

Old and New Media in Everyday Life of Czech Audiences

Research report, 2015

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The report presents selected descriptive findings from a quantitative survey into the Czech 18+ population. The data from 1998 respondents was collected in October and December 2014 by Median (http://www.median.cz); the collection employed quota sampling and computer-assisted personal interviewing,

The survey was preceded by a broader qualitative inquiry opening a path to a more thorough understanding of the researched phenomena. At the same time, the project was linked with a parallel, closely related research project entitled The Transformation of Public and Political Participation in the Context of Changing Media Technologies and Practice supported by Masaryk University (MUNI/A/0903/2013).

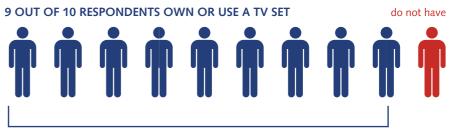
Besides the standard socio-demographic indicators, the questionnaire also included questions regarding:

- the full range of possible media-related practices including obtaining and reception of films, TV series and other TV content, news, sports, music, books, magazines and spoken word;
- online activities and use of social networking sites;
- playing computer- and videogames;
- ownership of media and computer technologies and access to the Internet;
- respondents' political and public activities.

The specific construction of the questionnaire enabled us to research the media-related practices in more complex ways than traditionally-used research tools do: we were following the fluid links between particular practices (such as watching TV series) and various media technologies (TV sets, tablets, computers...). Furthermore, regarding the most important practices (watching films, TV series and sports, receiving news), the questionnaire enabled us to identify in what situations and with whom the respondents do their activities.

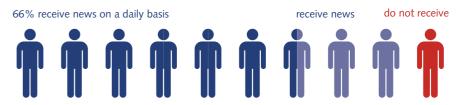
The research report focuses only on the basic description of the Czech audiences' practices. The findings related to political and public participation are presented in a separate report and conclusions from more-thorough analyses will be published in standard peer-reviewed papers. Despite that, even the basic descriptive data deliver several suggestions importantly illustrating the ongoing transformation of Czech media audiences:

- Unsurprisingly, the data demonstrate obvious and expected differences in the use of technologies between older and younger respondents.
- Specifically for the younger respondents, social networking sites (SNS) represented mainly by Facebook have become a routine part of their everyday life. Moreover, this is linked with an increasing mobility of media technologies.
- Nevertheless, TV broadcasting keeps its prominent position within everyday life as the main source both of news information and popular content in other words, television's impact is not diminishing. However, the data suggest that younger respondents are changing their relationship to TV and original TV content: in the age groups of 18–29 and 30–39, we can see a similar tendency to replace the 'traditional' media object of a TV set with online sources and alternative screens, as we see in a more significant form in the case of print media and radio.

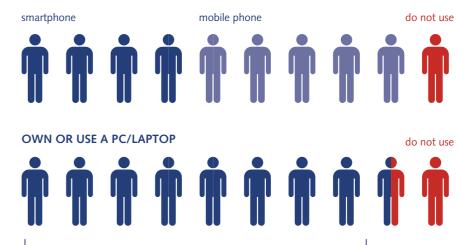


86% LIVE IN A HOUSEHOLD WITH TWO OR MORE TV SETS

9 OUT OF 10 RESPONDENTS RECEIVE NEWS



9 OUT OF 10 RESPONDENTS OWN A MOBILE PHONE OR SMARTPHONE



8 of 10 respondents are online, 20% use mobile internet



26% use Facebook daily

28% play videogames /

computer games

20%

5%

own a tablet own an e-book reader

NON-USERS

Data related to what the respondents do not do and do not use are actually useful as they balance our picture of Czech media audiences. The data underline that the proliferation of new media comes with a consequence: some of the members of audiences remain for various reasons beyond the main innovation trends. It does not necessarily mean that the non-users should be seen as disadvantaged. However, remaining beyond could be both a source and a result of cultural and economic inequalities.

TAB. 1: PORTIONS OF THE NON-USERS

	TV	PC	Internet	Mobile phone	Smart- phone	SNS	Books
Total (N=1998)	8.1%	26.2%	21.4%	10.9%	58.7%	59%	34.9%

With some simplification we can say about the Czech population that the younger the members of the audience are, the more they are convergent in their practices – they prefer online practices more often and they receive media content over multiple technologies more often. Conversely, the older the respondents are, the more often they prefer 'traditional' connections between particular types of content (or textuality) and particular technological interfaces.

For illustrative purposes we put here (and in some other sections of the report) as a means of contrast the practices of respondents aged 18–39 and 40+. It is necessary to underscore that this cut-off is really purely illustrative – and that the chosen cut-off point is inevitably arbitrary. A more-detailed look always shows that the changes in practices are – in relation to age – always gradual and the data actually do not prove the existence of any strict border between 'the two groups'.

TAB. 2: AGE OF THE NON-USERS

	TV	PC	Internet	Mobile phone	Smart- phone	SNS	Books
18-29 years	14.1%	13%	3.5%	5.9%	35.4%	17.3%	40%
30–39	6.5%	14.1%	4.7%	6%	39%	38.1%	34.4%
40–49	7.4%	17.6%	11.9%	9.5%	50.3%	62.5%	32.1%
50–59	6.1%	24.5%	22.3%	12.1%	65.9%	76.8%	36.9%
60–69	6.3%	36.1%	36.4%	9.5%	83.5%	85.1%	32%
70+	6.9%	65.3%	67.3%	27.3%	94.2%	95%	31.9%
p	< 0.01	< 0.001	< 0.001	< 0.001	< 0.001	< 0.001	< 0.05
n	1997	1997	1997	1998	1999	1998	2000

The preference or rejection of particular media-related practices can be linked not only to age but obviously also with the gender and education of the respondents (see tabs 3 and 4). A stronger role is played both by gender and education in the case of reading books; interestingly, one's education correlates with general internet use but not with the use of social networking sites.

***** Only 5% of the respondents do not receive any news LESS THAN 1 OUT OF 10 RESPONDENTS DO NOT HAVE AND DO NOT WATCH TV watching TV **8% OF THE RESPONDENTS** 32% of those not watching TV are between 18 and 30 years of age **NOT HAVING** not having A MOBILE PHONE a smartphone **NOT USING** THE INTERNET not using any of the social networking sites **7 OUT OF THE 10 RESPONDENTS** DO NOT READ PRINTED NEWSPAPERS

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TAB. 3: GENDER OF THE NON-USERS

	TV	PC	Internet	Mobile phone	Smart- phone	SNS	Books
Males	9.4%	22.9%	19.3%	10.6%	55.2%	61.1%	44.9%
Females	6.8%	29.3%	23.5%	11.2%	62%	57.4%	25.4%
p	n.s.	< 0.01	n.s.	< 0.01	< 0.01	< 0.01	< 0.001
n	1998	1998	1997	1998	1998	1567	1998

TAB. 4: EDUCATION OF THE NON-USERS

	TV	PC	Internet	Mobile phone	Smart- phone	SNS	Books
Primary	6.8%	36.5%	33.5%	13.5%	66.5%	49.3%	46.8%
Secondary	9.8%	17.5%	10.4%	9.9%	55%	45.3%	25%
Higher	8.4%	13.9%	8.7%	6%	44%	48.7%	19.9%
p	n.s.	< 0.001	< 0.001	< 0.001	< 0.001	n.s.	< 0.001
n	1998	1997	1997	1998	1999	1567	1998

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NEWS

The reception of news is a source for manifesting a common agenda connecting the nation and society while at the same time being one of the important indicators of interest in political and public issues. It conditions public engagement – participation in politics, in public activities etc. Czech society, in light of the aforementioned data, needn't be viewed with pessimism – namely two thirds of the population receive news every day and just a small minority is not interested in news at all.

In relation to news we have – among other questions – asked our respondents (1) how often they usually receive news, (2) what types of news they receive and (3) what media channels they use for such reception. The frequency of news reception indicates how firm a position these practices have in the respondents' everyday practices. Fragmentation of the media content types (based on previous qualitative pilot studies) takes into account the fact that news information are quite structured thematically and with regard to their cultural prestige.

The qualitative inquiries suggested that the respondents could have a quite disapproving stance to anything labelled as 'political'. Therefore we have made an explicit distinction between interest in local / nation / foreign information and news explicitly understood by the respondents as political.

Preference of particular media channels enables us to compare the position of the traditional mass media of TV, radio and mass print and online media. One of the most important findings here is the conclusion that TV broadcasting maintains its position as the most important news medium.

TAB. 5: HOW OFTEN DO RESPONDENTS USUALLY RECEIVE NEWS – ACCORDING TO AGE (p n.s.)

	Never	Less than once a month	Several times a month	Several times a week	Once a day	Several times a day
18-29 years	12.7%	5.1%	14.6%	23.6%	31.4%	12.5%
30–39	6.5%	3.7%	8.9%	23.8%	38.2%	18.9%
40–49	4.5%	2.1%	5.7%	20.7%	45.8%	21.3%
50–59	3.2%	0.6%	2.6%	26.2%	42.5%	24.9%
60–69	1.3%	0.6%	2.5%	8.3%	45.5%	41.7%
70+	1.9%	1.2%		9.6%	40.8%	46.5%

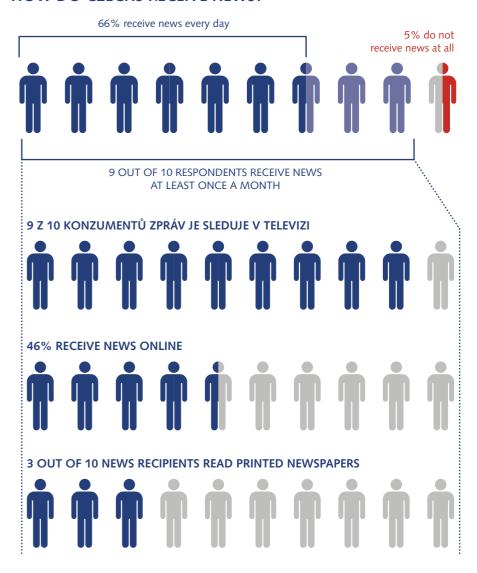
TAB. 6: HOW OFTEN DO RESPONDENTS USUALLY RECEIVE NEWS – ACCORDING TO GENDER (p <0.05)

	Never	Less than once a month	Several times a month	Several times a week	Once a day	Several times a day
Males	4.2%	2.2%	6.5%	18%	39.7%	29.4%
Females	6.5%	2.7%	6.1%	20.5%	41%	23.3%

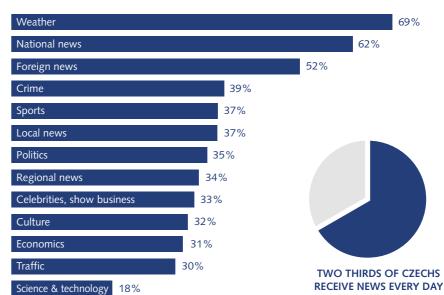
TAB. 7: HOW OFTEN DO RESPONDENTS USUALLY RECEIVE NEWS – ACCORDING TO EDUCATION (P N.S.)

	Never	Less than once a month	Several times a month	Several times a week	Once a day	Several times a day
Primary	5.5%	2.5%	6.6%	17.9%	40%	27.4%
Secondary	5.1%	2.5%	6.1%	21.7%	41.8%	22.8%
Higher	5.5%	1.9%	5.8%	19%	38.7%	29.1%

HOW DO CZECHS RECEIVE NEWS?



IN WHAT TYPES OF INFORMATION ARE THEY INTERESTED?



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LOCAL NEWS

Though the topic of local news represents just a small portion of the entire research project, the data serve as the first more-complex insight into the phenomenon in the Czech Republic. Unfortunately, a more-thorough analysis of the consumption of local news is complicated here by the low absolute values in some of the variables.

One third of the news recipients are interested in local news (delivering information on county, municipal or community issues). A similar portion of the news recipients are interested in regional news topics.

The respondents consume the local news mostly via traditional mass media (more than half of them read local newspapers, one third watch local TV channels) and one third get local information from their neighbours and other social peers. Only about one tenth of the recipients of local news use social networking sites as a means of reception. However, as in the case of other types of news, we have to take into account that many of the respondents do not consider social networking sites as a source of news but rather as a mere mediating channel recirculating content from other online media.

A portion of the recipients of local news positively correlate with age – older respondents express more interest in local information (see tab. 8). This interest is related even to the size of the municipality – local information is most often received within small towns with 5.000–20.000 inhabitants (see tab. 9).

TAB. 8: RECIPIENTS OF LOCAL NEWS AND NEWSPAPERS IN AGE GROUPS

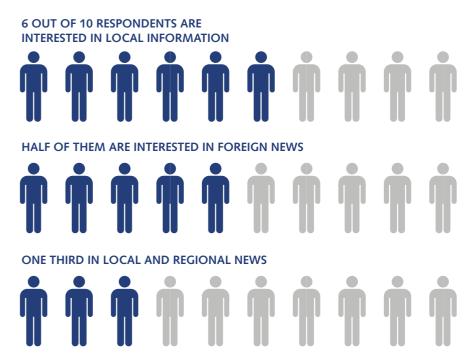
	Recipients of local news	Recipients of local newspapers
18-29 years	23%	9.5%
30–39	32.9%	17.6%
40–49	31%	17.6%
50–59	38.9%	20.4%
60–69	39.6%	22.5%
70+	43.8%	27.3%

TAB. 9: RECIPIENTS OF LOCAL NEWS AND SIZE OF MUNICIPALITY

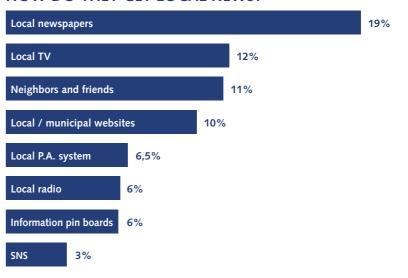
<1999 inhabitants	31.4%
2.000–4.999	30.7%
5.000–19.999	41.5%
20.000–49.999	34.5%
50.000–99.999	36.9%
>100.000	31.5%

Even the choice of a particular channel through which the respondents receive their local news content is related with age. Illustrative in this regard are local newspapers, which in the case of local news, are the most-used medium. Only 10% of the respondents in the youngest age group (19–29) utilized them, while in the oldest age group (70+) the portion is near one third of the respondents.

INFORMATION GEOGRAPHY IN NEWS



HOW DO THEY GET LOCAL NEWS?



CONSUMERS OF LOCAL NEWS / AGE



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POPULAR CONTENT, LEISURE ACTIVITIES

Reducing audiences' practices to the reception of news would be meaningless and misleading – media as technologies and texts play their role in our everyday lives not just as sources of information but at the same time as sources of popular content.

Our research focused on this dimension of audiences' practices very thoroughly – the aim was to get a detailed map of these practices and to better understand what role particular types of content play in the everyday life of the Czech population. The report presents mainly basic, descriptive information about these practices.

The firm bond between the consumption of a particular type of content and using particular types of technology is continually blurred and further complicated within the ongoing technological and cultural convergence. To put it simply, TV shows are not necessarily being watched on TV sets and they are not necessarily brought to our homes by broadcasting or cable services. Therefore, we focused in our first step on what types of content consumption we can encounter in Czech society and how these types are distributed within society.

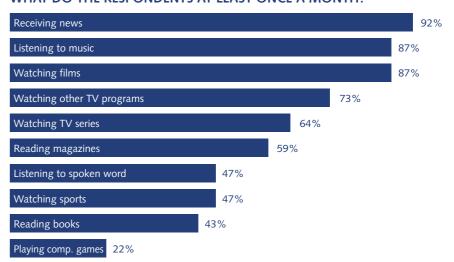
In particular, we worked with watching films, watching TV series, reception of news, watching sports, watching other TV content (i.e. all the programs with the exception of TV news, series, movies and sports), reading magazines, reading books, listening to music, listening to spoken word (i.e. any other listening to non-music audio-content beyond news), playing computer and videogames and using social networking sites. (For games and SNS see the chapters below.)

As the graphic figures show, the reception of news keeps its distinctive position even among other media-related practices. At the same time, it is clear that along with listening to reproduced music, the practices connected with audio-visual content – watching films, TV series and other TV content – play a crucial role in everyday life. The data presented in the following chapters underline the persistent position of television in the life of Czech society – TV broadcasting yet remains the prominent source of popularly engaged audio-visual content.

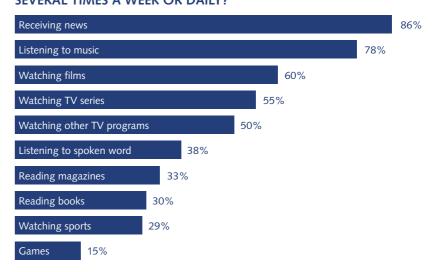
TAB. 10: FREQUENCIES OF SELECTED MEDIA-RELATED PRACTICES (% OVERALL)

	Never	Less than once a month	Several times a month	Several times a week	Once a day	Several times a day
reading magazines	25.6%	14.8%	25.3%	22.7%	8%	2.8%
reading books	35.1%	21.1%	13.4%	13.1%	11.8%	5.5%
watching TV series	23.2%	6.5%	14.8%	33.5%	15.1%	6.8%
watching films	4.7%	8%	27.3%	40.6%	15.1%	4.4%
listening to music	8.2%	4.2%	10.1%	20.5%	17.2%	39.9%
playing videogames	71.9%	6.3%	6.8%	7.1%	4%	3.9%

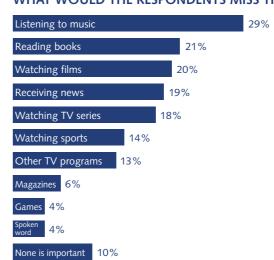
WHAT DO THE RESPONDENTS AT LEAST ONCE A MONTH?



WHAT DO THE RESPONDENTS SEVERAL TIMES A WEEK OR DAILY?



WHAT WOULD THE RESPONDENTS MISS THE MOST?



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OLD AND DISSAPEARING MEDIA

While watching TV (or more precisely watching TV broadcasting) for news and popular content keeps its position, the same cannot be noted in relation to using landlines, reading newspapers or listening to radio. It is apparent that an age-conditioned preference for print and radio as sources of news is shifting in relation to reception practices towards online environments. In the youngest age group (19–29) the simple overall frequencies of online practices are virtually reaching the levels of those related to watching TV. Illustrative of the character of the continual transformation of media practices is that in the case of those preferring print media, the role of age is more important than the influence of education.

TAB. 11: SOURCES OF NEWS IN AGE GROUPS

	TV	Radio	Print	Internet
18-29 years	65.9%	14%	16.8%	54.6%
30–39	77.7%	26.6%	22.5%	54.7%
40–49	84.5%	37.5%	31%	50.3%
50–59	86.6%	39.7%	31.2%	42%
60–69	94%	43%	33.5%	27.8%
70+	90.4%	41.5%	45.4%	13.8%

The position of TV broadcasting and the TV set (which is used not only for receiving broadcasting but also as a screen for DVD and blue-ray players, computers and gaming consoles) in the consumption of popular content is illustrated by tab. 12.

TAB. 12: WHERE RESPONDENTS WATCH FILMS AND TV SERIES

	Films	TV series
On a TV set – via TV broadcasting / cable	90.4%	92.4%
On a TV set – from DVD, USB, other physical carrier or from connected PC	28.5%	7.2%
On a PC monitor	7.6%	4%
On a laptop or tablet	13.5%	8.1%
With a projector connected to a PC or other device	1.4%	0.8%
Else	0.2%	0.4%

Tables 13 and 14 indicate that with the younger film and TV series viewers we encounter, a clear transformation of practices is apparent even in the realm of TV broadcasting.

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In the next chapter we focus on the sources of content in more detail.

TAB. 13: WATCHING FILMS IN WAYS
OTHER THAN VIA TV BROADCASTING –
AGE GROUPS

	TV broadcasting	Other than TV broadcasting
18-29 years	79.6%	68.1%
30–39	88%	52.2%
40–49	89%	43.2%
50–59	94.9%	31.6%
60–69	95.6%	18.4%
70+	100%	11.5%

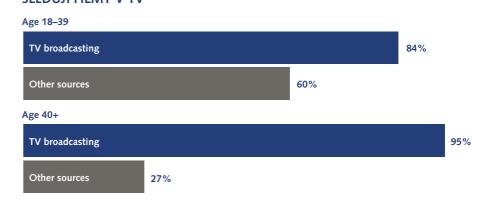
TAB. 14: WATCHING FILMS IN WAYS
OTHER THAN VIA TV BROADCASTING –
AGE GROUPS

	TV broadcasting	Other than TV broadcasting
18–29 years	78.1%	37.1%
30–39	93.1%	13.2%
40–49	91.4%	11.3%
50–59	97.2%	8%
60–69	98.4%	3.8%
70+	97.9%	1.9%

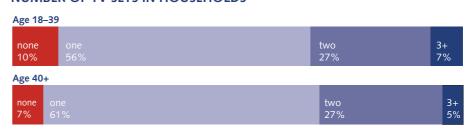
WATCHING TV SERIES VIA TV BROADCASTING



SLEDUJÍ FILMY V TV



NUMBER OF TV SETS IN HOUSEHOLDS



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DOWNLOADING POPULAR CONTENT

Network technologies and compression formats (such as MP3 or video codecs) have multiplied the possibilities for the distribution of digitalized popular content. At the same time, they challenged the position of content distributors and broadcasters as they helped to erode their distribution monopoly. However, the debate can hardly be reduced to grievances over illegal downloading of copyrighted content. First, the legal status of downloading itself is complicated. And second, the members of audiences obviously practice other forms of content acquisition.

In the survey, we did not focus on whether the respondents download legally or illegally – as the qualitative pilots indicated, the respondents were often not fully capable to decide over the legality of their action. Therefore, when talking about downloading, we refer both to legal as well as to legally-problematic practices.

Nevertheless, it is apparent that we encountered quite variable and variably distributed practices. In the case of TV series, these practices remain rather marginal – about 9% of the series viewers download their content from the Internet and about 8% of them watch it online in web browsers (in sum, we are talking about 14% of TV series viewers). In contrast to that, one fifth of film viewers and one quarter of music listeners use alternative online sources for content.

TAB. 15: SOURCES OF CONTENT USED BY FILM AND

TV SERIES VIEWERS (OTHER THAN TV BROADCASTING)	Films	TV series
Buying on DVDs or other media	13.7%	1.4%
Renting DVDs or other media in rentals	2.6%	0.7%
Borrowing DVDs or other media from friends	11.9%	1.1%
Downloading for free from the Internet	20.1%	8.6%
Having content downloaded by a partner	5%	1.5%
Having content downloaded by friends	6.7%	1.4%
Watching for free in a web browser (from Youtube or other online platforms offering the content)	12.6%	8.2%
Watching in a web browser for a fee	2%	0.9%

TAB. 16: SOURCES OF CONTENT USED BY MUSIC LISTENERS (OTHER THAN RADIO AND TV BROADCASTING)

Buying on CDs, vinyl or other media	23.4%
Renting CDs, vinyl or other media in the public library	1.8%
Borrowing CDs, vinyl or other media from friends	13.6%
Downloading for free from the Internet	27.8%
Having downloaded content by partner	5.3%
Having downloaded content by friends	10.1%
Listening for free in web browser (from Youtube or other online platforms offering the content)	23.1%
Listening online using authorized music services (Spotify, Deezer, Last FM etc.)	9.6%
Buying online (iTunes etc.)	1.6%

DOWNLOADING CONTENT FROM THE INTERNET

CZECH DOWNLOADING FILMS AND/OR TV SERIES Age 18-39 26% of the respondents Age 40+ 13% <2% 13% 12% watch films or TV series of the respondents watch film online for buy films on physical free. 6% TV series. online for a fee. media **DOWNLOADING MUSIC** Age 18-39 54% 32% of the respondents 18% 9% 21% 21% buy music on listen to music use authorized online services (Spotify, etc.). Only about physical media. online for free.

1% buy music online.

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USERS OF SOCIAL NETWORKING SITES

Social networking sites – with Facebook the most popular – developed in particular in the Czech context over the last five years, bringing with them the most remarkable change to our communication practices. In synergy with the diffusion of smartphones, they have emphasized a pressure towards the mobilization to users' privacy and their permanent availability to others.

In the survey, we focused on five SNS platform, distinguishing the non-users and non-active owners from the occasional and daily active users. In 2014, it was possible to say that in the younger cohorts of Czech society, Facebook had become a mainstream, fully domesticated communication platform. Interestingly, in the Czech context – despite its popularity in the mass media – Twitter remained marginal, used mainly by early adopters.

TAB. 17: FREQUENCIES OF USES – SELECTED SNS

	Daily+	At least once a month	Less often	Overall
FB	26.4%	10.2%	1.2%	37.7%
Twitter	0.6%	1.3%	2.8%	4.6%
LinkedIn	0.5%	2.1%	2%	4.6%
Google+	4.2%	5.1%	4.5%	13.7%
Lide.cz	0.8%	1.7%	4.6%	7.1%
Spolužáci.cz	0.7%	5.8%	14.4%	20.8%

TAB. 18: RESPONDENTS USING SNS WEEKLY AND MORE OFTEN: SELECTED DEMOGRAPHICS

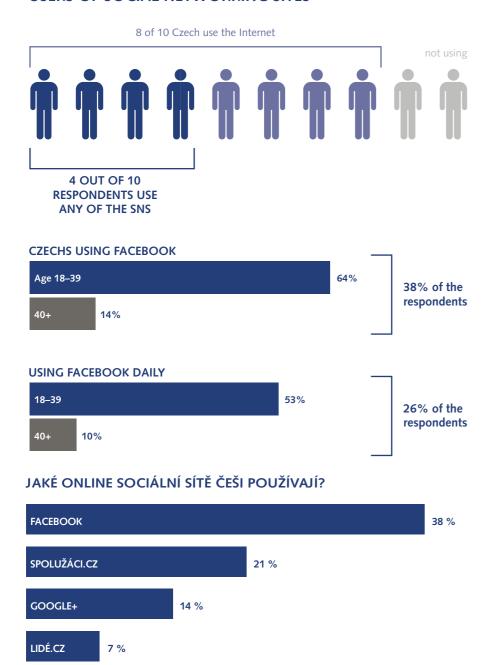
	FB	Twitter	LinkedIn	Google+
Overall	33.5%	1.3%	1%	6.3%
18-39 years	64.3%	3.1%	1.4%	12.4%
40+	14.1%	0.2%	0.7%	2.4%
р	< 0.001	< 0.001	n.s.	< 0.001
n	1997	1998	1997	1999
18-29 years	76.2%	5.1%	1.6%	15.7%
30–39	53.5%	1.2%	1.2%	9.4%
40–49	26.5%	0.3%	0.6%	5.1%
50–59	15%	0.3%		2.6%
60–69	8.9%		1.3%	0.6%
70+	3.1%		0.8%	0.8%
р	< 0.001	< 0.001	< 0.001	< 0.001
n	1996	1999	1998	1999
Males	30.9%	1.1%	1%	6%
Females	35.9%	1.5%	0.9%	6.5%
р	< 0.05	n.s.	n.s.	n.s.
n	1998	1998	1998	1998
Primary	28.4%	1.2%	0.5%	4.5%
Secondary	39.8%	1.2%	0.9%	7.3%
Higher	36.4%	1.6%	2.4%	9%
р	< 0.001	n.s.	< 0.01	< 0.01
n	1998	1998	1998	1998

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USERS OF SOCIAL NETWORKING SITES

TWITTER

LINKEDIN 5 %



PLAYERS OF COMPUTER GAMES

Regarding playing computer and videogames, we asked also about PC and console games as well as about mobile phone gaming. In contrast with specialized research focused on extensive playing or on the detailed mapping of one's technological and genre preferences, we treated gaming as a part of a broader portfolio of everyday media-related routine practices. Therefore, we asked – as in the case of the other researched activities – if, where and when the respondents played, with whom, and what technological objects they used for playing games.

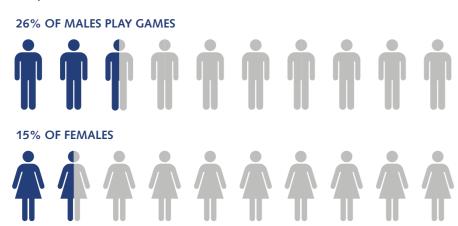
A more detailed analysis of Czech game players and their practices will follow in a specialized research paper. Yet, here we can say that gaming in Czech society is an age and gender-profiled activity. However, even in the case of gaming, it is not possible to draw a clear line between 'younger' and 'older' respondents. And similarly, it is not appropriate to stereotype gaming as a distinctly 'male' practice. Table 20 presents selected basic demographics of the non-players, casual players and daily players, focusing on age, gender and relationship status. (It is worth noting that relationship status is linked with age.)

TAB. 19: CZECH GAME PLAYERS: SELECTED DEMOGRAPHICS

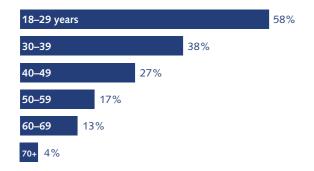
	Not playing	Playing	Playing daily
18–29 years	42.4%	38.1%	19.5%
30–39	62.3%	27.5%	10.2%
40–49	73.4%	21.5%	5.1%
50–59	82.7%	13.7%	3.5%
60–69	86.7%	9.5%	3.8%
70+	95.8%	2.7%	1.5%
p	< 0.001		
n	1997		
Males	65.5%	25.7%	8.7%
Females	77.9%	15.1%	7%
p	< 0.001		
n	1998		
Single	50.9%	33.4%	15.7%
With a partner (unmarried)	56.7%	30.2%	13.1%
Married	79.2%	16.2%	4.5%
Divorced / living separately	79.2%	16.7%	4.2%
Widow/er	92.3%	4.3%	3.4%
р	< 0.001		
n	1990		

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YES, THEY PLAY



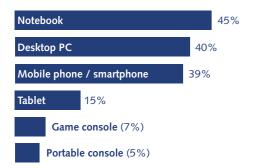
CZECH PLAYERS IN AGE GROUPS



WITH WHOM DO THEY PLAY?



ON WHAT DEVICES DO THEY PLAY?



The number of hours the players declare they play is one of the important information factors, as it enables us to make a distinction between extensive players (usually treated as potentially problematic) and casual players. Indeed, the declared time spent playing varies remarkably – not only in comparison to both groups of players but even within the groups.

TAB. 20INTENSITY OF PLAYING – HOURS PLAYED PER WEEK

	Play daily	Play several times a week and less
mean	18.8359 hrs./week	4.63 hrs./week
n	157	279
s.d.	13.60288	5.119

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Old and New Media in Everyday Life of Czech Audiences

Research report

Faculty of Social Studies Masaryk University Brno, Czech Republic 2015

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