VIDEOGAMES IN EUROPE: CONSUMER STUDY

Great Britain

November 2012
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 Great Britain, 1,307 respondents completed an online survey over a two week period in October 2012. The data was weighted to a profile of GB online gamers provided from a GB offline nationally representative sample of 4,062 adults.

GAMING FORMATS AND DEVICES COVERED

<table>
<thead>
<tr>
<th>APPS</th>
<th>ONLINE SOCIAL</th>
<th>PACKAGED (DISC/CARTRIDGE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FREE APPS</td>
<td>FREE DOWNLOAD</td>
<td>NEW</td>
</tr>
<tr>
<td>PAID APPS</td>
<td>PAID DOWNLOAD</td>
<td>PRE OWNED</td>
</tr>
<tr>
<td>PAID EXTRAS</td>
<td>PAID EXTRAS</td>
<td>RENTAL</td>
</tr>
<tr>
<td></td>
<td>MULTIPLAYER</td>
<td></td>
</tr>
<tr>
<td></td>
<td>WEBSITE</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CONSOLE</th>
<th>PORTABLE</th>
<th>MOBILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS2</td>
<td>DS</td>
<td>iPhone</td>
</tr>
<tr>
<td>PlayStation 3</td>
<td>PlayStation Portable</td>
<td>iPod touch</td>
</tr>
<tr>
<td>XBOX 360</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wii</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TABLET</th>
<th>COMPUTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPad</td>
<td></td>
</tr>
</tbody>
</table>
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

- ANY Video Gaming
  - Males 16-34: 40%
  - Males 35-64: 35%
  - Females 16-34: 28%
  - Females 35-64: 21%
- ANY Packaged
  - Males 16-34: 35%
  - Males 35-64: 28%
  - Females 16-34: 20%
  - Females 35-64: 14%
- ANY Apps
  - Males 16-34: 24%
  - Males 35-64: 18%
  - Females 16-34: 12%
  - Females 35-64: 14%
- ANY Online
  - Males 16-34: 24%
  - Males 35-64: 27%
  - Females 16-34: 29%
  - Females 35-64: 39%

GAMING AND THE FAMILY

61% of parents have children who play games.

GAMING AND THE FAMILY

- 25% Parents
- 75% Non parents

- 43% Play games with their children
- 17% Don’t play games with their children
- 38% Their children don’t play games

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

- Have fun
  - More: 70%
  - No difference: 22%
  - Less: 6%
- Competitive
  - More: 62%
  - No difference: 31%
  - Less: 5%
- Develop skills
  - More: 55%
  - No difference: 26%
  - Less: 14%
- Spend time alone
  - More: 46%
  - No difference: 32%
  - Less: 16%
- Creative
  - More: 39%
  - No difference: 29%
  - Less: 27%
- Social
  - More: 38%
  - No difference: 32%
  - Less: 27%
- Informed
  - More: 29%
  - No difference: 44%
  - Less: 20%
- Aggressive
  - More: 29%
  - No difference: 47%
  - Less: 16%

PERCEPTIONS OF GAMING

- Very interested
- Fairly interested
- Not very interested

69% Not very/at all interested
30% Fairly/very interested

TOP 3 WORDS ASSOCIATED WITH GAMING

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

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

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

- More
- No difference
- Less
- Don’t know

% 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
KEY HEADLINES

1. Incidence of gaming amongst the GB online population is at 40%
   The profile of gamers is fairly evenly distributed across age and gender, although males 16-34 are more likely to have played a game in the last 12 months.
   Online now matches Packaged as the most common form of gaming in GB.
   Over half of gamers are playing weekly. For non-gamers, a lack of interest in the category is the main barrier.

2. 30% of the online population are very or fairly interested in gaming
   Gaming is perceived as a ‘fun’ and ‘entertaining’ activity by the overall online population.
   In terms of interest in other activities, gamers are broadly similar to non-gamers.
   There is a strong interest in ‘technology’ amongst gamers (75% vs. 52% non-gamers).
   Gamers are also more likely to be interested in ‘going out to bars and clubs’ (50% vs. 38% non-gamers) and ‘taking part in sport’ (42% vs. 34% non-gamers).

3. 43% of parents play games with their children
   A fifth of parents playing games with their children do so for the ‘health and fitness’ and ‘educational’ benefits.
   Many parents see gaming as having a positive impact on their child(ren). 55% believe gaming encourages their child to ‘develop more skills’. A further 4 in 10 believe it encourages them to be more ‘creative’ (39%) and ‘social’ (38%).

4. The majority of children aged 6-15 are buying or receiving games
   6 in 10 children aged 10-15 have bought a game for themself, compared to 5 in 10 children aged 6-9.
   1 in 5 parents of children aged 6 and above describe themselves as ‘not at all’ or ‘not very’ knowledgeable about the games that child plays.
   4 in 5 children aged 10-15 are playing games with an age rating higher than their age (falling to 43% amongst those aged 6-9, and 37% amongst those aged 5 and under).

5. Half of the online population recognise PEGI age rating symbols
   7 in 10 agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.
   1 in 5 believe that the age rating system for games should be stricter than movies, although the majority (55%) believe the same level of strictness should be applied to both.
GAMING: WHO, WHAT AND HOW?
WHO PLAYS VIDEOGAMES? (ALL ONLINE RESPONDENTS)

40%

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

Incidence of gaming amongst the GB online population is at 40%.

The profile of gamers is fairly evenly distributed across age and gender, although there are more YOUNGER MALE gamers (16-25) than female.
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)

- Weekly: 24%
- Monthly: 7%
- Less frequently: 9%
- Never: 60%

TOP 5 REASONS FOR NOT GAMING

1. Not interested in them (73%)
2. More interested in other hobbies (41%)
3. No time to play them (19%)
4. Don’t have a console at home (13%)
5. Too old to play them (11%)

TYPES OF GAMES PLAYED (ALL ONLINE RESPONDENTS)

- ANY Video Gaming: 40%
- ANY Packaged: 28%
- ANY Apps: 18%
- ANY Online: 29%
- Downloads: 16%
- Social: 12%
- Websites: 11%
- Multiplayer Online: 8%

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 matches PACKAGED as the most popular forms of gaming in GB.
Across all categories gamers are most commonly MALES AGED 16-34, with the dominance most pronounced in Multiplayer Online games (21% vs. 8% Total).

Females are more active in the ONLINE gaming category overall than older males (27% vs. 24%).

The incidence of SOCIAL gaming is at the same level for males and females in the 16-34 age group (15% males vs. 14% females).
GAMES PLAYED: FREE OR PAID FOR (ALL ONLINE RESPONDENTS)

% of the online population playing each type of game

**Apps**
- Free: 17%
- Paid for: 8%

**Multiplayer online**
- Free: 6%
- Paid for: 3%
  *Paid for game*
  *Paid to play online*

**Downloads**
- Free: 12%
- Paid for: 7%

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

- 34% Have bought a game
- 23% New games on disc or cartridge
- 13% Secondhand games on disc or cartridge
- 7% Online games (download/subscription/extras)
- 7% Games apps

For **Apps** and **Downloads**, less than half of those active in the category are playing games that have been paid for.

A **THIRD** of the online population have bought a game in the last 12 months.

Of those buying games, **TWO THIRDS** have bought a new packaged game.
DEVICES USED TO PLAY GAMES (ALL ONLINE RESPONDENTS)

NET Console: 28%
- PS3: 10%
- Xbox 360: 11%
- Wii: 17%
- Other: 9%

NET Portable games device: 15%
- Nintendo DS: 12%
- Nintendo 3DS: 2%
- Sony PSP: 4%
- Other: 3%

NET Computer: 30%
- PC: 17%
- Laptop/Netbook: 22%
- Mac/Macbook: 3%

NET Mobile device: 22%
- Tablet: 8%
- Smartphone: 20%
- iPod Touch: 5%

MOST USED (ALL GAMERS)

- Laptop: 17%
- PC: 15%
- Xbox 360: 14%
- PS3: 13%
- Wii: 10%

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

- Wii: 19%
- Xbox 360: 16%
- PS3: 13%
- Laptop: 12%
- PC: 11%

Computers (laptops and PCs), closely followed by consoles, are the most commonly used devices for gaming.

1 in 5 have used a smartphone to play a game in the past 12 months.

Consoles, particularly the Wii, are the most used devices for parents who play with their children.
80% of gamers play games online

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

33%  Always play on my own
21%  Play on my own most of the time
19%  Sometimes on my own/sometimes with other online players
 4%  Play with other online players most of the time
 1%  Always play with other online players
20%  Never play games online

WHEN PLAYING WITH OTHERS ONLINE, WHO ARE THE OTHERS?

58%  Friends (met in real life)
41%  Family/relatives
39%  Online strangers
22%  Friends (not met in real life)
INTEREST IN GAMING (ALL ONLINE RESPONDENTS)

- **30%**: Fairly/very interested
- **69%**: Not very/at all interested

**WORDS ASSOCIATED WITH GAMING: TOP 5 SELECTED**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Word</th>
<th>ALL ONLINE</th>
<th>GAMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Entertaining</td>
<td>35%</td>
<td>56%</td>
</tr>
<tr>
<td>2</td>
<td>Fun</td>
<td>33%</td>
<td>58%</td>
</tr>
<tr>
<td>3</td>
<td>Competitive</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>4</td>
<td>Good at providing escapism</td>
<td>30%</td>
<td>45%</td>
</tr>
<tr>
<td>5</td>
<td>Immersive</td>
<td>23%</td>
<td>34%</td>
</tr>
</tbody>
</table>

30% of the online population say they are very or fairly interested in gaming.

Gaming is perceived as a **FUN** and **ENTERTAINING** activity by the majority of gamers.
BROADER MEDIA AND ACTIVITIES INTEREST:
(FAIRLY/VERY INTERESTED)

**Internet**
- All: 89%
- Males 16-34: 90%
- Males 35-64: 86%
- Females 16-34: 93%
- Females 35-64: 87%

**Travelling**
- All: 85%
- Males 16-34: 81%
- Males 35-64: 86%
- Females 16-34: 87%
- Females 35-64: 84%

**Television**
- All: 83%
- Males 16-34: 79%
- Males 35-64: 85%
- Females 16-34: 81%
- Females 35-64: 86%

**Music**
- All: 82%
- Males 16-34: 79%
- Males 35-64: 78%
- Females 16-34: 90%
- Females 35-64: 83%

**Film**
- All: 80%
- Males 16-34: 82%
- Males 35-64: 77%
- Females 16-34: 87%
- Females 35-64: 78%

**The latest technology**
- All: 62%
- Males 16-34: 62%
- Males 35-64: 72%
- Females 16-34: 61%
- Females 35-64: 52%

**News/current affairs**
- All: 77%
- Males 16-34: 70%
- Males 35-64: 88%
- Females 16-34: 67%
- Females 35-64: 78%

**Literature/art**
- All: 50%
- Males 16-34: 36%
- Males 35-64: 50%
- Females 16-34: 48%
- Females 35-64: 60%

**Going out to bars/clubs**
- All: 43%
- Males 16-34: 49%
- Males 35-64: 42%
- Females 16-34: 50%
- Females 35-64: 34%

**Sport (taking part)**
- All: 38%
- Males 16-34: 60%
- Males 35-64: 37%
- Females 16-34: 32%
- Females 35-64: 26%

**News about celebs/famous**
- All: 32%
- Males 16-34: 18%
- Males 35-64: 17%
- Females 16-34: 61%
- Females 35-64: 36%

**Gaming**
- All: 30%
- Males 16-34: 46%
- Males 35-64: 26%
- Females 16-34: 27%
- Females 35-64: 24%
### BROADER MEDIA AND ACTIVITIES INTEREST: DIFFERENCE BETWEEN GAMERS AND NON-GAMERS

<table>
<thead>
<tr>
<th>Activity</th>
<th>All</th>
<th>Gamers</th>
<th>Non-gamers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>89%</td>
<td>91%</td>
<td>87%</td>
</tr>
<tr>
<td>Television</td>
<td>83%</td>
<td>86%</td>
<td>81%</td>
</tr>
<tr>
<td>Film</td>
<td>80%</td>
<td>88%</td>
<td>75%</td>
</tr>
<tr>
<td>The latest technology</td>
<td>62%</td>
<td>76%</td>
<td>52%</td>
</tr>
<tr>
<td>Going out to bars/clubs</td>
<td>43%</td>
<td>50%</td>
<td>38%</td>
</tr>
<tr>
<td>News about celebs/famous</td>
<td>32%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Travelling</td>
<td>85%</td>
<td>84%</td>
<td>86%</td>
</tr>
<tr>
<td>Music</td>
<td>82%</td>
<td>89%</td>
<td>78%</td>
</tr>
<tr>
<td>News/current affairs</td>
<td>77%</td>
<td>73%</td>
<td>80%</td>
</tr>
<tr>
<td>Literature/art</td>
<td>50%</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>Sport (taking part)</td>
<td>38%</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Gaming</td>
<td>30%</td>
<td>65%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Apart from news/current affairs, a higher percentage of gamers than non-gamers are interested in many other activities.

There is a strong interest in TECHNOLOGY amongst gamers (75% vs. 52% non-gamers).

Gamers are also more likely to be interested in GOING OUT to bars and clubs (50% vs. 38% non-gamers) and taking part in SPORT (42% vs. 34% non-gamers).
WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

(ALL ONLINE RESPONDENTS)

Entertaining
- Internet: 44%
- Television: 69%
- Film: 70%
- The latest technology: 29%
- Going out to bars/clubs: 38%
- News about celebs/famous: 23%
- Gaming: 35%

Informative/educational
- Internet: 25%
- Television: 24%
- Film: 32%
- The latest technology: 12%
- Going out to bars/clubs: 20%
- News about celebs/famous: 9%
- Gaming: 23%

Immersive
- Internet: 28%
- Television: 54%
- Film: 54%
- The latest technology: 11%
- Going out to bars/clubs: 64%
- News about celebs/famous: 7%
- Gaming: 30%

Fun
- Internet: 26%
- Television: 15%
- Film: 23%
- The latest technology: 9%
- Going out to bars/clubs: 42%
- News about celebs/famous: 7%
- Gaming: 33%

Good at providing escapism
- Internet: 54%
- Television: 51%
- Film: 47%
- The latest technology: 41%
- Going out to bars/clubs: 42%
- News about celebs/famous: 7%
- Gaming: 33%

Sociable
- Internet: 37%
- Television: 36%
- Film: 33%
- The latest technology: 19%
- Going out to bars/clubs: 35%
- News about celebs/famous: 7%
- Gaming: 29%

Family orientated
- Internet: 7%
- Television: 36%
- Film: 47%
- The latest technology: 5%
- Going out to bars/clubs: 15%
- News about celebs/famous: 7%
- Gaming: 46%

Competitive
- Internet: 5%
- Television: 38%
- Film: 33%
- The latest technology: 5%
- Going out to bars/clubs: 5%
- News about celebs/famous: 12%
- Gaming: 10%

Most commonly selected category for each word
Amongst non-gamers, there is a strong perception of gaming as being a **COMPETITIVE** activity.

A fifth of gamers describe gaming as a **SOCIAL** activity.
61% of parents have children who play games

- 25% Parents
- 75% Non parents

Reasons Parents Play Games with Their Children

- **To spend time with them**: 42%
- **They ask me to**: 41%
- **It’s a fun activity for all the family**: 39%
- **I enjoy playing with them**: 36%

Health and fitness benefits:

- 20%

Educational benefits:

- 19%

To monitor what games they play:

- 14%

To monitor how long they play for:

- 13%

6 in 10 parents have children that play games. Of these, 70% play with their children (43% parents play games with their children vs. 17% don’t).

The most common reason parents play games with children is to SPEND TIME WITH THEM.

A fifth of parents playing games with their children do so for the HEALTH/FITNESS and EDUCATIONAL benefits.
WORDS ASSOCIATED WITH GAMING:  
DIFFERENCE BETWEEN PARENTS OF CHILDREN WHO PLAY GAMES AND NON-PARENTS

Parents of children who play games are more likely to describe gaming as **FUN** and **ENTERTAINING** than non-parents. They are also nearly three times as likely to describe gaming as a **FAMILY ORIENTATED** activity.
**EFFECT OF GAMES ON CHILDREN:**
*(PARENTS OF CHILDREN WHO PLAY GAMES)*

<table>
<thead>
<tr>
<th>Activity</th>
<th>More</th>
<th>No difference</th>
<th>Less</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have fun</td>
<td>70%</td>
<td>22%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Competitive</td>
<td>62%</td>
<td>31%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Develop skills</td>
<td>55%</td>
<td>26%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Spend time alone</td>
<td>46%</td>
<td>32%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Creative</td>
<td>39%</td>
<td>29%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td>38%</td>
<td>32%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Informed</td>
<td>29%</td>
<td>44%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Aggressive</td>
<td>29%</td>
<td>47%</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

**WORDS ASSOCIATED WITH GAMING:**

**PARENTS OF CHILDREN WHO PLAY GAMES**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informative/educational</td>
<td>7%</td>
</tr>
<tr>
<td>Family orientated</td>
<td>22%</td>
</tr>
</tbody>
</table>

**PARENTS OF CHILDREN WHO DON’T PLAY GAMES**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informative/educational</td>
<td>0%</td>
</tr>
<tr>
<td>Family orientated</td>
<td>3%</td>
</tr>
</tbody>
</table>

Many parents see gaming as having a positive impact on their child(ren). 55% believe gaming encourages their child to **DEVELOP THEIR SKILLS** more.

A further 4 in 10 believe it encourages them to be more **CREATIVE** (39%) and **SOCIAL** (38%).

For parents of children who don’t play games, the family orientated nature of gaming is rarely acknowledged.
### WHETHER PARENTS BUY THEIR YOUNGEST CHILD’S GAMES

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>Never (+child doesn’t buy/receive)</th>
<th>Never (but child does buy/receive)</th>
<th>Sometimes</th>
<th>Most of the time</th>
<th>Rarely</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>37%</td>
<td>13%</td>
<td>21%</td>
<td>9%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>15%</td>
<td>7%</td>
<td>14%</td>
<td>23%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>10 to 15</td>
<td>4%</td>
<td>12%</td>
<td>16%</td>
<td>31%</td>
<td>26%</td>
<td>11%</td>
</tr>
</tbody>
</table>

### WHETHER THE CHILD IS PRESENT DURING PURCHASE

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>Don’t buy games for youngest child</th>
<th>Sometimes</th>
<th>Never</th>
<th>Most of the time</th>
<th>Rarely</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>38%</td>
<td>4%</td>
<td>11%</td>
<td>24%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td>6 to 9</td>
<td>22%</td>
<td>7%</td>
<td>20%</td>
<td>36%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>16%</td>
<td>5%</td>
<td>34%</td>
<td>29%</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

*Parents were asked in reference to their YOUNGEST child only

Most children aged 6 and above are buying or receiving games. 1 in 5 parents of children aged 6-9 always buy that child’s games, compared to 1 in 10 parents of children aged 10-15.
**WHETHER CHILD BUYS THEIR OWN GAMES**

Parents were asked in reference to their YOUNGEST child only.

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>Never (child doesn’t receive games)</th>
<th>Never (but do receive games)</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>37%</td>
<td>43%</td>
<td>10%</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>15%</td>
<td>31%</td>
<td>20%</td>
<td>20%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>4%</td>
<td>33%</td>
<td>27%</td>
<td>25%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>Child doesn’t play</th>
<th>Not at all</th>
<th>Not very</th>
<th>Quite</th>
<th>Very</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>22%</td>
<td>6%</td>
<td>41%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>7%</td>
<td>9%</td>
<td>36%</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>6%</td>
<td>14%</td>
<td>55%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

*Parents were asked in reference to their YOUNGEST child only.

1 in 5 parents of children aged 6 and above describe themselves as ‘not at all’ or ‘not very’ knowledgeable about the games that child plays.

6 in 10 children aged 10-15 have bought a game for themself, compared to HALF of all children aged 6-9.
### WHETHER CHILD PLAYS GAMES WITH A HIGHER AGE RATING THAN THEIR AGE

#### AGE OF CHILD*

<table>
<thead>
<tr>
<th>Age of Child</th>
<th>Child doesn’t play games</th>
<th>Rarely</th>
<th>Don’t know</th>
<th>Sometimes</th>
<th>Never</th>
<th>Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>22%</td>
<td>40%</td>
<td>11%</td>
<td>21%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>7%</td>
<td>47%</td>
<td>9%</td>
<td>25%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>19%</td>
<td>34%</td>
<td>37%</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- **11%** Aged 5 and under play games at a friend’s home
- **41%** Aged 6-9 play games at a friend’s home
- **63%** Aged 10-15 play games at a friend’s home

#### AGE OF CHILD*

<table>
<thead>
<tr>
<th>Age of Child</th>
<th>Don’t know</th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>8%</td>
<td>29%</td>
<td>23%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>9%</td>
<td>34%</td>
<td>7%</td>
<td>33%</td>
<td>16%</td>
</tr>
<tr>
<td>10 to 15</td>
<td>23%</td>
<td>10%</td>
<td>18%</td>
<td>43%</td>
<td>7%</td>
</tr>
</tbody>
</table>

*Parents were asked in reference to their YOUNGEST child only

**Note low base sizes for this question (n < 50)
USE OF PARENTAL CONTROLS
(PARENTS OF CHILDREN WHO PLAY GAMES)

FOR CHILDREN AGED 5 OR UNDER

31%
use parental control settings to limit what their youngest child can access on their games consoles

30%
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

41%
use parental control settings to limit what their youngest child can access on their games consoles

43%
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

29%
use parental control settings to limit what their youngest child can access on their games consoles

41%
use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

WHAT RESTRICTED

FOR CHILDREN AGED 5 OR UNDER

21% Online access through the console
20% Games played by age rating
15% Amount of play time

FOR CHILDREN AGED 6-9

22% Games played by age rating
18% Amount of play time
18% Online access through the console

FOR CHILDREN AGED 10-15

15% Games played by age rating
12% Online access through the console
7% Amount of play time
PEGI RATING SYSTEM
Awareness of ANY age rating system for videogames: 67%

Aware of PEGI age rating system for videogames: 20%

Aware of PEGI age rating symbols: 50%

Aware of PEGI content symbols: 22%

Extent to Which the Symbols Are...

**PEGI Age Rating Symbols**
- Clear: 84%
- Useful: 94%

**PEGI Content Symbols**
- Clear: 90%
- Useful: 87%

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

67% are aware of an age rating system for games, but only 1 in 5 are aware of PEGI ratings.

Awareness of the PEGI age ratings increases to 50% after prompting with images.

The vast majority of respondents agree that both sets of symbols are CLEAR and USEFUL.
## SHOULD THE PEGI RATING SYSTEM ALSO APPLY TO APP AND SOCIAL GAMES? (ALL ONLINE RESPONDENTS)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>Agree PEGI ratings should apply to app games</td>
</tr>
<tr>
<td>71%</td>
<td>Agree PEGI ratings should apply to games on social network sites</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>The age rating system for videogames should be stricter overall than that used for movies</td>
</tr>
<tr>
<td>55%</td>
<td>The age rating system for videogames and movies should be equally strict</td>
</tr>
<tr>
<td>3%</td>
<td>The age rating system for movies should be stricter overall than that used for videogames</td>
</tr>
<tr>
<td>21%</td>
<td>Don’t know/none of these</td>
</tr>
</tbody>
</table>

7 in 10 agree that PEGI ratings should be applied to app games and games on social network sites, as well as packaged games.

1 in 5 believe that the age rating system for games should be stricter than movies, although the majority (55%) believe the same level of strictness should be applied to both.
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

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

<table>
<thead>
<tr>
<th>GENDER</th>
<th>PS2</th>
<th>ALL GAMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Males</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>% 11-14</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>% 15-24</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td>% 25-34</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>% 35-44</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>% 45+</td>
<td>9%</td>
</tr>
<tr>
<td>Females</td>
<td></td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td>% 11-14</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>% 15-24</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>% 25-34</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>% 35-44</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>% 45+</td>
<td>4%</td>
</tr>
</tbody>
</table>

Household:
- Any kids: 58% (47%)
- No kids: 42% (53%)

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%)

Spend:
- Average £24 in quarter
- Average £1 in quarter on PS2 games

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

Top Devices (share of hours):
- PC/laptop: 22%
- PS3: 12%
- PS2: 11%

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