



CONTENTS

INTRODUCTION	
Research overview	3
Gaming formats and devices covered	3
SUMMARY	
Infographic results summary	4
Key headlines	5
GAMING: WHO, WHAT AND HOW?	
Who plays videogames?	7
Frequency of gaming	8
Types of games played	9
Devices used to play games	11
Online gaming	12
PERCEPTIONS OF GAMING	
Interest in gaming	14
Broader media and activities interest	15
Words associated with different media/activities	17
GAMING AND THE FAMILY	
Parents and children who play games	20
Words associated with gaming: Parents	21
The effect of games on children	22
SUPERVISION	
Parental supervision of children's gaming	24
Use of parental controls	27
PEGI RATING SYSTEM	
Awareness, usefulness and clarity of rating systems	29
How rating systems should be applied	30

RESEARCH OVERVIEW

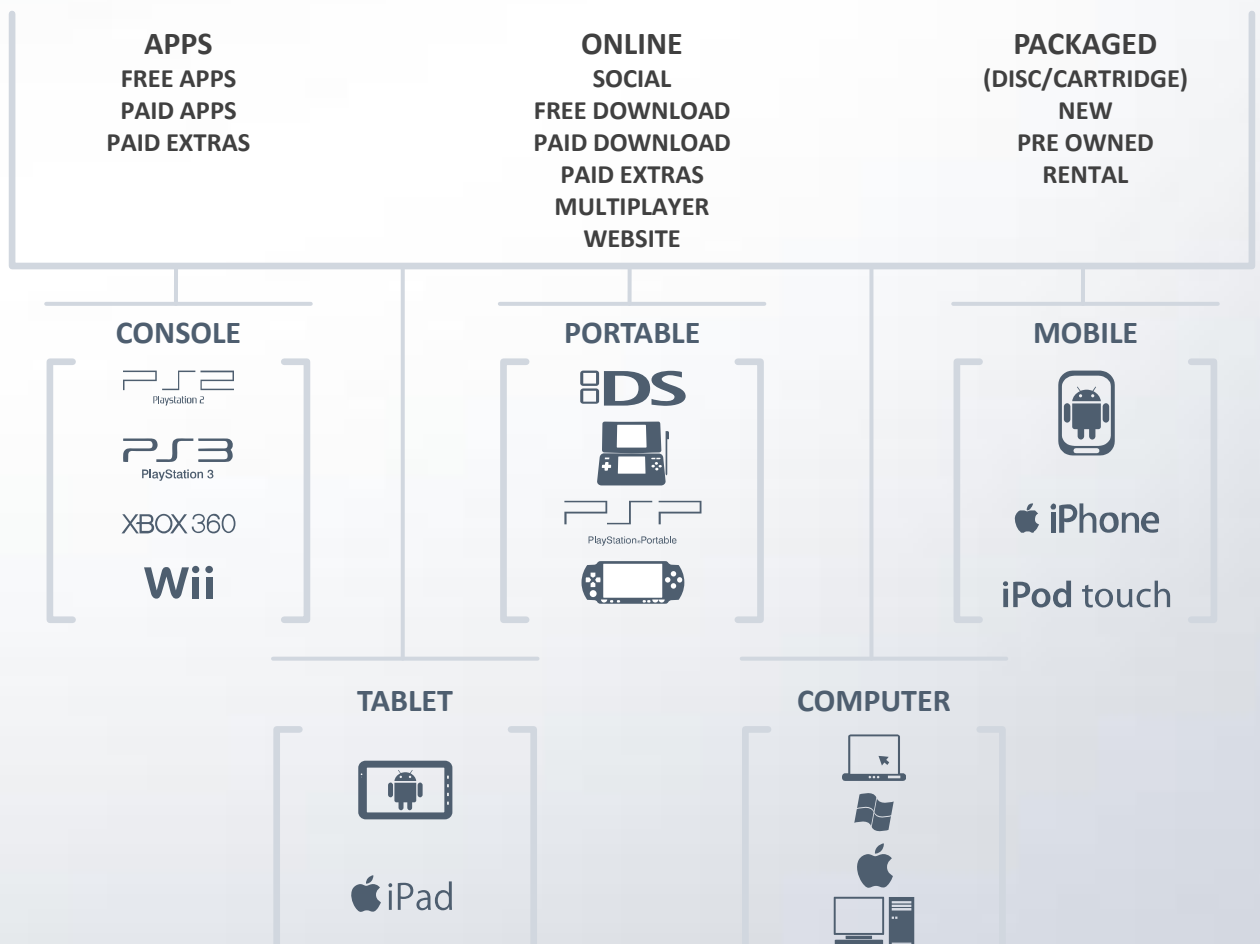
The European Consumer Study is a multi-country survey run by Ipsos MediaCT, in partnership with the Interactive Software Federation of Europe (ISFE). It is designed to provide a better understanding of the societal context in which games are being played today in 16 European countries. The study used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

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

In Czech Republic, 651 respondents completed an online survey over a two week period in October 2012.

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

GAMING FORMATS AND DEVICES COVERED





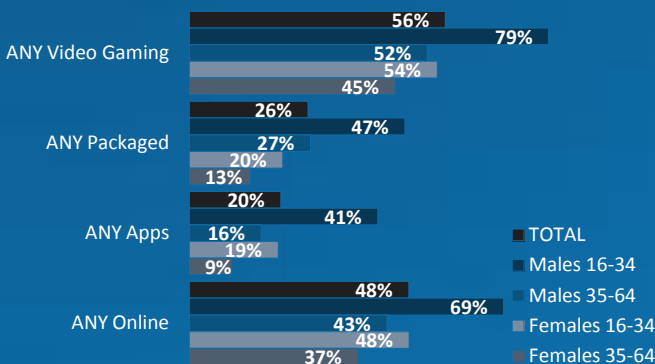
OVERVIEW OF GAMING

56%

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

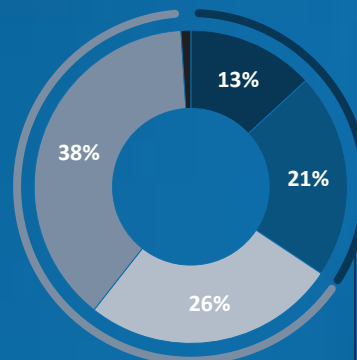


TYPES OF GAMES PLAYED: BY AGE AND GENDER



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

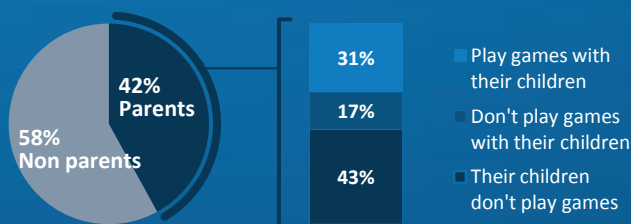
TOP 3 WORDS ASSOCIATED WITH GAMING

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

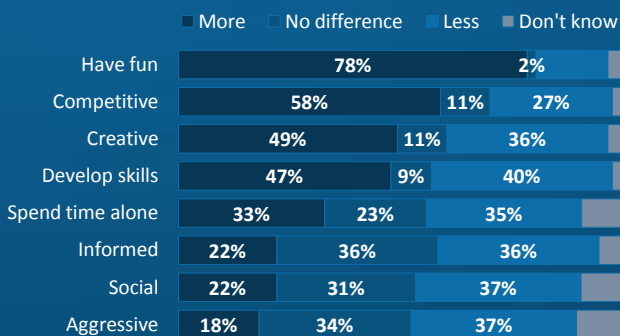
GAMING AND THE FAMILY

49%

of parents have children who play games



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



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

KEY HEADLINES

1

Incidence of gaming amongst the online population is at 56%

The profile of gamers is skewed towards males, with a large proportion of gamers in the 16-24 age group.

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

More than 1 in 4 adults are playing weekly. For non-gamers, a lack of interest in the category is the main barrier.

2

34% of the online population are very or fairly interested in gaming

Gaming is most commonly perceived as an entertaining activity amongst the online population, and gamers in particular.

A higher percentage of gamers than non-gamers are interested in nearly all other activities.

There is a strong interest in browsing the Internet amongst gamers (88% vs. 73% non-gamers). Gamers are also more likely to be interested in the latest technology (65% vs. 37% non-gamers) and taking part in sports (49% vs. 38% non-gamers).

3

31% of parents play games with their children

A third of those playing games with their children do so for the educational benefits.

Many parents see gaming as having a positive impact on their child(ren) beyond having fun, with 47% believing it encourages them to develop their skills more.

37% believe gaming encourages children to be less aggressive, whereas half as many (18%) say it encourages them to be more aggressive.

4

The majority of children aged 6-15 are buying or receiving games

46% of children aged 10-15 have bought a game for themselves.

9 in 10 parents of children aged 6-9, and 8 in 10 parents of children aged 10-15, consider themselves to be 'quite' or 'very' knowledgeable about the games that child plays.

55% of children aged 10-15 are sometimes or often playing games with an age rating higher than their age, according to their parents. The same is true for 37% of children aged 6-9.

5

28% of the online population recognise PEGI age rating symbols

More than half agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.

1 in 4 believe that the age rating system for games should be stricter than movies, and 43% believe the same level of strictness should be applied to both.



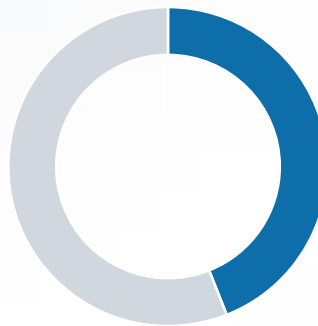
WHO PLAYS VIDEOGAMES? (ALL ONLINE RESPONDENTS)

56%

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



56%



44%



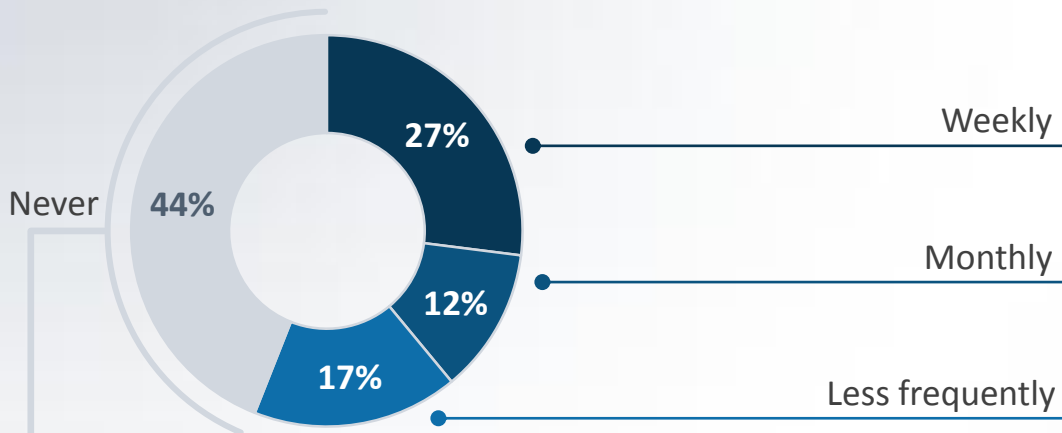
7%	16-19	5%
8%	20-24	5%
13%	25-34	9%
12%	35-44	10%
9%	45-54	7%
7%	55-64	8%

Incidence of gaming amongst the online population in Czech Republic is at **56%**.

The profile of gamers is skewed towards **MALES**, with a large proportion of gamers in the 16-24 age group.



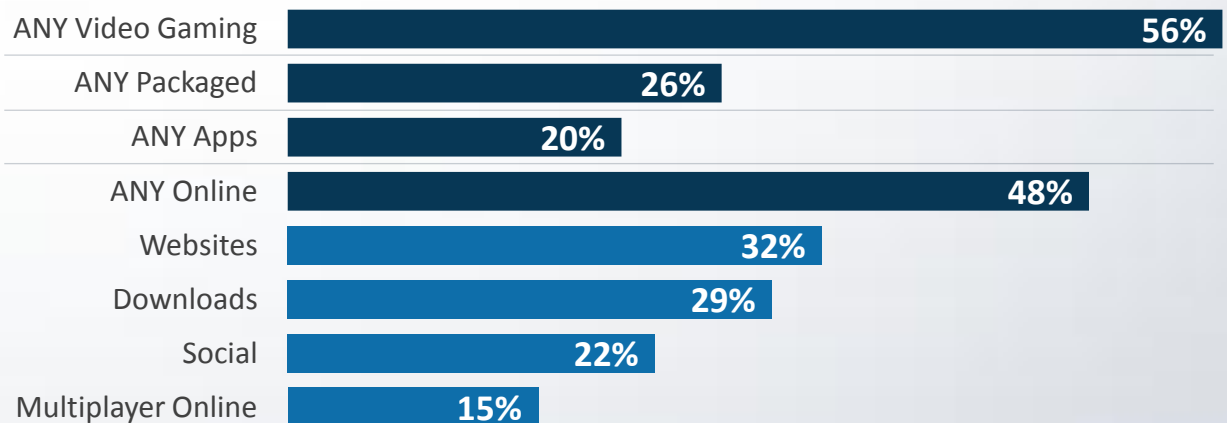
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)



TOP 5 REASONS FOR NOT GAMING

1	Not interested in them	67%
2	No time to play them	44%
3	More interested in other hobbies	41%
4	Don't have a console at home	21%
5	Too old to play them	13%

TYPES OF GAMES PLAYED (ALL ONLINE RESPONDENTS)

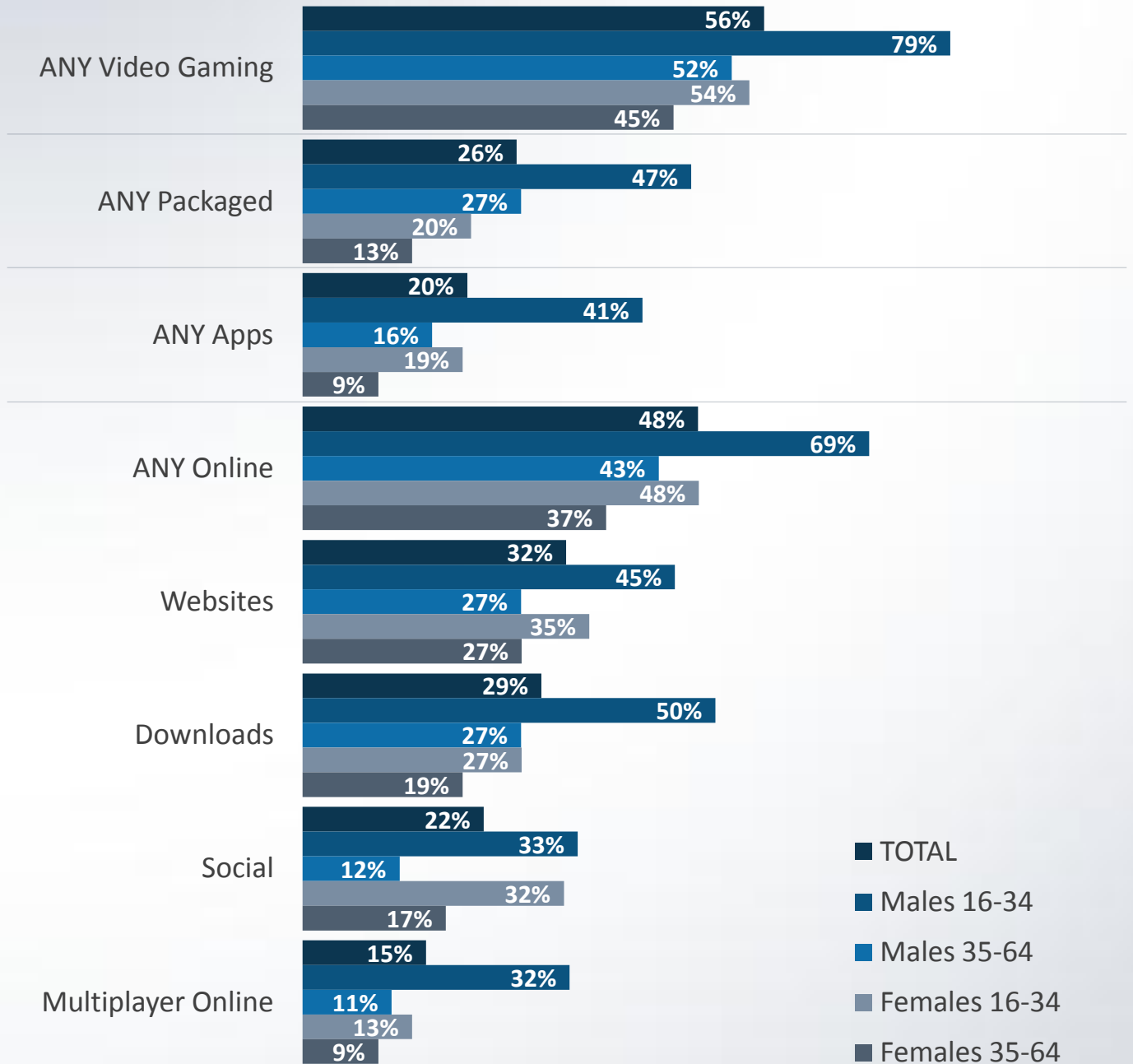


More than **1 in 4** adults are playing games on a weekly basis. For non-gamers, a lack of interest in the category is the main barrier.

ONLINE is by far the most popular form of gaming amongst the online population.



TYPES OF GAMES PLAYED: BY AGE AND GENDER



Incidence of gaming is consistently highest amongst **MALES AGED 16-34**, with the difference most evident in App (41% vs. 20% Total) and Multiplayer Online games (32% vs. 15% Total).

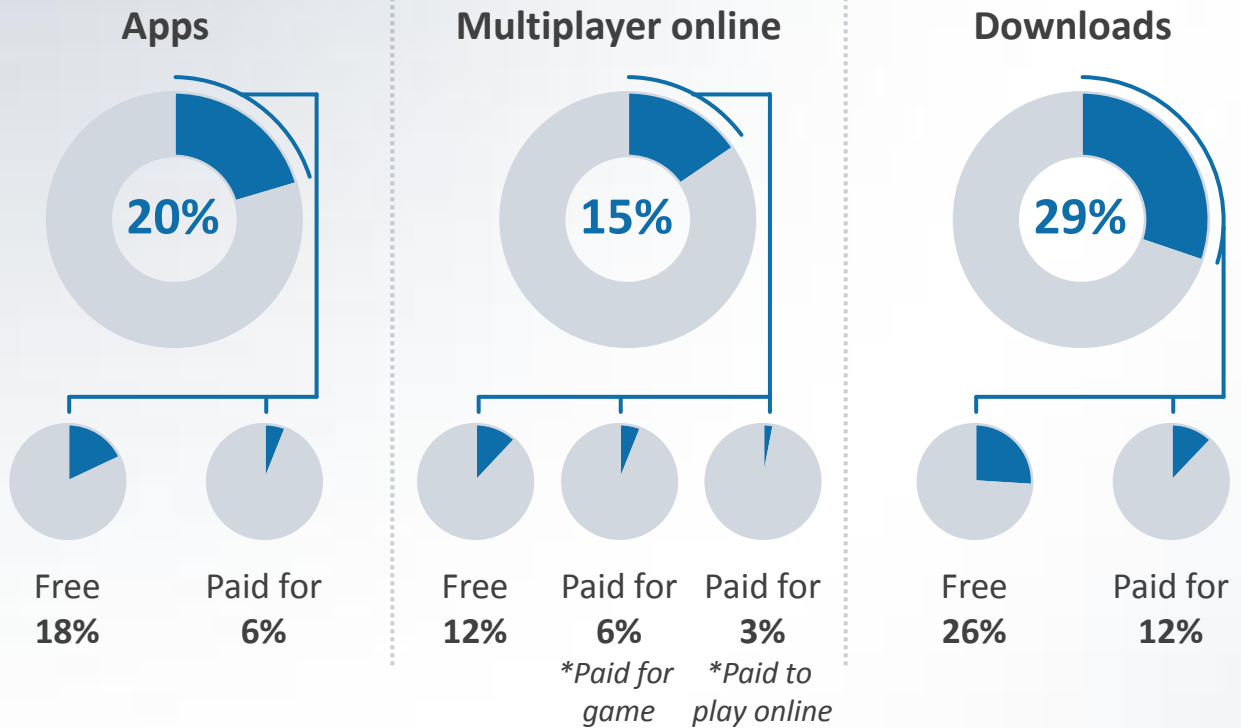
For **SOCIAL** gaming, females are as active as males in the 16-34 age group.

FEMALES AGED 16-34 are slightly more active than older males in Online gaming (48% vs. 43% Males aged 35-64).



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

% of the online population playing each type of game



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

37%

Have bought
a game

- 19%** New games on disc or cartridge
- 11%** Online games (download/subscription/extras)
- 7%** Secondhand games on disc or cartridge
- 6%** Games apps

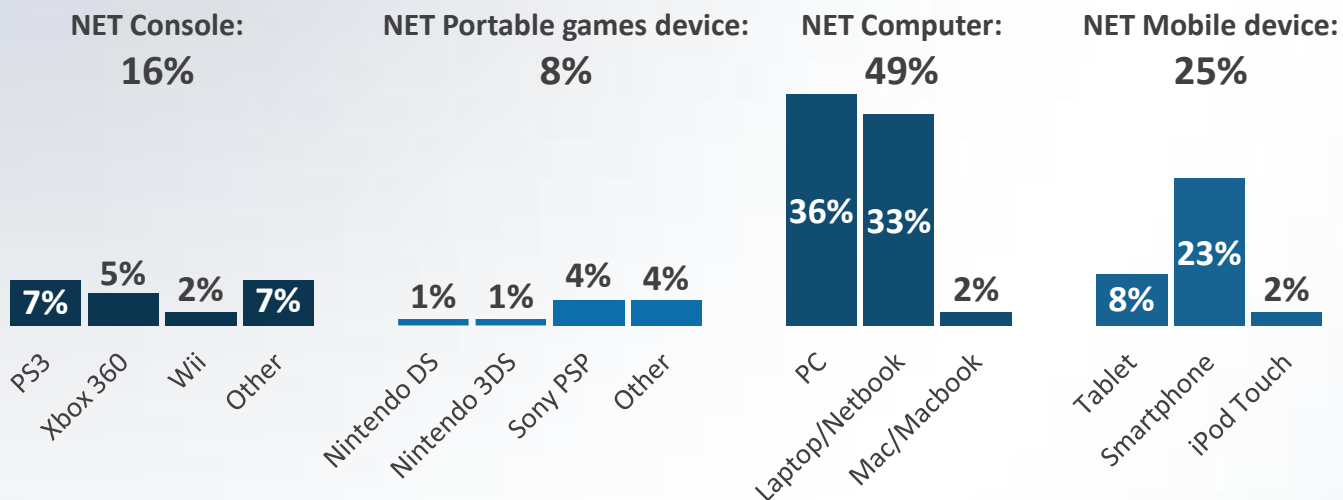
A quarter of those active in the **APP** gaming category are playing games that have been paid for.

37% of the online population have bought a game in the last 12 months.

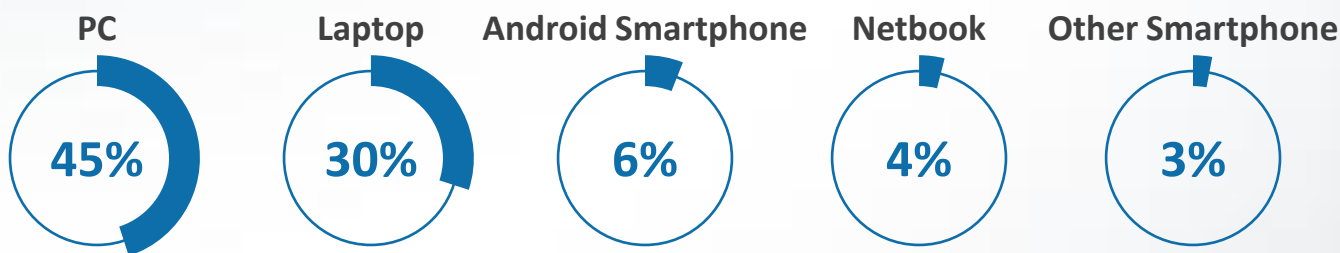
Of those buying games, around **HALF** have bought a new packaged game.



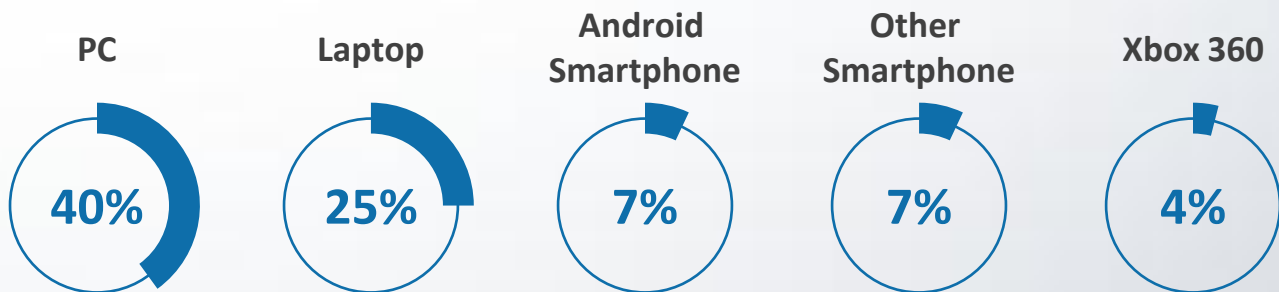
DEVICES USED TO PLAY GAMES (ALL ONLINE RESPONDENTS)



MOST USED (ALL GAMERS)



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



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

23% of the online population have played a game on a **SMARTPHONE** in the past 12 months.

Amongst gamers, computers (laptops and PCs) and Smartphones are the most used devices for gaming.



90%

of gamers play games online

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

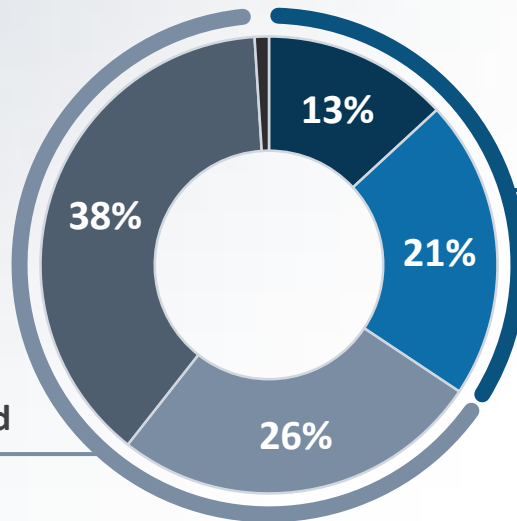
- 31%** Always play on my own
- 23%** Play on my own most of the time
- 21%** Sometimes on my own/sometimes with other online players
- 10%** Play with other online players most of the time
- 4%** Always play with other online players
- 9%** Never play games online

WHEN PLAYING WITH OTHERS ONLINE, WHO ARE THE OTHERS?

- 56%** Online strangers
- 40%** Friends (met in real life)
- 27%** Family/relatives
- 24%** Friends (not met in real life)



INTEREST IN GAMING (ALL ONLINE RESPONDENTS)



34%

Fairly/very interested

64%

Not very/at all interested

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

WORDS ASSOCIATED WITH GAMING: TOP 5 SELECTED

		ALL ONLINE	GAMERS
1	Entertaining	39%	52%
2	Good at providing escapism	34%	44%
3	Competitive	30%	38%
4	Fun	18%	27%
5	Informative/educational	6%	9%

34% of the online population say they are very or fairly interested in gaming.

Gaming is most commonly perceived as an **ENTERTAINING** activity amongst the online population, and gamers in particular.

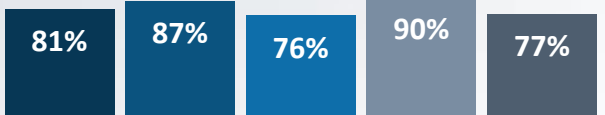


BROADER MEDIA AND ACTIVITIES INTEREST: (FAIRLY/VERY INTERESTED)

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



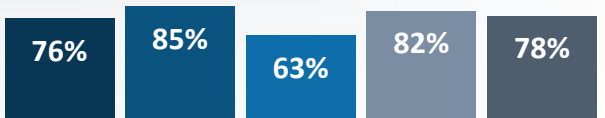
Internet



News/current affairs



Film



Travelling



Music



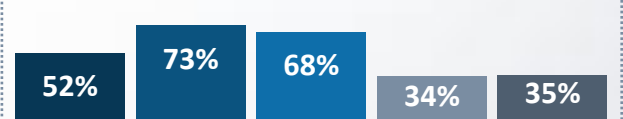
Television



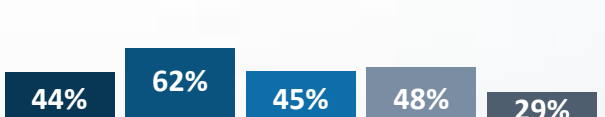
Literature/art



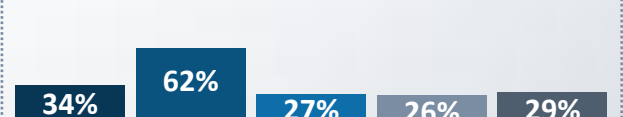
The latest technology



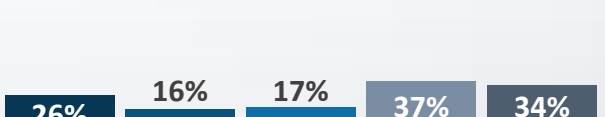
Sport (taking part)



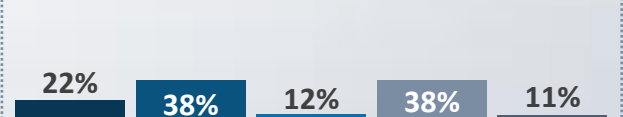
Gaming



News about celebs/famous



Going out to bars/clubs





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



A higher percentage of gamers than non-gamers are interested in nearly all other activities.

There is a strong interest in browsing the **INTERNET** amongst gamers (88% vs. 73% non-gamers).

Gamers are also more likely to be interested in **TECHNOLOGY** (65% vs. 37% non-gamers) and taking part in **SPORTS** (49% vs. 38% non-gamers).



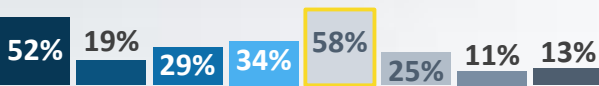
WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

(ALL ONLINE RESPONDENTS)

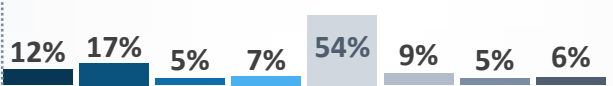
Entertaining Immersive
Informative/educational Fun

Good at providing escapism Sociable
Family orientated Competitive

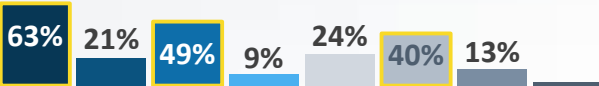
Internet



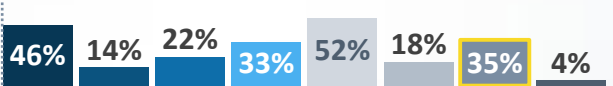
News/current affairs



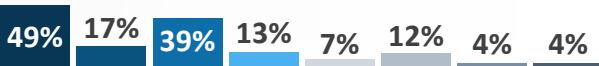
Film



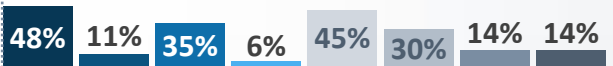
Travelling



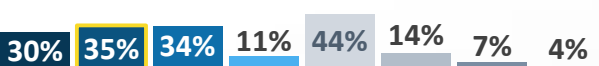
Music



Television



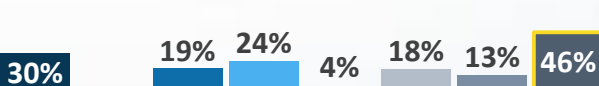
Literature/art



The latest technology



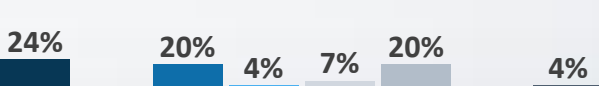
Sport (taking part)



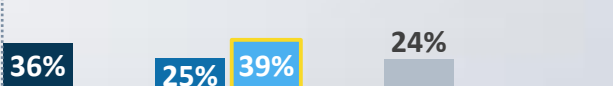
Gaming



News about celebs/famous



Going out to bars/clubs

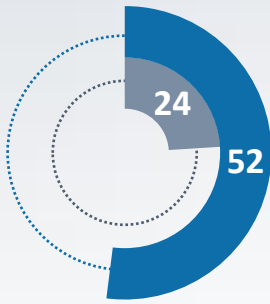


Most commonly selected category for each word

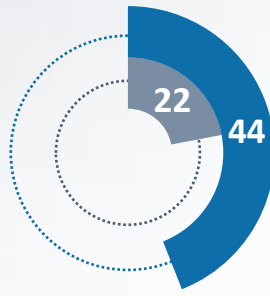


WORDS ASSOCIATED WITH GAMING: DIFFERENCE BETWEEN GAMERS AND NON-GAMERS

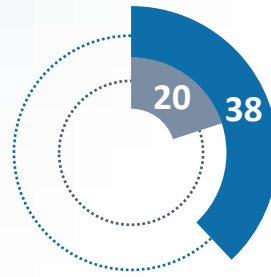
■ Gamers ■ Non-gamers



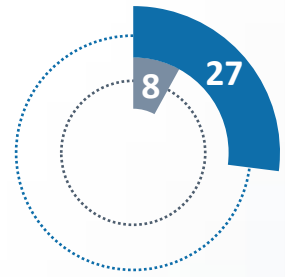
Entertaining



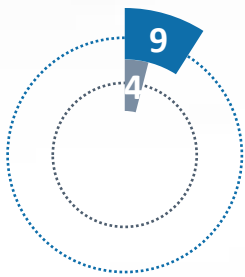
Good at providing escapism



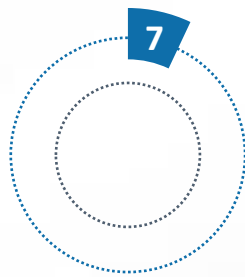
Competitive



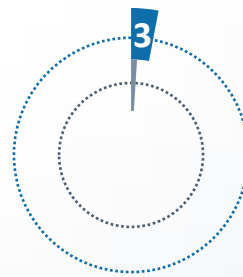
Fun



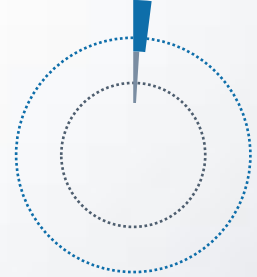
Informative/
educational



Sociable



Immersive



Family orientated

Gamers are more likely to associate a range of words with the activity than non-gamers.

1 in 10 gamers describe gaming as an **INFORMATIVE/EDUCATIONAL** activity.

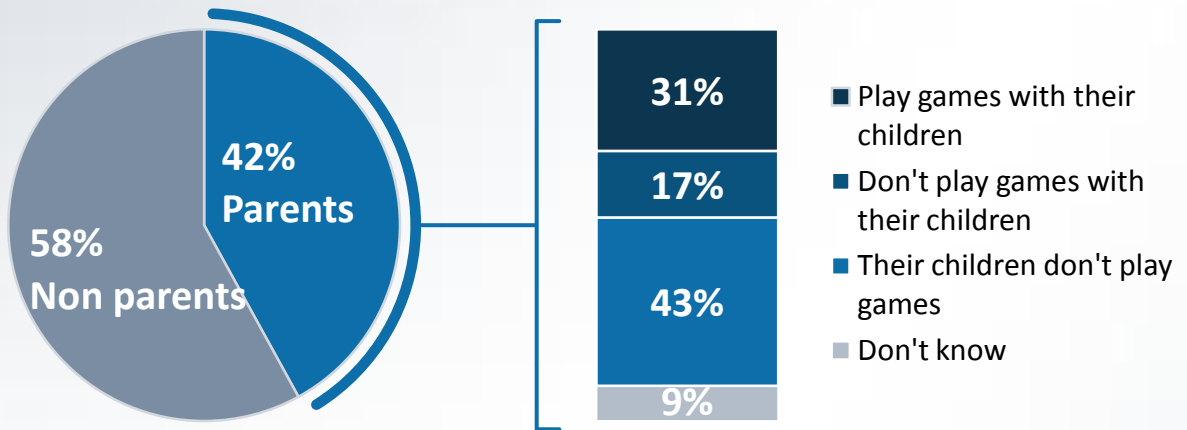
Amongst non-gamers, gaming is most commonly described as **ENTERTAINING** and **GOOD AT PROVIDING ESCAPISM**.



PARENTS AND CHILDREN WHO PLAY GAMES (ALL ONLINE RESPONDENTS)

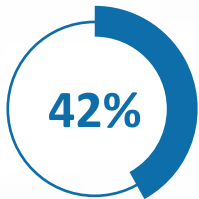
49%

of parents have children who play games

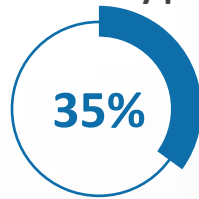


REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN

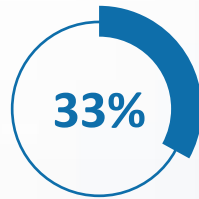
They ask me to



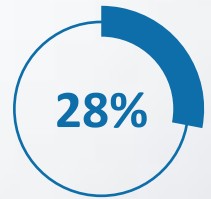
To monitor what games they play



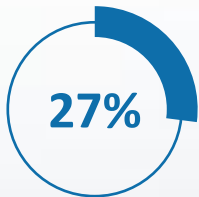
Educational benefits



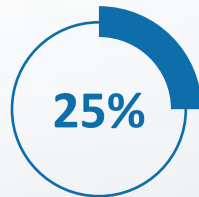
I enjoy playing with them



To monitor how long they play for



It's a fun activity for all the family



To spend time with them



Health and fitness benefits



49% of parents have children that play games. Of these, more than **6 in 10** play with their children (31% parents play games with their children vs. 17% don't).

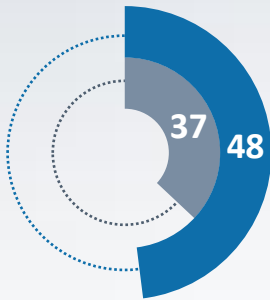
The most common reason parents play games with children is because they are **ASKED TO**. A third of those playing games with their children do so for the **EDUCATIONAL BENEFITS**.

WORDS ASSOCIATED WITH GAMING:

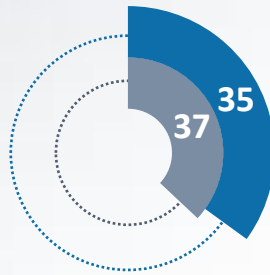
DIFFERENCE BETWEEN PARENTS OF CHILDREN WHO PLAY GAMES AND NON-PARENTS

■ Parents of children who play games

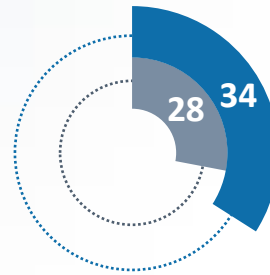
■ Non-parents



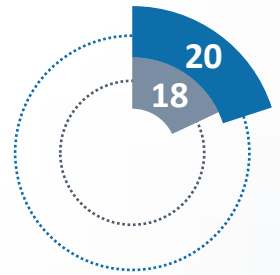
Entertaining



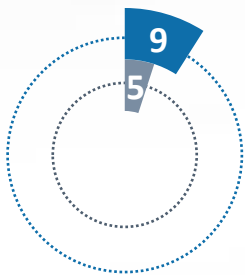
Good at providing escapism



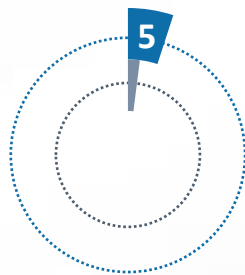
Competitive



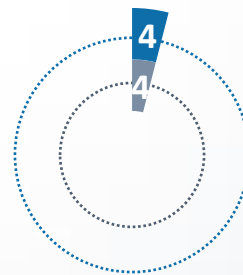
Fun



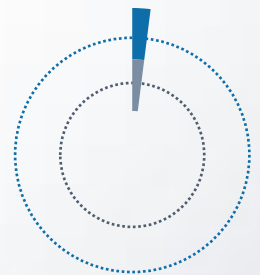
Informative/
educational



Immersive



Sociable



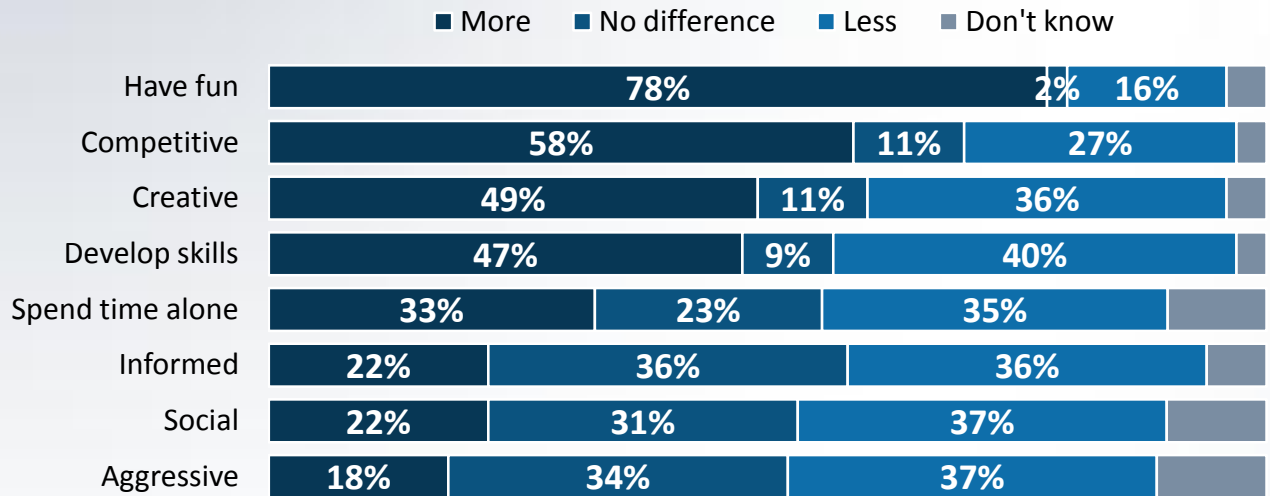
Family orientated

Parents of children who play games and non-parents associate a similar range of words with gaming.

Parents of children who play games are more likely to describe gaming as an **INFORMATIVE / EDUCATIONAL** activity (9% vs. 5% Non-parents).



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



WORDS ASSOCIATED WITH GAMING:

PARENTS OF CHILDREN WHO PLAY GAMES

PARENTS OF CHILDREN WHO DON'T PLAY GAMES

Informative/educational

9%

vs.

Informative/educational

7%

Family orientated

2%

vs.

Family orientated

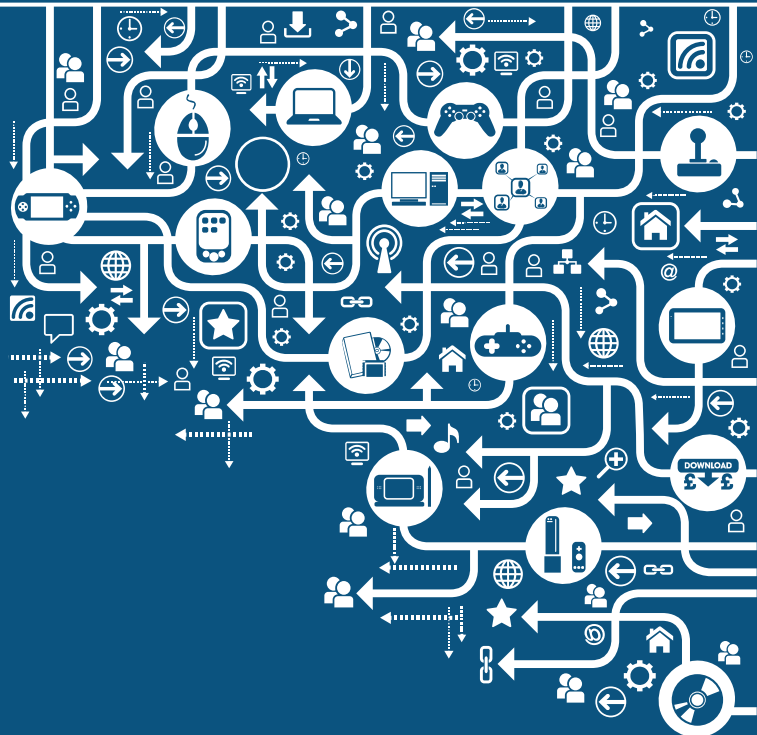
1%

Many parents see gaming as having a positive impact on their child(ren) beyond having fun, with 47% believing it encourages them to **DEVELOP THEIR SKILLS** more.

49% believe it encourages them to be more **CREATIVE**.

37% believe gaming encourages children to be **LESS AGGRESSIVE**, whereas half as many (18%) say it encourages them to be more aggressive.

SUPERVISION

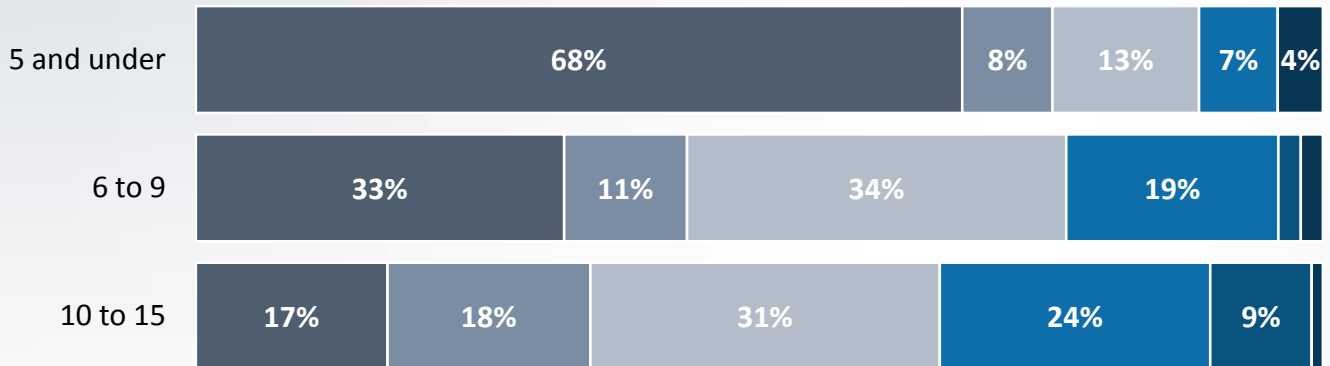




WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES **

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

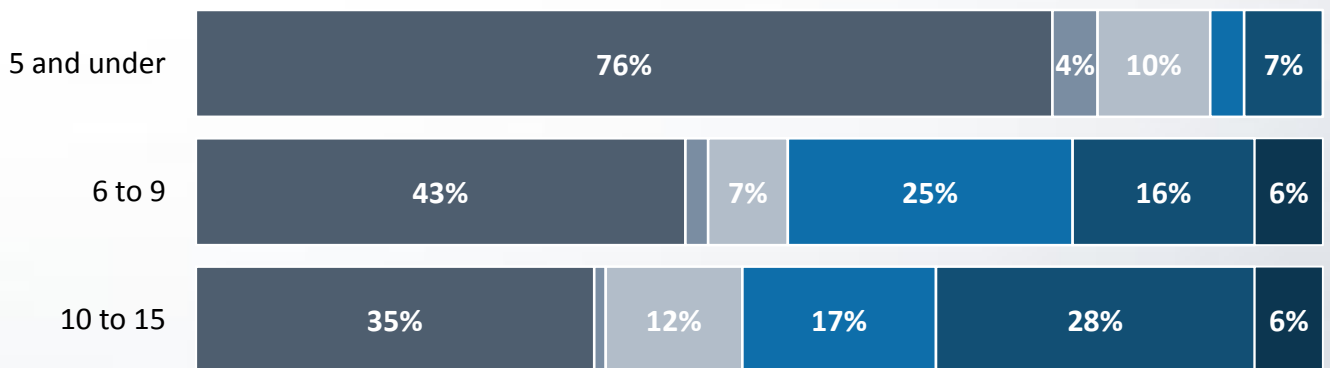
AGE OF CHILD*



WHETHER THE CHILD IS PRESENT DURING PURCHASE **

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

AGE OF CHILD*



*Parents were asked in reference to their YOUNGEST child only

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

The majority of children aged 6 and above are buying or receiving games.

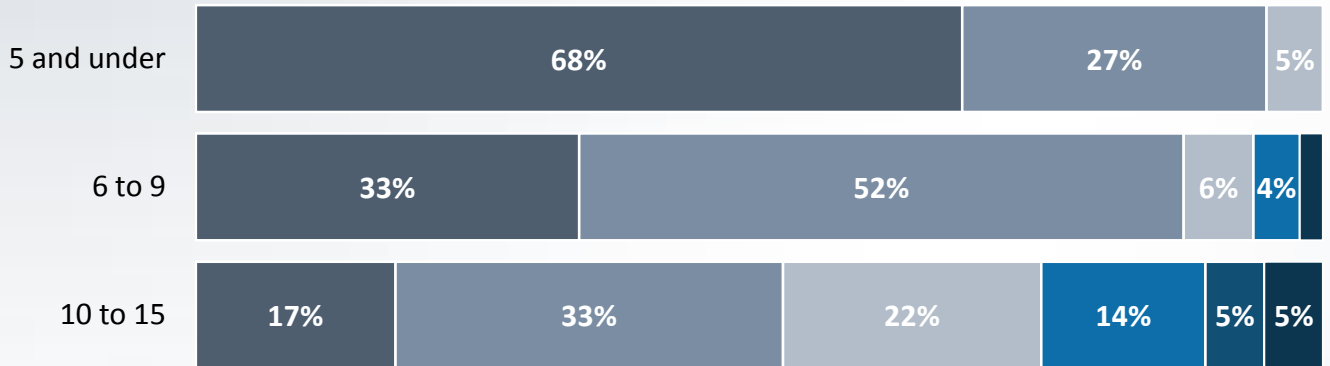
Just under **HALF** of parents of children aged 6 and above rarely/never buy that child's games.



WHETHER CHILD BUYS THEIR OWN GAMES **

- Never (child doesn't receive games)
- Never (but do receive games)
- Rarely
- Sometimes
- Most of the time
- Always

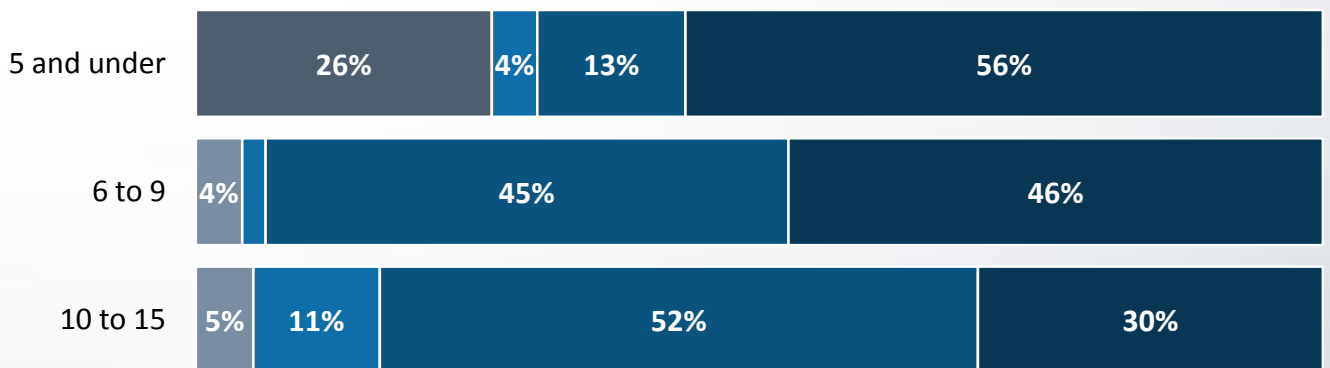
AGE OF CHILD*



HOW KNOWLEDGEABLE PARENTS ARE ABOUT THE GAMES THEIR CHILD PLAYS **

- Child doesn't play
- Not at all
- Not very
- Quite
- Very

AGE OF CHILD*



*Parents were asked in reference to their YOUNGEST child only

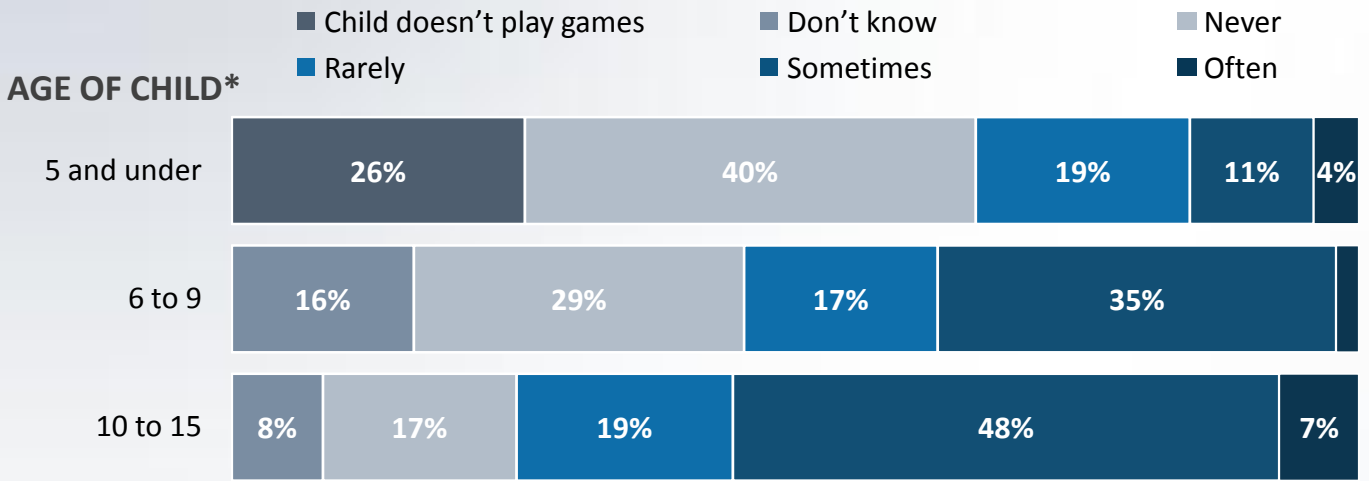
**Note low base sizes for this question (n < 50)

46% of children aged 10-15 have bought a game for themselves.

9 in 10 parents of children aged 6-9, and 8 in 10 parents of children aged 10-15, consider themselves to be 'quite' or 'very' knowledgeable about the games that child plays.



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

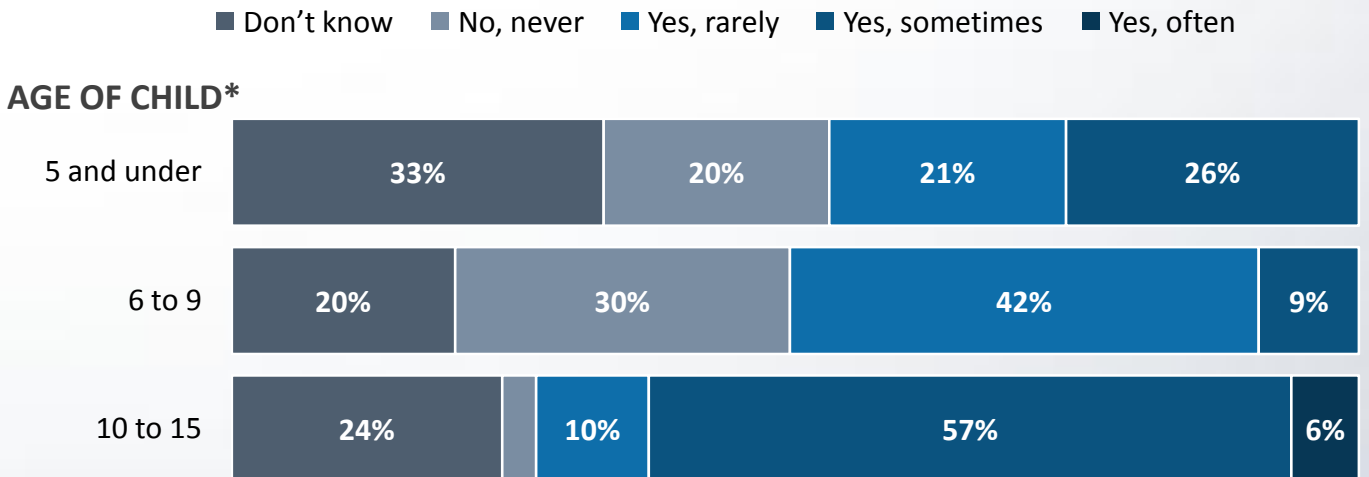


WHETHER CHILD PLAY GAMES WITH HIGHER AGE RATING THAN THEIR AGE AT A FRIEND'S HOME **

8% Aged 5 and under play games at a friend's home

26% Aged 6-9 play games at a friend's home

41% Aged 10-15 play games at a friend's home



*Parents were asked in reference to their YOUNGEST child only

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

55% of children aged 10-15 are sometimes or often playing games with an age rating higher than their age, according to their parents. The same is true for **37%** of children aged 6-9.



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

FOR CHILDREN AGED 5 OR UNDER

9%

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

WHAT RESTRICTED

- 7% Games played by age rating
- 5% Online access through the console
- 4% Amount of play time

13%

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

FOR CHILDREN AGED 6-9

35%

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

WHAT RESTRICTED

- 24% Games played by age rating
- 23% Online access through the console
- 22% Amount of play time

27%

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

FOR CHILDREN AGED 10-15

24%

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

WHAT RESTRICTED

- 14% Games played by age rating
- 11% Amount of play time
- 9% Online access through the console

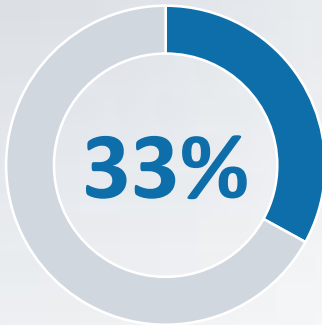
16%

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

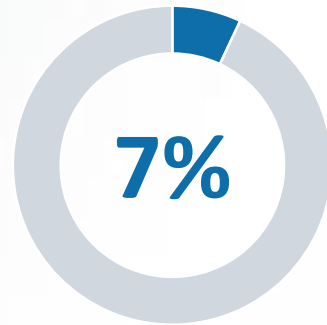
**Note low base sizes for this question (n < 50)



AWARENESS OF RATING SYSTEMS (ALL ONLINE RESPONDENTS)



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



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



28%

aware of PEGI age rating symbols

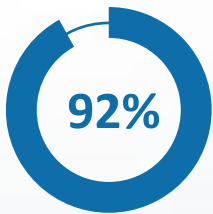


16%

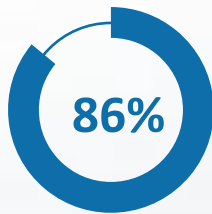
aware of PEGI content symbols

EXTENT TO WHICH THE SYMBOLS ARE...

PEGI AGE RATING SYMBOLS

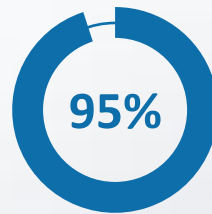


Clear

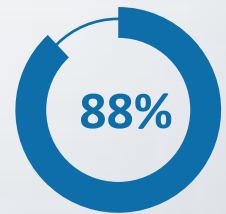


Useful

PEGI CONTENT SYMBOLS



Clear



Useful

■ % NET Fairly/Very

Clear: Amongst those aware of symbols
Useful: Amongst parents of children who game

33% are aware of an age rating system for games, but only 7% are aware of PEGI ratings.

Awareness of the PEGI age ratings increases to 28% after prompting with images.

Fewer (16%) recognise the PEGI content symbols.



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

56%

agree PEGI ratings should apply to app games

54%

agree PEGI ratings should apply to games on social network sites

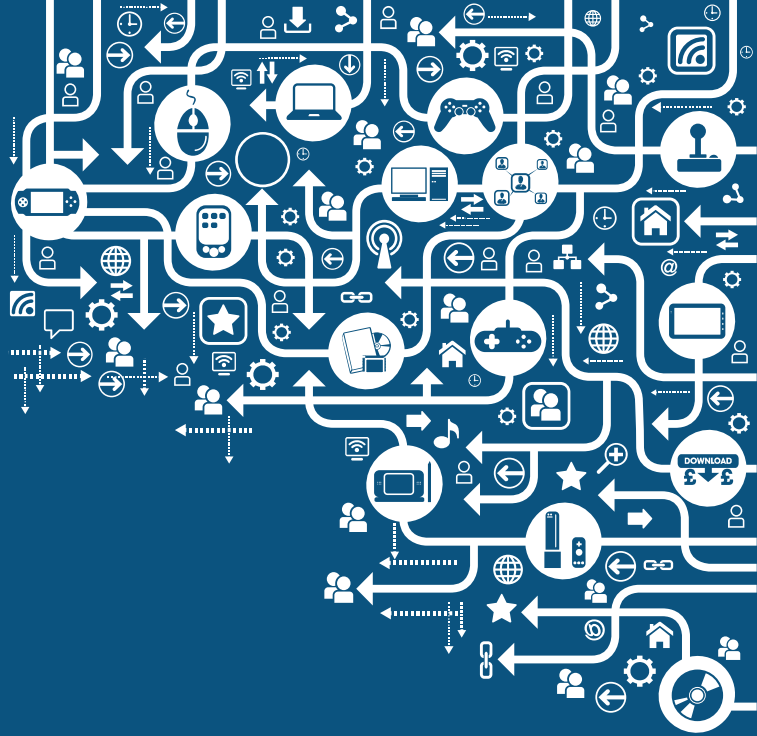
HOW THE AGE RATING SYSTEM FOR VIDEOGAMES SHOULD COMPARE TO MOVIES (ALL ONLINE RESPONDENTS)

% AGREE WITH STATEMENT THE MOST

- 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 the same
- 4%** The age rating system for movies should be stricter overall than that used for videogames
- 28%** Don't know/none of these

MORE THAN HALF agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.

1 in 4 believe that the age rating system for games should be stricter than movies, and 43% believe the same level of strictness should be applied to both.



FOR MORE INFORMATION

DIRK BOSMANS
Communication Manager
Interactive Software Federation of Europe

t: +32 (0) 2 612 1772
e: dirk.bosmans@isfe.eu
w: <http://www.isfe.eu>

PAUL MASKELL
Research Director
Ipsos MediaCT

t: +44 (0) 20 8515 3467
e: dirk.bosmans@isfe.eu
w: <http://www.isfe.eu>

