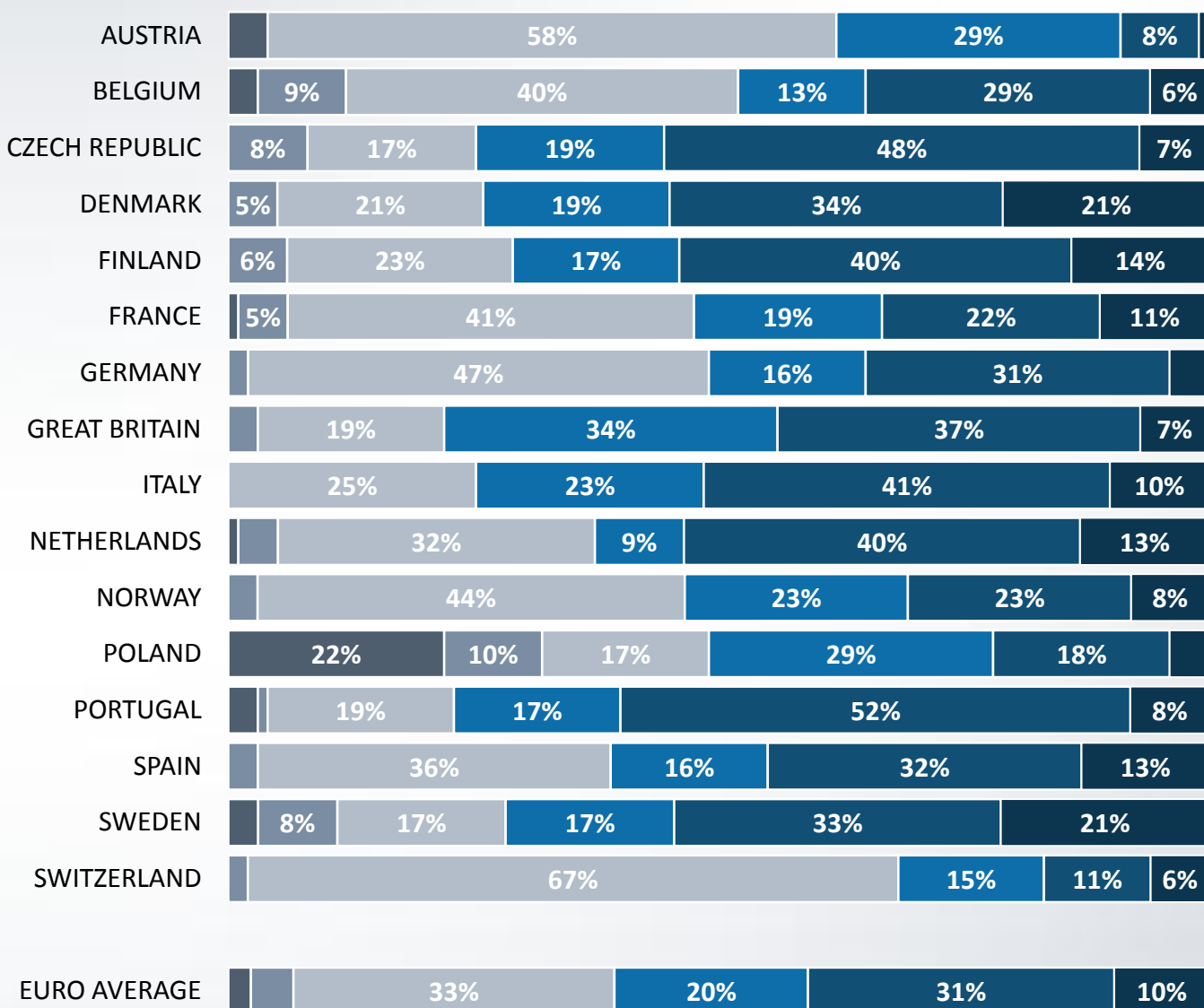
■ Child doesn't play games ■ Don't know ■ Never ■ Rarely ■ Sometimes ■ Often



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

Youngest child aged 10-15

■ Child doesn't play games ■ Don't know ■ Never ■ Rarely ■ Sometimes ■ Often



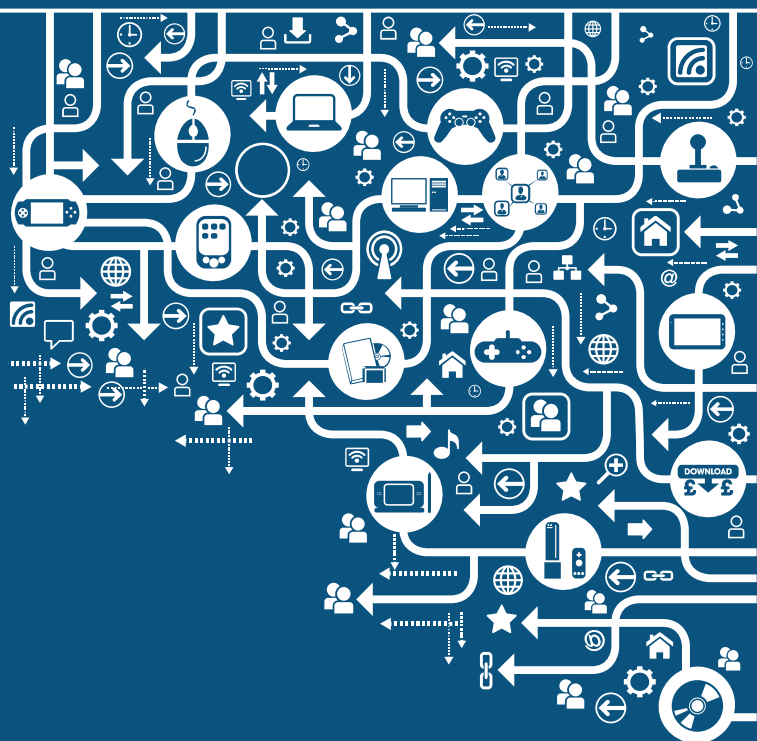
USE OF PARENTAL CONTROLS

(PARENTS OF CHILDREN WHO PLAY GAMES)

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

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

PEGI RATING SYSTEM

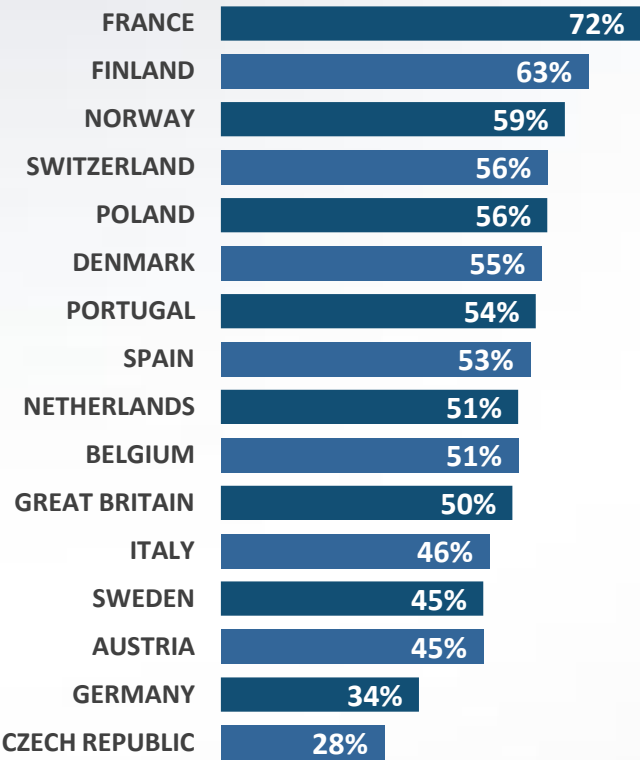


AWARENESS OF PEGI SYMBOLS (ALL ONLINE RESPONDENTS)



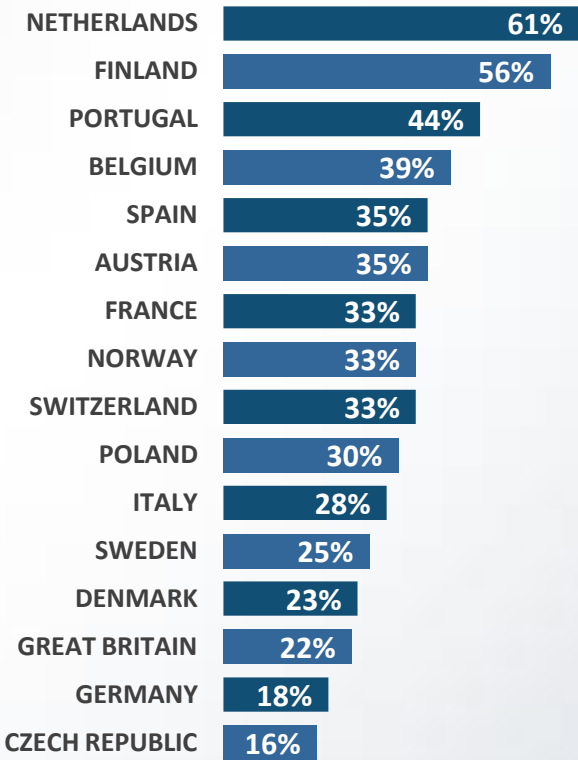
Aware of PEGI age rating symbols

Euro Average: 51%



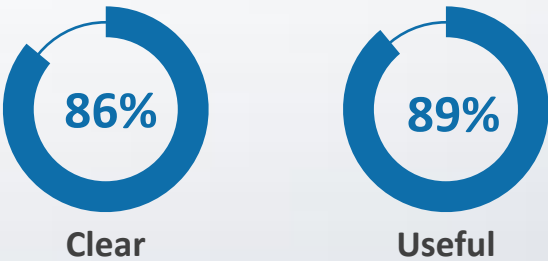
Aware of PEGI content symbols

Euro Average: 33%



EXTENT TO WHICH THE SYMBOLS ARE...

PEGI AGE RATING SYMBOLS
 (EURO AVERAGE)

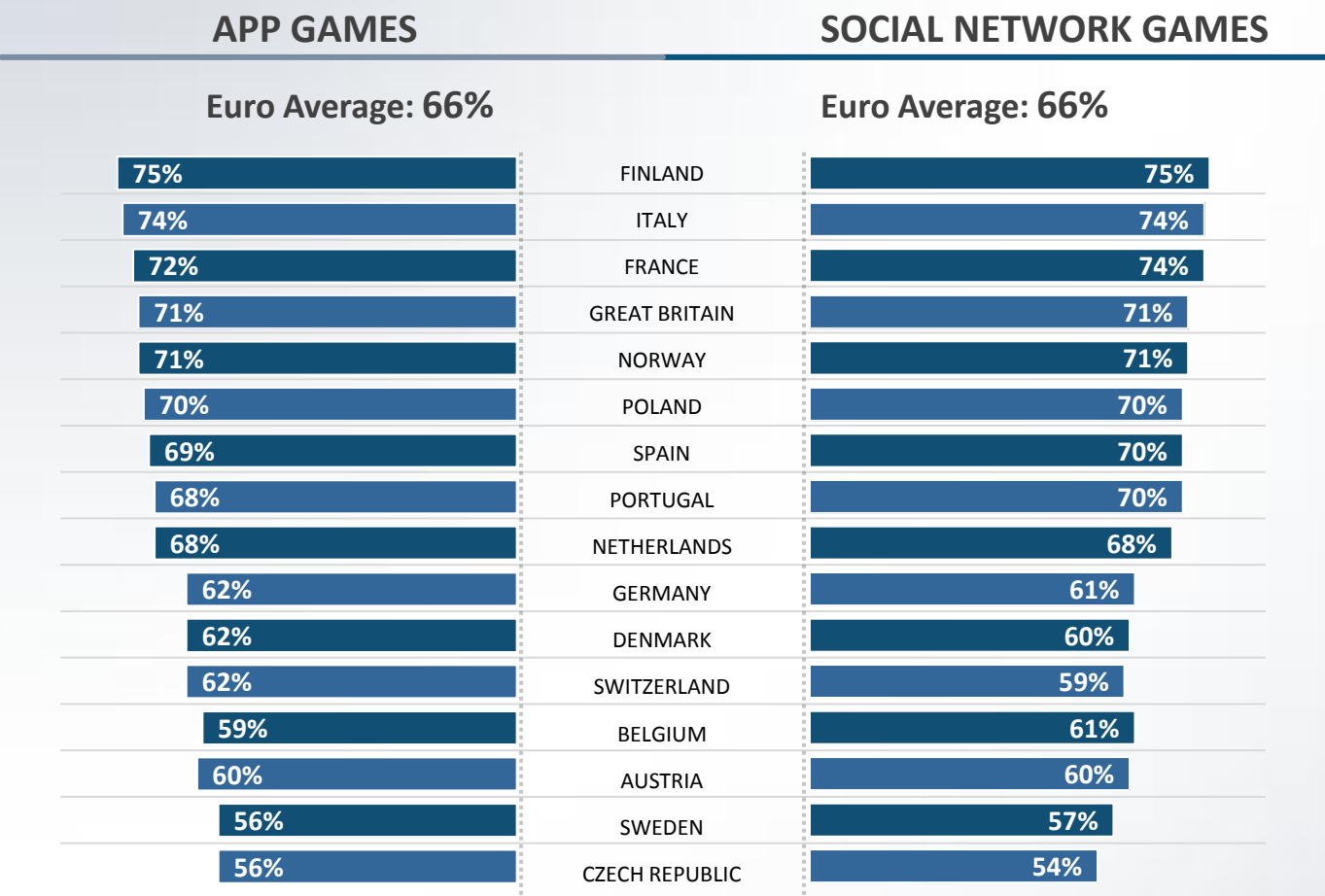


PEGI CONTENT SYMBOLS
 (EURO AVERAGE)



■ % NET Fairly/Very

% AGREE THAT PEGI RATING SYSTEM SHOULD APPLY TO...
(ALL ONLINE RESPONDENTS)



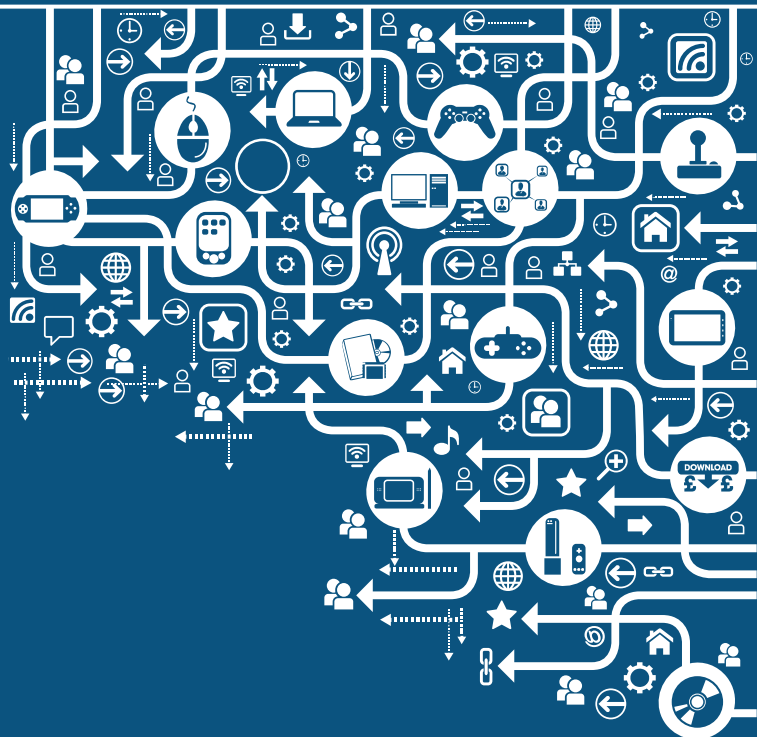
HOW THE AGE RATING SYSTEM FOR VIDEOGAMES SHOULD
COMPARE TO MOVIES (ALL ONLINE RESPONDENTS - EURO AVERAGE)

% AGREE WITH STATEMENT THE MOST

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

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

APPENDIX: MARKET SUMMARY INFOGRAPHICS





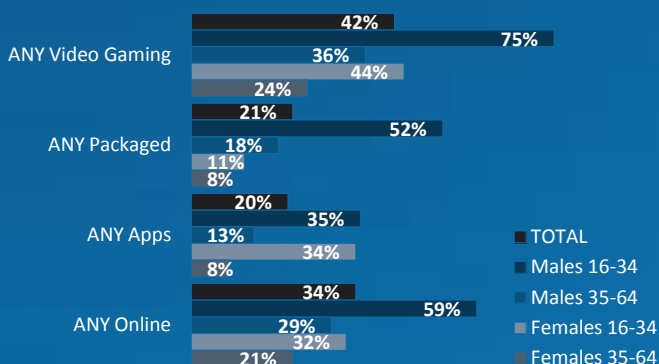
OVERVIEW OF GAMING

42%

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

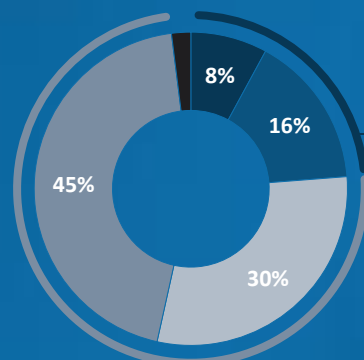


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



75%

Not very/at all interested

24%

Fairly/very interested

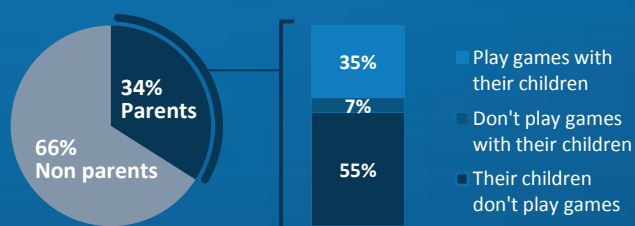
TOP 3 WORDS ASSOCIATED WITH GAMING

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

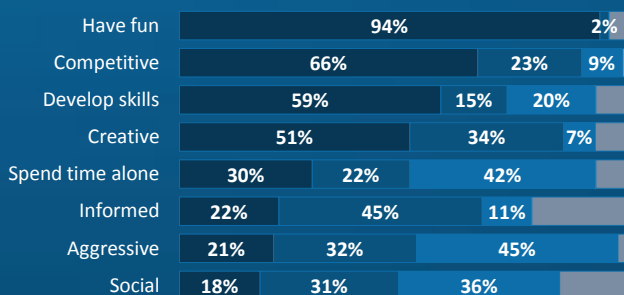
GAMING AND THE FAMILY

42%

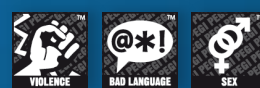
of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



45%

aware of PEGI age rating
symbols

35%

aware of PEGI content
symbols

60%

agree PEGI ratings should apply to app games

60%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



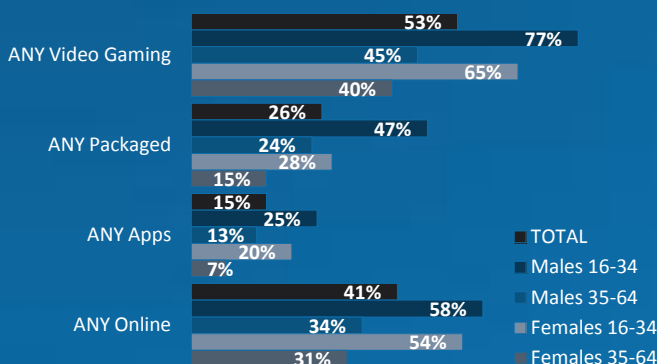
OVERVIEW OF GAMING

53%

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

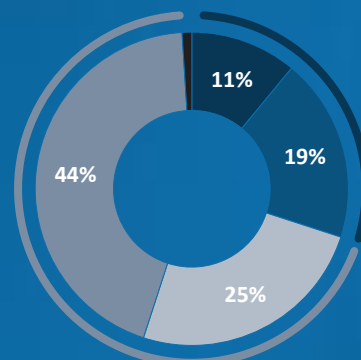


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



69%

Not very/at all interested

30%

Fairly/very interested

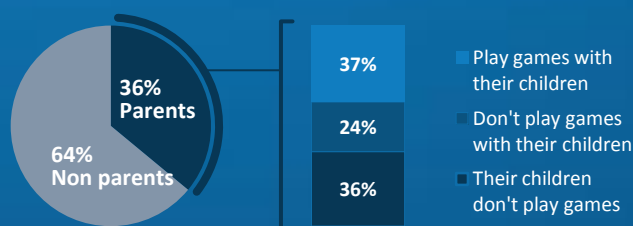
TOP 3 WORDS ASSOCIATED WITH GAMING

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

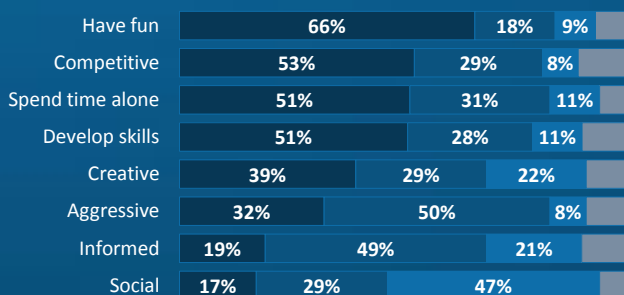
GAMING AND THE FAMILY

62%

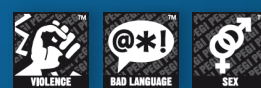
of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



51%

aware of PEGI age rating
symbols

39%

aware of PEGI content
symbols

59%

agree PEGI ratings should apply to app games

61%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

- 21% The age rating system for videogames should be stricter overall than that used for movies
- 47% The age rating system for videogames and movies should be equally strict
- 5% The age rating system for movies should be stricter overall than that used for videogames
- 27% Don't know



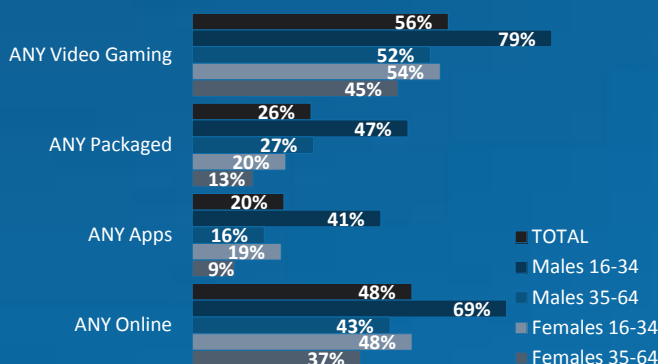
OVERVIEW OF GAMING

56%

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

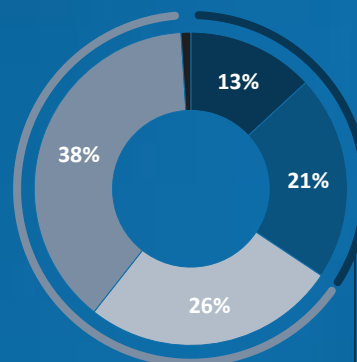


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



64%

Not very/at all interested

34%

Fairly/very interested

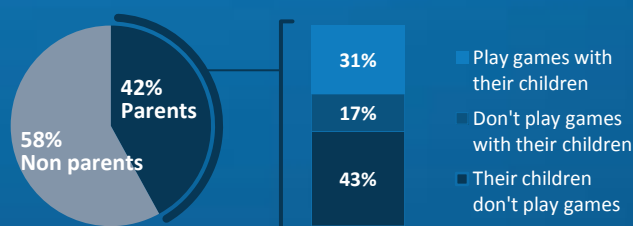
TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Entertaining	39%	52%
2	Good at providing escapism	34%	44%
3	Competitive	30%	38%

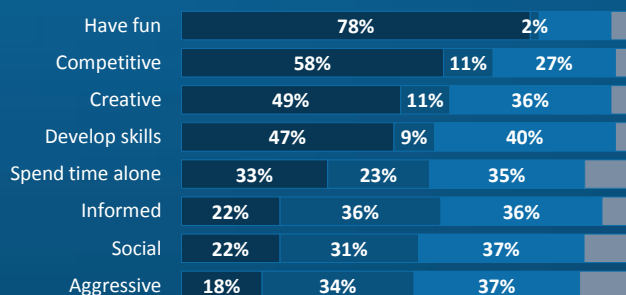
GAMING AND THE FAMILY

49%

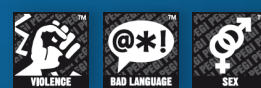
of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



28%

aware of PEGI age rating
symbols

16%

aware of PEGI content
symbols

56%

agree PEGI ratings should apply to app games

54%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



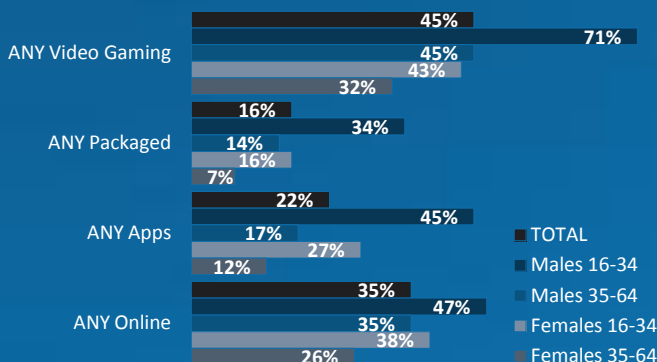
OVERVIEW OF GAMING

45%

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

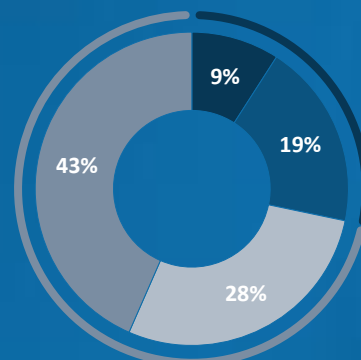


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



71%

Not very/at all interested

29%

Fairly/very interested

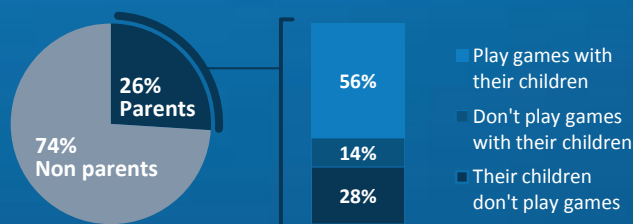
TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Immersive	50%	46%
2	Entertaining	38%	38%
3	Informative/educational	29%	28%

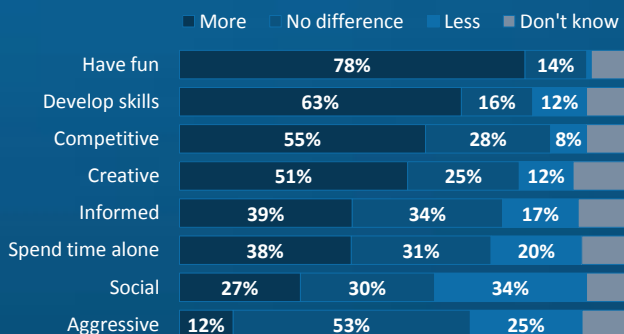
GAMING AND THE FAMILY

70%

of parents have children who play games



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



PEGI RATING SYSTEM



55%

aware of PEGI age rating symbols

23%

aware of PEGI content symbols

62%

agree PEGI ratings should apply to app games

60%

agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

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



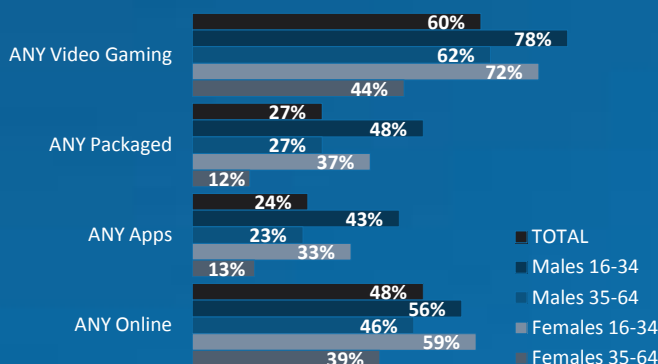
OVERVIEW OF GAMING

60%

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

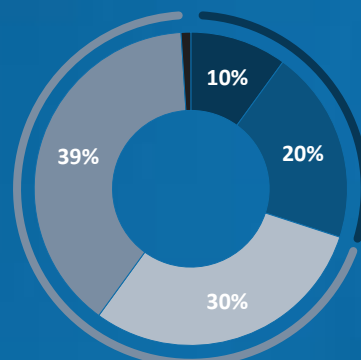


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



69%

Not very/at all interested

30%

Fairly/very interested

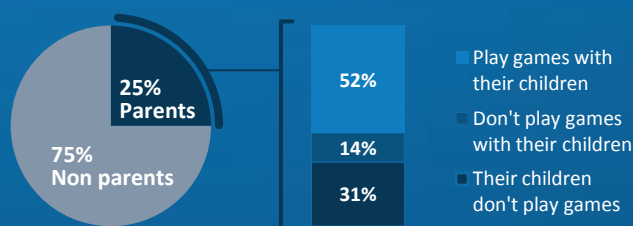
TOP 3 WORDS ASSOCIATED WITH GAMING

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

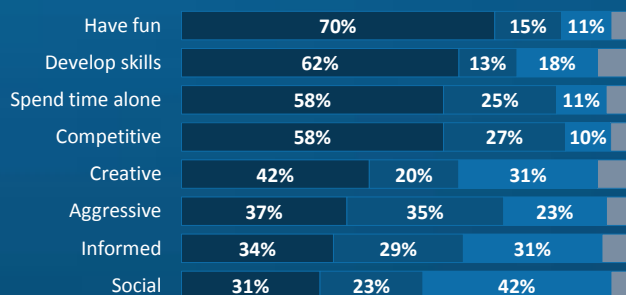
GAMING AND THE FAMILY

67%

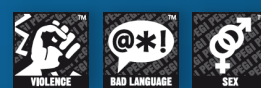
of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



63%

aware of PEGI age rating
symbols

56%

aware of PEGI content
symbols

75%

agree PEGI ratings should apply to app games

75%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

- 26% The age rating system for videogames should be stricter overall than that used for movies
- 50% The age rating system for videogames and movies should be the same
- 4% The age rating system for movies should be stricter overall than that used for videogames
- 20% Don't know

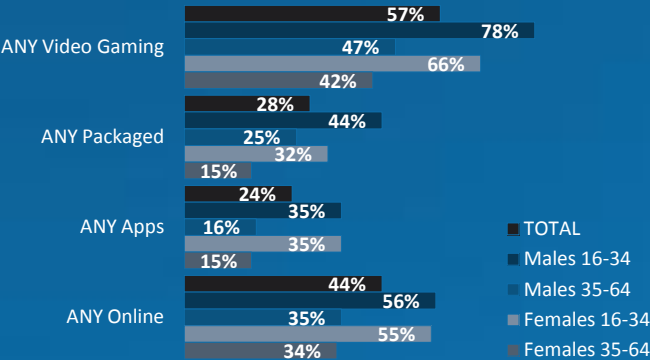
OVERVIEW OF GAMING

57%

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



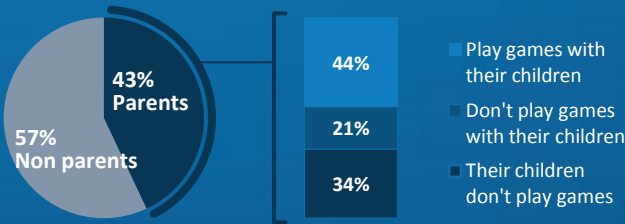
TYPES OF GAMES PLAYED: BY AGE AND GENDER



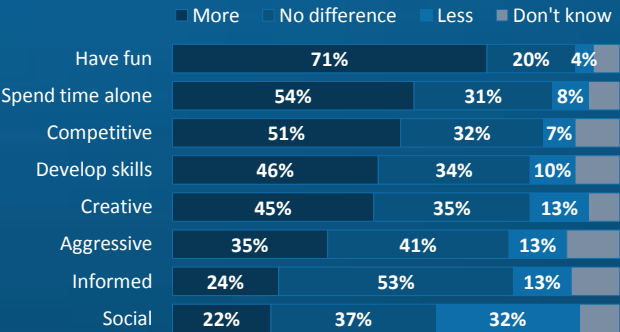
GAMING AND THE FAMILY

65%

of parents have children who play games

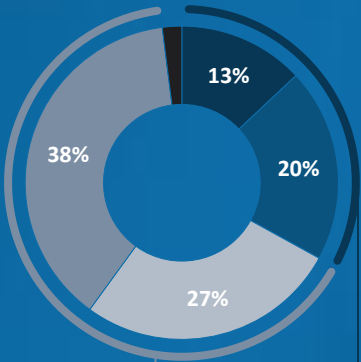


EFFECT OF GAMES ON CHILDREN: PARENTS OF CHILDREN WHO PLAY GAMES



PERCEPTIONS OF GAMING

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



65%

Not very/at all interested

33%

Fairly/very interested

TOP 3 WORDS ASSOCIATED WITH GAMING

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

PEGI RATING SYSTEM



72%

aware of PEGI age rating symbols

33%

aware of PEGI content symbols

72%

agree PEGI ratings should apply to app games

74%

agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

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



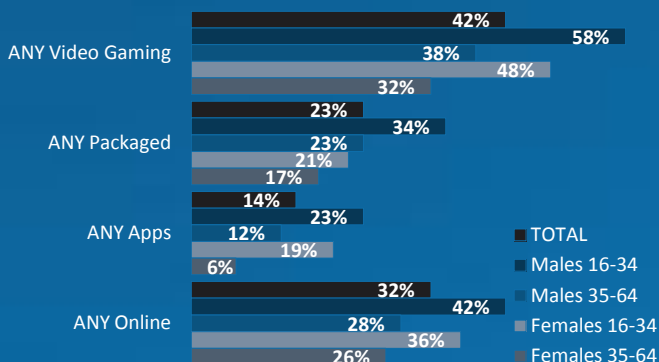
OVERVIEW OF GAMING

42%

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

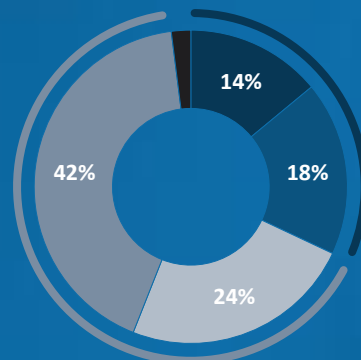


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



67%

Not very/at all interested

32%

Fairly/very interested

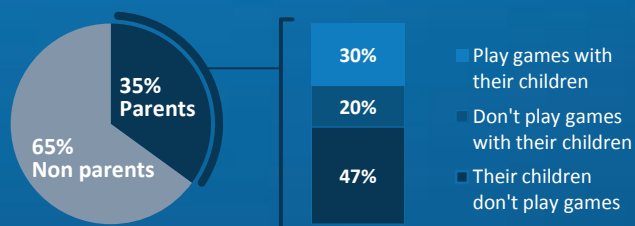
TOP 3 WORDS ASSOCIATED WITH GAMING

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

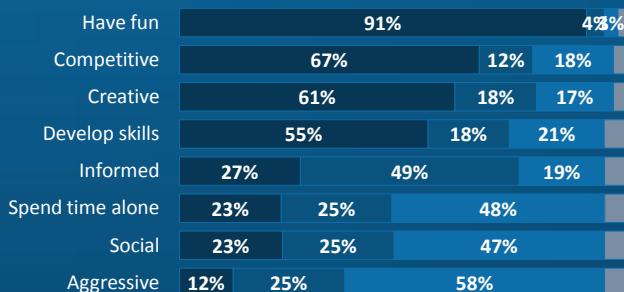
GAMING AND THE FAMILY

50%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



34%

aware of PEGI age rating
symbols

18%

aware of PEGI content
symbols

62%

agree PEGI ratings should apply to app games

61%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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

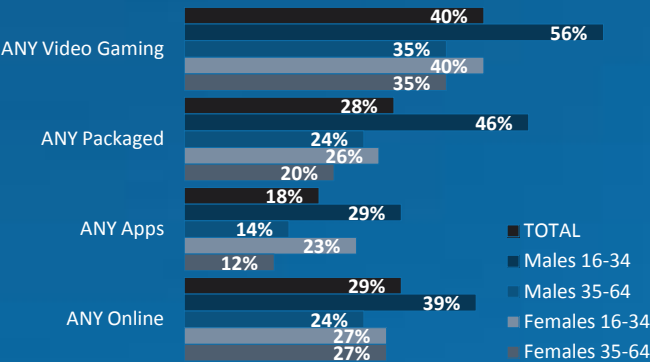
OVERVIEW OF GAMING

40%

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

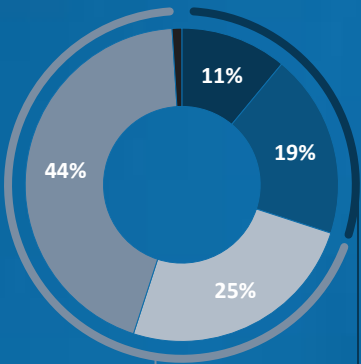


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



69%

Not very/at all interested

30%

Fairly/very interested

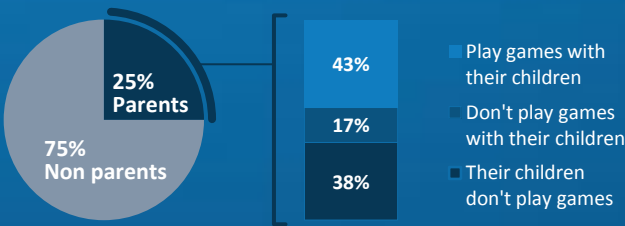
TOP 3 WORDS ASSOCIATED WITH GAMING

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

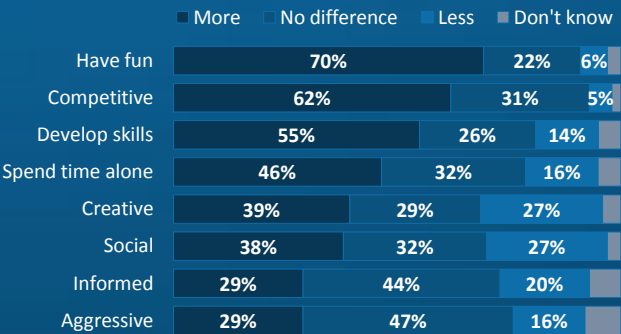
GAMING AND THE FAMILY

61%

of parents have children who play games



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



PEGI RATING SYSTEM



50%

aware of PEGI age rating symbols

22%

aware of PEGI content symbols

71%

agree PEGI ratings should apply to app games

71%

agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

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



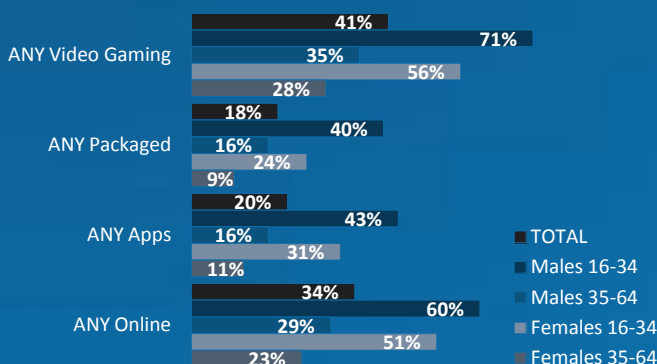
OVERVIEW OF GAMING

41%

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

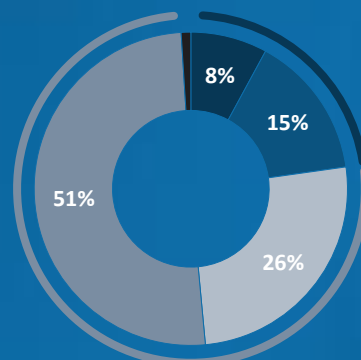


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



76%

Not very/at all interested

23%

Fairly/very interested

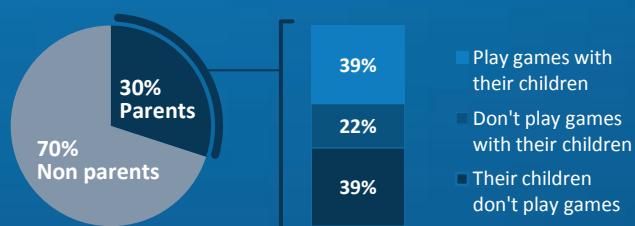
TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Fun	31%	50%
2	Entertaining	22%	33%
3	Good at providing escapism	21%	33%

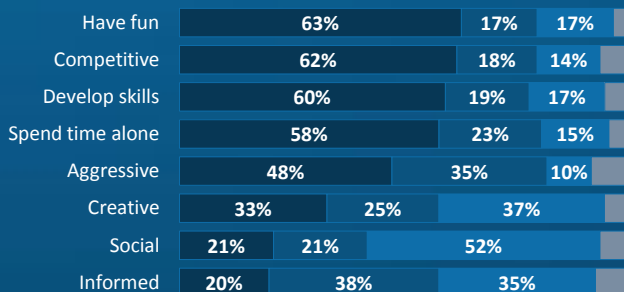
GAMING AND THE FAMILY

61%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



46%

aware of PEGI age rating
symbols

28%

aware of PEGI content
symbols

74%

agree PEGI ratings should apply to app games

74%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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

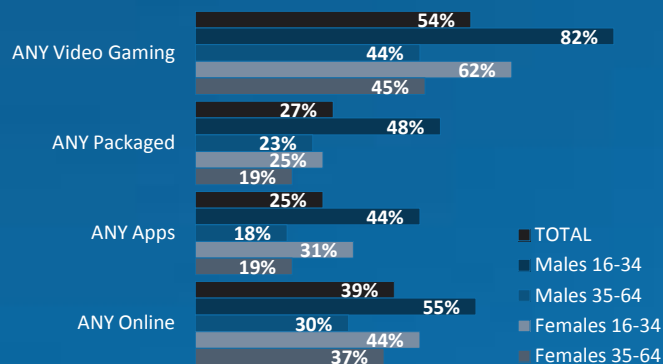
OVERVIEW OF GAMING

54%

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

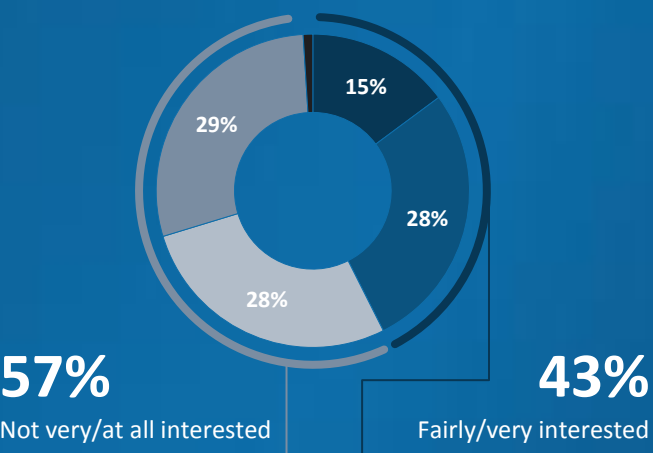


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



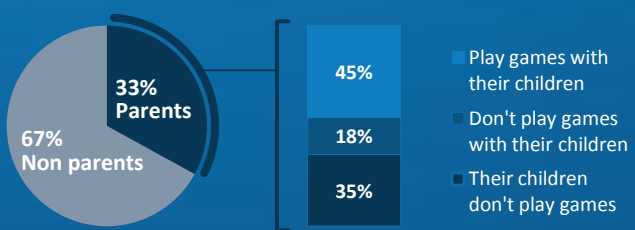
TOP 3 WORDS ASSOCIATED WITH GAMING

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

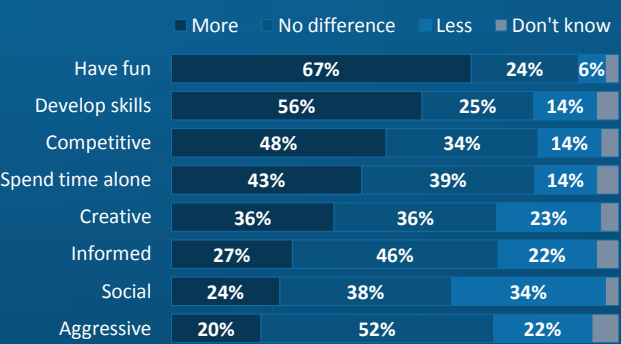
GAMING AND THE FAMILY

63%

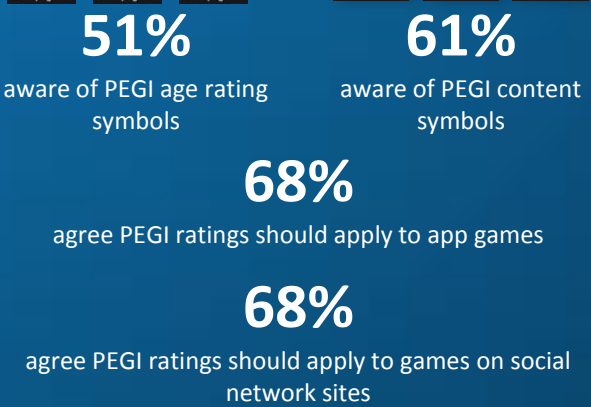
of parents have children who play games



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



PEGI RATING SYSTEM



% AGREE WITH STATEMENT THE MOST

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



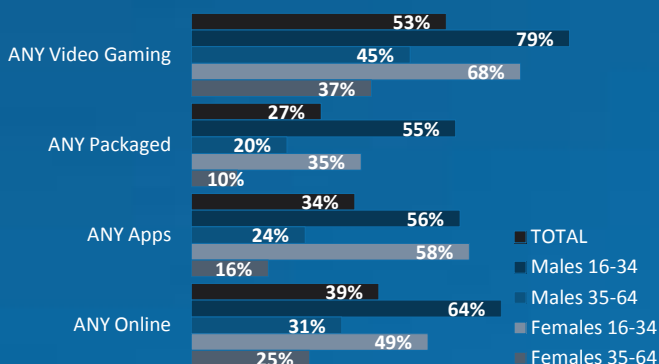
OVERVIEW OF GAMING

53%

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

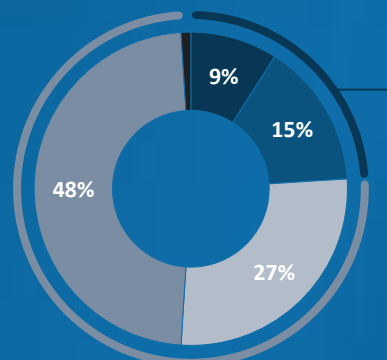


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



75%

Not very/at all interested

24%

Fairly/very interested

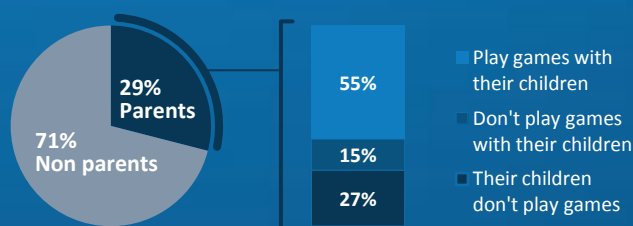
TOP 3 WORDS ASSOCIATED WITH GAMING

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

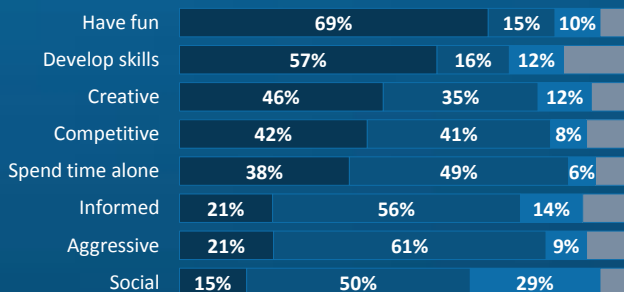
GAMING AND THE FAMILY

70%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



59%

aware of PEGI age rating
symbols

33%

aware of PEGI content
symbols

71%

agree PEGI ratings should apply to app games

71%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



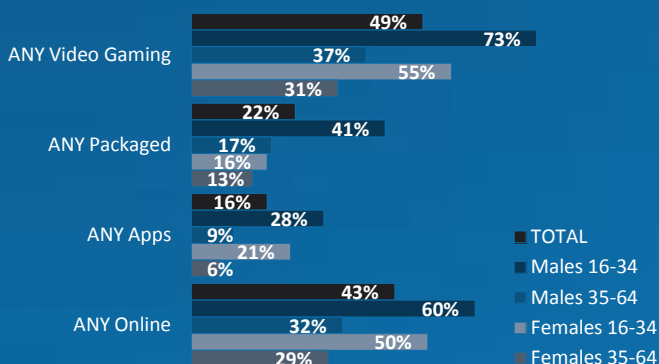
OVERVIEW OF GAMING

49%

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

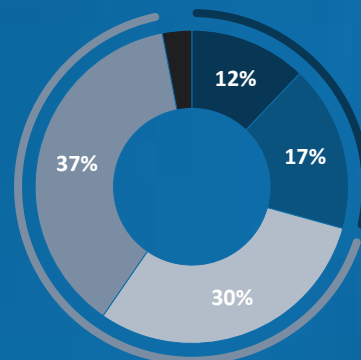


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



67%

Not very/at all interested

30%

Fairly/very interested

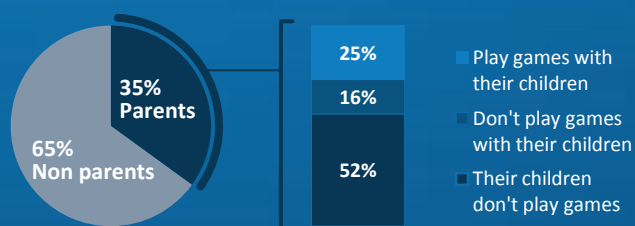
TOP 3 WORDS ASSOCIATED WITH GAMING

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

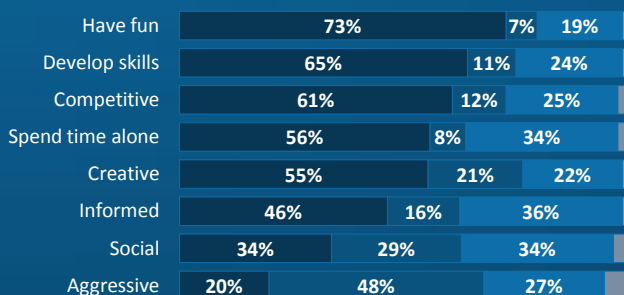
GAMING AND THE FAMILY

41%

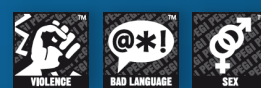
of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



56%

aware of PEGI age rating
symbols

30%

aware of PEGI content
symbols

70%

agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



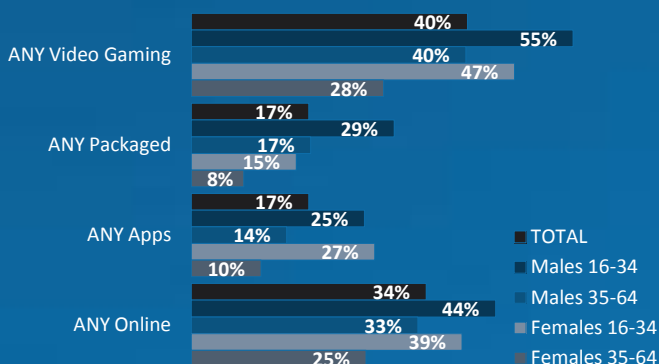
OVERVIEW OF GAMING

40%

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

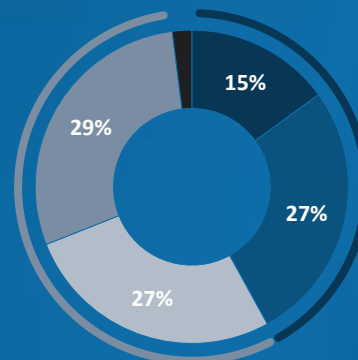


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



56%

Not very/at all interested

42%

Fairly/very interested

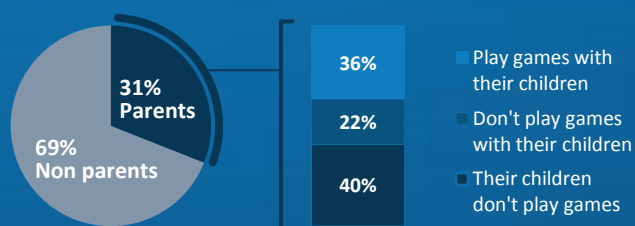
TOP 3 WORDS ASSOCIATED WITH GAMING

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

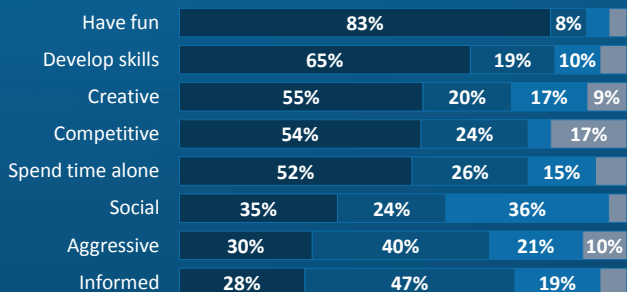
GAMING AND THE FAMILY

58%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



54%

aware of PEGI age rating
symbols

44%

aware of PEGI content
symbols

68%

agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



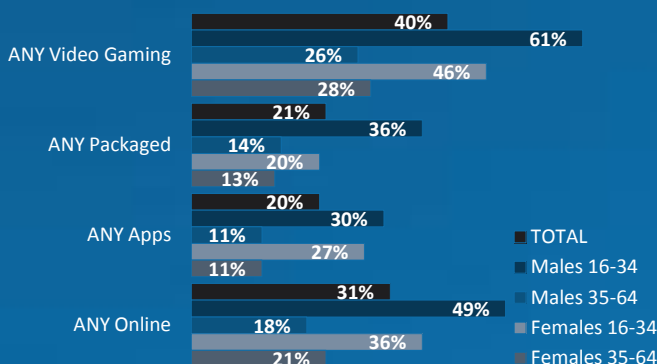
OVERVIEW OF GAMING

40%

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

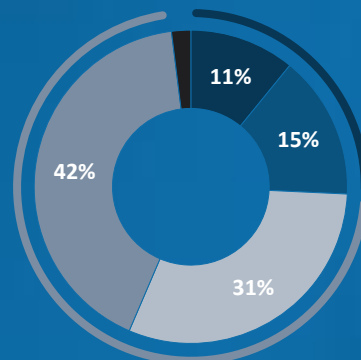


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



73%

Not very/at all interested

26%

Fairly/very interested

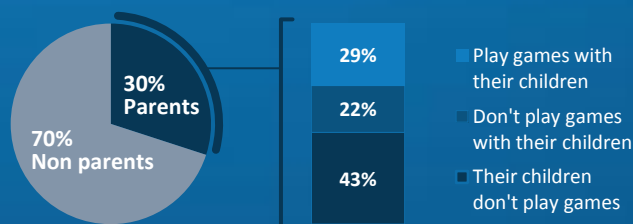
TOP 3 WORDS ASSOCIATED WITH GAMING

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

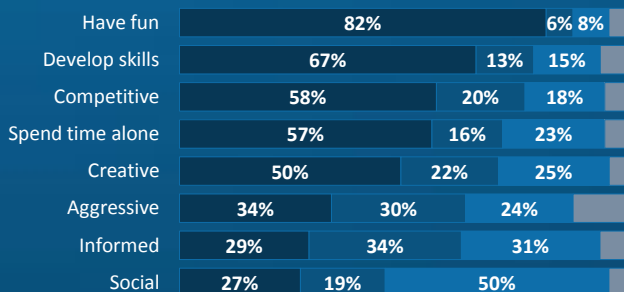
GAMING AND THE FAMILY

50%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



53%

aware of PEGI age rating
symbols

35%

aware of PEGI content
symbols

69%

agree PEGI ratings should apply to app games

70%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

- 28% The age rating system for videogames should be stricter overall than that used for movies
- 50% The age rating system for videogames and movies should be the same
- 4% The age rating system for movies should be stricter overall than that used for videogames
- 18% Don't know



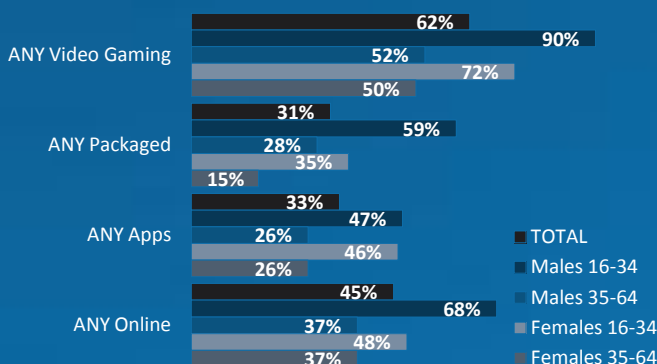
OVERVIEW OF GAMING

62%

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

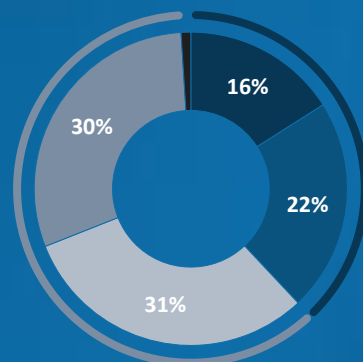


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



61%

Not very/at all interested

39%

Fairly/very interested

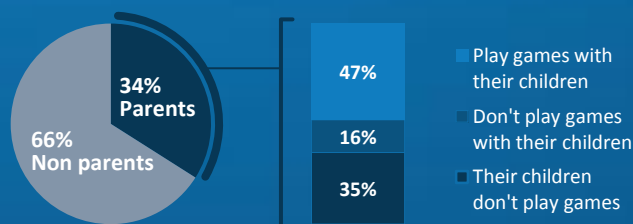
TOP 3 WORDS ASSOCIATED WITH GAMING

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

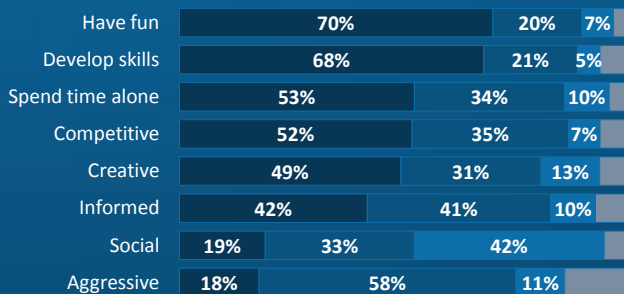
GAMING AND THE FAMILY

64%

of parents have children who play games

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

More No difference Less Don't know



PEGI RATING SYSTEM



45%

aware of PEGI age rating
symbols

25%

aware of PEGI content
symbols

56%

agree PEGI ratings should apply to app games

57%

agree PEGI ratings should apply to games on social
network sites

% AGREE WITH STATEMENT THE MOST

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



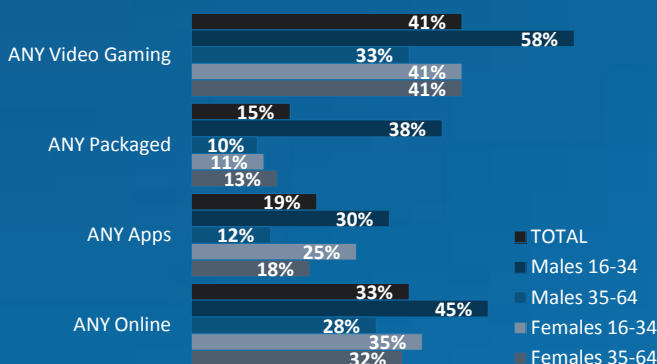
OVERVIEW OF GAMING

41%

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

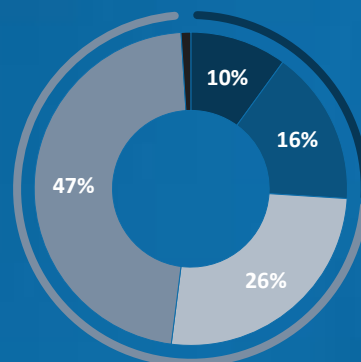


TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING

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



73%

Not very/at all interested

26%

Fairly/very interested

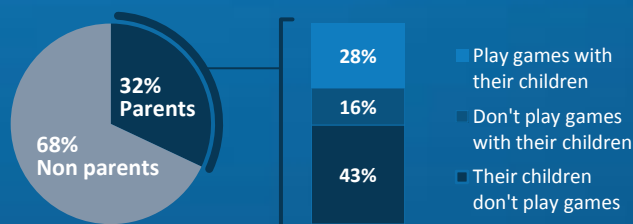
TOP 3 WORDS ASSOCIATED WITH GAMING

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

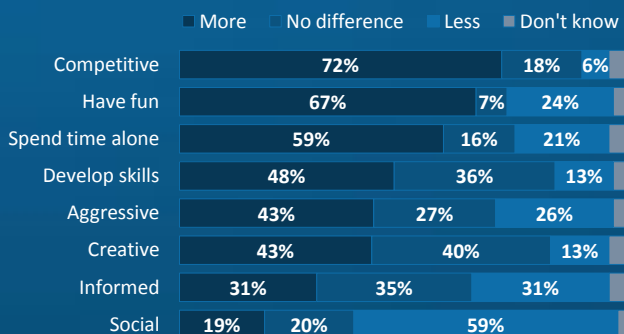
GAMING AND THE FAMILY

43%

of parents have children who play games



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



PEGI RATING SYSTEM



56%

aware of PEGI age rating symbols

33%

aware of PEGI content symbols

62%

agree PEGI ratings should apply to app games

59%

agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

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

ALSO AVAILABLE FROM ISFE AND IPSOS MEDIACT:

GAMETRACK

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

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

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

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

COUNTRIES COVERED



USA



UK



FRANCE



GERMANY



SPAIN





% PLAYING GAMES IN PAST 12 MONTHS – Q3 2012

Base: all 6+ population



ANY video gaming	20m people	35%	29m people	50%	26m people	40%	14m people	40%
ANY Packaged		22%		29%		20%		20%
ANY Apps		14%		10%		8%		8%
ANY Online		19%		25%		18%		18%
Downloads		8%		9%		7%		7%
Social		8%		13%		9%		9%
Multiplayer		8%		6%		4%		4%
Browse		8%		7%		8%		8%

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

PS2 GAMERS

Playstation 2

TIME

Playing time
Average 12 hours per week ANY gaming
average 1 hour per week gaming on PS2

Total time gaming
37 MILLION HOURS (of which PS2= 11%)

VALUE

Spend
Average £24 in quarter
average £1 in quarter on PS2 games

Total value
£72 MILLION (of which PS2= 4%)

SIZE

11+ population = 3m people
5%
14%
of all gamers
3%
of all gaming hours

TOP DEVICES (share of hours)

PC/laptop	22%
PS3	12%
PS2	11%

GENDER

	PS2	ALL GAMERS
Males	61%	55%
% 11-14	15%	6%
% 15-24	16%	16%
% 25-34	11%	12%
% 35-44	11%	9%
% 45+	9%	12%
Females	39%	45%
% 11-14	10%	5%
% 15-24	11%	11%
% 25-34	8%	8%
% 35-44	6%	9%
% 45+	4%	12%
Household		
Any kids	58%	47%
No kids	42%	53%

PS2 gamers - time spent on all gaming

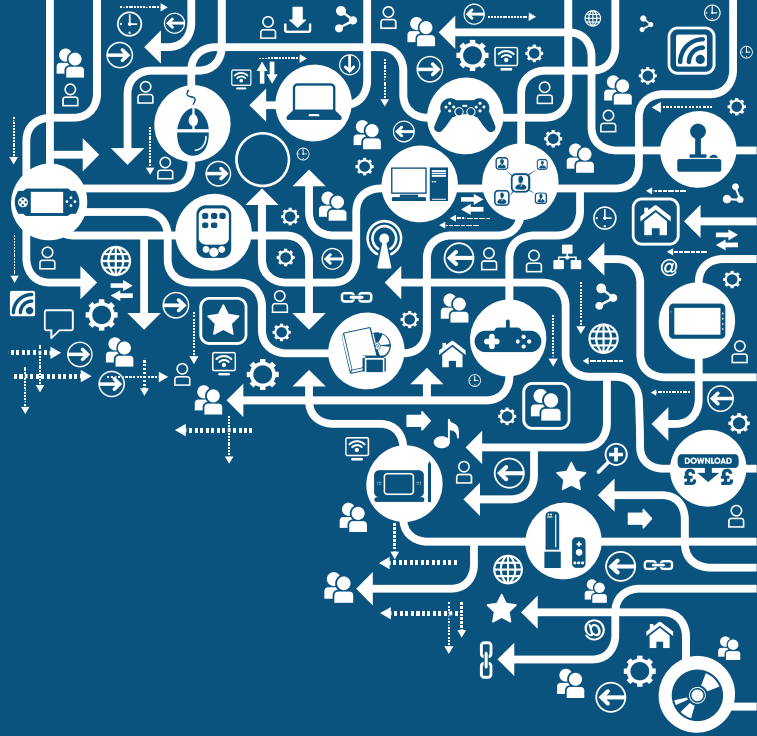
Online 27%, Packaged 61%, Apps 12%

PS2 gamers - value spent on all gaming

Online 12%, Packaged 78%, Apps 10%

Base: all 11+ population

Ipsos MediaCT



FOR MORE INFORMATION

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