VIDEOGAMES IN EUROPE: CONSUMER STUDY

Spain

November 2012
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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 Spain, 1,320 respondents completed an online survey over a two week period in October 2012.

The data was weighted to a profile of online gamers in Spain provided from an offline nationally representative sample of 1,715 adults.

### Gaming Formats and Devices Covered

**APPS**
- FREE APPS
- PAID APPS
- PAID EXTRAS

**Packaged (Disc/Cartridge)**
- NEW
- PRE OWNED
- RENTAL

**Online**
- SOCIAL
  - FREE DOWNLOAD
  - PAID DOWNLOAD
  - PAID EXTRAS
  - MULTIPLAYER
  - WEBSITE

**Console**
- PS2
- PS3
- XBOX 360
- Wii

**Portable**
- DS
- PlayStation Portable

**Mobile**
- iPhone
- iPod touch

**Tablet**
- iPad

**Computer**
- Windows
- Mac

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Ipsos MediaCT
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

ANY Video Gaming

- Males 16-34: 26%
- Females 16-34: 28%
- Males 35-64: 21%
- Females 35-64: 36%

ANY Packaged

- Males 16-34: 14%
- Males 35-64: 20%
- Females 16-34: 13%
- Females 35-64: 20%

ANY Apps

- Males 16-34: 11%
- Males 35-64: 27%
- Females 16-34: 11%
- Females 35-64: 31%

ANY Online

- Males 16-34: 18%
- Males 35-64: 36%
- Females 16-34: 21%
- Females 35-64: 36%

GAMING AND THE FAMILY

50%
of parents have children who play games

- 30% Parents
- 29% Play games with their children
- 22% Don’t play games with their children
- 43% Their children don’t play games

- 70% Non parents

PERCEPTIONS OF GAMING

73%
Not very/at all interested

26%
Fairly/very interested

TOP 3 WORDS ASSOCIATED WITH GAMING

1. Entertaining
   - ALL ONLINE: 40%
   - GAMERS: 59%

2. Immersive
   - ALL ONLINE: 38%
   - GAMERS: 50%

3. Fun
   - ALL ONLINE: 34%
   - GAMERS: 55%

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
Consumer Study | November 2012

SUMMARY

KEY HEADLINES

1. Incidence of gaming amongst the online population is at 40%
   The profile of gamers is fairly evenly distributed across age and gender, although males 25-34 are more likely to have played a game in the last 12 months.
   1 in 4 adults are playing weekly. For non-gamers, a lack of interest in the category is the main barrier.
   Online is the most popular form of gaming amongst the online population in Spain with higher incidence levels than the traditional packaged format.

2. 26% of the online population are very or fairly interested in gaming
   Gaming is perceived as a ‘entertaining’ and ‘fun’ activity by the majority of gamers.
   A higher percentage of gamers than non-gamers are interested in a range of other activities.
   There is a strong interest in ‘technology’ amongst gamers (76% vs. 45% non-gamers).
   Gamers are also more likely to be interested in ‘going out to bars and clubs’ (66% vs. 50% non-gamers) and ‘taking part in sport’ (66% vs. 45% non-gamers).

3. 29% of parents play games with their children
   1 in 4 parents playing games with their children do so for the ‘educational’ benefits.
   Many parents see it as having a positive impact on their child(ren). 67% believe gaming encourages their child to ‘develop skills’ more. A further 1 in 2 parents believe it encourages them to be more ‘creative’ and 27% say it make them more ‘social’.

4. The majority of children aged 6-15 are buying or receiving games
   One third of children aged 10-15 have bought a game for themself, compared to 1 in 20 children aged 6-9.
   Over 3 in 10 parents of children aged 6 and above describe themselves as ‘not at all’ or ‘not very’ knowledgeable about the games that child plays.
   23% of children aged 6-9 and 45% of children aged 10-15 are playing games with an age rating higher than their age.

5. 53% 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.
   Almost 3 in 10 believe that the age rating system for games should be stricter than movies, although 1 in 2 (50%) 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 Spain have played a game in the past 12 months

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

The profile of gamers is fairly evenly distributed across age and gender, skewing towards MALES in the 25-34 age bracket.
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)

- Weekly: 24%
- Monthly: 8%
- Less frequently: 9%
- Never: 60%

TOP 5 REASONS FOR NOT GAMING

1. Not interested in them: 60%
2. More interested in other hobbies: 39%
3. No time to play them: 22%
4. Don’t have a console at home: 16%
5. Too old to play them: 12%

TYPES OF GAMES PLAYED (ALL ONLINE RESPONDENTS)

- ANY Video Gaming: 40%
- ANY Packaged: 21%
- ANY Apps: 20%
- ANY Online: 31%
- Downloads: 17%
- Social: 17%
- Websites: 15%
- Multiplayer Online: 10%

24% of adults are playing weekly. For non-gamers, a lack of interest in the category is the main barrier. ONLINE is the most popular form of gaming in Spain with higher incidence levels than the traditional packaged format.
### TYPES OF GAMES PLAYED: BY AGE AND GENDER

<table>
<thead>
<tr>
<th>Game Type</th>
<th>Males 16-34</th>
<th>Males 35-64</th>
<th>Females 16-34</th>
<th>Females 35-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY Video Gaming</td>
<td>61%</td>
<td>46%</td>
<td>40%</td>
<td>26%</td>
</tr>
<tr>
<td>ANY Packaged</td>
<td>28%</td>
<td>21%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>ANY Apps</td>
<td>27%</td>
<td>20%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>ANY Online</td>
<td>36%</td>
<td>21%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Downloads</td>
<td>29%</td>
<td>19%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Social</td>
<td>24%</td>
<td>27%</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>Websites</td>
<td>26%</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Multiplayer Online</td>
<td>25%</td>
<td>10%</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Observations

Across all categories gamers are most commonly **MALES AGED 16-34**, with their dominance most pronounced within **Packaged** (36% vs. 21% Total) and **Multiplayer Online** gaming (25% vs. 10% Total).

Females aged 16-34 are generally more active in the **ONLINE** gaming category than older males (36% vs. 18%).

The incidence of **SOCIAL** gaming is at a similar level for males and females in the 16-34 age group (27% males vs. 24% females).
GAMES PLAYED: FREE OR PAID FOR (ALL ONLINE RESPONDENTS)

% of the online population playing each type of game

- **Apps**
  - Free: 19%
  - Paid for: 4%
  - Total paid for: 5%

- **Multiplayer online**
  - Free: 7%
  - Paid for: 3%
  - Total paid for: 3%

- **Downloads**
  - Free: 15%
  - Paid for: 4%
  - Total paid for: 4%

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

- **35%** Have bought a game
- **20%** New games on disc or cartridge
- **10%** Secondhand games on disc or cartridge
- **5%** Online games (download/subscription/extras)
- **3%** Games apps

For **Apps** and **Downloads**, only a minority of those active in the category are playing games that have been paid for.

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

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

- **NET Console:** 26%
  - PS3: 12%
  - Xbox 360: 7%
  - Wii: 15%
  - Other: 12%
- **NET Portable games device:** 17%
  - Nintendo DS: 12%
  - Nintendo 3DS: 4%
  - Sony PSP: 8%
  - Other: 5%
- **NET Computer:** 31%
  - PC: 21%
  - Laptop/Netbook: 22%
  - Mac/Macbook: 3%
- **NET Mobile device:** 25%
  - Tablet: 12%
  - Smartphone: 24%
  - iPod Touch: 3%

MOST USED (ALL GAMERS)

- **Laptop:** 17%
- **PC:** 15%
- **Android smartphone:** 13%
- **PS3:** 12%
- **Wii:** 10%

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

- **Wii:** 19%
- **Android smartphone:** 14%
- **PC:** 12%
- **Laptop:** 11%
- **PS3:** 8%

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

1 in 4 now use **SMARTPHONES** as a gaming device, a similar level as those using consoles.

The **Wii** is the most popular device (19%) amongst parents who play games with their children.
83% of gamers play games online

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

- **24%** Always play on my own
- **19%** Play on my own most of the time
- **28%** Sometimes on my own/sometimes with other online players
- **8%** Play with other online players most of the time
- **4%** Always play with other online players
- **15%** Never play games online

WHEN PLAYING WITH OTHERS ONLINE, WHO ARE THE OTHERS?

- **56%** Friends (met in real life)
- **41%** Online strangers
- **29%** Family/relatives
- **29%** Friends (not met in real life)
INTEREST IN GAMING (ALL ONLINE RESPONDENTS)

- 26% Fairly/very interested
- 42% Not very/interested
- 15% Very interested
- 11% Not at all interested
- 31% Don’t know

WORDS ASSOCIATED WITH GAMING: TOP 5 SELECTED

<table>
<thead>
<tr>
<th>Rank</th>
<th>Term</th>
<th>ALL ONLINE</th>
<th>GAMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Entertaining</td>
<td>40%</td>
<td>59%</td>
</tr>
<tr>
<td>2</td>
<td>Immersive</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>3</td>
<td>Fun</td>
<td>34%</td>
<td>55%</td>
</tr>
<tr>
<td>4</td>
<td>Good at providing escapism</td>
<td>32%</td>
<td>45%</td>
</tr>
<tr>
<td>5</td>
<td>Competitive</td>
<td>21%</td>
<td>28%</td>
</tr>
</tbody>
</table>

26% of the online population are very or fairly interested in gaming.

Gaming is perceived as an ENTERTAINING activity by 6 in 10 gamers. Around half also describe it as IMMERSIVE and FUN.
BROADER MEDIA AND ACTIVITIES INTEREST: (FAIRLY/VERY INTERESTED)

Travelling
- All: 86%
- Males 16-34: 82%
- Males 35-64: 83%
- Females 16-34: 88%
- Females 35-64: 89%

News/current affairs
- All: 79%
- Males 16-34: 69%
- Males 35-64: 89%
- Females 16-34: 75%
- Females 35-64: 81%

Music
- All: 76%
- Males 16-34: 79%
- Males 35-64: 65%
- Females 16-34: 86%
- Females 35-64: 75%

Internet
- All: 76%
- Males 16-34: 75%
- Males 35-64: 75%
- Females 16-34: 86%
- Females 35-64: 70%

Film
- All: 67%
- Males 16-34: 62%
- Males 35-64: 69%
- Females 16-34: 74%
- Females 35-64: 65%

Television
- All: 59%
- Males 16-34: 56%
- Males 35-64: 63%
- Females 16-34: 60%
- Females 35-64: 56%

The latest technology
- All: 57%
- Males 16-34: 68%
- Males 35-64: 63%
- Females 16-34: 55%
- Females 35-64: 42%

Going out to bars/clubs
- All: 57%
- Males 16-34: 65%
- Males 35-64: 48%
- Females 16-34: 69%
- Females 35-64: 46%

Gaming
- All: 26%
- Males 16-34: 51%
- Males 35-64: 18%
- Females 16-34: 24%
- Females 35-64: 10%

Sport (taking part)
- All: 53%
- Males 16-34: 74%
- Males 35-64: 51%
- Females 16-34: 45%
- Females 35-64: 44%

News about celebs/famous
- All: 14%
- Males 16-34: 11%
- Males 35-64: 5%
- Females 16-34: 22%
- Females 35-64: 19%
A higher percentage of gamers than non-gamers are interested in a range of other activities. There is a strong interest in TECHNOLOGY amongst gamers (76% vs. 45% non-gamers).

Gamers are also more likely to be interested in GOING OUT to bars and clubs (66% vs. 50% non-gamers) and taking part in SPORT (66% vs. 45% non-gamers).
WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

(ALL ONLINE RESPONDENTS)

- **Entertaining**
- **Informative/educational**
- **Immersive**
- **Fun**
- **Good at providing escapism**
- **Sociable**
- **Family orientated**
- **Competitive**

### Travelling
- Entertaining: 43%
- Informative/educational: 26%
- Immersive: 33%
- Fun: 45%
- Good at providing escapism: 47%
- Sociable: 56%
- Family orientated: 49%

### Music
- Entertaining: 58%
- Informative/educational: 33%
- Immersive: 53%
- Fun: 20%
- Good at providing escapism: 11%
- Sociable: 43%
- Family orientated: 30%

### Film
- Entertaining: 65%
- Informative/educational: 22%
- Immersive: 52%
- Fun: 14%
- Good at providing escapism: 15%
- Sociable: 50%
- Family orientated: 42%

### The latest technology
- Entertaining: 30%
- Informative/educational: 25%
- Immersive: 17%
- Fun: 12%
- Good at providing escapism: 29%
- Sociable: 21%
- Family orientated: 13%

### Literature/art
- Entertaining: 39%
- Informative/educational: 24%
- Immersive: 31%
- Fun: 14%
- Good at providing escapism: 55%
- Sociable: 21%
- Family orientated: 25%

### Gaming
- Entertaining: 40%
- Informative/educational: 38%
- Immersive: 32%
- Fun: 8%
- Good at providing escapism: 5%
- Sociable: 34%
- Family orientated: 11%

### News/current affairs
- Entertaining: 24%
- Informative/educational: 4%
- Immersive: 8%
- Fun: 17%
- Good at providing escapism: 65%
- Sociable: 4%
- Family orientated: 9%

### Internet
- Entertaining: 59%
- Informative/educational: 41%
- Immersive: 48%
- Fun: 41%
- Good at providing escapism: 43%
- Sociable: 41%
- Family orientated: 19%

### Television
- Entertaining: 61%
- Informative/educational: 27%
- Immersive: 51%
- Fun: 6%
- Good at providing escapism: 32%
- Sociable: 28%
- Family orientated: 36%

### Going out to bars/clubs
- Entertaining: 49%
- Informative/educational: 10%
- Immersive: 53%
- Fun: 65%
- Good at providing escapism: 54%
- Sociable: 9%

### Sport (taking part)
- Entertaining: 41%
- Informative/educational: 25%
- Immersive: 44%
- Fun: 35%
- Good at providing escapism: 8%
- Sociable: 38%
- Family orientated: 29%

### News about celebs/famous
- Entertaining: 17%
- Informative/educational: 6%
- Immersive: 14%
- Fun: 4%
- Good at providing escapism: 6%

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Most commonly selected category for each word.
WORDS ASSOCIATED WITH GAMING: DIFFERENCE BETWEEN GAMERS AND NON-GAMERS

Gaming is perceived as IMMERSIVE, ENTERTAINING and GOOD AT PROVIDING ESCAPISM by more than 1 in 4 non-gamers. A fifth of gamers describe gaming as a FAMILY ORIENTATED activity but only 1 in 20 non-gamers would make this association.
GAMING AND THE FAMILY
PARENTS AND CHILDREN WHO PLAY GAMES (ALL ONLINE RESPONDENTS)

50% of parents have children who play games

- 30% Parents
- 70% Non parents

- 29% Play games with their children
- 22% Don't play games with their children
- 43% Their children don't play games
- 32% Don't know

REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN

- To spend time with them: 33%
- It's a fun activity for all the family: 32%
- They ask me to: 31%
- I enjoy playing with them: 31%
- Educational benefits: 23%
- Health and fitness benefits: 19%
- To monitor what games they play: 10%
- To monitor how long they play for: 10%

50% of parents have children that play games. Of these, AROUND 3 in 5 play with their children (29% parents play games with their children vs. 22% who don’t).

A third of parents like to SPEND TIME playing games with their children. A further third describe it as a FUN ACTIVITY FOR ALL THE FAMILY.

Just under a quarter of parents who play games with their children say they have 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

40
41

33
38

40
41

39
37

34
28

Good at providing escapism

Immersive

Fun

Competitive

Family orientated

Sociable

Informative/educational

22
24

11
14

9
7

4

There is little or no difference in the words associated with gaming between parents of children who play games and non-parents. Slightly more parents then non-parents describe gaming as GOOD AT PROVIDING ESCAPISM and FAMILY ORIENTATED.
EFFECT OF GAMES ON CHILDREN:
PARENTS OF CHILDREN WHO PLAY GAMES

<table>
<thead>
<tr>
<th></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>82%</td>
<td>6%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Develop skills</td>
<td>67%</td>
<td>13%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Competitive</td>
<td>58%</td>
<td>20%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Spend time alone</td>
<td>57%</td>
<td>16%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Creative</td>
<td>50%</td>
<td>22%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Aggressive</td>
<td>34%</td>
<td>30%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Informed</td>
<td>29%</td>
<td>34%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td>27%</td>
<td>19%</td>
<td>50%</td>
<td></td>
</tr>
</tbody>
</table>

WORDS ASSOCIATED WITH GAMING:

PARENTS OF CHILDREN WHO PLAY GAMES

| Informative/educational | 4% |
| Family orientated       | 14% |

PARENTS OF CHILDREN WHO DON’T PLAY GAMES

| Informative/educational | 11% |
| Family orientated       | 7%  |

Many parents see gaming as having a positive impact on their child(ren). 67% believe gaming encourages their child to develop their SKILLS more. A further 1 in 2 believe it encourages them to be more CREATIVE.

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

**AGE OF CHILD***

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Never (+child <em>doesn’t</em> buy/receive)</th>
<th>Sometimes</th>
<th>Never (but child <em>does</em> buy/receive)</th>
<th>Most of the time</th>
<th>Rarely</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 and under</td>
<td>33%</td>
<td>9%</td>
<td>11%</td>
<td>20%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>11%</td>
<td>19%</td>
<td>14%</td>
<td>25%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>11%</td>
<td>10%</td>
<td>16%</td>
<td>30%</td>
<td>17%</td>
<td>16%</td>
</tr>
</tbody>
</table>

### WHETHER THE CHILD IS PRESENT DURING PURCHASE

**AGE OF CHILD***

<table>
<thead>
<tr>
<th>Age Group</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>42%</td>
<td>9%</td>
<td>19%</td>
<td>20%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td>12%</td>
<td>14%</td>
<td>35%</td>
<td>21%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>21%</td>
<td>7%</td>
<td>7%</td>
<td>19%</td>
<td>27%</td>
<td>19%</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.

29% parents of children aged 6-9 always buy that child’s games, compared to 16% of parents of children aged 10-15.
## WHETHER CHILD BUYS THEIR OWN GAMES

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>5 and under</th>
<th>6 to 9</th>
<th>10 to 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never (child doesn’t receive games)</td>
<td>33%</td>
<td>62%</td>
<td>11%</td>
</tr>
<tr>
<td>Never (but do receive games)</td>
<td></td>
<td>92%</td>
<td>53%</td>
</tr>
<tr>
<td>Sometimes</td>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Most of the time</td>
<td></td>
<td></td>
<td>19%</td>
</tr>
<tr>
<td>Always</td>
<td></td>
<td></td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>AGE OF CHILD*</th>
<th>5 and under</th>
<th>6 to 9</th>
<th>10 to 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child doesn’t play</td>
<td>29%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Not at all</td>
<td></td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Not very</td>
<td></td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Quite</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very</td>
<td></td>
<td></td>
<td>17%</td>
</tr>
</tbody>
</table>

*Parents were asked in reference to their YOUNGEST child only

One third of children aged 10-15 have bought a game for themselves, compared to 1 in 20 children aged 6-9.

Over 3 in 10 parents of children aged 6 and above describe themselves as ‘not at all’ or ‘not very’ knowledgeable about the games that child plays.
WHETHER CHILD PLAYS GAMES WITH A HIGHER AGE RATING THAN THEIR AGE

AGE OF CHILD*

<table>
<thead>
<tr>
<th>Age Group</th>
<th>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>29%</td>
<td>27%</td>
<td>23%</td>
<td>16%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>6 to 9</td>
<td></td>
<td></td>
<td>30%</td>
<td>16%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>10 to 15</td>
<td>36%</td>
<td>16%</td>
<td>32%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

12% Aged 5 and under play games at a friend’s home

29% Aged 6-9 play games at a friend’s home

63% 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)
## USE OF PARENTAL CONTROLS
(PARENTS OF CHILDREN WHO PLAY GAMES)

### FOR CHILDREN AGED 5 OR UNDER

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>15%</strong></td>
<td>Use parental control settings to limit what their youngest child can access on their games consoles</td>
</tr>
<tr>
<td><strong>26%</strong></td>
<td>Use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites</td>
</tr>
</tbody>
</table>

### WHAT RESTRICTED

- **9%** Amount of play time
- **8%** Online access through the console
- **7%** Games played by age rating

### FOR CHILDREN AGED 6-9

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>29%</strong></td>
<td>Use parental control settings to limit what their youngest child can access on their games consoles</td>
</tr>
<tr>
<td><strong>32%</strong></td>
<td>Use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites</td>
</tr>
</tbody>
</table>

### WHAT RESTRICTED

- **17%** Online access through the console
- **13%** Games played by age rating
- **8%** Amount of play time

### FOR CHILDREN AGED 10-15

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>38%</strong></td>
<td>Use parental control settings to limit what their youngest child can access on their games consoles</td>
</tr>
<tr>
<td><strong>47%</strong></td>
<td>Use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites</td>
</tr>
</tbody>
</table>

### WHAT RESTRICTED

- **21%** Amount of play time
- **21%** Games played by age rating
- **15%** Online access through the console
PEGI RATING SYSTEM
AWARENESS OF RATING SYSTEMS (ALL ONLINE RESPONDENTS)

22% aware of ANY age rating system for videogames

14% aware of PEGI age rating system for videogames

53% aware of PEGI age rating symbols

35% aware of PEGI content symbols

EXTENT TO WHICH THE SYMBOLS ARE...

PEGI AGE RATING SYMBOLS
- Clear: 75%
- Useful: 85%

PEGI CONTENT SYMBOLS
- Clear: 81%
- Useful: 84%

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

22% are aware of an age rating system for games, but only 14% are aware of PEGI ratings.

Awareness of the PEGI age ratings increases to 53% after prompting with images.

The 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)

69% agree PEGI ratings should apply to app games
70% 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

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/none of these

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

Almost 3 in 10 believe that the age rating system for games should be stricter than movies, although 50% believe the same level of strictness should be applied to both.
ALSO AVAILABLE FROM ISFE AND IPSOS MEDIACT:

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

TIME SPENT  ACQUISITION  VALUE
LATEST GAMETRACK DATA

% PLAYING GAMES IN PAST 12 MONTHS – Q3 2012
Base: all 6+ population

<table>
<thead>
<tr>
<th>ANY video gaming</th>
<th>20m people</th>
<th>35%</th>
<th>29m people</th>
<th>50%</th>
<th>26m people</th>
<th>40%</th>
<th>14m people</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY Packaged</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22%</td>
<td></td>
<td></td>
<td>29%</td>
<td></td>
<td>20%</td>
<td></td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>ANY Apps</td>
<td>14%</td>
<td></td>
<td>10%</td>
<td></td>
<td>8%</td>
<td></td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>ANY Online</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19%</td>
<td></td>
<td></td>
<td>25%</td>
<td></td>
<td>18%</td>
<td></td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Downloads</td>
<td>8%</td>
<td></td>
<td>9%</td>
<td></td>
<td>7%</td>
<td></td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td>8%</td>
<td></td>
<td>13%</td>
<td></td>
<td>9%</td>
<td></td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Multiplayer</td>
<td>8%</td>
<td></td>
<td>6%</td>
<td></td>
<td>4%</td>
<td></td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Browse</td>
<td>8%</td>
<td></td>
<td>7%</td>
<td></td>
<td>8%</td>
<td></td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

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

PS2 - Playstation 2

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%)

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

Ipsos MediaCT