



VIDEO GAMERS IN EUROPE - 2008

Prepared for the Interactive Software Federation of Europe (ISFE)

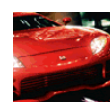
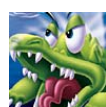
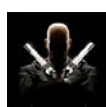


By Nielsen Games



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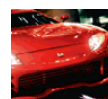
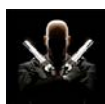
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EXECUTIVE SUMMARY

► Background on the European Games Market

In 2007 interactive software sales in nine of the major European markets* reached an approximate total of €7.3 billion. These figures represent games software alone (i.e. the games themselves, excluding the revenue generated by sales of hardware). The UK alone represented €2.3 billion in revenue, followed by France (€1.6bn), Germany (€1.4bn), Spain (€0.7bn) and Italy (€0.6bn).

The growth in software sales was accompanied by an explosion in hardware sales. New consoles such as the Sony PlayStation 3 and Nintendo Wii joined Microsoft's XBOX 360 in offering gamers a 'next generation' experience and hardware revenue represented €5.7 billion in 2007 compared to €3 billion in 2006. Comparatively, reported software revenue in the United States was approximately €6.9 billion** in 2007 and €7.4 billion*** in the Asia-Pacific region for 2006 (2007 figures not yet available).

As indicated in this year's research report, in large part this expansion in revenue appears related to the growing ability of video games to offer a mainstream and stimulating experience to a wide range of Europeans. The predominance of mainstream video games among 2007's best-sellers also indicated the growing breadth of the European market.

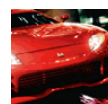
In 2007, only one game rated 16+ featured in the top 20 best-sellers of the year in France. The situation was similar in Spain, where all of the top ten games except for one (which was rated 16+) were rated suitable for players over the age of three years old. The top 10 in Germany consisted of eight games rated 3+ and two games rated 12+. In Italy, games designated for those eighteen and over achieved two places in the top 10, while in the UK only one game rated 18+ listed among the ten top selling games of the year.

Building on previous research commissioned by ISFE in 2004, 2005 and 2007, this year's research report continues to profile the evolving composition of the European market, consumer perceptions of games in relation to other media, awareness and understanding of age ratings and potential future directions for the industry. This Executive Summary now provides consumer insight from Benelux, Austria, Switzerland, Denmark and Finland - in addition to countries included in previous surveys – and a snapshot of the games consumer in relation to the general populations of the UK, Finland and Spain.

* Based on GFK data out of GFK sales and consumer panels 2007 for the UK, France, Germany, Spain, Italy, Netherlands and Switzerland, as well as data provided by the Swedish and Finnish ISFE member organizations.

**Based on the ESA press communication from February 20, 2008. Michael D. Gallagher, president and CEO of the ESA, reported \$9.5 billion of software sales for 2007.

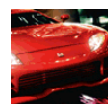
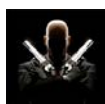
*** Price Waterhouse Report, 2006.



► Who's Playing Video Games? A Snapshot Across Europe....

Based on nationally representative omnibus data in the UK, Finland and Spain (chosen to represent a range of European geographies and stages of market development), the proportion of the population playing video games has reached very significant levels. Highlights include:

- In the UK, 37 % of the population aged between 16 and 49 describe themselves as 'active gamers' (defined as currently playing games on a console, handheld or PC).
- In comparison, in Spain and Finland 28% of the population aged 16 and 49 are defined as 'active gamers'.
- Among those under the age of 30, playing video games is even more ubiquitous (48% of 16 to 29 year olds classify themselves as active gamers in the UK, 43% in Spain, 36% in Finland).
- However, gaming is not restricted to the 'younger crowd'; 33% of those aged 30 to 49 in the UK classify themselves as active gamers, followed by 23% in Finland and 16% in Spain.
- In this sample of European countries, the average age of the active video gamer ranges from 33 years old in the UK to 26 years old in Spain (average age of Finnish gamers stands at 30).
- While males (aged 16-49) in Finland and Spain are twice as likely to be active gamers when compared to females (38% vs. 18% of females), females still represent a sizeable chunk of the gaming market. In the UK, the gap is narrower (48% of males are active gamers vs. 29% of females), perhaps reflective of its status as one of the more mature gaming markets.



► Video Gamers' Broader Activities and Interests

In addition to the age profile of gamers in the countries selected above, this year's broader research data (gathered online across fifteen European countries) also shows that European gamers incorporate a broad range of interests, levels of education and occupations:

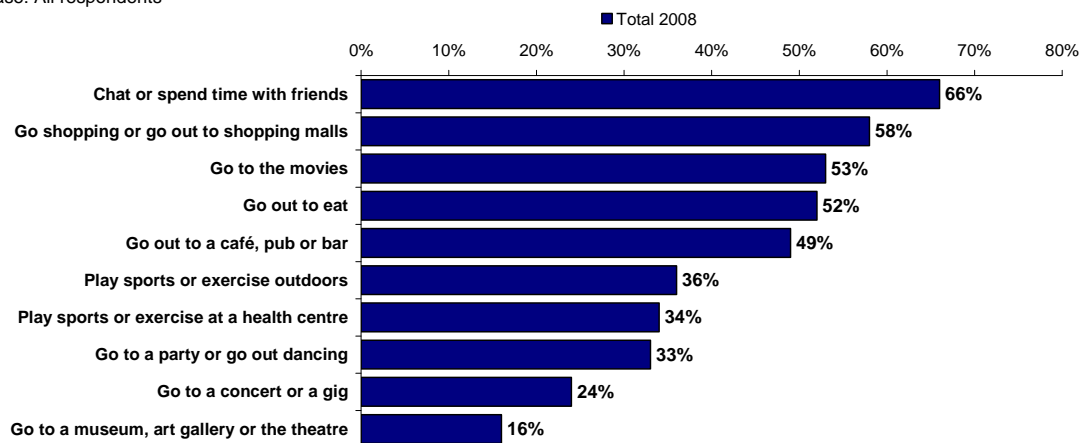
- Two in ten (20%) European gamers say they have completed graduate or post graduate degrees (11% report they are still at school, 44% that they have school/ advanced school leavers qualifications, with a further 17% saying they left education while either at school or university.
- While students made up the largest single element in the 2008 survey (25%), 17% of gamers categorised themselves in professional or service-related industries (i.e. law, medicine, banking), while a further 12% said they work in sales, entrepreneurial areas or management.

Furthermore, European gamers participate in a wide range of activities – chatting and spending time with friends, shopping, going out to eat or the movies – with over 50% saying they participate in these activities at least once a month - and over a third saying they regularly play sports.

Total European Gamers:

If you have a few hours of spare time, what sort of leisure or entertainment-related activities do you usually do at least once a month, Do you...?

Base: All respondents



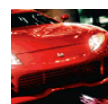
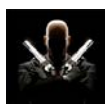
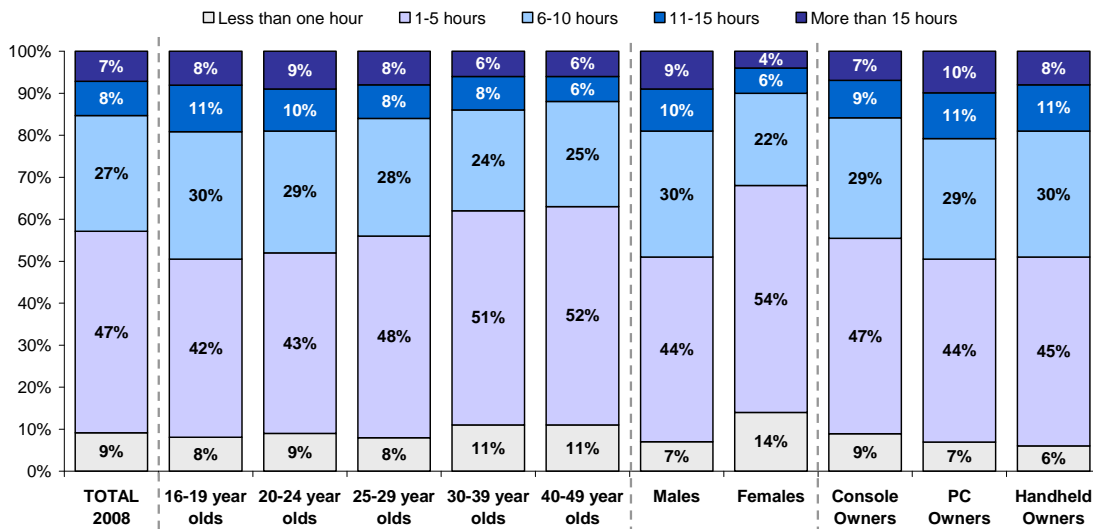
► Time Spent Playing Video Games

Despite active and busy lives, video games appear to have demarcated a clear role in the lives of many Europeans and this is reflected in the number of hours gamers report playing in an average week. While 16 to 24 year olds (who tend to have the most available leisure time) report the heaviest gameplay activity, a quarter of gamers aged 30+ say they play between 6 and 10 hours a week. Furthermore, while men report playing more hours per week than women, over 50% of female gamers say they play between 1 and 5 hours in a typical week, with a further third saying they play more than 6 hours a week.

Total European Gamers – Breakdown by Demographics:

In a typical week, how many hours do you spend playing video games?

Base: All respondents



► Why Europeans Play Video Games

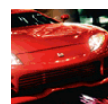
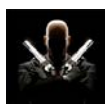
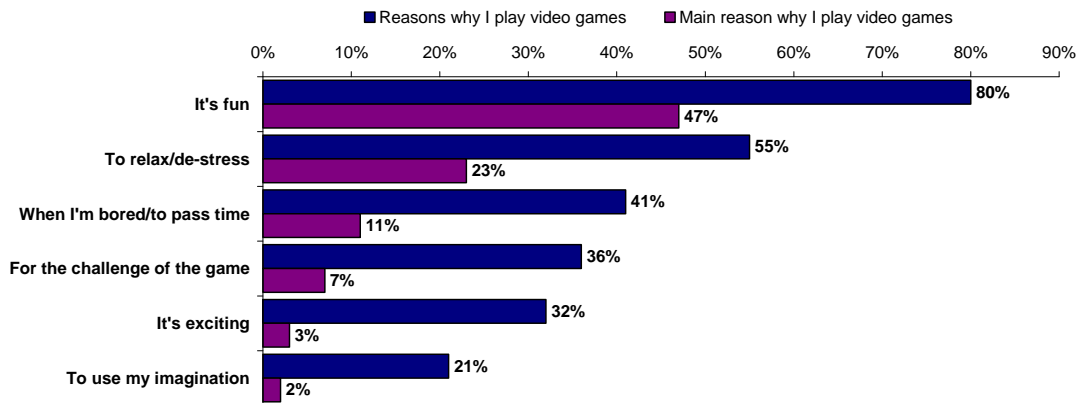
The most prevalent reason for playing video games is the activity's sense of fun (mentioned by 80% as a reason to play games and by 47% as their main reason for playing). Factors such as 'challenge', 'excitement' and the ability to 'use imagination' are also mentioned at high levels (indicated on graph on the next page) and appear to constitute key elements that make up the 'fun' of video games as a whole.

While there is a passive element to playing games (41% say that they play when they're bored), over half the European gamers surveyed (55%) say that they actively play to de-stress or relax. From Nielsen's broader work across media forms, the combination of factors such as challenge, excitement and imagination mentioned by respondents appears to play a direct role in generating the sense of escapism and active mental stimulation, which distinguishes many successful games. The perception of video games in relation to other media is explored in more depth in both this summary and the full report.

Total European Gamers:

Top 6 Reasons for Playing Video Games

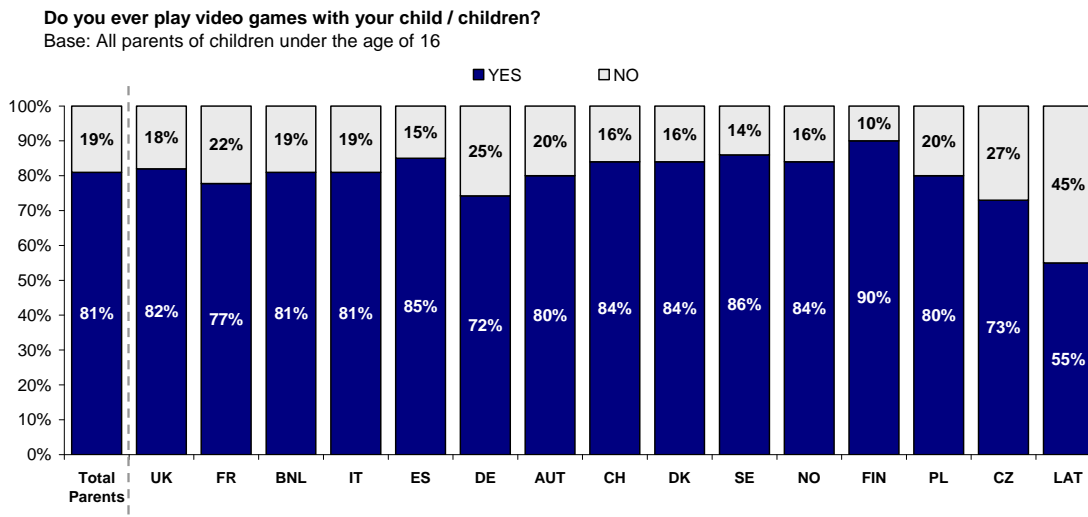
Base: All respondents



► Video Games in the Family

However, those gamers who are already parents appear to clearly appreciate the benefits of playing video games with their children. Among those European gamers who are parents of children under 16 (36% of the sample), over eight in ten (81%) play video games with their children. Even in countries such as Germany, the Czech Republic and Latvia – where parents are less likely to play video games with their children – over 50% say they play video games as a family.

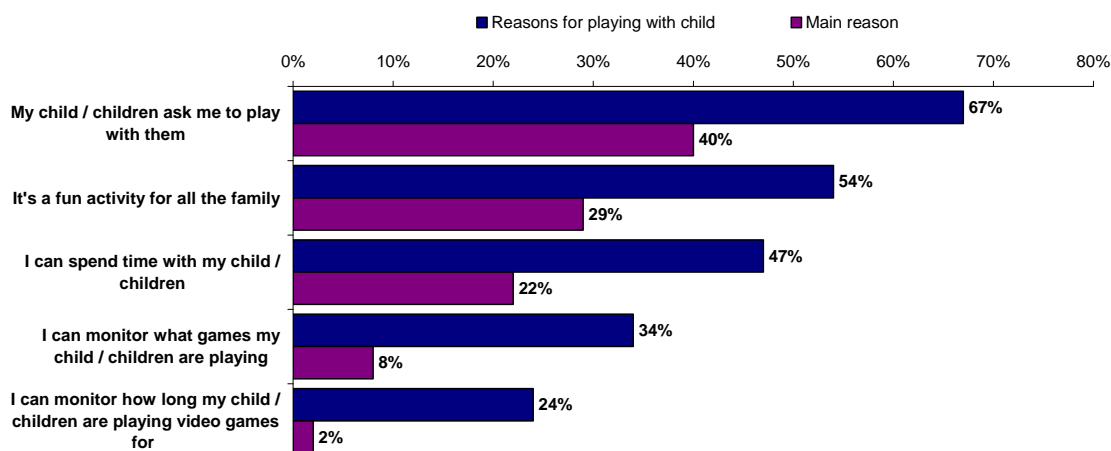
Total European Parents (Active Gamers):



Furthermore, the reasons for doing so are widespread: ranging from children requesting that their parents play with them, to being a fun activity for all the family and as a good opportunity to spend time or do something together with children. Factors such as monitoring what a child is playing, or for how long, are mentioned at relatively lower levels. However, as detailed in the main report, these parents do take an active interest in what video games their children are buying (79% say they check what games their children are buying either 'always' or 'most of the time').

Total European Parents (Active Gamers) Who Play Video Games With Their Children:

Why do you play video games with your child / children? And what is the main reason?
Base: All parents who play video games with their kids under the age of 16



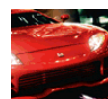
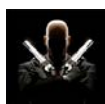
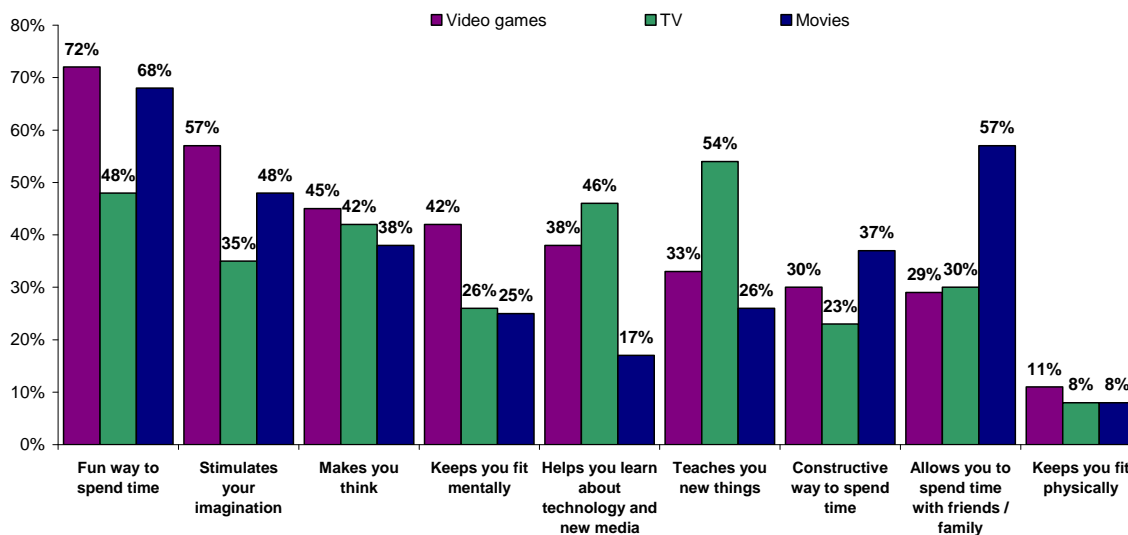
► Video Games in Relation to Television and Cinema

Consistent with their positive evaluation of games overall and the time spent playing video games, the countries surveyed believe that games deliver a number of unique benefits in relation to television and movies. In relation to television, both games and movies are seen as a 'fun way to spend time', but video games are clearly seen as the strongest medium in terms of stimulating imagination (57% agree with the statement for games, in relation to 48% for movies and 35% for TV). Video games also score particularly highly as a means of keeping you 'fit mentally' (42% agreement for games, 26% for television and 25% for movies).

At relatively lower levels, games are seen as a strong means of 'making you think' (45% agreement) and 'helping learn about technology and new media' (38%). However, it should be noted that television is currently perceived as a more effective direct learning tool (achieving the highest ratings for those statements mentioning 'learning' or 'teaching'). Movies are rated the highest in terms of allowing time with friends/ family and as a 'constructive' way to spend time – possibly due to their perceived ability to deliver both fun and social time together.

Total European Gamers:

Please indicate whether you agree with each statement using a 1 to 5 rating scale, where a 5 stands for Agree Strongly, and a 1 stands for Disagree Strongly - Total agreement (5 plus 4)
Base: All respondents



► **Future Trends**

The Rise of Online Gaming as a Social Medium

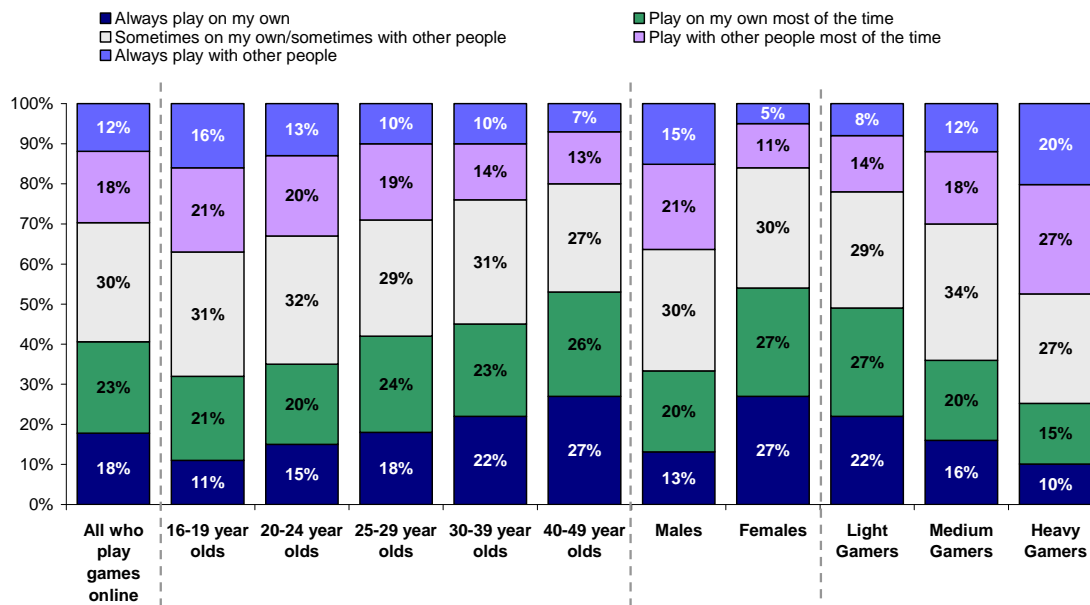
In line with their increasing online penetration across Europe, 16 to 19 year olds – followed by 20 to 24 year olds – are the most likely to report that they play online games ‘always’ or ‘most of the time’ with/against other people (and up to 90% of the time via a network rather than in person). While the likelihood of playing online games with other people directly decreases with age – and is strongest among males and heavier gamers – the predominance of multiplayer online gaming among younger groups suggests that this trend is likely to continue.

While the social aspect of gaming is not cited at particularly high levels as an overall motivation for playing video games in general (13% gave this as a reason), among those playing games online, social interaction is given as a reason by 27% of respondents (and 32% of those under the age of 25). In other areas of Nielsen’s work we see the increasing predominance of online forms of communication and self-expression among younger age groups – whether through blogging, instant messaging or a variety of other means – and 2008’s research data appears to suggest that video games are beginning to play an important role within this dynamic forum.

Total European Gamers Who Play Online– Breakdown by Demographics:

Do you generally play games online by yourself or with/against other people?

Base: All who play video games online



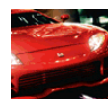
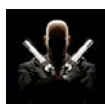
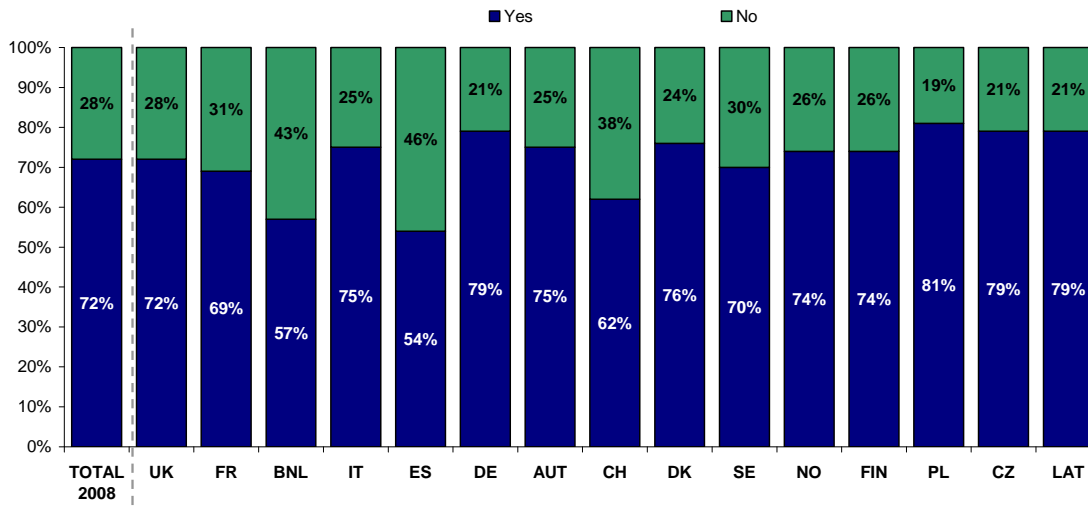
The Games Console as a Multimedia Hub?

Almost eight in ten European gamers (78%) perceive their games console to have multimedia capabilities (such as watching DVDs). Furthermore, among those European gamers who report owning a multimedia capable console, over seven in ten (72%) say they use that device for broader media activities such as accessing the Internet, playing DVDs or listening to MP3's.

While there is considerable variation across Europe (countries such as the Czech Republic, Latvia and Poland are the most likely to be using the wider functionality of their games consoles, whereas Spain is the least likely) on a total European level over 50% of those aware of the broader capabilities of games consoles are using them for more than just playing games. While this research did not examine the composition of usage – or any variations in the type of broader media content that might be used on consoles as opposed to other devices – this does appear to indicate that the games console is taking an increasingly broader role; not just in terms of games players but also in the use of game technology itself.

Total European Gamers Who Own Consoles With Multimedia Capabilities– Breakdown by Country:

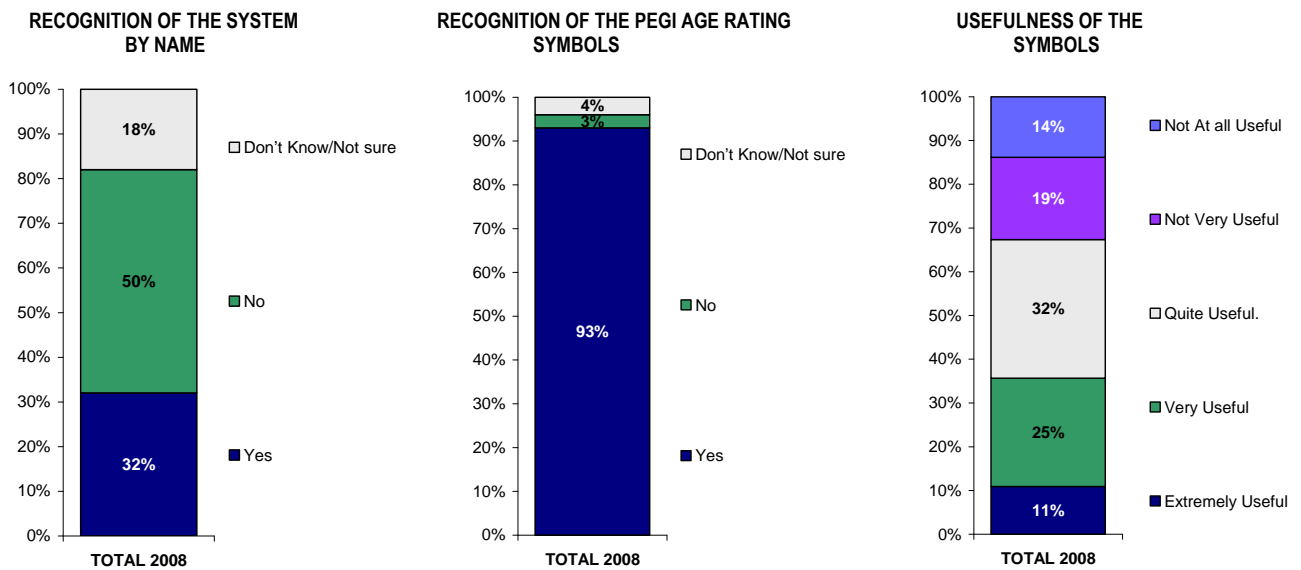
And do you use your games console as a multimedia device (e.g. to watch DVDs)?
 Base: All respondents who report owning a console with multimedia capabilities



► The PEGI Age Ratings and Descriptors

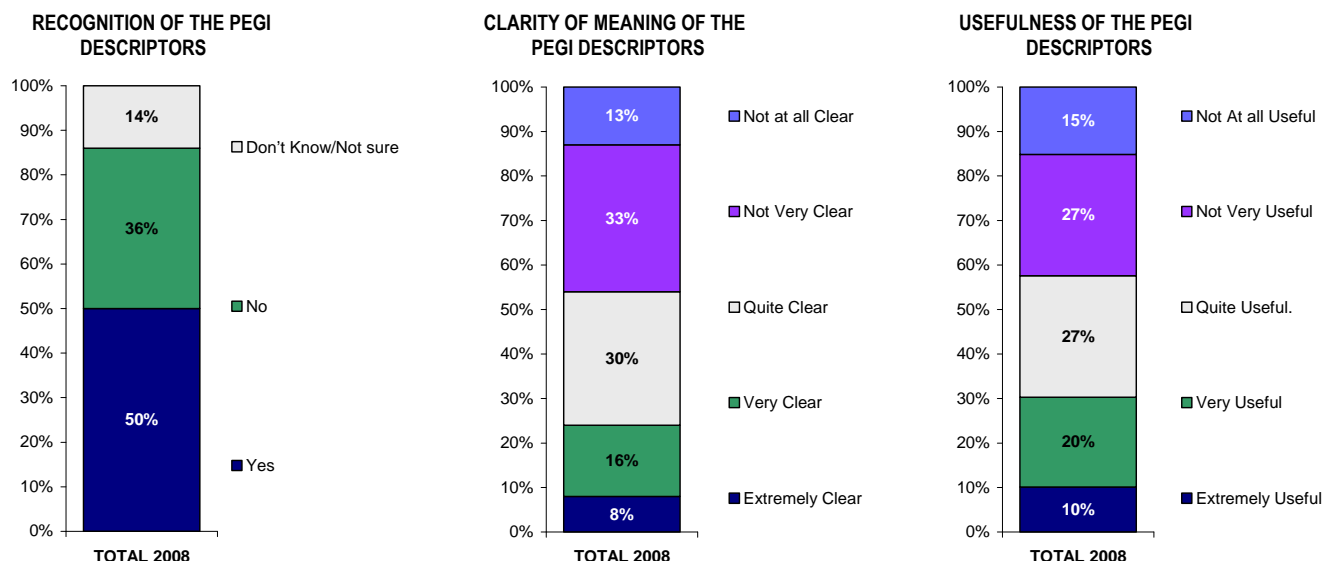
While six in ten (62%) European gamers claim to be familiar with a European age ratings system, these levels halve when gamers are presented with the name PEGI (32% are familiar). However, while the name holds less resonance for European gamers, importantly the visual marks of the PEGI age ratings system are almost universally recognised (93%). Additionally, among the markets where PEGI campaigns ran in 2007/08, France saw the greatest increase in awareness (24% to 39%), although all the countries involved (France, Italy, Sweden and Norway) show elevated levels of recognition. When considering the PEGI age rating symbols, gamers find them broadly useful (35% 'useful'), with parents finding them a particularly beneficial tool (49%).

Total European Gamers:

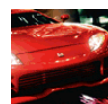
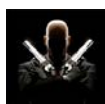


In comparison to the age rating symbols, both familiarity and understanding of the PEGI descriptors for violence, bad language and fear, reaches lower levels among these European gamers (50%), and consistent with the lack of familiarity, a quarter (24%) find their meaning clear. While parents register lower levels of familiarity (43%), a third (34%) of this group consider the PEGI descriptors to be a relatively useful tool when purchasing games for a child.

Total European Gamers:



Launched under a year ago, two in ten European gamers (20%) are familiar with the PEGI Online symbol, which denotes license holders committed to a six point PEGI Online Safety Code. The relatively low levels of awareness for this latest addition to the PEGI system may be a function of both its infancy and a broader lack of familiarity with the PEGI name as a whole.



BACKGROUND AND METHODOLOGY

► Background

This survey was commissioned by the Interactive Software Federation of Europe (ISFE) in order to examine consumer attitudes and usage of video games across fifteen European and Baltic countries (see map and country abbreviations overleaf)– the UK, France, Germany, Italy, Spain, Benelux (defined as Belgium, The Netherlands, Luxembourg), Switzerland, Austria, Denmark, Sweden, Norway, Finland, Czech Republic, Poland and Latvia.

The purpose of this study is to provide both general consumer insights into the usage of video games, placing them within the wider context of other media and leisure activities.

The study also follows on from consumer research conducted for ISFE in 2004, 2005 and 2007. The 2007 study has been referenced where appropriate throughout this report – please see paragraph overleaf on trending for full details.

► Methodology

A 25 minute quantitative survey was administered online in the fifteen countries concerned, based on 400 respondents per country. Please note that while online interviewing is increasingly prevalent, especially in Western Europe, the technique is not yet as widespread in the Baltic states and Central and Eastern Europe, and as such results from these territories should be taken as directional rather than absolute.

Fieldwork was conducted in February and March 2008 using a questionnaire designed in conjunction with ISFE and its membership.

► Sample

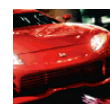
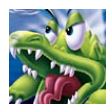
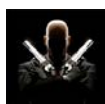
The sample comprised 6,000 respondents, based on 400 per territory (UK, France, Germany, Italy, Spain, Benelux, Switzerland, Austria, Denmark, Sweden, Norway, Finland, Czech Republic, Poland and Latvia).

All respondents were required to play video games on at least one of the following, PC, home-based or portable console, and to have personally purchased at least one legitimate video game in the last 6 months. This sample should be taken as representative of a broad cross section of active gamers.

Respondents were aged between 16 and 49, with 70% being male and 30% being female (please note, whilst representative of a widespread gaming audience, the data does not include the attitudes of gamers under the age of 16). The sample was broadly divided into five age groups: 16-19 year olds, 20-24 year olds, 25-29 year olds, 30-39 year olds and 40-49 year olds.

Minimum quotas were applied for usage of consoles, although allowing for cross-ownership and usage. Overall, 72% of the total sample play video games on consoles (X-Box, X-Box 360, GameCube, Wii, PS2, PS3), 61% play games on PCs, and 35% play on handheld platforms (GameBoy Advance, GameBoy Advance SP, Nintendo DS, Nintendo DS Lite, PSP), although this varies by country.

In addition, respondents who did not qualify as active gamers i.e. non gamers were asked a series of questions before they were closed out of the survey to determine their attitudes towards video games, with these findings reported within the body of this report (see page 34).

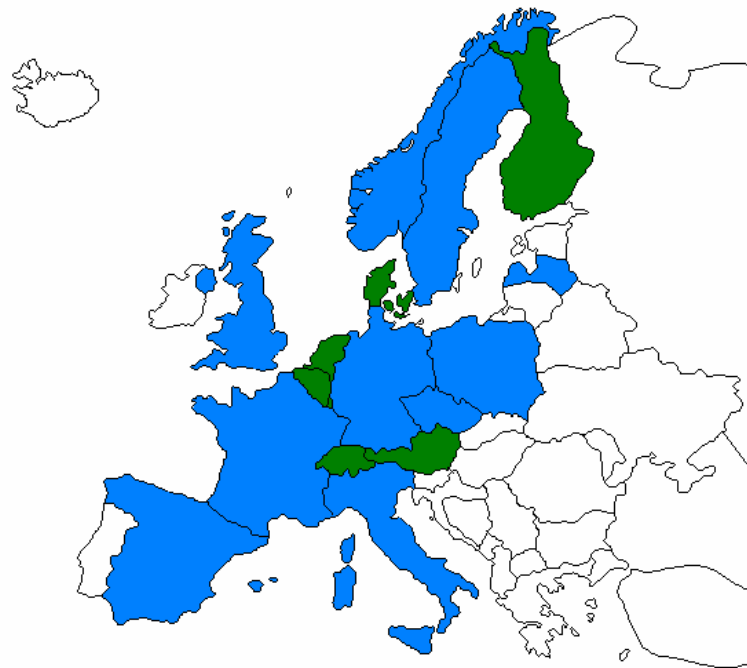


► **Trending**

Trending from 2007 to 2008 has been included where appropriate throughout this report. However, to allow for direct year on year comparisons across the two studies, please note that where comparisons have been drawn, the 2008 data has been weighted to reflect the sample composition used in 2007 (aged 16-39, and 80% male / 20% female) and countries surveyed for the first time in 2008 have been excluded from the total (countries new to 2008 and therefore omitted from the trending are Denmark, Finland, Benelux, Austria, and Switzerland). Both studies were conducted online, over the same period year on year, with 400 respondents surveyed across each market.

The map below shows the markets surveyed in 2007 and 2008 shaded in blue, while the countries shaded in green are those new to 2008.

| | |
|----------------|-------|
| UK | (UK) |
| France | (FR) |
| Benelux | (BNL) |
| Italy | (IT) |
| Spain | (ES) |
| Germany | (DE) |
| Austria | (AUT) |
| Switzerland | (CH) |
| Denmark | (DK) |
| Sweden | (SE) |
| Norway | (NO) |
| Finland | (FIN) |
| Poland | (PL) |
| Czech Republic | (CZ) |
| Latvia | (LAT) |



► **Market sizing**

In addition to the core survey, an omnibus survey was conducted among 1,000 respondents aged 16 plus in the UK, Spain and Finland in order to determine the percentage of the population in each market who are active gamers and their demographic profile. A face to face methodology was utilised in the UK and Spain, while the Finnish survey was conducted via telephone. To ensure the results were as representative of the general population in each market as possible, the sample was aligned to the demographic profile of the general population in each market. This survey was designed to provide a snapshot of exactly who active gamers are across the three European markets, and highlight any similarities and differences in their profiles.

The findings of this study are presented alongside the findings of the core survey (see page 18).



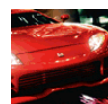
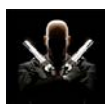
► Terminology

Respondents aged 16 to 24 may be referred to as 'younger respondents', while those aged 25 to 49 may be termed 'older respondents'. For the purposes of this study, 'heavy' gamers are those who play video games in excess of 10 hours per week, while 'medium gamers' play for 6 to 10 hours in an average week, and 'light' gamers play for five hours or less.

Within the course of the survey, respondents were asked the extent to which they agreed with a number of statements. Where a five point scale was used (ranging from '5' representing 'strongly agree' to '1' representing 'strongly disagree'), those answering with a 4 or 5 to any given statement have been classified as 'agreeing'. Similarly, in questions where future interest was asked using a 5 point scale (ranging from '5' representing 'definitely interested' to '1' representing 'definitely not interested'), respondents answering 4 or 5 have been classified as expressing 'positive interest'.

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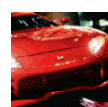
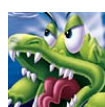


SECTION 1: WHO'S PLAYING VIDEO GAMES? A SNAPSHOT ACROSS EUROPE (UK, FINLAND AND SPAIN)

A separate omnibus study was conducted (face to face in the UK and Spain, and via telephone in Finland) to establish the percentage of the population who are active gamers in the UK, Finland and Spain in order to provide a snapshot of active gamers across these three European territories (selected to represent both a range of European geographies and different stage of market development). The survey was conducted among 1000 respondents aged 16 plus, demographically aligned to the age/gender profile of each country's population as a whole. Please note, however, these results should not be taken as indicative of Europe in general, but rather an insight into these three markets.

KEY POINTS

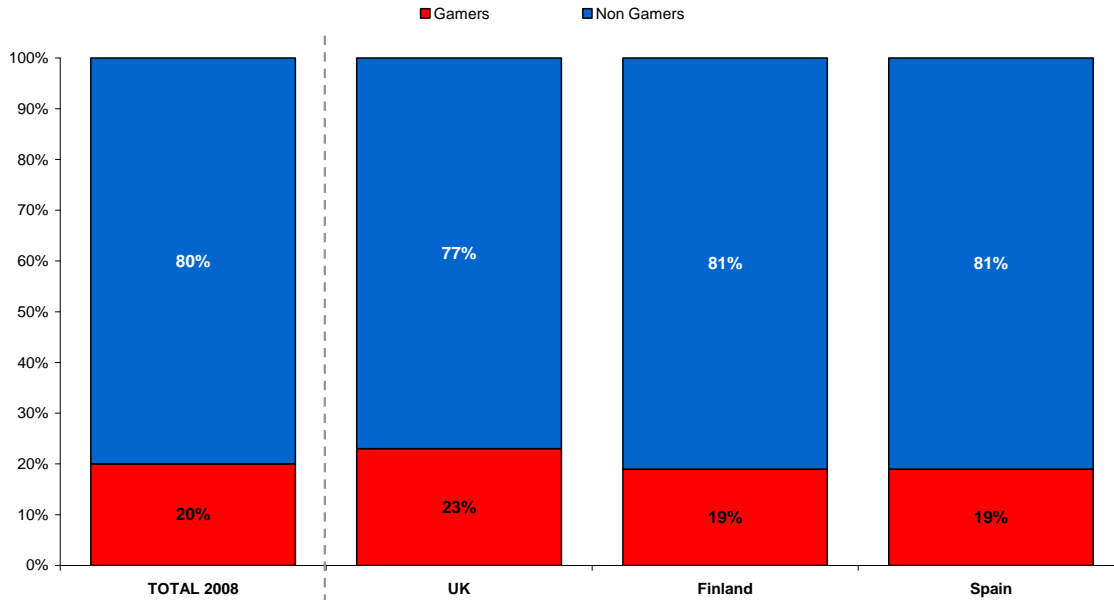
- Based on nationally representative omnibus data in the UK, Finland and Spain (chosen to represent a range of European geographies and stages of market development), the proportion of the population playing video games has reached very significant levels. Additionally, active gamers represent a diverse cross section of the population across these three markets, both in terms of age and gender, further cementing video games as a mainstream entertainment option.
- Overall, around three in ten (31%) respondents aged 16-49 are active gamers, with the more established market, the UK, leading Finland and Spain (37% vs. 28%).
- In general, engagement with the category peaks among teens and gradually decreases with age to reach very limited levels among the 50+ age group (3%-6%):
 - In the UK, half (48%) of those aged 16-29 define themselves as active gamers (vs. 33% of 30-49 year olds), with the average age of a gamer standing at 33 years old.
 - In Finland, over a third (36%) of the under 30s are active gamers (vs. 23% among 30-49 year olds), with a mean age of 30.
 - In Spain, the 16-29 age group are significantly more likely to be active gamers in comparison to their 30-49 year old counterparts (43% vs. 16%), with the average age of gamers falling below the other markets surveyed at 26.
- While males (aged 16-49) in Finland and Spain are twice as likely to be active gamers when compared to females (38% vs. 18% of females), females still represent a sizeable chunk of the gaming market. In the UK, the gap is narrower (48% of males are active gamers vs. 29% of females), perhaps reflective of its status as one of the more mature gaming markets.
- In a similar vein, UK parents are more likely to be actively gaming (42%) in comparison to the other two markets (31% in Finland and 23% in Spain).



► Sizing The Market In The UK, Finland And Spain

Total UK, Finnish and Spanish Gamers / Non Gamers- Breakdown By Country:

Proportion of Gamers vs. Non Gamers in the UK, Finland and Spain
Base: All respondents



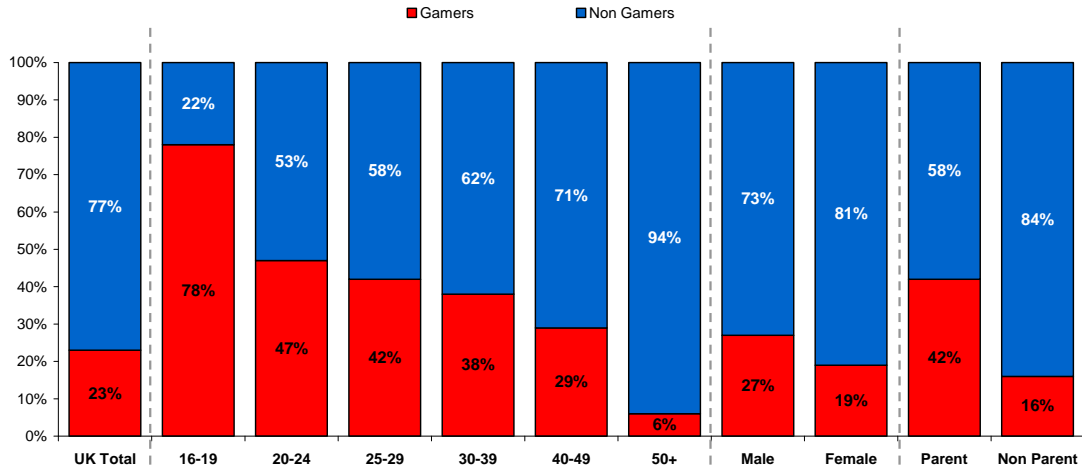
Overall, around two in ten (20%) respondents surveyed aged 16 plus fall into the category of active gamers, with a slightly higher proportion in the UK (23% vs. 19% in Finland and Spain).



► Demographic Profile Of Gamers vs. Non Gamers In The UK, Finland And Spain

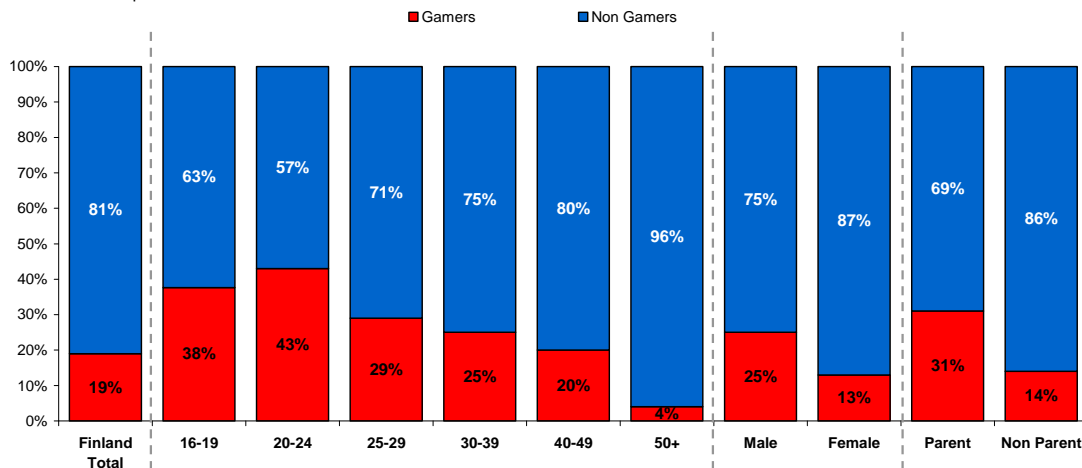
Total UK Gamers / Non Gamers – Demographic Breakdown:

Demographic Profile of Gamers vs. Non Gamers in the UK
Base: All respondents



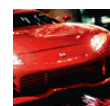
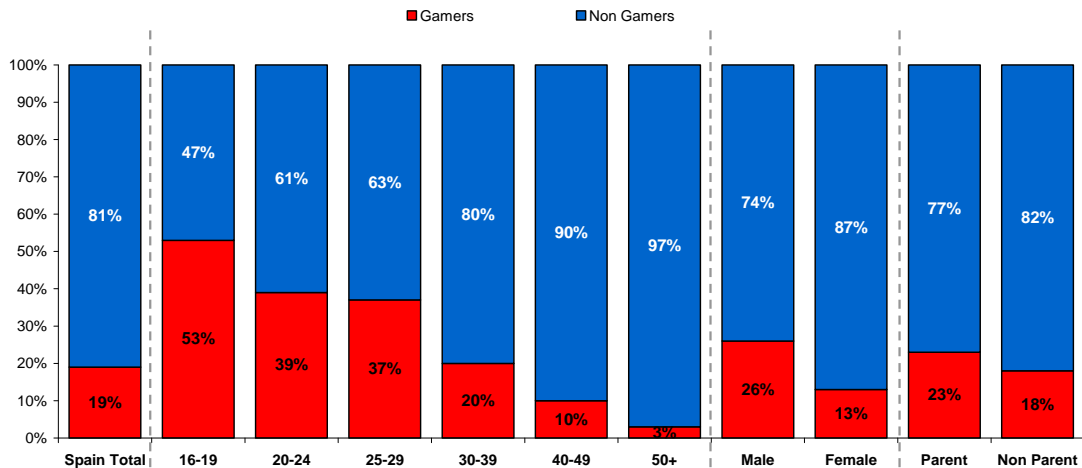
Total Finnish Gamers / Non Gamers – Demographic Breakdown:

Demographic Profile of Gamers vs. Non Gamers in FINLAND
Base: All respondents



Total Spanish Gamers / Non Gamers – Demographic Breakdown:

Demographic Profile of Gamers vs. Non Gamers in SPAIN
Base: All respondents



Within the UK and Spain, engagement with the category peaks among teens aged 16-19 (78% of this age group are active gamers in the UK, and 53% in Spain), and diminishes with age (just 3%- 6% of respondents aged 50+ are active gamers), with the UK recording higher levels of gamers across all the age categories. However, in Finland a slightly different pattern emerges, with respondents aged 20-24 slightly ahead of their teen counterparts (43% of 20-24 year olds are active gamers vs. 38% among teens).

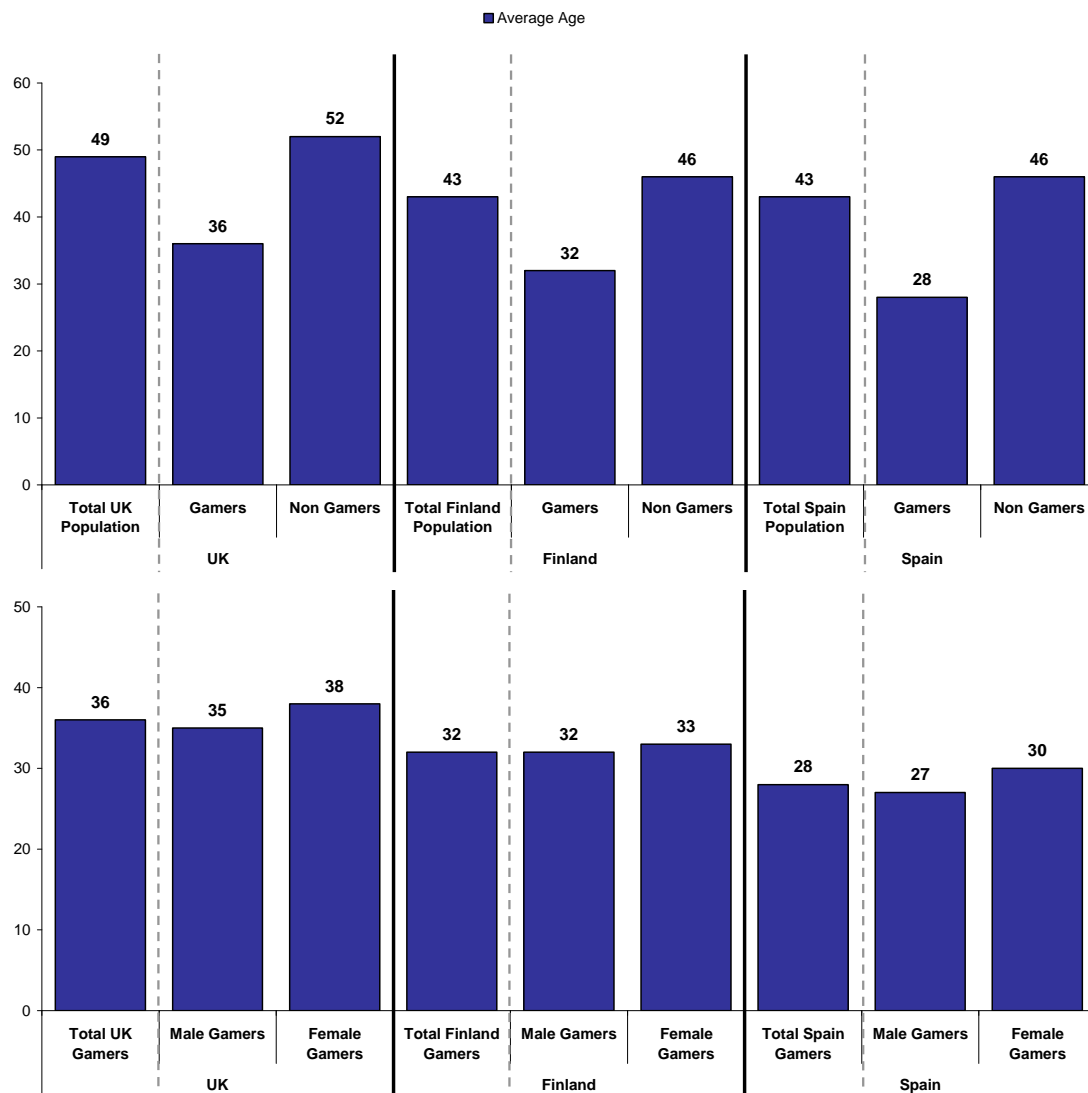
By gender, around a quarter (24%-27%) of males play video games, consistent across all three countries. In comparison, just over one in ten (13%) females fall into the category of active gamers in Finland and Spain, rising to two in ten (19%) in the UK.

There is also a degree of variation among parents, with four in ten (42%) parents in the UK being active gamers, dropping to three in ten (31%) in Finland, and falling again to just under a quarter (23%) in Spain.

Looking specifically at the average age of gamers within the context of the age profile of the population at large (all figures rounded to the nearest whole year), the average age of gamers falls some way below the average age of the general population. Across male and female gamers, the average age is relatively consistent, with females tending to be slightly older in comparison to their male counterparts in the UK and Spain.

Total Gamers vs. Non Gamers Age Profile – Breakdown By Country and By Gender:

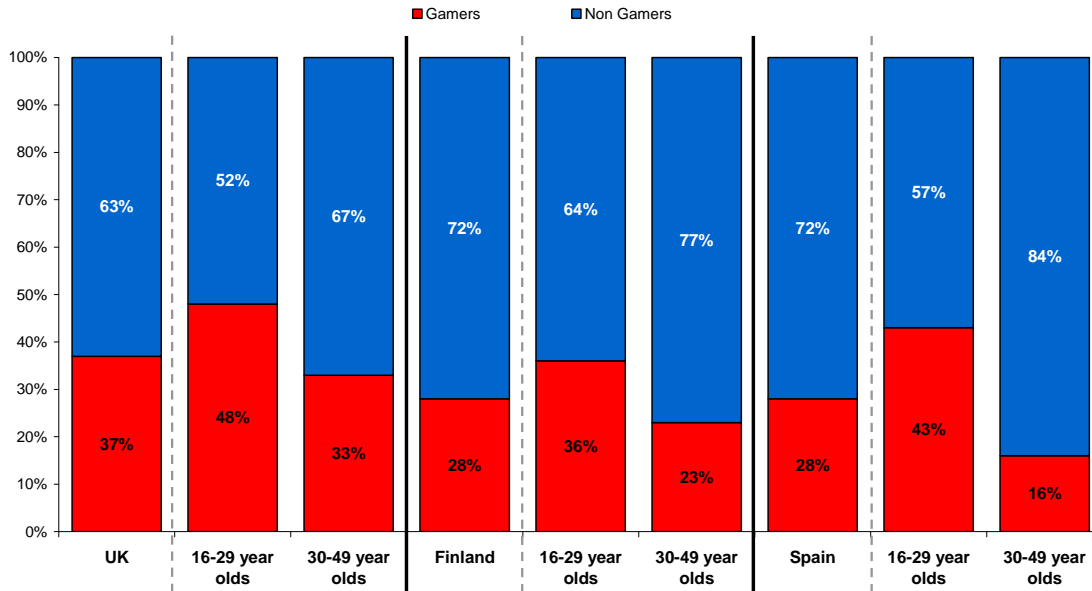
Average Age of Gamers vs. Non Gamers in the UK, Finland and Spain
Base: All respondents



► Gamers vs. Non Gamers Aged 16-49 Only In The UK, Finland and Spain

Total Gamers vs. Non Gamers – Breakdown By Country:

Proportion of Gamers vs. Non Gamers in the UK, Finland and Spain - Respondents Aged 16-49 Only
 Base: All respondents aged 16-49



As seen in the previous sections, gaming is very limited among respondents aged 50+, and by removing these older respondents, a more accurate picture of the active gaming population is presented across these three markets.

Within the 16-49 age group, around three in ten (31%) define themselves as 'active gamers', with a higher incidence in the UK (37%) in comparison to Spain and Finland (both 28%). In all three markets, gamers skew towards the 16-29 age group, reaching nearly 50% in the UK, while the proportion of 30-49 year olds who qualify as active gamers is much lower, particularly in Spain (just 16% are active gamers).

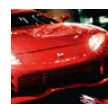
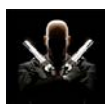
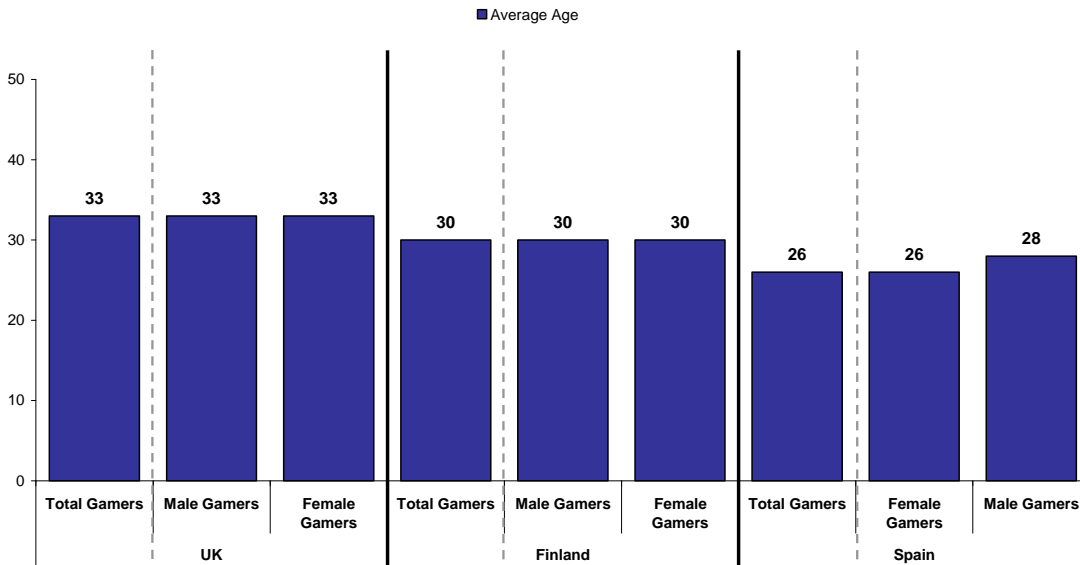
Similar patterns are seen by gender, with males aged 16-49 significantly more likely to be active gamers across all three markets (48% vs. 29% of females in the UK; 38% vs. 18% of females in both Spain and Finland).



Among gamers aged 16-49, the average age stands at 33 in the UK, followed by 30 in Finland, with Spanish gamers being the youngest on average (26 years old). While there is little difference between the average age of gamers by gender in the UK and Finland, female gamers in Spain are on average two years older than their male counterparts (28 vs. 26 years old).

Total Gamers Aged 16-49 Only – Breakdown By Country:

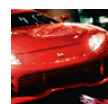
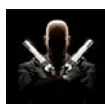
Average Age of Gamers vs. Non Gamers in the UK, Finland and Spain
Base: All respondents



SECTION 2: USAGE OF VIDEO GAMES

KEY POINTS

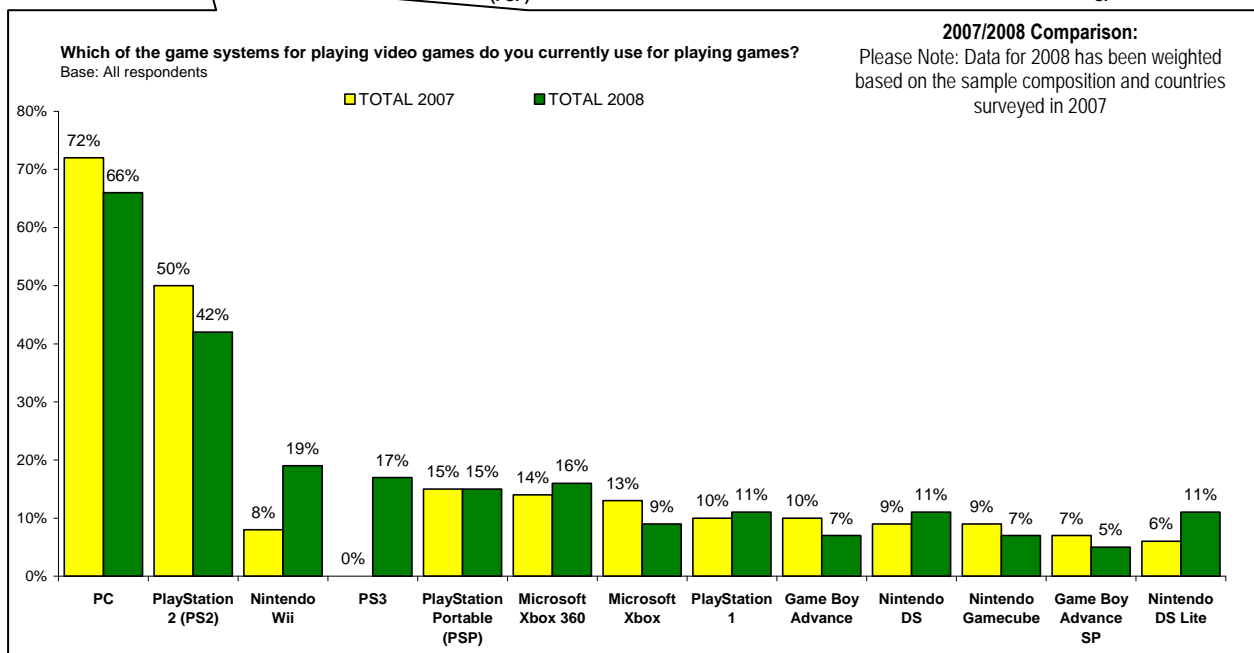
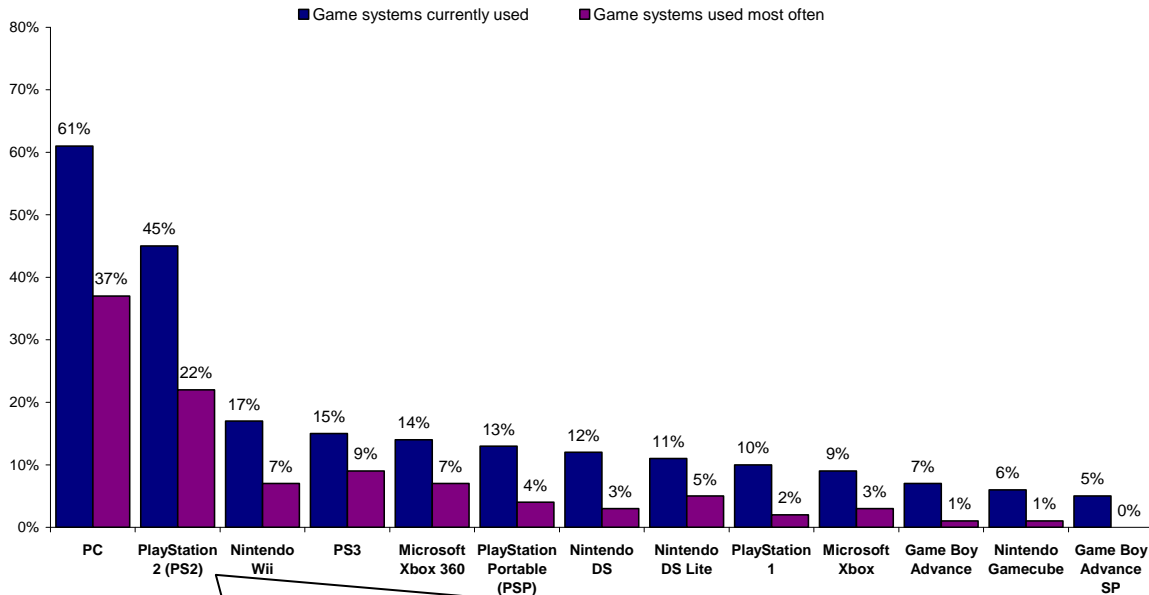
- The PC continues to be the most prevalent platform for playing video games among these European gamers, although seeing a slight decrease year on year (66% vs. 72% in 2007), with the new generation consoles (Wii and PS3) making significant inroads over the past twelve months (19% now own a Wii and 17% have invested in a PS3):
 - Demographically, males are more likely to use a PC for gaming (65% vs. 53% among females), while females lead ownership of the handheld DS consoles (15% vs. 9% among males).
- Around one in seven (15%) of these European gamers fall into the category of heavy gamers (playing in excess of 10 hours per week), led by males (19%) and the under 25s (19%), while a significant proportion (56%) qualify as light gamers (playing for 1 to 5 hours per week). These findings add further support to the notion that video games are viewed as a mainstream form of entertainment, serving a diverse array of gamers, from the casual to the very committed.
- The majority (74%) of European gamers purchase between one and six video games per year:
 - UK respondents are the most prolific buyers (18% purchase ten or more games per year).
- The average number of video games owned by European gamers stands at 36, with gamers in the UK, Poland and the Czech Republic the most avid collectors (40+ games on average).
 - Unsurprisingly, heavy gamers report to own the largest collections, totalling 67 video games on average.



► Reported Platform Ownership And Usage

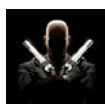
Total European Gamers:

Which of the game systems for playing video games do you currently use for playing games? And which do you use most often?
Base: All respondents



Looking at patterns of game system ownership, the trends are very similar year on year, with the PC still the dominant platform (66%), followed by the PS2 (42%), with reported usage of both platforms seeing a decrease from the figures recorded in 2007. However, it is interesting to note the growing prevalence of the Nintendo Wii, with the number reporting to own the console more than doubling over the past twelve months (19% in 2008 vs. 8% in 2007). Similarly, new to 2008 is the PlayStation 3, with the proportion claiming to own the console similar to consoles such as the Xbox 360 and the PSP (15%-16%).

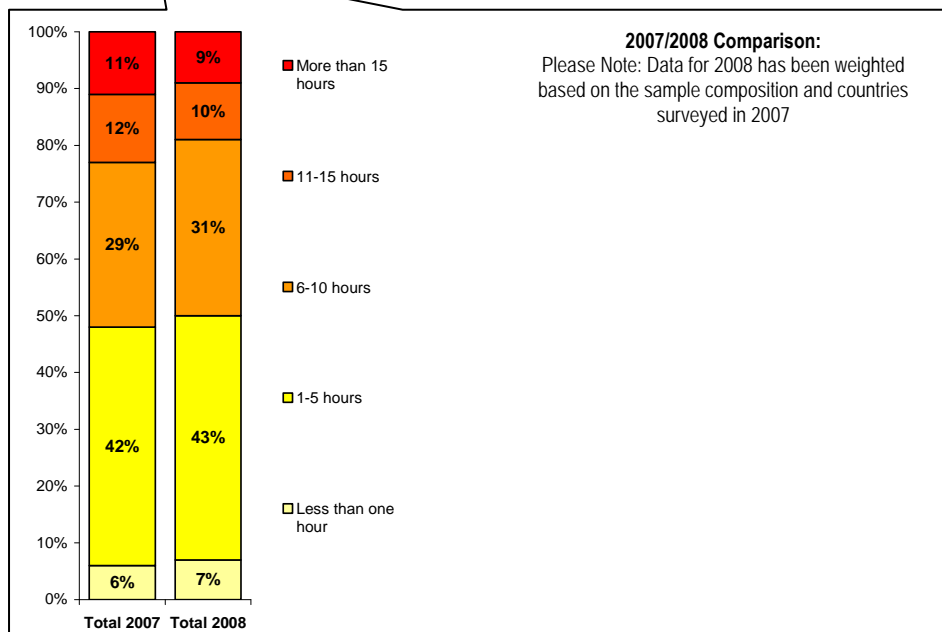
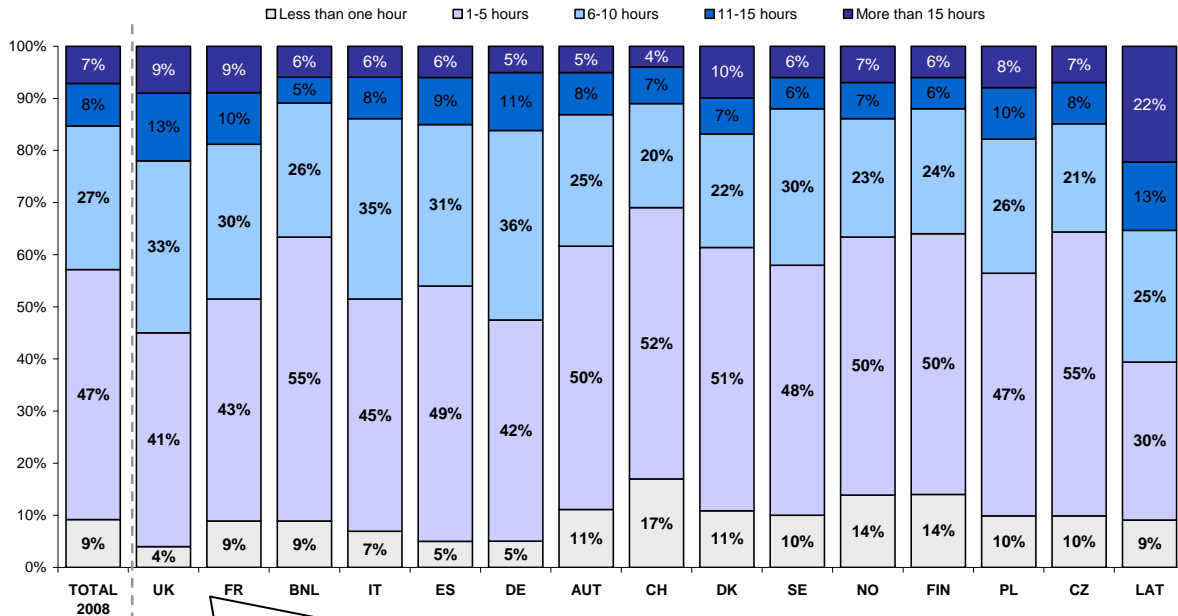
Similarly, some distinct differences emerge by gender; males are more likely to report using PCs for gaming (65% vs. 53% among females), while usage of the handheld Nintendo DS consoles (original and Lite) skews towards female gamers (15% vs. 9%-10% among males).



► Reported Gameplay Hours

Total European Gamers – Breakdown by Country:

In a typical week, how many hours do you spend playing video games?
Base: All respondents



Overall, over half (56%) of these European gamers report playing games five hours or less per week, falling into the category of 'light' gamers (for the purposes of this study), with gamers in Switzerland the least active across these fifteen markets (69% are light gamers).

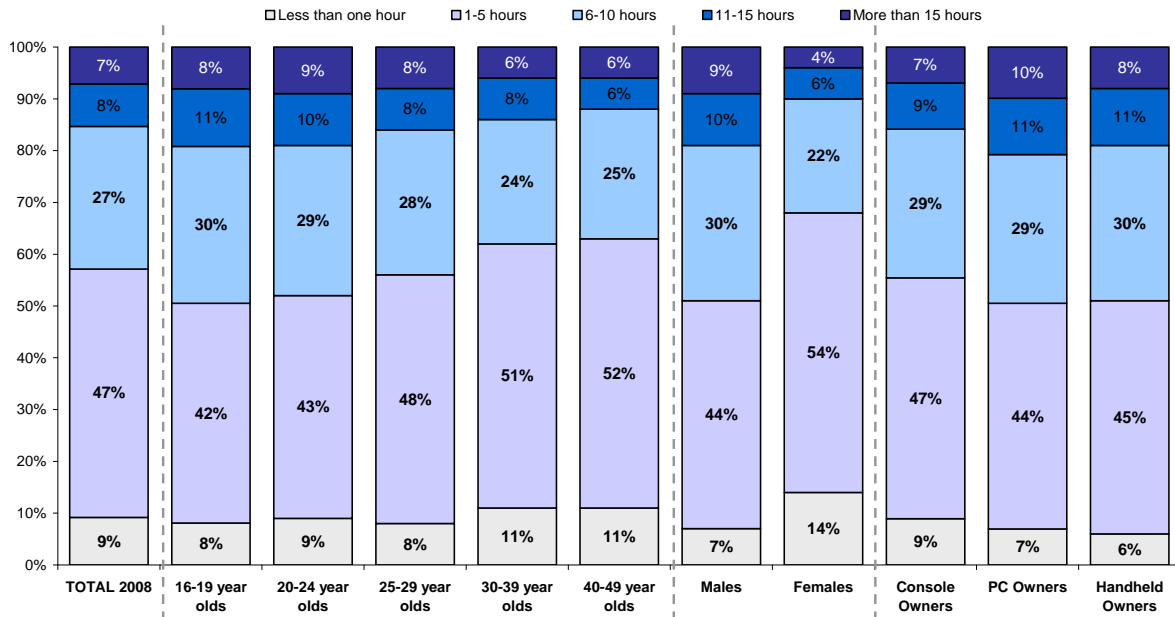
Just over a quarter (27%) could be classed as 'moderate' gamers, playing for between six and ten hours each week, while 15% are defined as 'heavy' gamers, reportedly playing for in excess of ten hours per week. Latvian gamers are the most committed (35% are heavy gamers).



Reported gameplay hours are relatively consistent with the patterns seen in 2007, although there are early indications that gaming is an increasingly mainstream activity, with a greater proportion of casual gamers year on year (81% light / moderate gamers in 2008 vs. 77% in 2007).

Total European Gamers – Breakdown by Demographics:

In a typical week, how many hours do you spend playing video games?
Base: All respondents

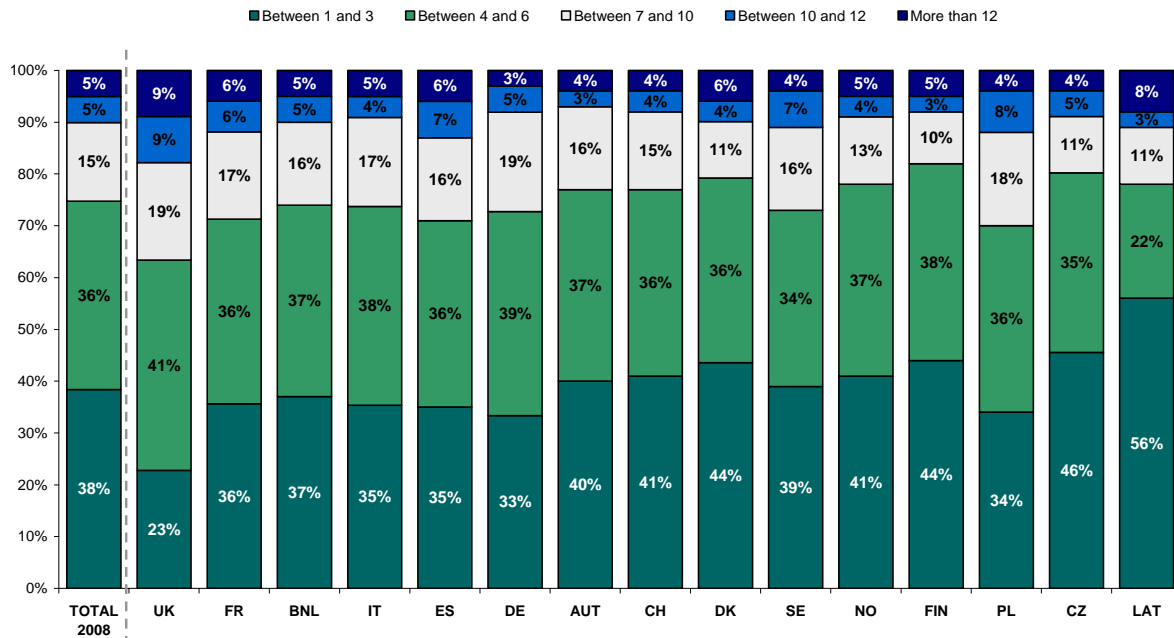


► Purchase Behaviour And Video Game Ownership

Total European Gamers – Breakdown by Country:

On average, how many games do you usually buy in a year?

Base: All respondents



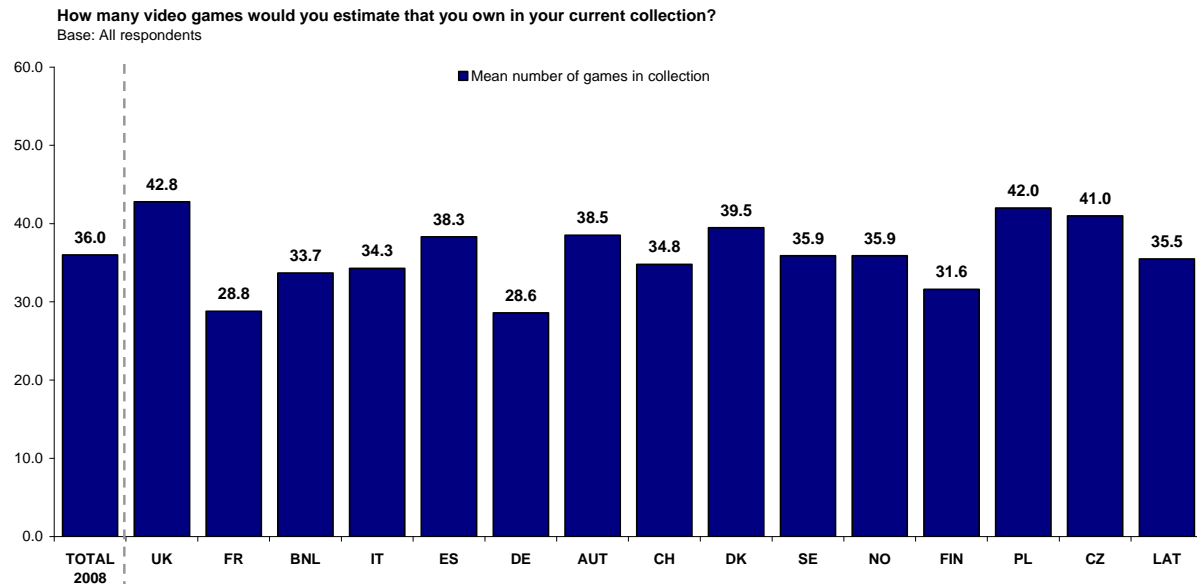
On average, the majority of Europeans (74%) purchase a video game every two months or less (i.e. between one and six games per year). In comparison, one in twenty (5%) buy in excess of twelve games per year. These patterns are in line with the figures reported in 2007.

UK gamers continue to be the most prolific purchasers of games (18% purchase ten or more games per year), along with those who own handheld devices (16% buy 10+ per annum). Purchase behaviour shows relatively little variation by age or gender.



► Size Of Collections

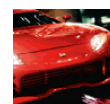
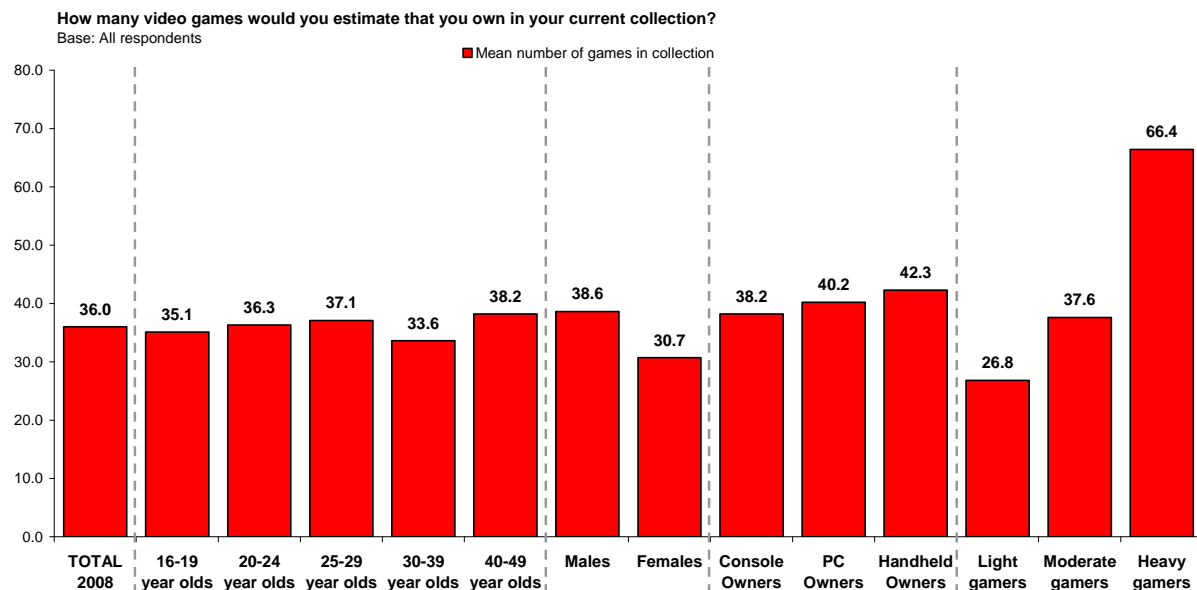
Total European Gamers – Breakdown by Country:



In 2008, European gamers own an average of 36 games. While the average collection reaches over forty games in the UK (43), Poland (42) and the Czech Republic (41), French and German gamers own fewer than thirty games on average (29).

The number of games owned is relatively consistent by age, while males are the more avid collectors (39 vs. 31 among females). Unsurprisingly, heavy gamers report owning the highest number of games, nearly twice the average at 67.

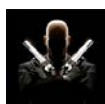
Total European Gamers – Breakdown by Demographics:



SECTION 3: VIDEO GAMES ATTITUDES AND PREFERENCES

KEY POINTS

- The primary reason for playing video games is that they are 'fun' (47% select this as the main reason they play games), while at a more secondary level the relaxing benefits are noted (23% play to 'relax / de-stress'):
 - Younger (under 25) gamers are more likely to cite the social aspects as motivating factors (17% select these as a reason for playing games), and while not viewed as directly educational, video games are certainly seen as stimulating (21% play to use their imagination and 11% play because they learn new things).
- Among non-gamers, time appears to be the key constraint (40% say this is the main reason they don't play games), while it would appear that the games themselves prove less of a factor (13% don't play because they are 'boring', 8% say they are 'too expensive' and 3%-4% say games are 'too violent' or 'too difficult'):
 - This group claim the ability to play games that 'stimulate their imagination / make them think' would make them more interested in playing video games (19% select this as the key motivating factor), while for parents, the opportunity to 'play with their children' is an added incentive (19%).
 - The fact that there doesn't appear to be any significant negative barriers to playing video games among non-gamers, with time emerging as the key constraint, coupled with a desire for accessible games suited to short bursts of gameplay, suggests these may be particular areas to target in order to convert non-gamers.

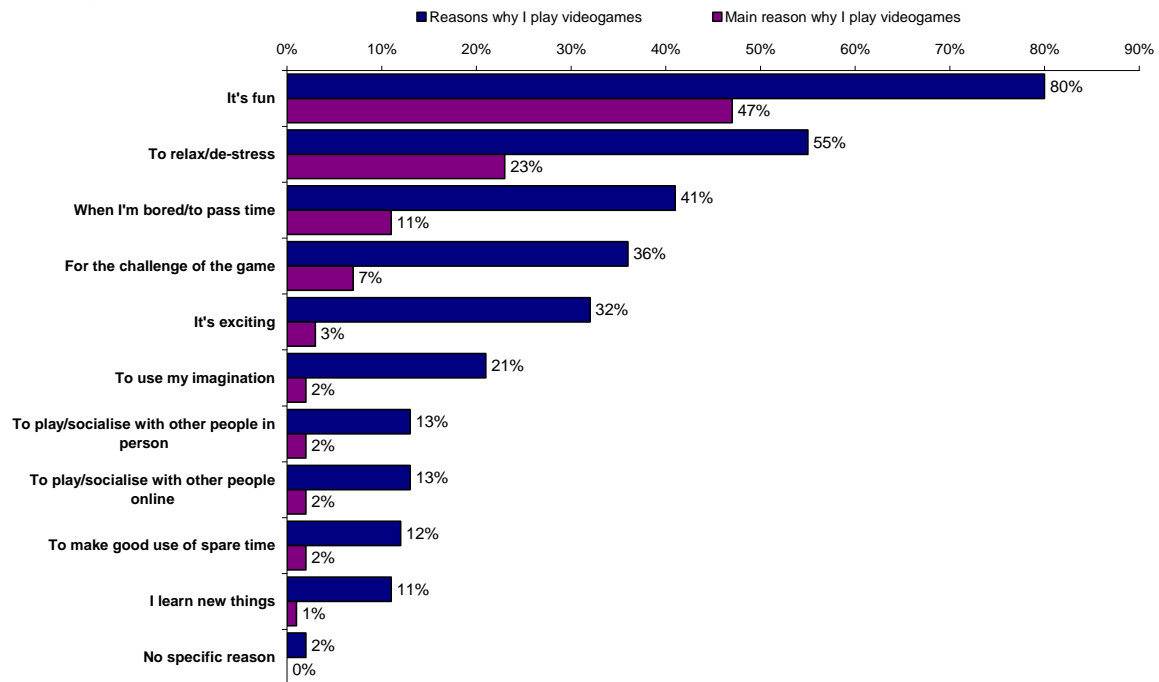


► Motivations For Playing Video Games

Total European Gamers:

Why do you play video games? And what is the main reason you play videogames?

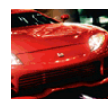
Base: All respondents



Eight out of ten (80%) European gamers play video games because 'it's fun', while just over half (55%) like to play to 'relax / de-stress', with these factors consistent across all markets surveyed.

In comparison, the social elements of the games prove less influential overall (13%), although younger (under 25) gamers are more likely to cite these reasons (17% each). While not viewed as directly educational, video games are certainly seen as stimulating (21% play to use their imagination and 11% play because they learn new things).

When selecting the main reason for playing video games, a similar pattern emerges; just under half (47%) cite the 'fun' nature of games as the key driver, while a quarter (23%) do so to 'relax /de-stress'.

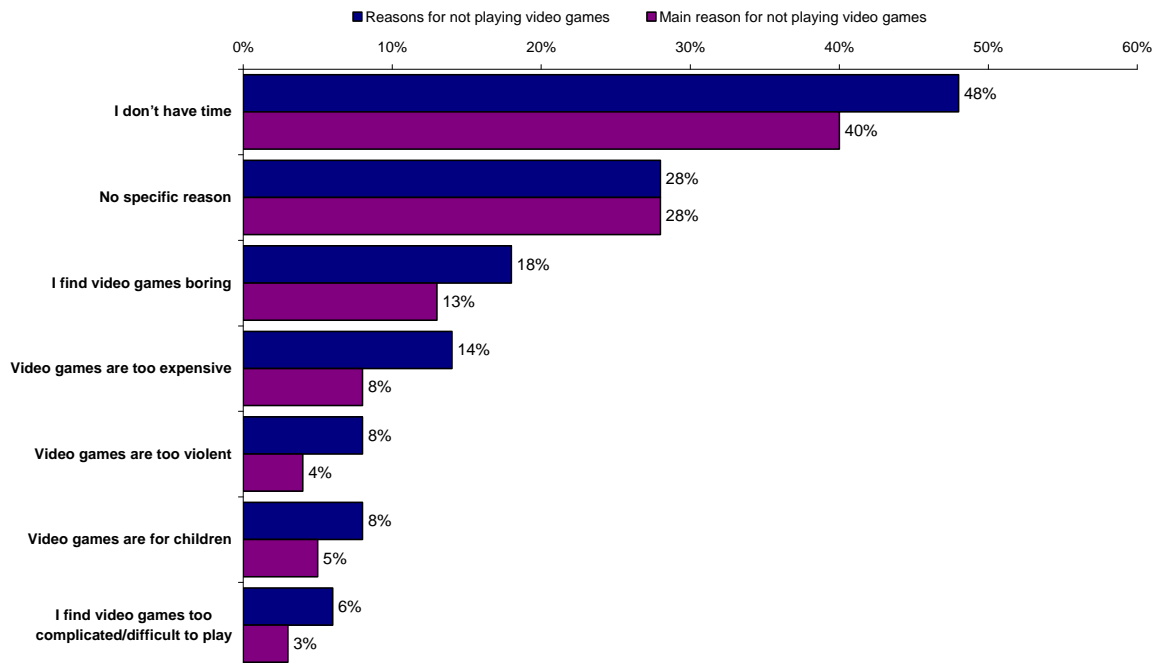


► Reasons For Not Playing Video Games Among Non Gamers

Total European Non Gamers:

Why don't you play video games? And what is the main reason you don't play video games?

Base: Non gamers only (subsequently screened out of survey)



Time appears the main constraint for non-gamers across Europe; half (48%) find they 'don't have time' to play video games.

In comparison, negative sentiments are not endorsed at high levels; cost (14% say they are 'too expensive'), a lack of interest (18% find video games 'boring') or issues around violent content (8% say they are 'too violent') appear to be more minor concerns. It would appear that a shortage of time and a lack of clarity surrounding the value proposition are the key obstacles to overcome in order to convert these non-gamers to gamers, perhaps via more accessible games and games which are suited to short bursts of gameplay.

By age, teens (16-19) are more likely to cite the cost of video games as a barrier (21% find they are 'too expensive'), while non-gamers aged 40-49 are more likely to feel video games are either too complex (9% feel they are 'too difficult') or deem them 'for children' (11%).

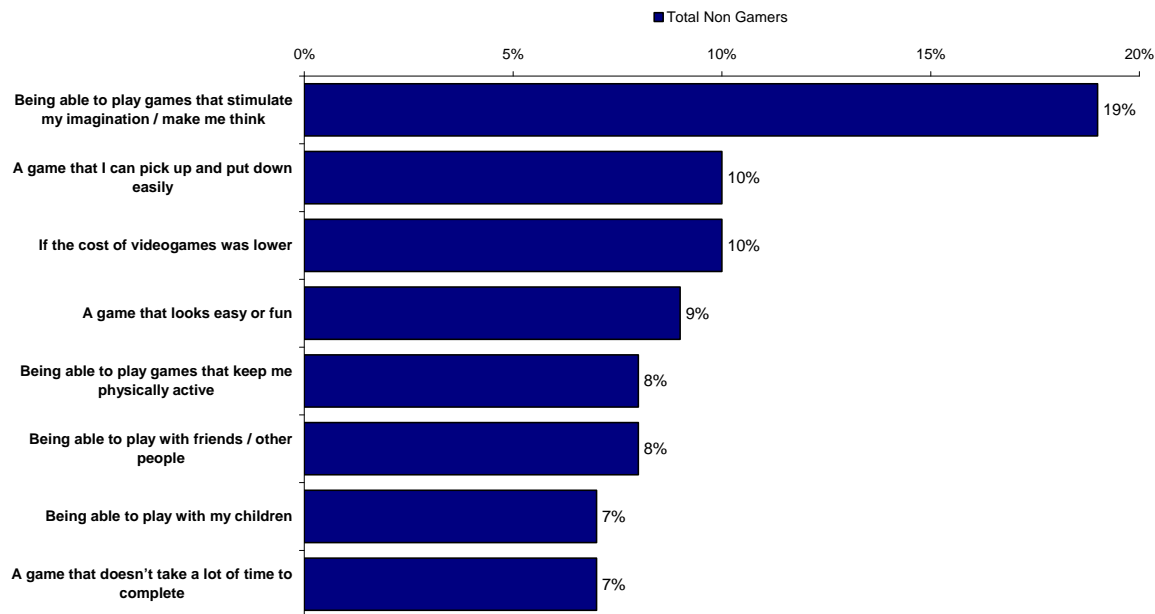


► Encouraging Non-Gamers To Play Video games:

Total European Non Gamers:

What would make you more interested in playing video games?

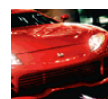
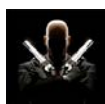
Base: Non gamers only (subsequently screened out of survey)



When asked which factor would make them most interested in playing video games, two in ten (19%) European non-gamers feel that games aimed at stimulating their imagination would encourage them to pick up the activity. Furthermore, easily accessible games and games which are easy to pick up and put down are noted by one in ten (9%-10%), consistent with the findings overleaf where time constraints emerge as the major stumbling block for non-gamers at the moment.

For parents, this is supplemented by the opportunity to play video games with their children (19%).

Non-gamers under the age of 25 are more likely to claim to find the prospect of playing with others motivating (14% vs. 6% among the 25+ age group), while males consider themselves more price sensitive, suggesting they would be encouraged to take up video games if the cost of games was lower (13% vs. 8% among females).

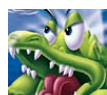


SECTION 4: VIDEO GAMES AND THE FAMILY

A section of the study focussed on video games within the context of the family, with parents asked about video games and their children. Overall, 36% of the gamers surveyed qualified as parents of children under the age of 16.

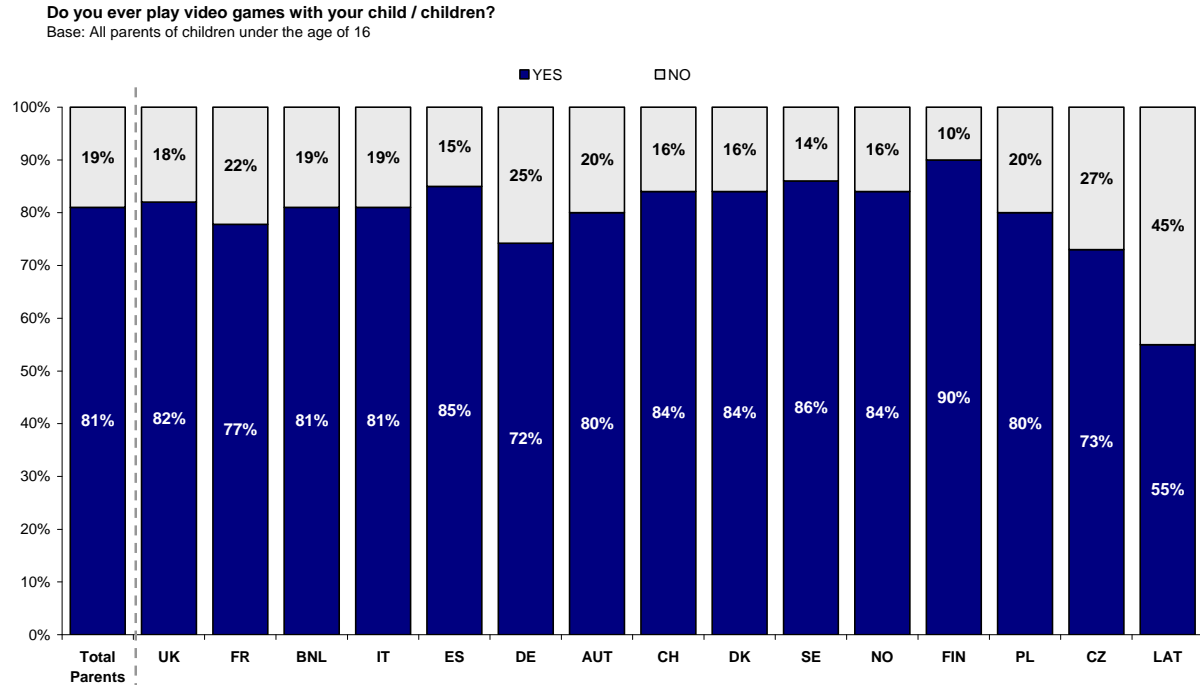
KEY POINTS

- Eight out of ten (81%) parents (who are active gamers themselves) report playing video games with their children, with no apparent gender differences across mums and dads.
- The key reason cited among these parents for playing video games with children is because their children ask them to (40% cite this as the main reason), while a significant proportion also do so because it is viewed as a family friendly activity (29%) and allows parents to spend time with their children (22%).
- Just under half (46%) these European parents report purchasing video games for their children the majority of the time, while around one in ten (13%) claim to never buy games for their children:
 - Italian and Spanish parents are the most likely to purchase games for their children, with around six in ten (61%-64%) doing so all or most of the time.
- When making video game purchases on behalf of a child, half (49%) indicate their child is present all or most of the time.
- European parents appear to heavily supervise video game content with regards to their children, with half (52%) reporting to always monitor what games their child is playing, and a further quarter (26%) indicating they do so most of the time:
 - Parents of younger children (aged 0-7) are more likely to always monitor what their child is playing (58% vs. 48% among parents of 8-15 year olds).
- Similarly, when it comes to video game purchases, six in ten (59%) parents claim to check what games their child is buying for themselves all of the time, with a further 20% monitoring their child's purchases most of the time.



► Parents And Children: Video Games As A Family Activity

Total European Parents (Active Gamers):



Overall, eight out of ten (81%) parents (who are active gamers themselves) report playing video games with their child/children, rising to nine out of ten (90%) in Finland but dipping to just over half (55%) in Latvia.

There is no apparent gender divide among parents, with both mums and dads equally likely to engage in gaming with their offspring.

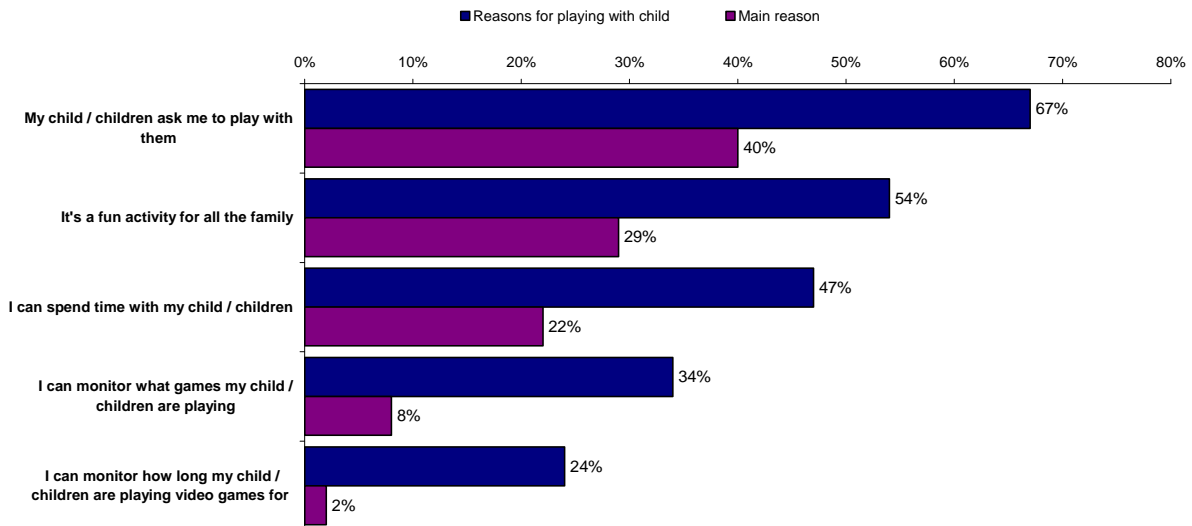


► Parents And Children: Motivations For Family Gaming

Total European Parents (Active Gamers) Who Play Video Games With Their Children:

Why do you play video games with your child / children? And what is the main reason?

Base: All parents who play video games with their kids under the age of 16



Two thirds of these European parents play games with their children as a result of their children asking them to play with them (67%), also cited as the main reason for engaging in the activity (40%).

Roughly half (47%-54%) of parents also play games with their kids because they consider it a family friendly activity or because it allows them to spend time with their children.

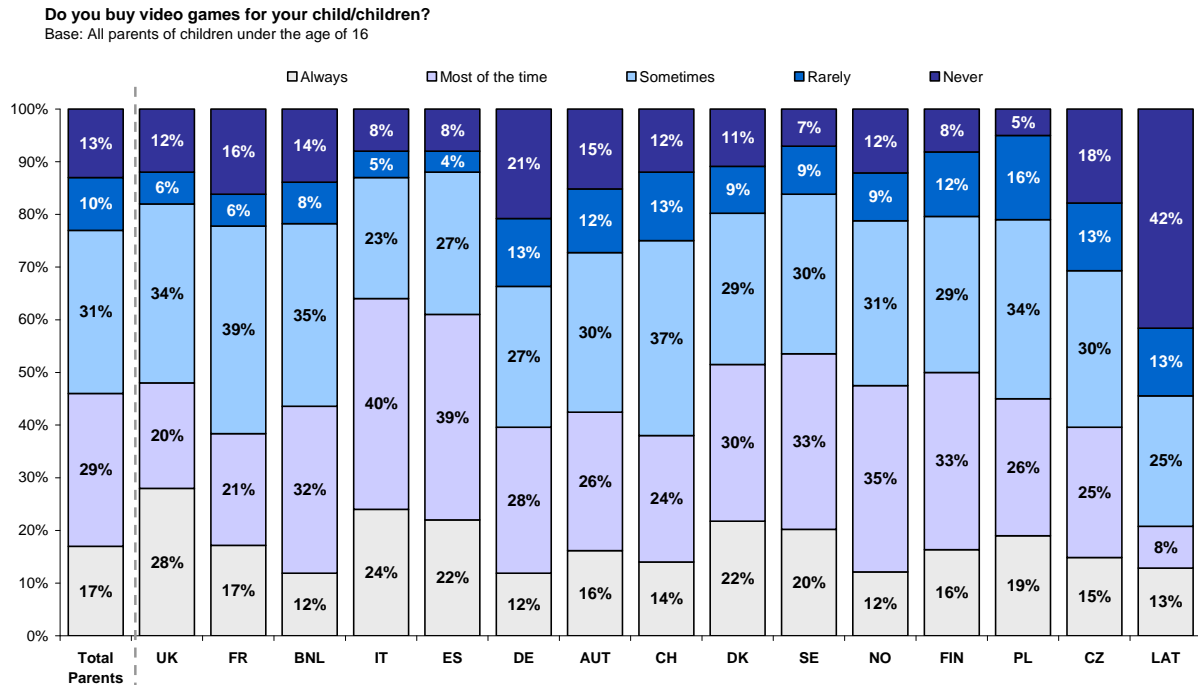
A third (34%) do so because it enables them to supervise the types of games their child is playing, while a quarter (24%) play with their children in order to monitor how long their children play video games for.

Notably there are few variations by child gender or age.



► Parents And Children: Purchasing Video Games For Children

Total European Parents (Active Gamers):



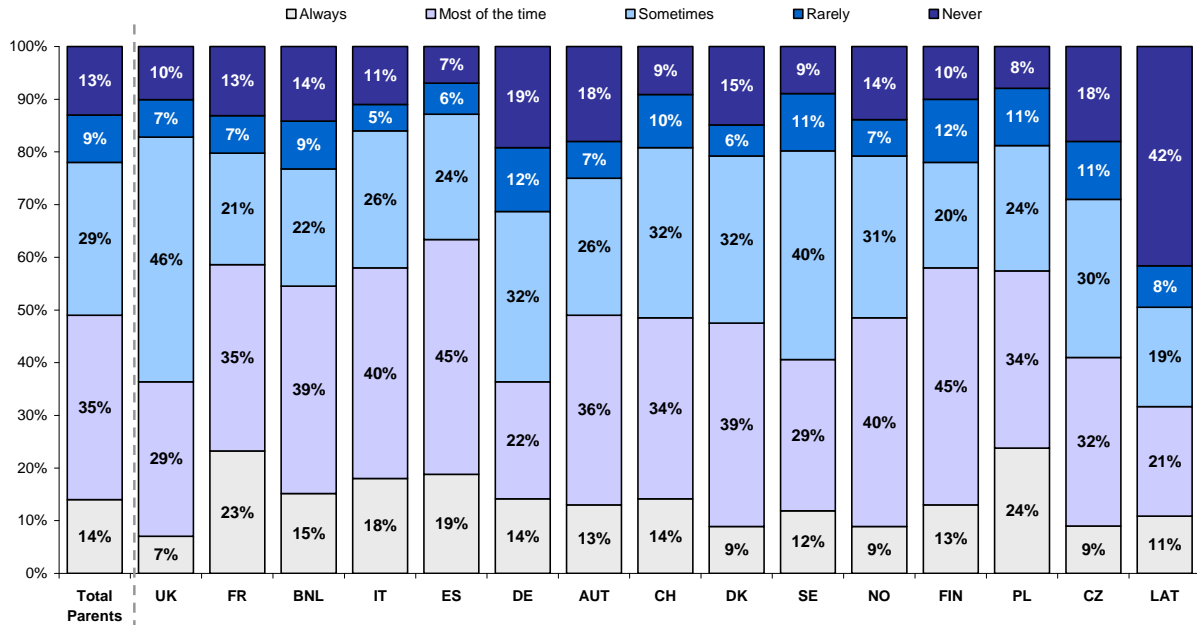
Under half (46%) of these European parents report purchasing video games for their children the majority of the time (17% 'always' buy them for their children plus 29% buy them 'most of the time'). A further three in ten (31%) buy games for their kids sometimes, while just over one in ten (13%) never buy games for their children.

Latvian parents are the least likely to purchase games for their kids (42% 'never' buy them), while Italian and Spanish parents demonstrate the reverse, with over six in ten (61%-64%) reporting to buy their offspring games either all or most of the time.



Total European Parents (Active Gamers):

And when you buy video games for your child/children is your child/children present?
 Base: All parents of children under the age of 16



When making video game purchases on behalf of their children, half (49%) of parents indicate their children are either always present or present most of the time.

Parents in Latvia, Germany and the Czech Republic are more likely to buy video games for their kids without their children being present at the point of purchase (50% of Latvian parents make purchases with their kids 'rarely' or 'never' present, with 31% and 29% saying the same in Germany and the Czech Republic, respectively). Conversely, children are most likely to be present in Spain, where two thirds (64%) of parents indicate their children are always or mostly with them when the buy video games on their behalf.

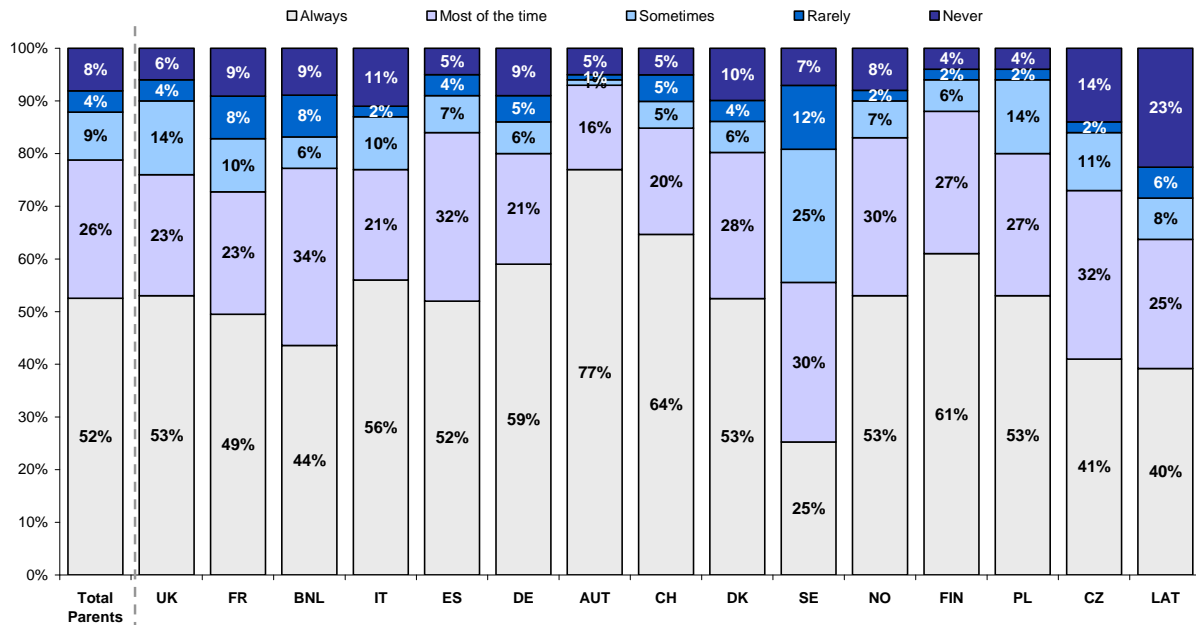


► Parents And Children: Monitoring Videogame Content

Total European Parents (Active Gamers):

Do you monitor what video games your child/children are playing?

Base: All parents of children under the age of 16



Overall, these European parents appear to heavily supervise their children in terms of the video games they are playing. Half (52%) of parents report they 'always' monitor what video games their children are playing, with a further quarter (26%) indicating they do so 'most of the time'.

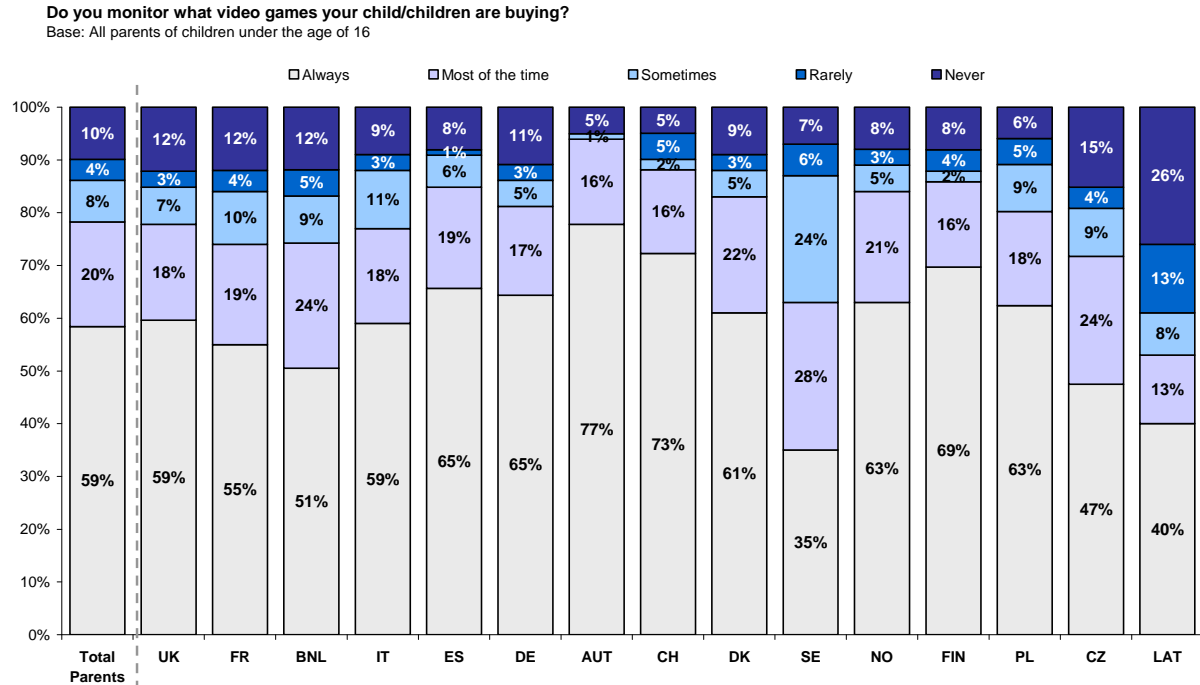
Austrian and Finnish parents seem to monitor their children's video games most frequently (93% of Austrian parents monitor what their children are playing 'always' or 'most of the time', and 88% say the same in Finland). However, parents in Sweden appear the least likely to check what video games their children are playing, with just over half (55%) doing so all or most of the time.

While relatively few differences emerge across child gender, parents with younger (0-7 years old) children are more likely to 'always' monitor the video games their children are playing (58% 'always' monitor vs. 48% among parents of 8-15 year olds).



► Parents And Children: Monitoring Videogame Purchases

Total European Parents (Active Gamers):



As seen previously, while around half (52%) of these European parents 'always' monitor what video games their children are playing, six in ten (59%) report supervising the video games their children purchase themselves all of the time. In total, eight out of ten (79%) check what video games their children are buying all or most of the time.

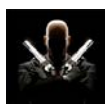
Again, Austrian parents appear to exercise the greatest degree of control over their children's video game purchases (93% do so 'always' or 'most of the time'), while Swedish and Latvian parents do not monitor them so heavily (53% top two box in Latvia, 63% in Sweden).



SECTION 5: VIDEO GAMES AMONG OTHER LEISURE ACTIVITIES

KEY POINTS

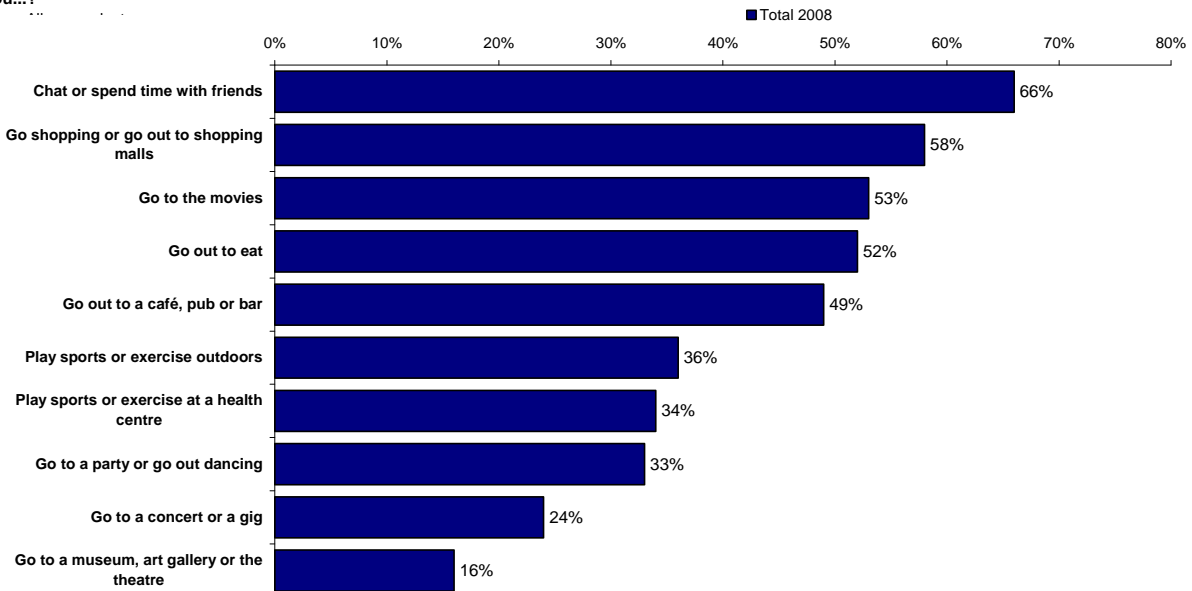
- European gamers engage in a wide variety of activities in their spare time, with an active social life paramount:
 - Two thirds (66%) regularly spend time with friends, whilst group activities such as going shopping, going to the cinema or going out to eat or drink also feature highly (at least half report to regularly participate in these activities).
- Within the wider context of media and entertainment consumption, the increasing importance of the Internet in the lives of Europeans as a whole is reflected in the amount of time these European gamers dedicate to surfing the Internet (four in ten spend 15+ hours per week on the web):
 - Playing video games (13% play for 15+ hours per week) falls behind socialising with friends/family (29%) as well as watching TV (22%) and listening to music (15%-17%), but is ahead of watching films, exercising or reading (3%-5%).
- When considering video games within the wider context of other media options such as TV and movies, video games are more likely to be considered to offer mental stimulation (57% agree vs. 35% for TV and 48% for movies) and 'keep you fit mentally' (42% vs. 25%-26% for TV and movies):
 - On the other hand, movies are felt to be the most social activity (57% agree 'they allow you to spend time with friends/family' vs. 29%-30% for TV and video games) and constructive use of time (37% vs. 30% for video games and 23% for TV).
 - Both video games and movies are considered some way ahead of TV in terms of being 'a fun way to spend time' (68%-72% agree vs. 48% for TV), while TV is felt to be the more informative medium (54% agree 'it teaches you new things' / 46% agree 'it helps you learn about technology and new media').
 - While relatively few consider any of the three mediums to 'keep you fit physically', video games do edge ahead slightly (11% agree vs. 8% for either TV or movies), potentially due to the new generation of consoles such as the Nintendo Wii which enable a more physical gaming experience.



► Participation In Other Leisure Activities

Total European Gamers:

If you have a few hours of spare time, what sort of leisure or entertainment-related activities do you usually do at least once a month, Do you...?



Within the broader category of entertainment and leisure, gamers across Europe participate in a wide variety of activities in their spare time, leading active social lives. As seen in previous years, spending time with friends is an important component of gamers' free time (66% regularly chat or spend time with friends), consistent with the 2007 study. Teens aged 16-19 (75%) and females (71% vs. 64% among males) in particular value time spent socialising with others.

Shopping also proves to be a popular way of spending spare time, more so among female gamers (71% regularly go shopping vs. 52% among males). To note, shopping or going to malls appears of less importance to gamers in Latvia or the Czech Republic (34% and 44%, respectively).

Going out to the movies (53% do so regularly) or going out to eat (52%) or to a café or bar (49%) are regular activities for around half these European gamers. Spanish respondents are most likely to visit the cinema in their spare time (71% do so regularly) while gamers in the Scandinavian countries of Denmark (37%), Sweden (38%) and Finland (36%) are the least likely. Going to a restaurant or eating outside the home proves more popular in the UK (63% do so regularly), France (60%) and Spain (62%), but is of less importance to gamers in the Eastern European and Baltic markets (38% in Poland, 39% in Latvia and 42% in the Czech Republic).

European gamers also dedicate a proportion of their spare time to sport, whether it be playing outdoors (36% do so regularly) or at a health centre (34%), with males most likely to engage in physical activity (37%-41% vs. 28% among females).

A third (33%) regularly go to parties or out dancing, while a quarter (24%) will go to see live music, rising to four in ten (42%) in Latvia. More cultural pursuits, such as going to the theatre or museum, are less popular although around one in six (16%) still report visiting these attractions on a regular basis.

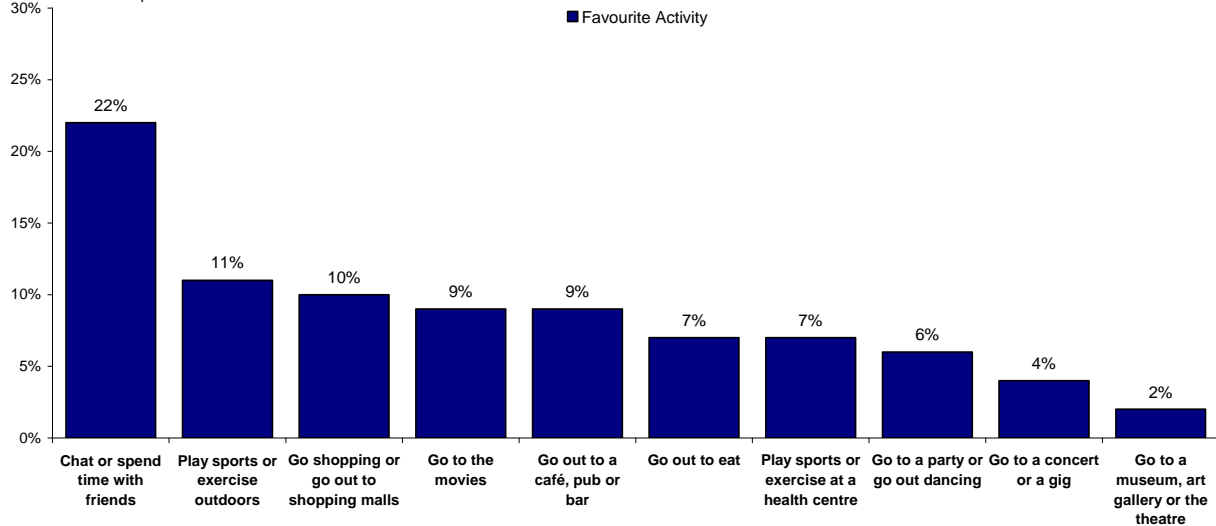


► Favourite Leisure Activities

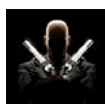
Total European Gamers:

Please rank your favourite activities from 1 to 3, regardless of how often you typically do them, with 1 being your favourite activity and 3 being your third favourite.

Base: All respondents



European gamers' favourite activities broadly follow a similar pattern to their lifestyle choices shown overleaf, with socialising with friends emerging as the top choice (22% select it as their favourite activity).

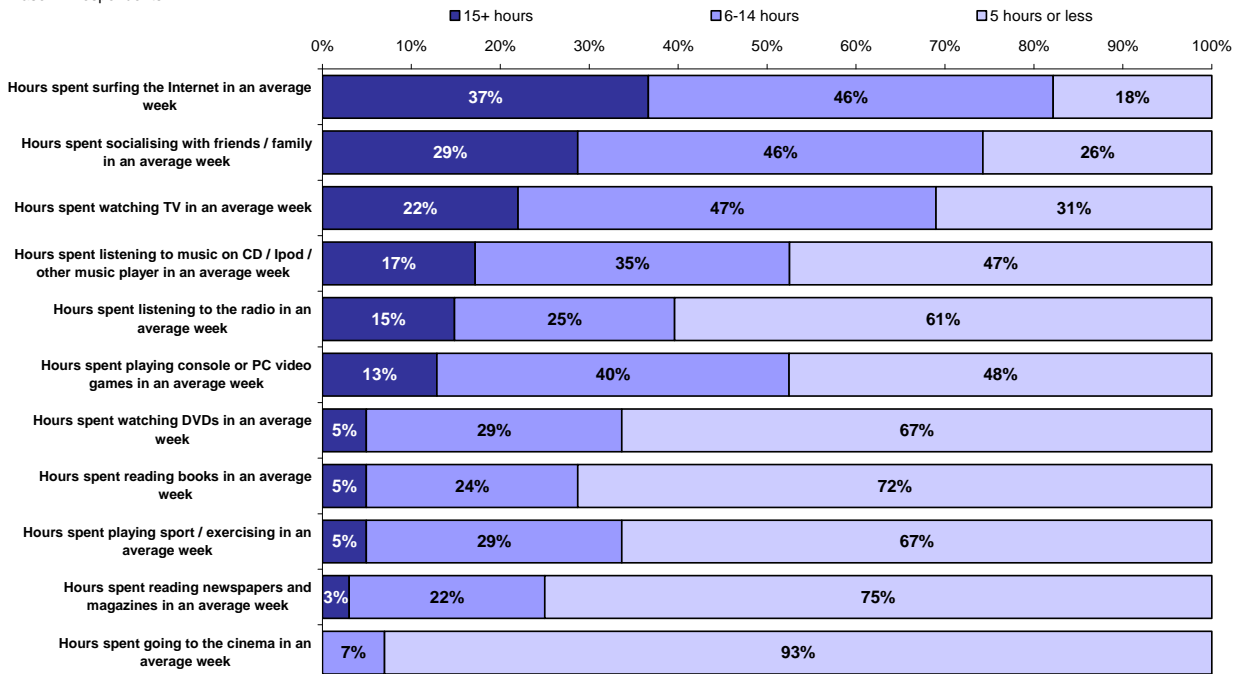


► Time Spent On Leisure Activities

Total European Gamers:

In an average week, how much time would you say you spend...?

Base: All respondents



Wider media and entertainment consumption patterns follow very similar patterns year on year, with no significant variation in the time dedicated to the various leisure options offered.

The increasing importance of the Internet in the lives of Europeans as a whole is reflected in the amount of time these European gamers dedicate to surfing the web, with nearly four in ten (37%) active on the Internet in excess of 14 hours per week, rising to 46% among Polish gamers and 51% among heavy gamers. In line with gamers' active social lives, three in ten (29%) claim to spend 15+ hours per week with friends and family, peaking in the Scandinavian and Baltic markets (38%-43% in Poland, Latvia, Denmark and Sweden, and 50% in the Czech Republic).

Two in ten (22%) devote 15 hours or more per week to watching television, while 15%-17% spend the same amount of time either listening to music on CD / MP3 player (rising to 28% among teens) or listening to the radio.

Playing video games is ranked sixth, with 13% playing for 15+ hours per week. As seen previously, Latvians record the highest levels, with 30% claiming to dedicate more than 2 hours per day (15+ hours per week) to the pastime.

In comparison, time dedicated to films (either DVDs or the cinema), reading (books / newspapers / magazines) or exercise is considerably less within the average week. While two thirds (67%) spend 5 hours or less watching DVDs, 93% report spending the same amount of time at the cinema. Similarly, around three quarters (72%-75%) generally read for 5 hours or less per week, while two thirds (67%) will spend the same amount of time playing sport / exercising.

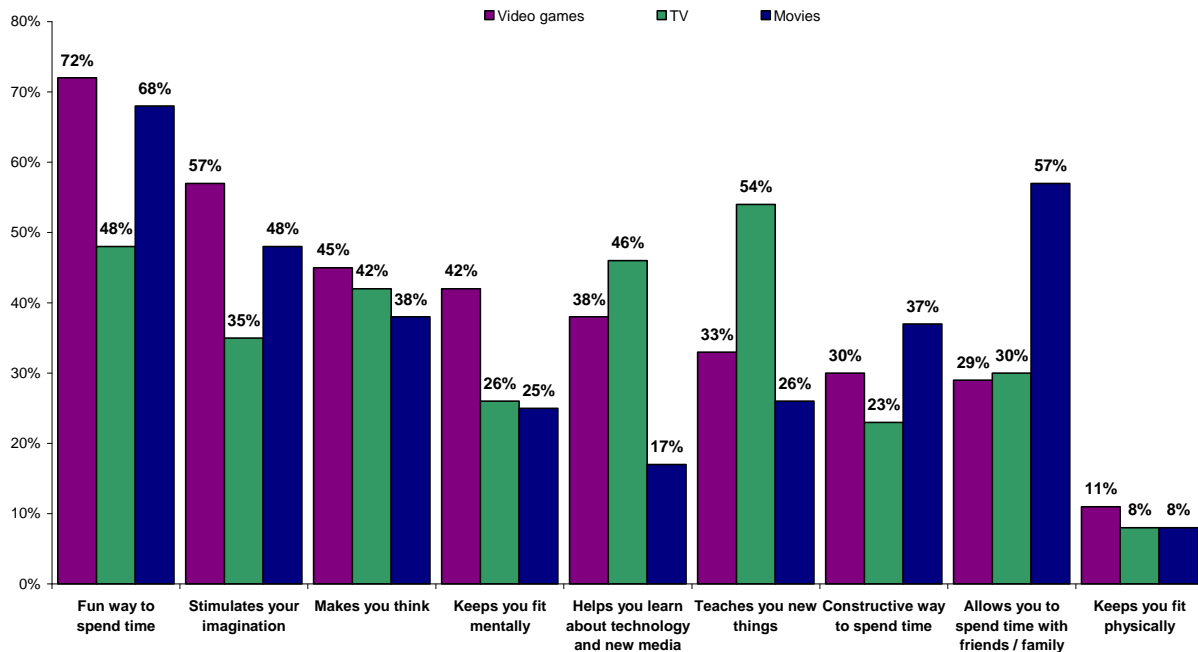


► Benefits Of Video Games In Relation To Other Media

Total European Gamers:

Please indicate whether you agree with each statement using a 1 to 5 rating scale, where a 5 stands for Agree Strongly, and a 1 stands for Disagree Strongly

- Total agreement (5 plus 4)



While movies are felt to be the most social activity (57% agree they 'allow you to spend time with friends / family' vs. 29%-30% for TV and video games) and the most constructive way to spend time (37% vs. 23% for TV and 30% for video games), video games are felt to offer the most mental stimulation (57% agree 'stimulates your imagination' and 42% agree 'keeps you fit mentally').

In fact, movies and video games are felt to be some way ahead of TV in terms of being a 'fun way to spend time' (68%-72% agree vs. 48% for TV).

On the other hand TV is felt to be the more informative medium (54% agree 'teaches you new things' and 46% agree 'helps you learn about technology and new media').

While relatively few consider any of the three mediums to 'keep you fit physically', video games do edge ahead slightly (11% agree vs. 8% for either TV or movies), potentially due to the new generation of consoles such as the Nintendo Wii which enable a more physical gaming experience.



SECTION 5: ONLINE GAMING AND MULTIMEDIA

A separate component of the study addressed video games within the larger context of multimedia consumption, including downloading from both illegal and legal sources, online gaming, and the relationship between video games with wireless devices. Please note, however, that this survey was conducted online and thus reported behaviour in this respect may be higher than the general population.

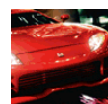
KEY POINTS**Online Gaming**

- Playing online is part of the overall gaming experience for the majority (62%) of European gamers. Online gaming transcends gender and age, although teens are especially likely to play games online (70%). The high penetration of online gaming among teens, early in their gaming life, suggests that this component of the gameplay experience is likely to be of increasing importance in the future.
- Gamers play a diverse range of games online, though males show a preference for console-friendly fare (sports, role play etc.) and tend to enjoy playing multiplayer. Females, on the other hand, tend to play casual games (such as puzzle or mini games) online, typically by themselves. Light and heavy gamers mirror these differences, with the former playing the more casual games by themselves and the latter playing multiplayer console-type games. The diversity of the online gaming experience – and its ability to attract a range of gamer types – again suggests that this element of the games world is likely to be of importance in the future.
- While social aspects are not rated among the top reasons for playing gaming in general (13% play video games for this reason), online gamers are twice as likely to cite the opportunity to play/socialise with others as a reason for engaging in online gaming (27%). This represents a strong secondary motivator and differentiates online gaming from general gameplay. This may also be indicative of a growing role for video games as online environments become an increasingly prevalent means of communication and self-expression for a younger generation.

Gaming on Wireless Devices

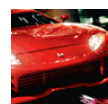
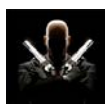
- Just under half of the gamers surveyed (44%) also play games on some form of wireless device (whether a mobile phone or handheld console such as the Nintendo DS or Sony PSP).
- Given their inherent mobility, it may not be surprising that wireless games are played in a variety of locations. However, while a significant proportion play mobile games while they are on the move (53%), even more gamers tend to play them at home (70%; 47% play at home most of the time).
- Motivations to play mobile or wireless games are primarily driven by their capacity to fill in time although, at lower levels, they share attributes of home-console and PC based gaming in terms of providing fun, challenge and an opportunity to engage the imagination. It should also be noted that respondents under the age of 16 were not interviewed, and therefore responses should only be taken as representative of an adult audience:

However, in order to develop further the appeal of wireless gaming for a more adult audience, it appears that a clearer and more active entertainment proposition (beyond filling in time) is required.



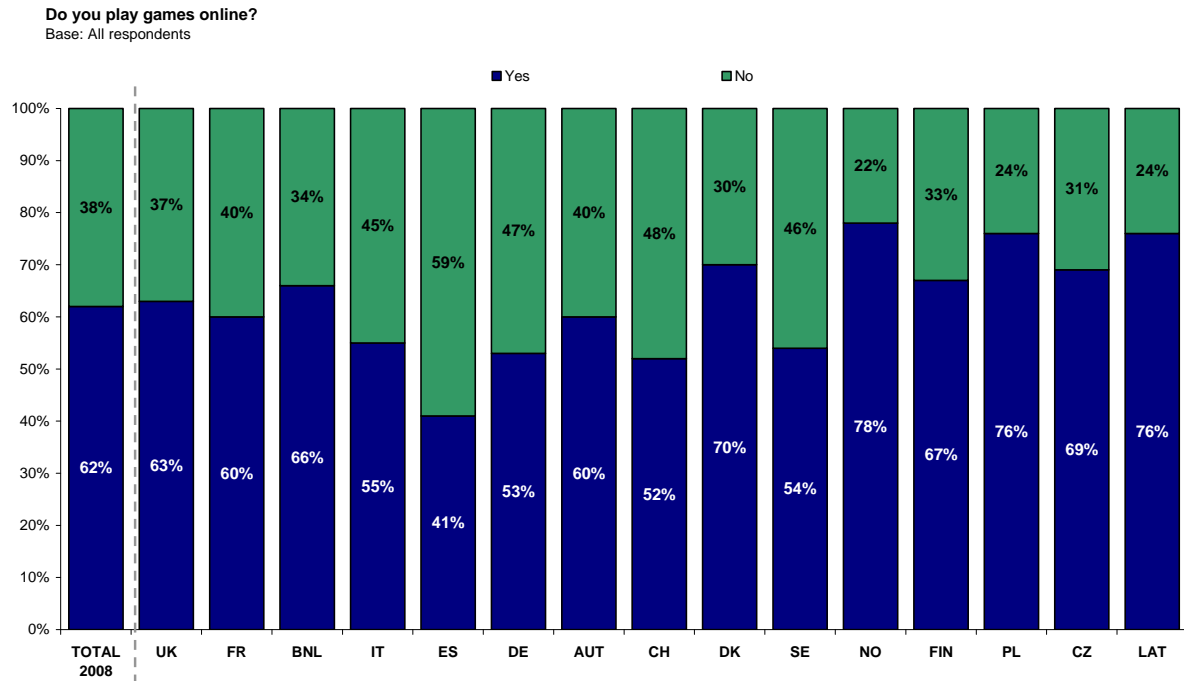
KEY POINTS (continued)**The Games Console as Multimedia Device**

- Nearly eight in ten European gamers (78%) perceive their games console to have multimedia capabilities. Of those gamers who report owning a multimedia capable console, over 70% say that they use their console(s) for broader media activities (such as accessing the Internet or playing DVDs).
- On a total European level this means over half (56%) of European gamers aware of the broader capabilities of their games consoles use them for more than just playing games:
 - While this research did not probe on the quality or extent of usage, it appears to indicate that the games console is taking on an increasingly broader role in the entertainment space for gamers. If this convergence of technology continues, gaming devices could take a central role in becoming a “one stop” entertainment source, merging video gameplay, DVD and social interaction in the process.



► Online Gaming: Prevalence Of Online Gaming

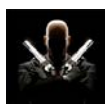
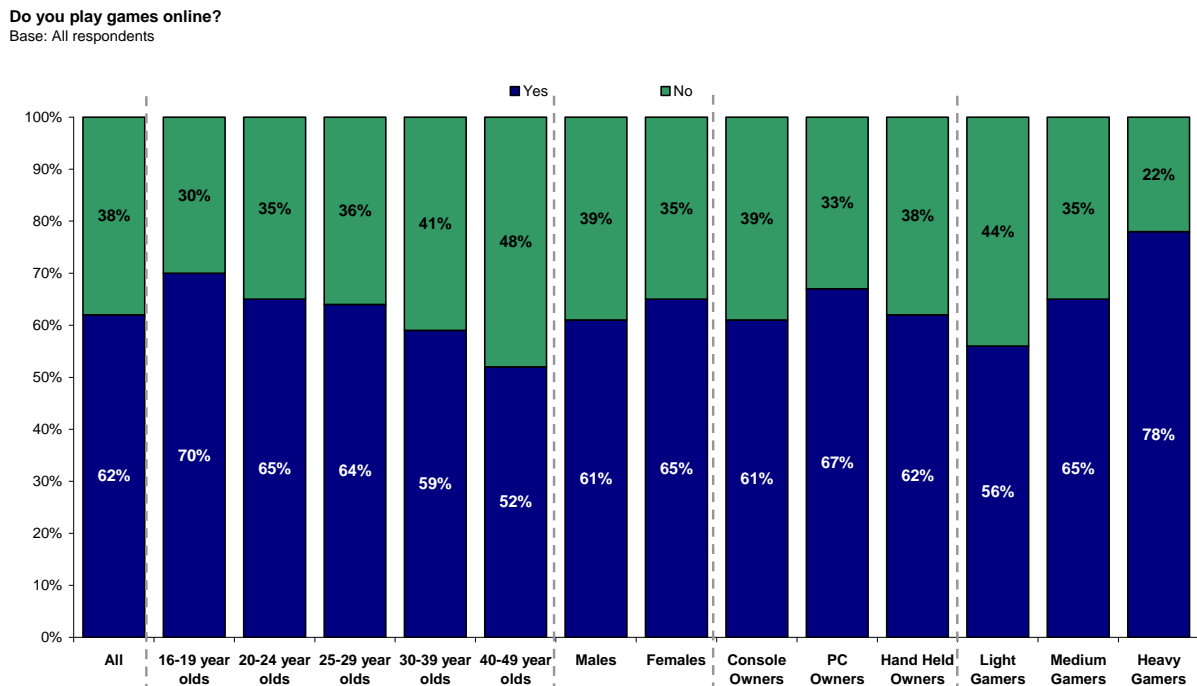
Total European Gamers – Breakdown by Country:



Six in ten (62%) European gamers report playing video games via the Internet; gamers in Norway (78%), Poland and Latvia (76% each) are the most likely to be actively gaming online, while levels of online gaming drop to 41% in Spain.

Internet based gaming is also more prevalent among heavy gamers (78%), and teens (70%). While online gaming generally diminishes with age, there is still a significant proportion of 40-49 year olds engaged in the activity (52%).

Total European Gamers – Breakdown by Demographics:

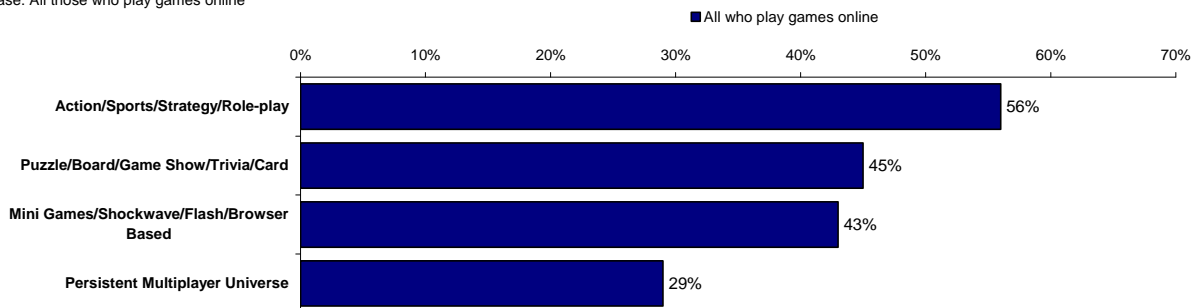


► Online Gaming: Types Of Games Played Online

Total European Gamers Who Play Online:

What kind of games do you play online?

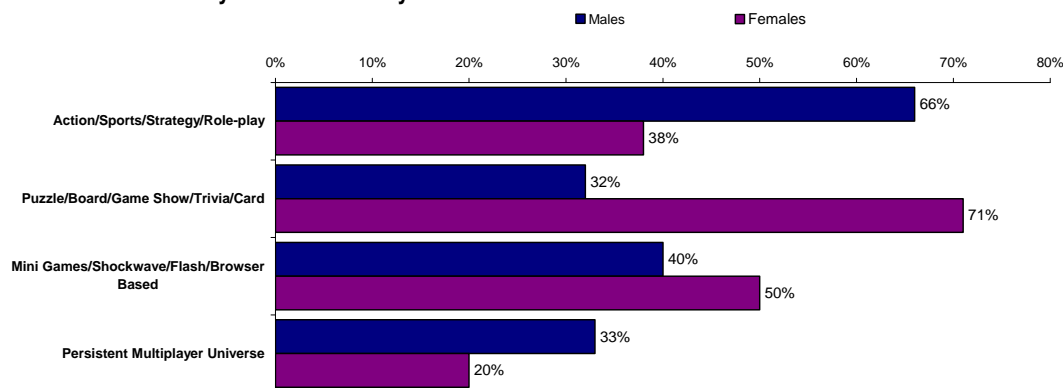
Base: All those who play games online



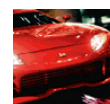
Online gamers play a wide variety of games via the Internet, ranging from just over half (56%) who play action/sports/strategy/role playing games down to three in ten (29%) who enjoy playing persistent multiplayer universe games online, with the latter proving particularly popular in Spain, Denmark and Latvia (47%-52%).

While heavy gamers are more likely to play action/sports/strategy/role playing games (69%) and persistent multiplayer universe games (47%), light gamers are more likely to play more casual, puzzle based games online (53%).

Types of Online Games Played – Breakdown by Gender:



There are some notable gender differences in the types of games played online. Males are most likely to play action/sports/strategy/role-play games online (66%), whereas females are most likely to play puzzle/board/game show/trivia/card games (71%).

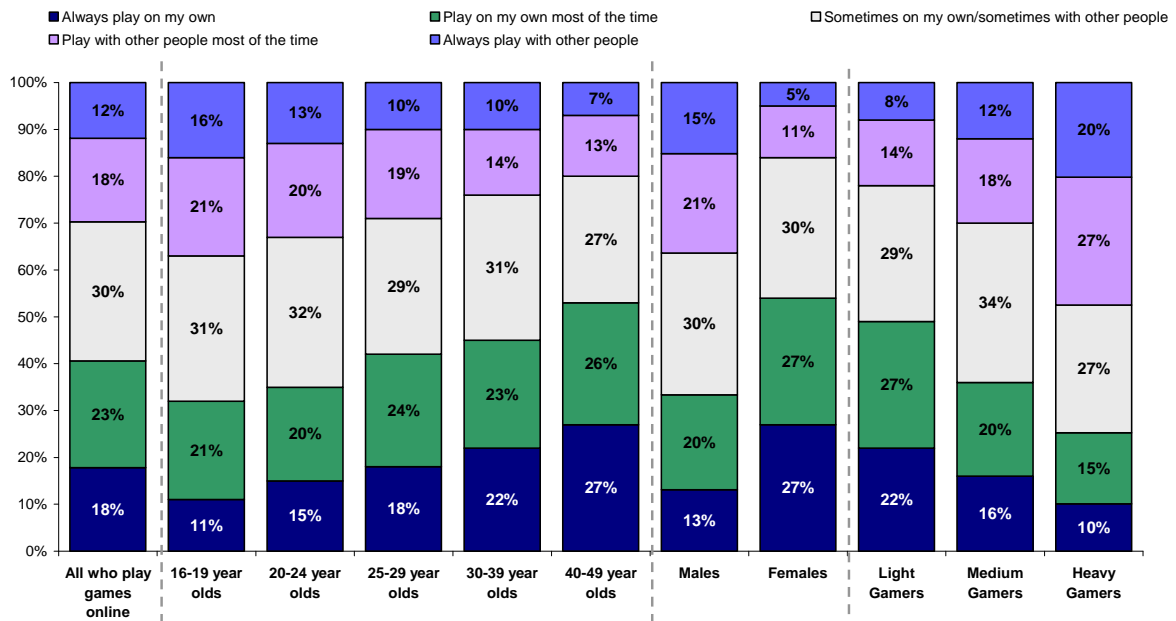


► Online Gaming: Solitary vs. Multiplayer Gaming

Total European Gamers Who Play Online– Breakdown by Demographics:

Do you generally play games online by yourself or with/against other people?

Base: All who play video games online



While four in ten (41%) online gamers generally play games on their own, three in ten (30%) state the opposite, engaging in multiplayer gaming either with or against other people most of the time. Multiplayer gaming peaks among teens (37%) and decreases with age (to 20% among 40-49 year olds).

The predominance of multiplayer online gaming teens, early in their gaming life, suggests that this component of the gameplay experience is likely to be of increasing importance in the future.

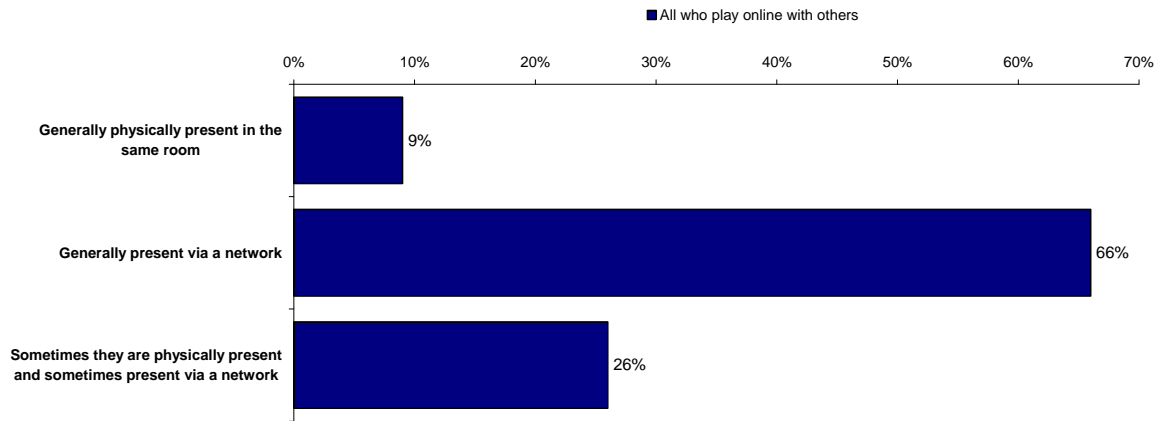


► Online Gaming: Virtual vs. Physically Present Multiplayer Gaming

Total European Gamers Who Play Online:

And when you play games online against other people are they generally physically present in the same room, or present via a network?

Base: All those who play games online against other people



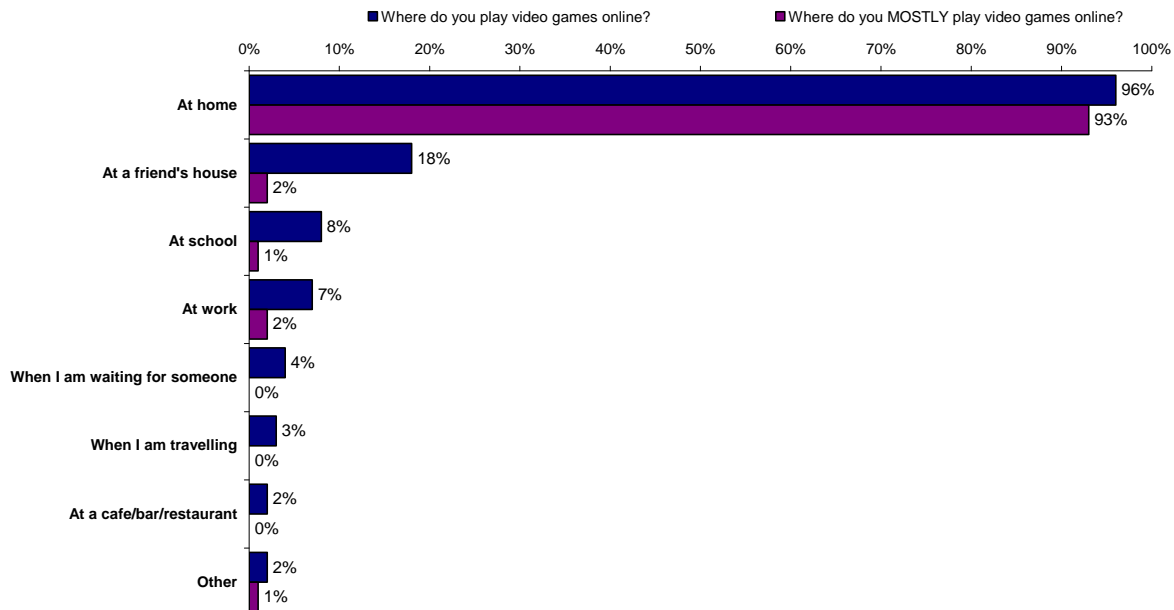
Perhaps unsurprisingly, the vast majority of online multiplayer gaming is conducted virtually (66% play with /against others present via a network).

► Online Gaming: Location

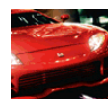
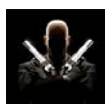
Total European Gamers Who Play Online:

And Where do you play video games online? And, where do you mostly play video games online?

Base: All those who play video games online



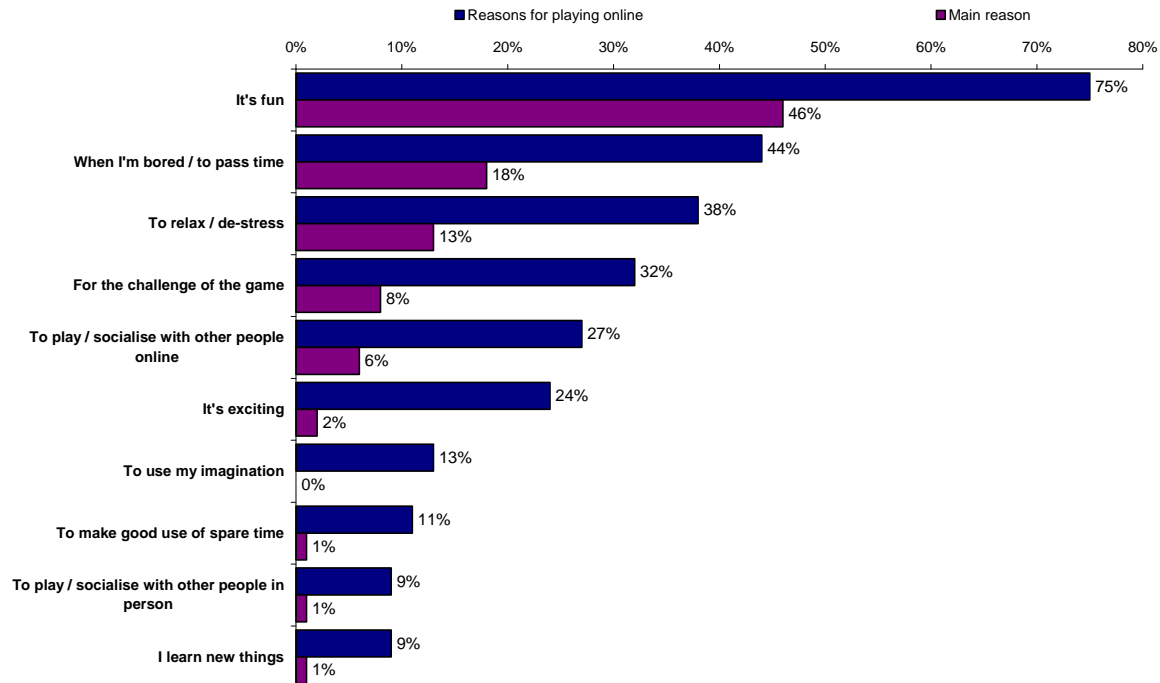
In terms of location, the overwhelming majority mostly play online games in their own home (93%), with very few selecting the remaining locations.



► Online Gaming: Reasons For Playing Online Video Games

Total European Gamers Who Play Online:

Why do you play online video games? And what is the main reason?
 Base: All those who play online videogames



While social aspects of gaming does not appear strongly motivating within the context of gaming in general (13% play video games for this reason), online gamers are twice as likely to cite the opportunity to play/socialise with others as a reason for engaging in online gaming (27%; highest among those under 25 years old). In Nielsen's wider work we are seeing online communication playing an increasingly larger role across sectors. This research suggests that online gaming is playing a role and may be indicative of gaming's place in a new generation's means of communication and self-expression.

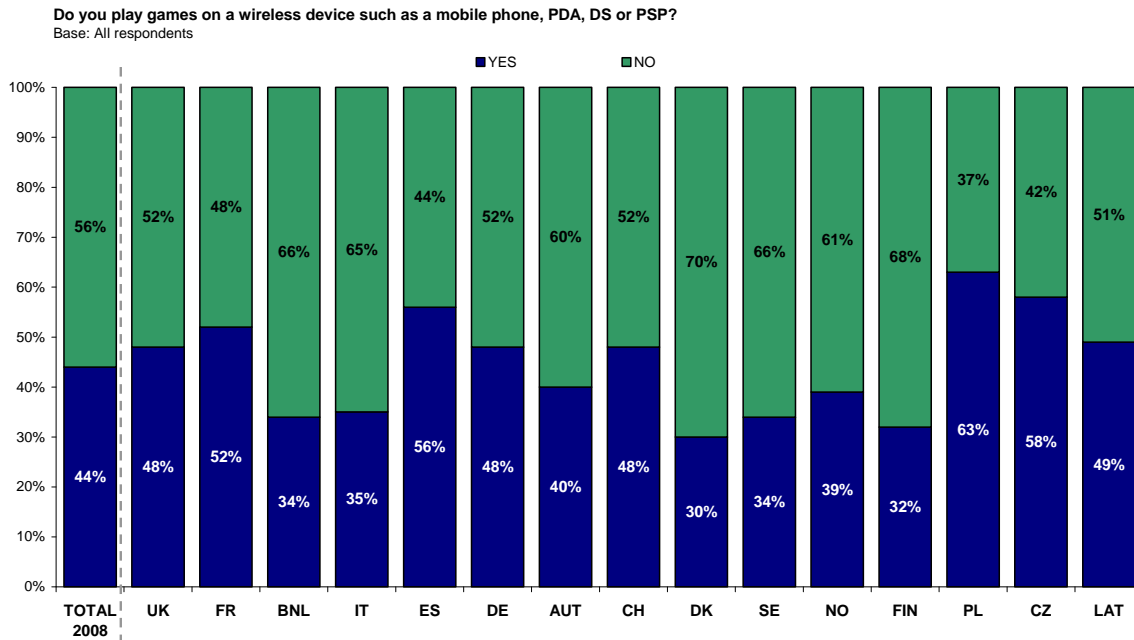
Mirroring the motivations for playing video games generally, three quarters of European gamers (75%) play online video games for fun, with just under half (46%) citing this as the main reason.

Similarly, boredom and the opportunity to relax/distress are cited as more secondary motivations for playing online games (44% and 38%, respectively).



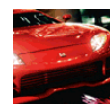
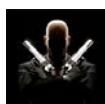
► Wireless Devices: Gaming Habits

Total European Gamers – Breakdown by Country:



Overall, just under half (44%) of European gamers report playing video games on a wireless device (e.g. a mobile phone, PDA, DS or PSP), with gamers in Spain (56%) and Eastern Europe (63% in Poland and 58% in the Czech Republic) leading the remaining European markets.

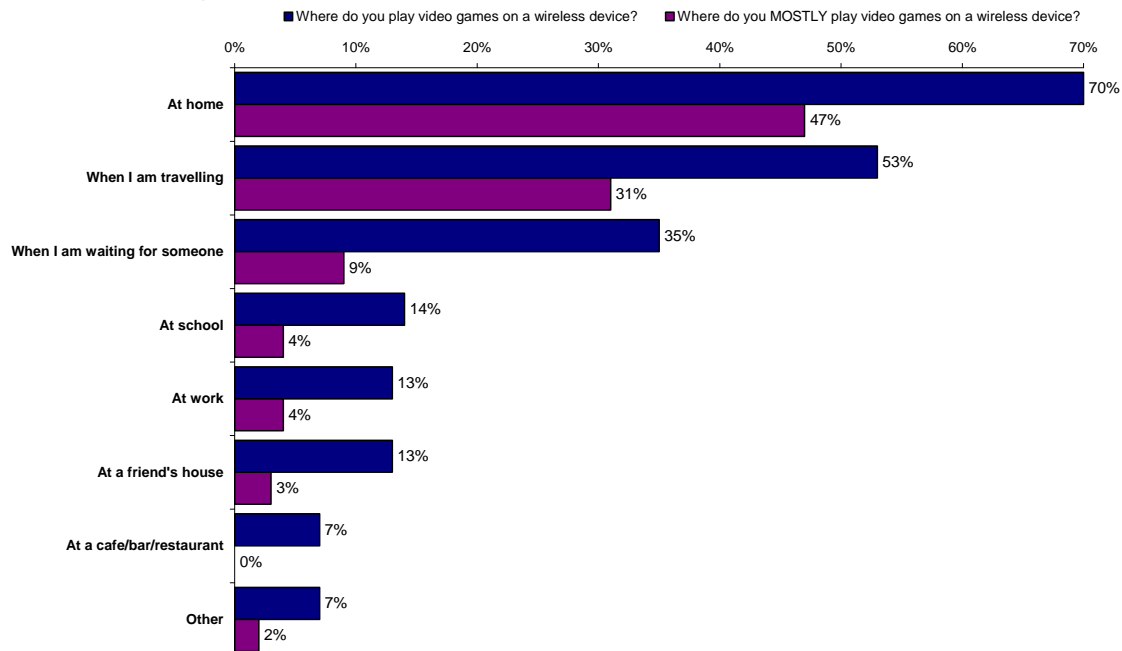
While there is little variation by gender, wireless gameplay peaks among teens (49%) and decreases with age (37% among 40-49 year olds).



► Wireless Devices: Typical Locations For Use

Total European Gamers Who Play on a Wireless Device:

Where do you play video games on your wireless device? And, where do you mostly play video games on your wireless device?
 Base: All those who play video games online



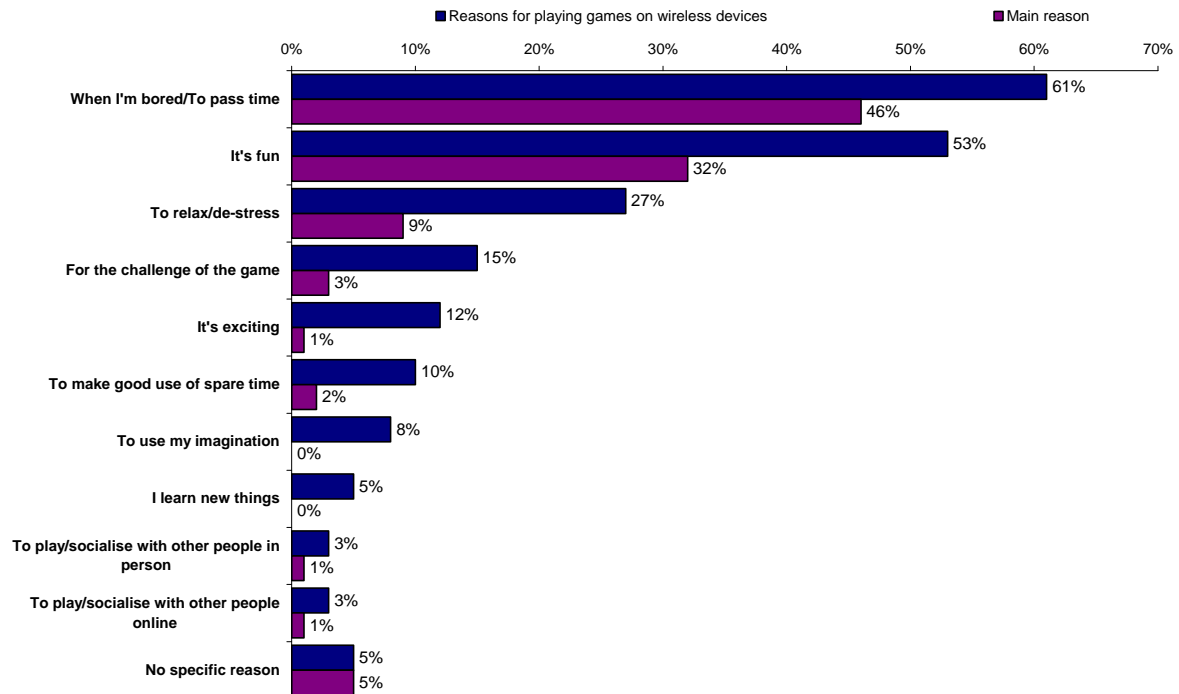
Given the mobility of wireless devices, it is not surprising that they are played on in a variety of locations. While a significant proportion use these devices to play games while they are on the move (53%), even more gamers tend to play them at home (70%; 47% play at home most of the time), suggesting there is appetite for mobile content even in the home.



► Wireless Devices: Reasons For Playing On Wireless Devices

Total European Gamers Who Play on a Wireless Device:

Why do you play video games on your wireless device? And, what is the main play video games on your wireless device?
 Base: All those who play video games online



While the fun nature of video games was cited as the primary motivation for playing games in general, the reasons for playing games on a wireless device have a slightly different focus for these European gamers; just under half (46%) cite boredom or the need to pass time as the main reason for playing games on handheld devices.

Albeit at lower levels, gameplay on mobiles or wireless devices are also played for the fun, challenge and for intellectual stimulation. In order to further develop the appeal of wireless gaming among adult audiences, it seems there is room to promote these value propositions, thereby surpassing its current perception as primarily a time-filler.

The motivations for wireless gameplay, primarily as a productive way to fill time, distinguish it from other gaming experiences (console gaming, PC, etc.), which in turn suggests that different gaming platforms play a complementary role in gamers' lives (as opposed to cannibalizing each other).

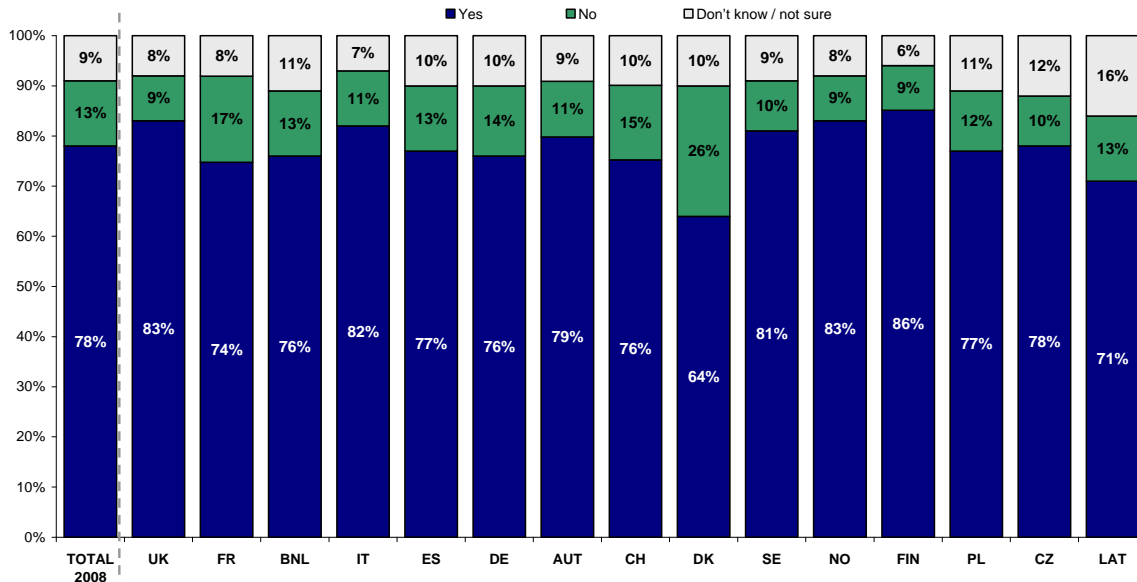
NB: It should be noted that respondents under age 16 were not interviewed, and therefore responses should only be taken as representative of an adult audience.



► Multimedia: Console Capabilities

Total European Gamers – Breakdown by Country:

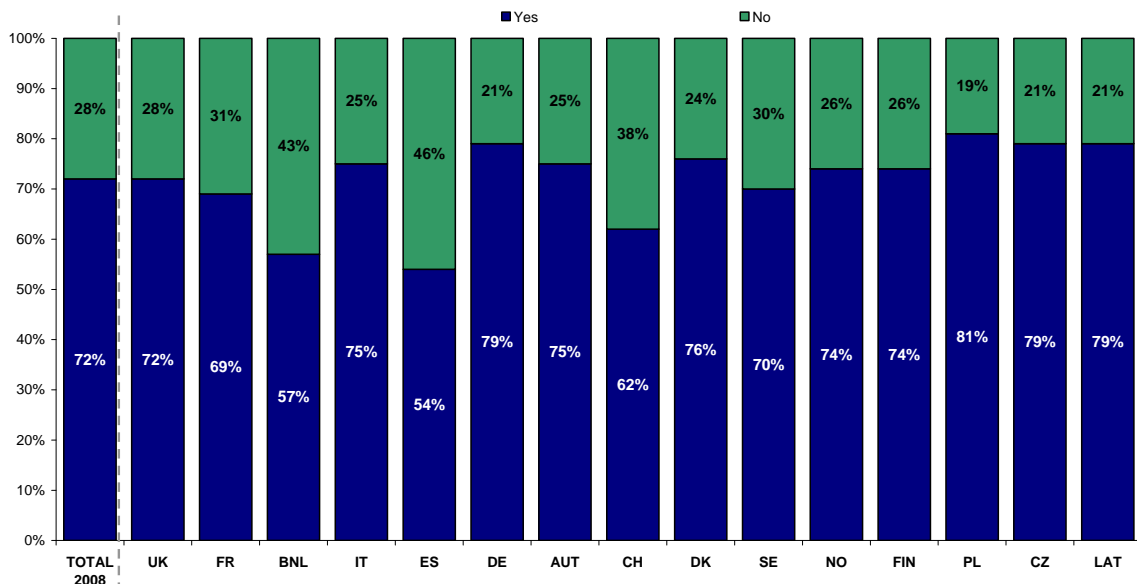
Does your games console have multimedia capabilities (e.g. watch DVDs / listen to MP3s / connect to the Internet)?
Base: All respondents



Nearly eight in ten (78%) European gamers consider their consoles to have multimedia capabilities, peaking in Finland (86%), the UK (83%), and in Norway (83%), while Danish gamers report slightly lower penetration rates for this technology (64% report owning a console with multimedia capabilities).

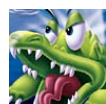
Total European Gamers Who Report Owning Consoles with Multimedia Capabilities – Breakdown by Country:

And do you use your games console as a multimedia device (e.g. to watch DVDs)?
Base: All those who report owning a console with multimedia capabilities



Among those who report owning multimedia capable consoles, around seven in ten (72%) European gamers are actively using these features, led by gamers in the Eastern European and Baltic Markets (79%-81% in Germany, Poland, the Czech Republic and Latvia).

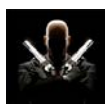
Further analysis reveals that over half (56%) of all European gamers surveyed use their gaming device for other activities in addition to gaming. If this trend continues, gaming devices appear to be taking a central role in becoming a “one stop” entertainment source, merging video games, DVD, and social interaction in the process.



SECTION 6: THE PEGI AGE RATINGS AND GAME DESCRIPTOR SYSTEMS

KEY POINTS

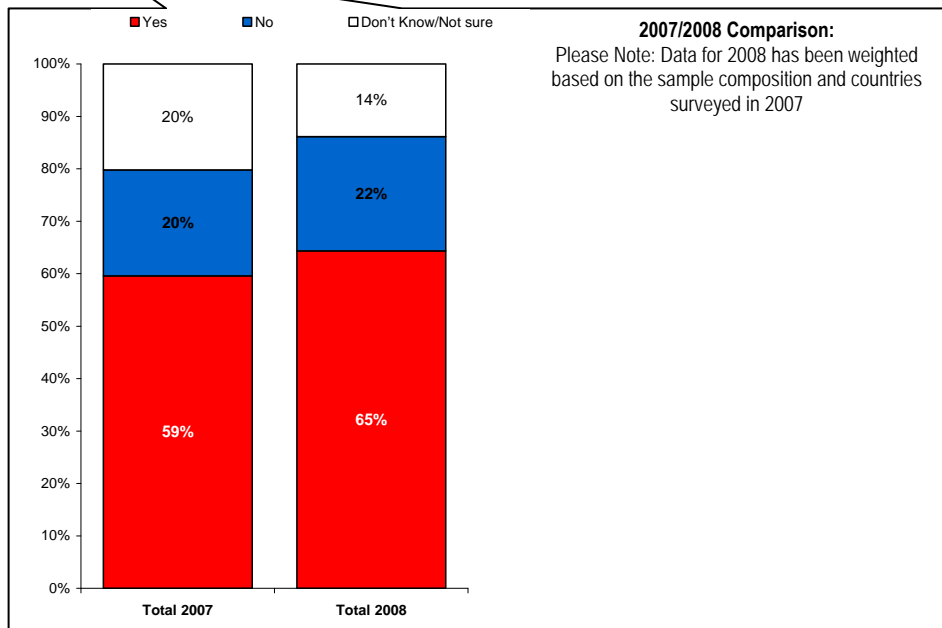
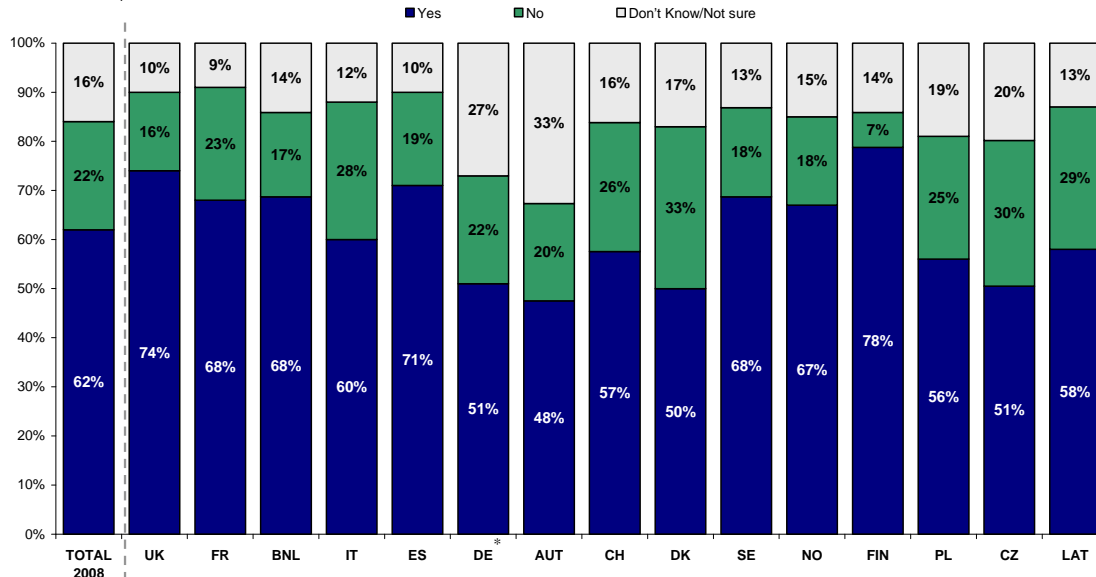
- While six in ten (62%) European gamers claim to be familiar with a European age ratings system, these levels halve when gamers are presented with the name PEGI (32% are familiar). However, while the name holds less resonance for European gamers, importantly the visual marks of the PEGI age ratings system are almost universally recognised (93%).
- Although awareness of the PEGI name still lags behind that of the age rating symbols, there have been some increases year on year (now 35% are aware, up from 29% in 2007), and notably in the markets where PEGI awareness campaigns have run over the past twelve months:
 - Among the markets where PEGI campaigns ran in 2007/08, France saw the greatest increase in awareness (24% to 39%), although all the countries involved show elevated levels of recognition.
- When considering the PEGI age rating symbols, gamers find them a broadly useful tool (35% 'useful'), however a similar proportion consider them of less use, suggesting that, along with the PEGI name, there may be an opportunity to educate gamers further in terms of how the age ratings system could inform their video game purchases:
 - The perceived usefulness of the PEGI age ratings system is stronger among parents, with half (49%) reporting to find them a beneficial tool.
- In comparison to the age rating symbols, both familiarity and understanding of the PEGI descriptors for violence, bad language and fear, reaches lower levels among these European gamers:
 - Half (50%) these European gamers are familiar with the descriptors (vs. 93% for the age symbols), and, consistent with the lack of familiarity, just 24% find their meaning clear.
 - As the descriptors are often displayed on the reverse of video game packing, they are not necessarily as immediately visible as their age rating counterparts (usually displayed on the front cover), which may impact on awareness. However, parents may be a key group to target moving forward in terms of improving both awareness and understanding, with this demographic registering lower levels of familiarity (43%), but considering the PEGI descriptors to be a relatively useful tool when purchasing games for a child (34%).
- Launched under a year ago, two in ten European gamers (20%) are familiar with the PEGI Online symbol, which denotes license holders committed to a six point PEGI Online Safety Code. The relatively low levels of awareness for this latest addition to the PEGI system, may be a function of both its infancy and a broader lack of familiarity with the PEGI name as a whole:
 - In line with these findings, just two in ten (18%) currently find the meaning of the PEGI Online descriptor to be clear.



► Awareness Of The Age Rating System

Total European Gamers– Breakdown by Country:

As I am sure you know, DVDs and videos have age ratings applied to them. Are you aware, or have you heard of a European age ratings system for video games?
Base: All respondents



Overall, six in ten (62%) European gamers claim to be aware of a European age rating system, rising to three quarters in the UK (74%) and Finland (78%). There appears to be an upward trend year on year, with awareness up to two thirds (65%) in 2008, compared to 59% in the ten markets surveyed in 2007.

Germany, where the PEGI rating system is not currently being utilised, has among the lowest awareness (51%) along with Austria (48%), Denmark (50%) and the Czech Republic (51%).

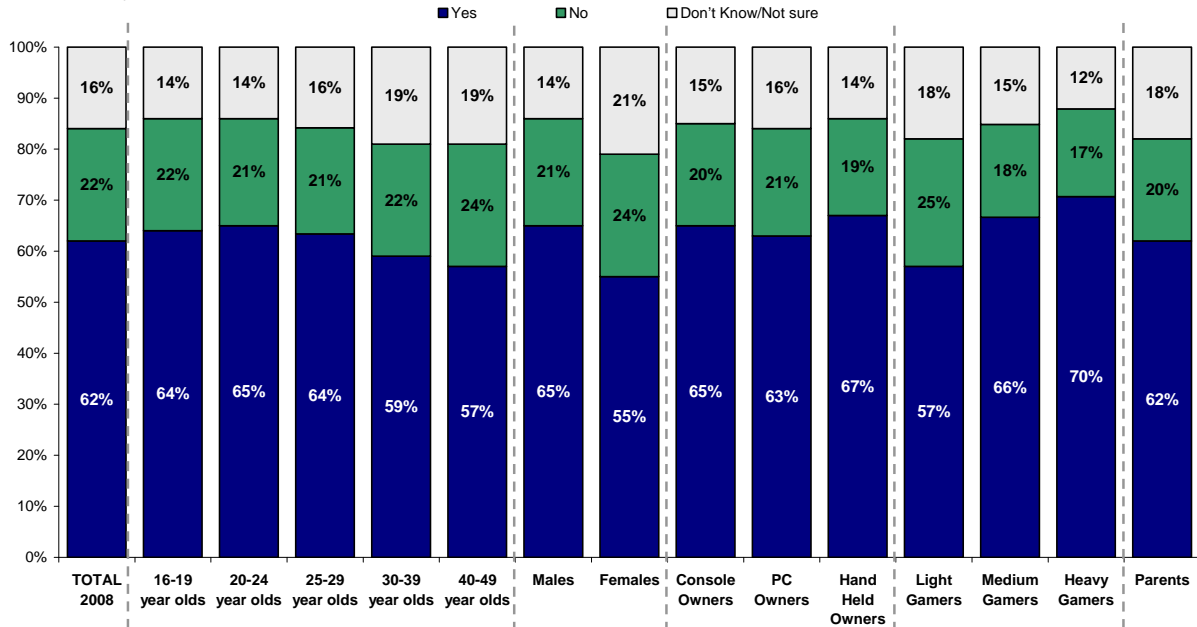
*Germany does not currently operate under the PEGI system.



Total European Gamers– Breakdown by Demographics:

As I am sure you know, DVDs and videos have age ratings applied to them. Are you aware, or have you heard of a European age ratings system for video games?

Base: All respondents



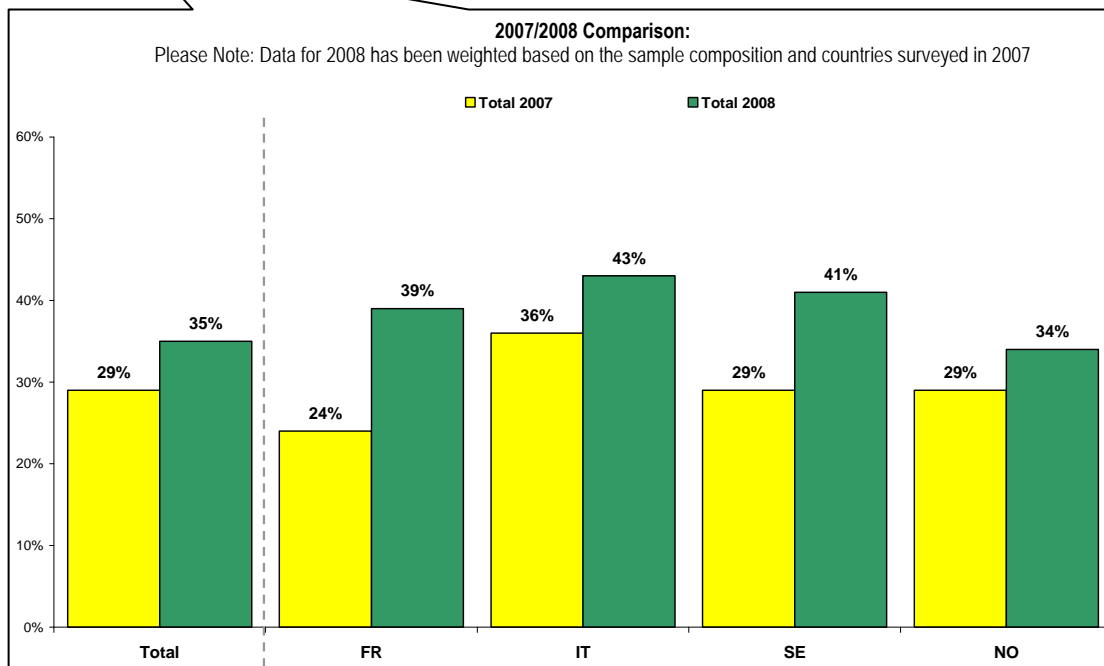
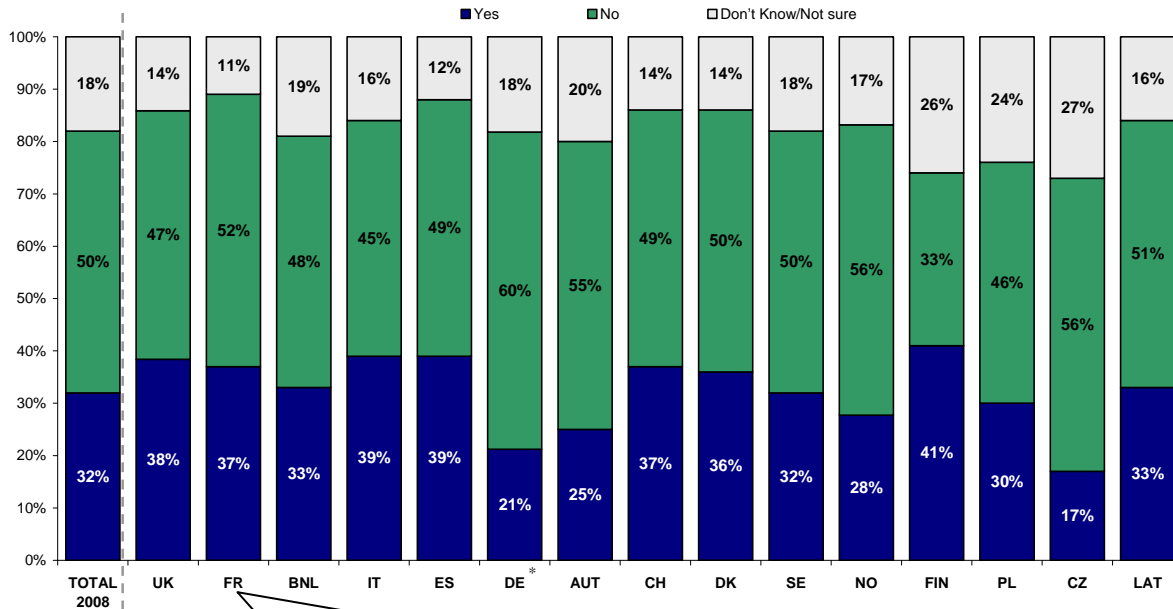
Demographically, younger gamers aged 16-29 are slightly more likely to be familiar with a ratings system (64-65%) than those aged 30-49 (57%-59%). Furthermore, awareness levels skew towards males (65%; 55% among females), and perhaps unsurprisingly to heavy gamers (70%).



► Awareness Of The PEGI Age Rating System

Total European Gamers – Breakdown by Country:

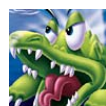
Are you aware, or have you heard of, an age ratings system for video games called PEGI or Pan-European Game Information?
Base: All respondents



While six in ten (62%) European gamers claim to be familiar with a European age ratings system, recognition of the PEGI ratings system by name is lower; a third (32%) claim to be familiar with the PEGI system, with half (50%) reportedly unaware of PEGI. However, there have been some increases year on year, with awareness of PEGI now standing at just over a third (35%) in 2008, versus three in ten (29%) in 2007.

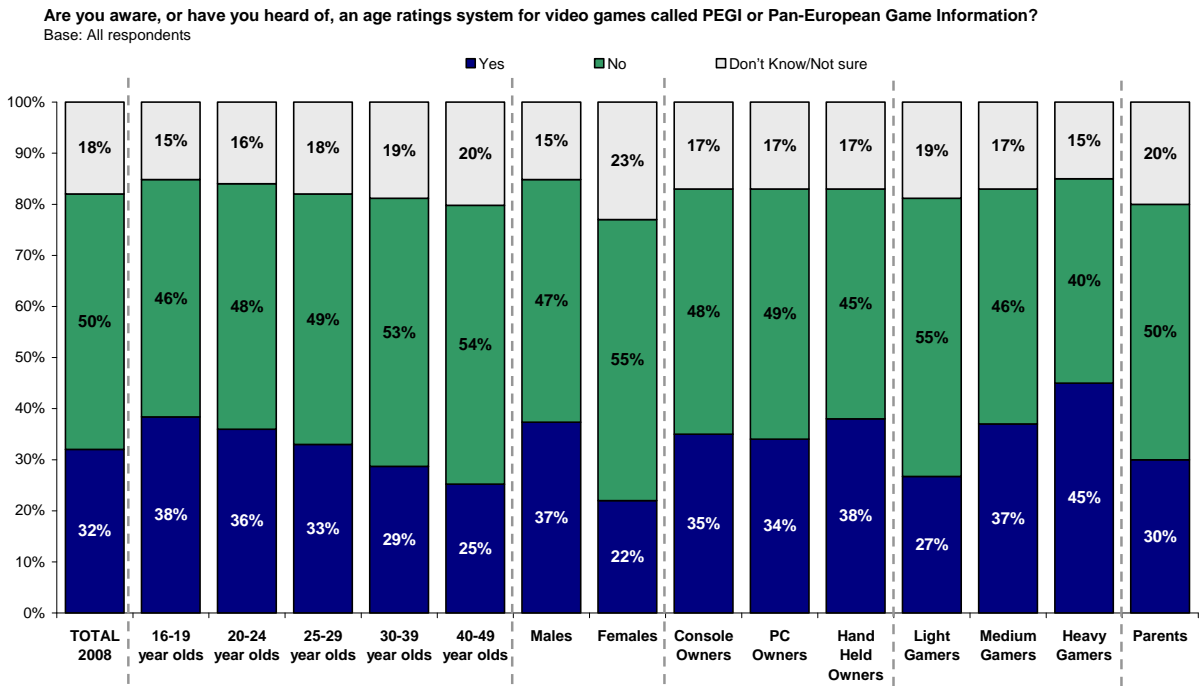
Among the markets where PEGI campaign ran in 2007/08 (see above graph), France saw the greatest increase in awareness of the PEGI rating system over last year (24% to 39%), although all countries involved show elevated levels of recognition.

*Germany does not currently operate under the PEGI system.



As with knowledge of a ratings system, awareness of PEGI specifically is relatively high in the UK (38%) and Finland (41%), as well as Italy and Spain (39% each). Although PEGI is not widely used in Germany, two in ten (21%) German gamers claim to be familiar with the system.

Total European Gamers– Breakdown by Demographics:



Awareness of the PEGI name is led by males (37% vs. 22% among females), while levels of familiarity among parents are on par with the European total (30% vs. 32%).

While teens lead awareness (38%), familiarity with the PEGI name decreases with age, dipping to 25%-29% among gamers aged 30+, suggesting that alongside parents, there is some room to boost awareness across the board and particularly among older gamers.

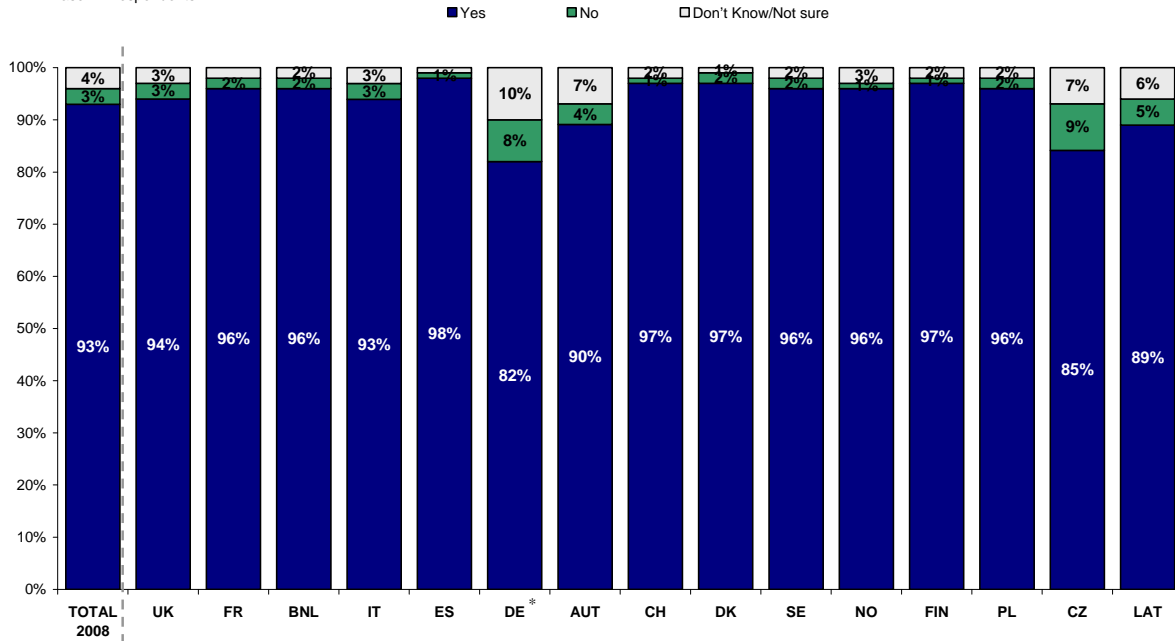


► Familiarity With The PEGI Age Rating Symbols



Total European Gamers– Breakdown by Country:

Are you aware or have you ever seen the following symbols?
Base: All respondents



When prompted with the PEGI symbols, recognition is near universal (93%), demonstrating that while respondents don't necessarily know PEGI by name, the visual marks of the PEGI age rating system appear very well known across Europe.

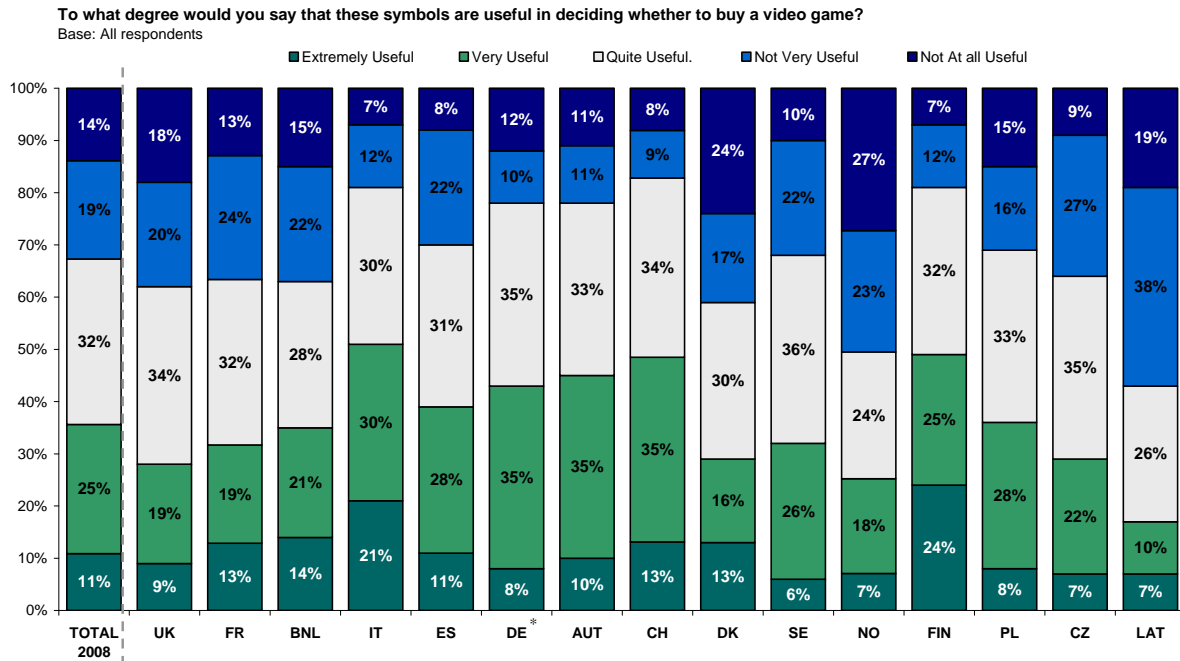
Although the PEGI symbols are not widely used in Germany, eight out of ten (82%) German gamers recognise the symbols.

*Germany does not currently operate under the PEGI system.



► Usefulness Of The Age Rating System

Total European Gamers– Breakdown by Country:



On a five point scale, one in three (32%) select the midpoint, maintaining that the PEGI symbols are 'quite' useful when deciding to purchase a game, consistent with the 2007 findings (31% in 2007). Furthermore, in excess of a third (36%) feel the symbols are of more value ('extremely' plus 'very' useful).

Another third (33%) are more negative ('not very' useful plus 'not at all' useful), suggesting that there is opportunity to educate consumers on the ways that age ratings can help to inform their video game purchases.

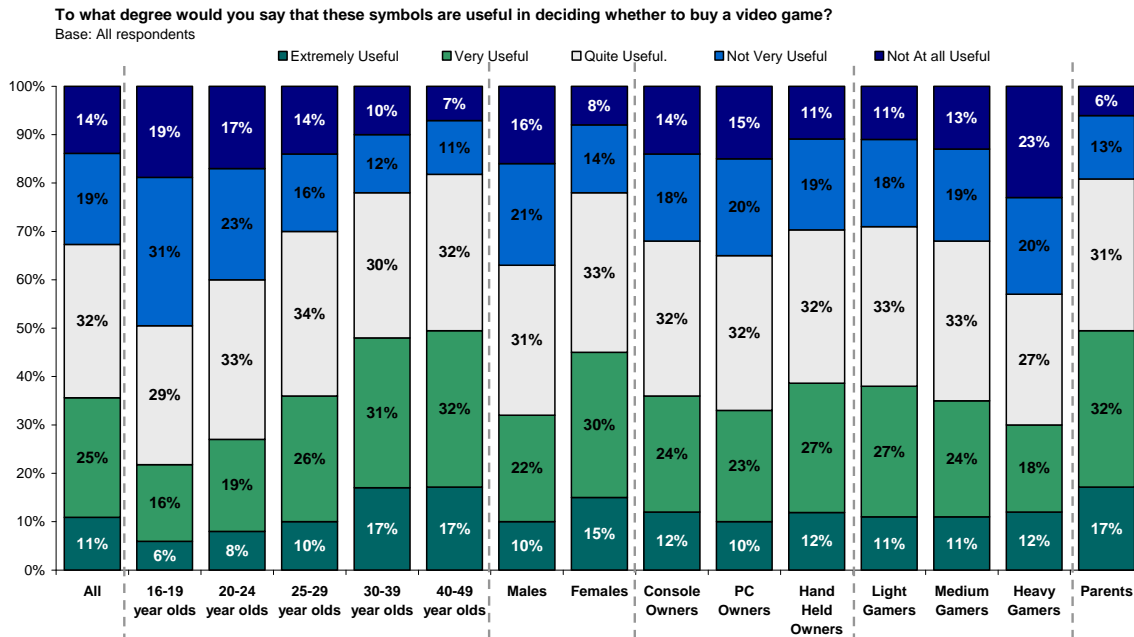
Denmark (41% 'not very' plus 'not at all' useful), Norway (50%) and Latvia (57%) are the least likely to describe the symbols as useful when making a purchase, while Italy (51%) and Finland (49%) lead in terms of finding the PEGI symbols 'extremely' or 'very' useful.

Again, despite the fact that the use of the PEGI symbols is not widespread across Germany, these German gamers do appear to find them a useful tool (42% 'useful').

*Germany does not currently operate under the PEGI system.



Total European Gamers– Breakdown by Demographics:



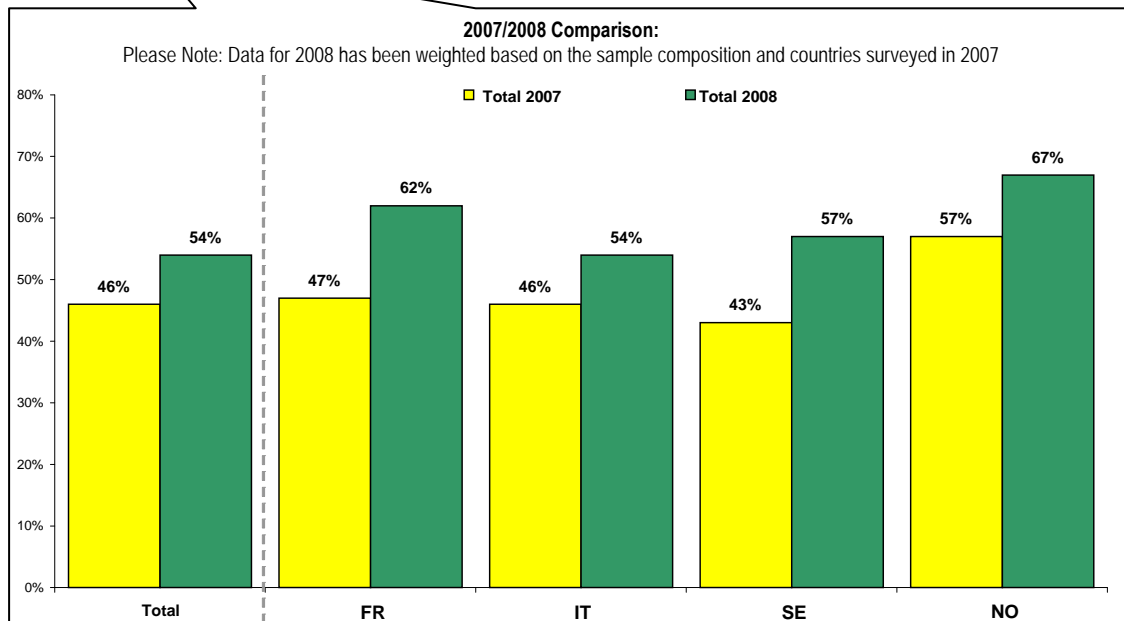
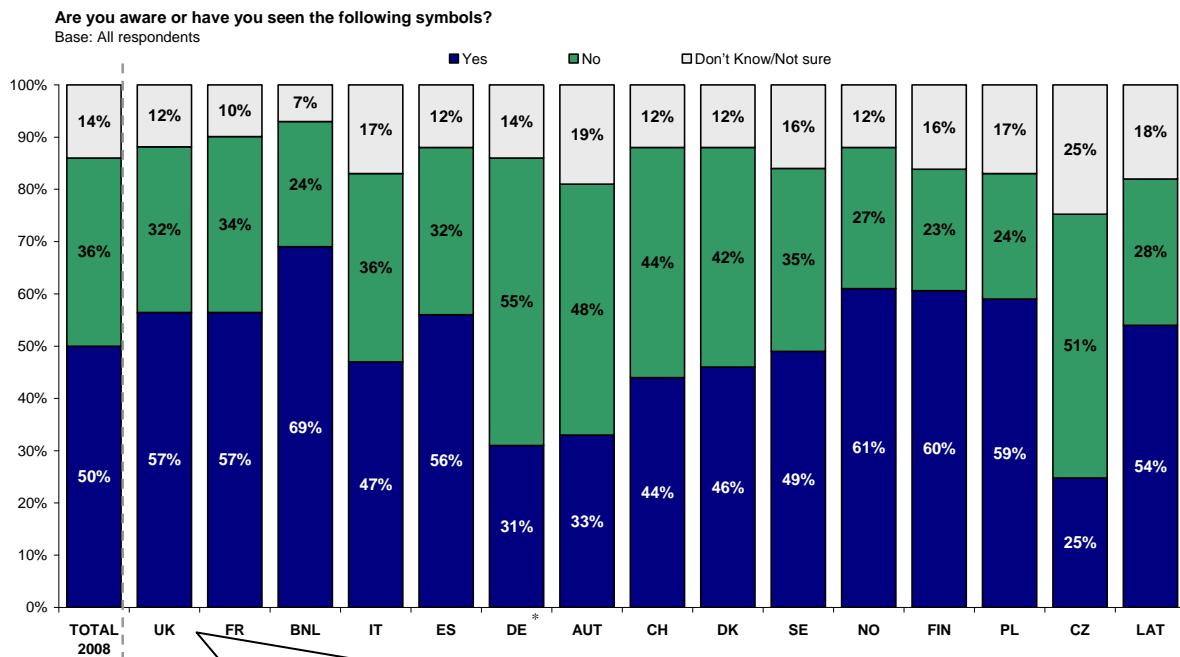
Demographically, females tend to feel that the age ratings are more helpful (45% 'extremely' plus 'very' useful' vs. 32% among males). Additionally, parents in particular find the ratings system to be a helpful tool (49% 'extremely' plus 'very' useful) in their purchase decision making. Further analysis of parents reveals that the perceived usefulness of the PEGI symbols does not vary by child age (50%-52%).



► Awareness Of The PEGI Descriptors For Violence, Bad Language and Fear



Total European Gamers– Breakdown by Country:



As seen in 2007, recognition of the PEGI descriptors for violence, bad language and fear falls well below the near universal awareness levels for the age rating symbols (50% are familiar with the PEGI descriptors vs. 93% who recognise the age symbols when prompted).

Awareness is greatest in Benelux (69%), followed by Norway (61%), Finland (60%) and Poland (59%). In comparison, Germany (31%), where the descriptors are not currently used as standard, Austria (33%) and the Czech Republic (25%) trail the other countries.

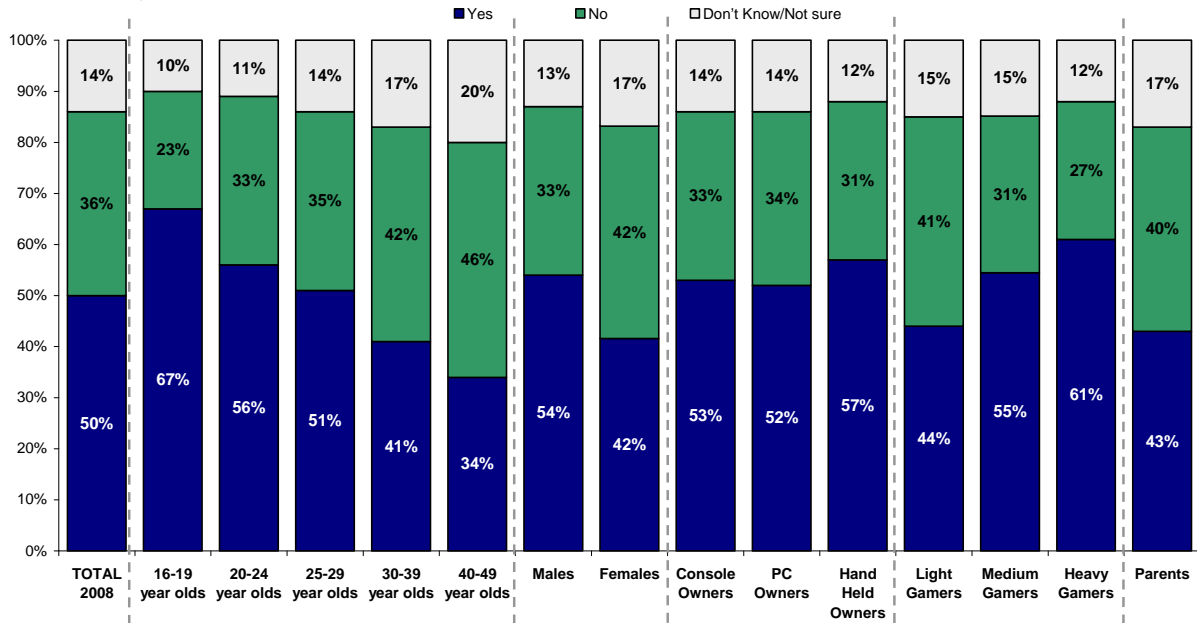
Consistent with the increased levels of familiarity with the PEGI name in the markets where PEGI campaigns were conducted in 2007/08 (shown in inset graph above), there is also an upward trend in terms of familiarity with the descriptors, with France showing the greatest lift (62% vs. 47% in 2007).

*Germany does not currently operate under the PEGI system.



Total European Gamers– Breakdown by Demographics:

Are you aware or have you seen the following symbols?
Base: All respondents



As seen with the PEGI name, knowledge of the PEGI descriptors decreases with age, peaking among teens 16-19 (67%) and tapering off with age (40-49 showing the least familiarity at 34%).

Familiarity among parents falls below that of European gamers overall (43% vs. 50%), and this group may be a key target in terms of improving awareness and understanding of the descriptors moving forward.

The descriptors' placement on the reverse of game packaging may contribute to the lower familiarity levels in comparison to the age symbols (which are usually presented on the front cover); however, the lower levels of familiarity seen among those 30 years and older (including parents) suggest a knowledge gap among this potentially critical audience.

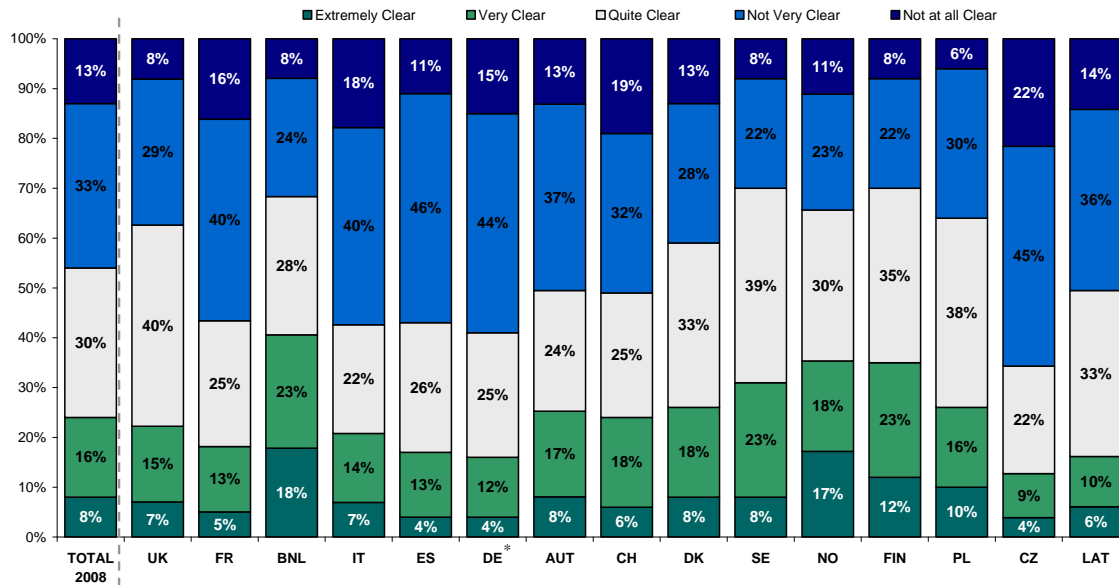


► Meaning Of The PEGI Descriptors For Violence, Bad Language And Fear

Total European Gamers— Breakdown by Country:

Thinking about whether it is clear what these symbols mean, on a scale of 1 to 5 where 1 is extremely clear, and 5 is not at all clear, how clear is the meaning of these symbols?

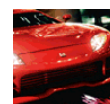
Base: All respondents



Overall, respondents do not appear to find the meaning of the descriptors for violence, bad language and fear particularly clear. Nearly half (46%) rate them 'not very clear' or 'not at all clear' on a five point scale, suggesting there is some degree of ambiguity for gamers.

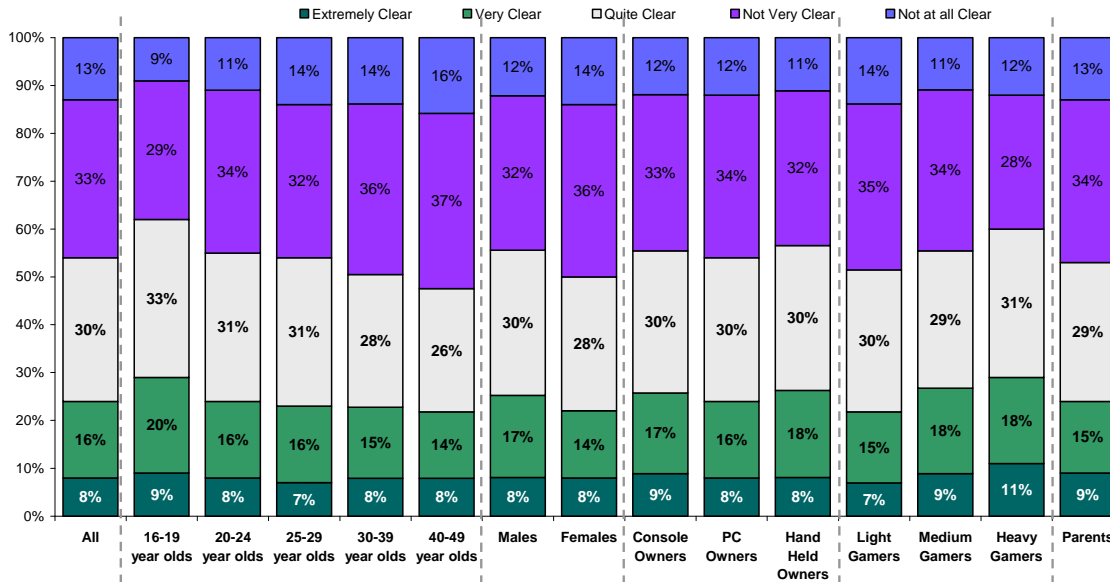
About a quarter feel that the symbols are clear (24% 'extremely clear' plus 'very clear'), rising to 41% in Benelux, 35% in Norway and 35% Finland.

*Germany does not currently operate under the PEGI system.



Total European Gamers– Breakdown by Demographics:

Thinking about whether it is clear what these symbols mean, on a scale of 1 to 5 where 1 is extremely clear, and 5 is not at all clear, how clear is the meaning of these symbols?
 Base: All respondents

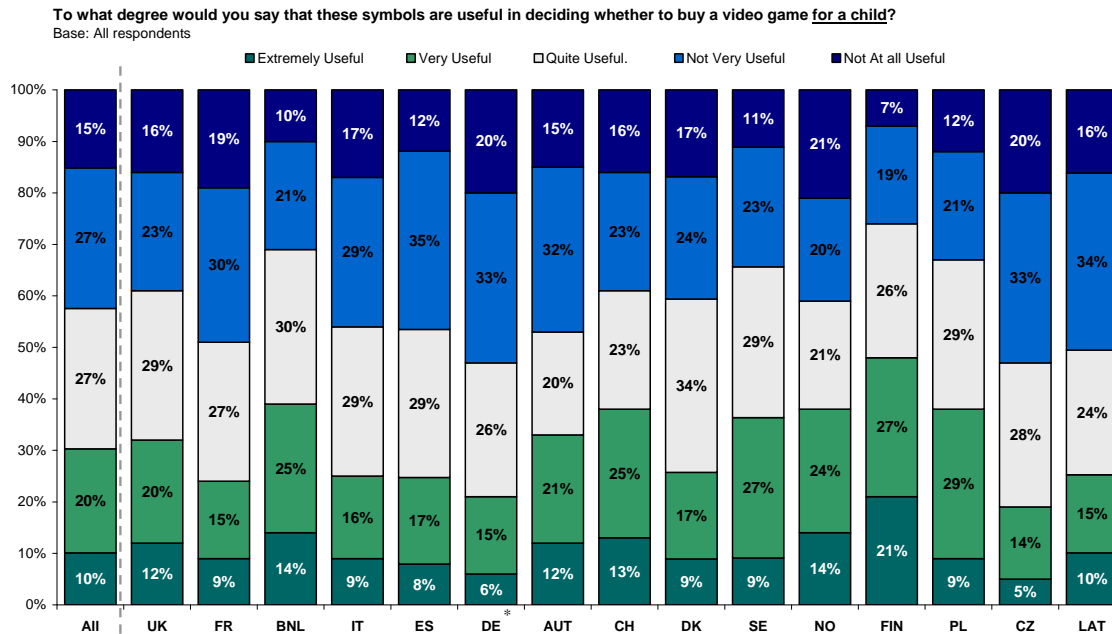


There is little variation by age or gender in terms of the perceived clarity of the PEGI descriptors for violence, bad language and fear. Teens are marginally more likely to find their meaning clear (29%), while just a quarter (24%) of parents clearly understand their meaning, suggesting that efforts to improve understanding among parents may be beneficial.



► Usefulness Of The Symbols When Purchasing A Video Game For A Child

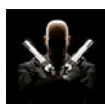
Total European Gamers– Breakdown by Country:



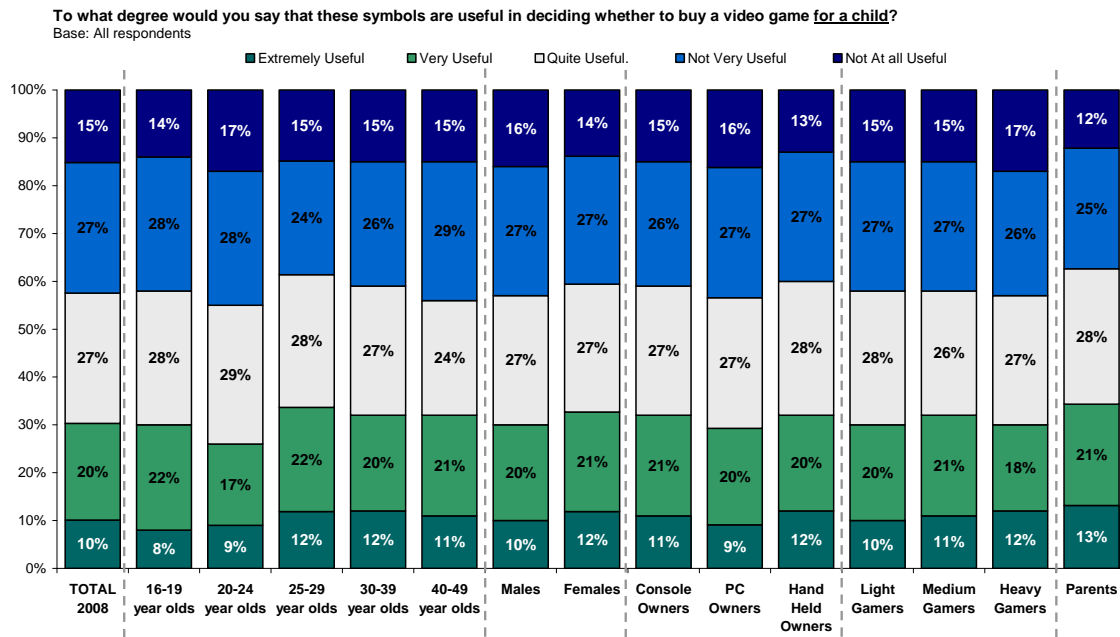
In line with the relatively low awareness and perceived ambiguity of the PEGI descriptors among these European gamers, only three in ten (30%) regard them as useful ('extremely' plus 'very' useful) when shopping for video games for children. Conversely, four in ten do not consider the symbols to be a useful tool in their decision-making process (42% 'not very' plus 'not at all' useful).

There are variations in perceived usefulness by territory; gamers in Finland (48%) are the most likely to consider these descriptors helpful when buying games on behalf of a child, while gamers in the Czech Republic and Germany (which does not currently utilise the system) are the least likely to find them helpful (19-21%).

*Germany does not currently operate under the PEGI system.



Total European Gamers– Breakdown by Demographics:



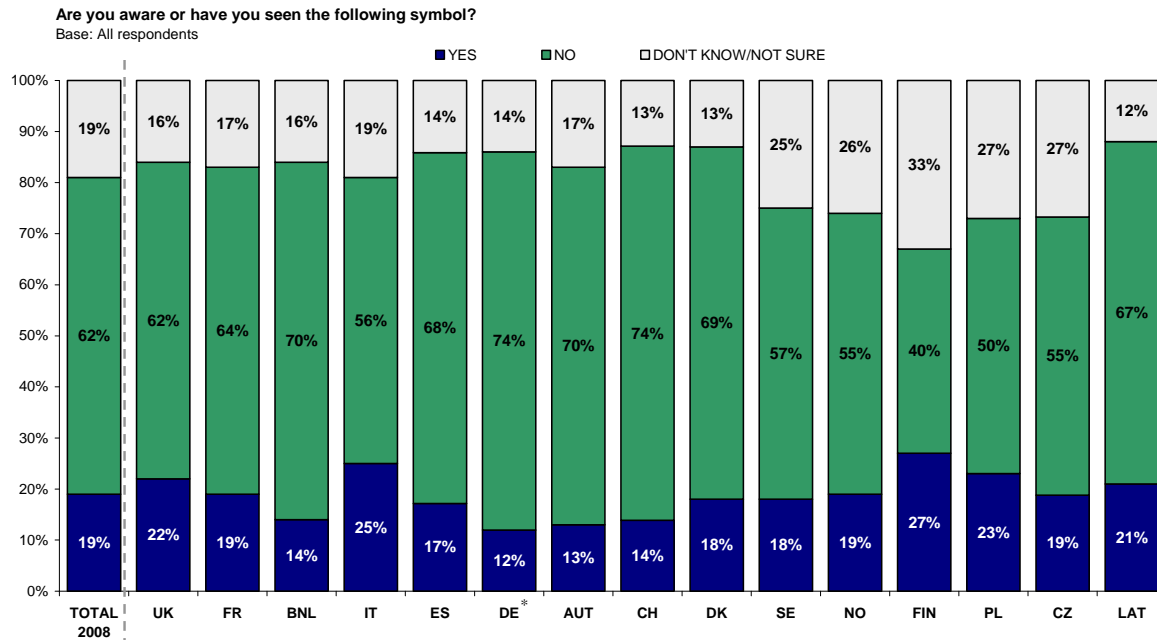
There is little variation in the perceived usefulness among the subgroups, with parents finding the descriptors just a touch more useful than overall (34% vs. 30% 'extremely' plus 'very' useful).



► Awareness Of The PEGI Online Descriptor



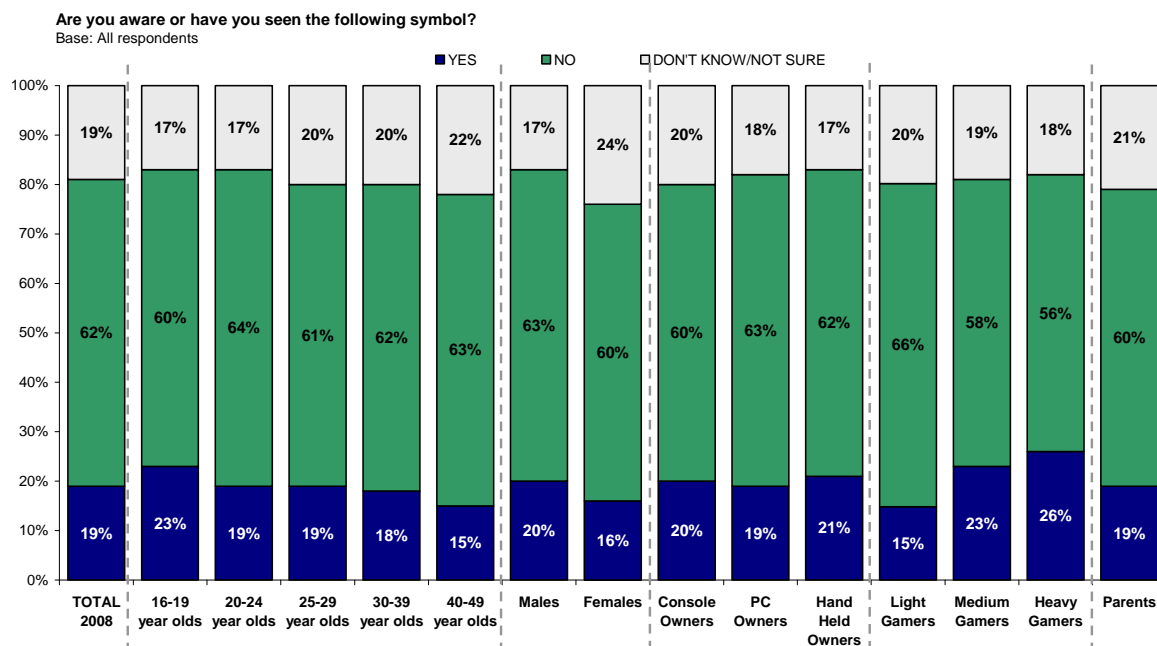
Total European Gamers– Breakdown by Country:



One in five (19%) European gamers are familiar with the PEGI Online symbol. Just launched in 2007, the relatively low levels of awareness for this latest addition to the PEGI system may be a result of both its infancy and a broader lack of familiarity with the PEGI name as a whole. Gamers in Finland (27%) and Italy (25%) register slightly higher levels of awareness, while gamers in Germany (12%; PEGI is not widely used in this market) and Austria (13%) are the least familiar.

*Germany does not currently operate under the PEGI system.

Total European Gamers– Breakdown by Demographics:



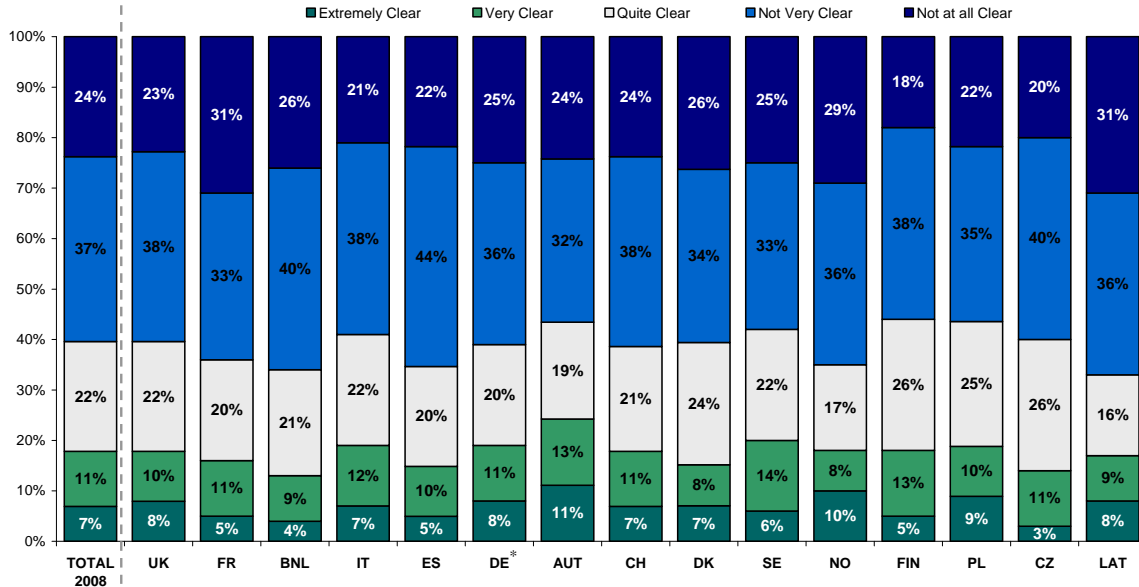
Awareness of the PEGI Online mark peaks among teens (23%) and heavy gamers (26%), consistent with these groups' higher levels of familiarity with both the PEGI name and PEGI descriptors for violence, bad language and fear.



► Meaning Of The PEGI Online Descriptor

Total European Gamers– Breakdown by Country:

Thinking about whether it is clear what this symbol means, on a scale of 1 to 5 where 1 is extremely clear, and 5 is not at all clear, how clear is the meaning of this symbol?
Base: All respondents

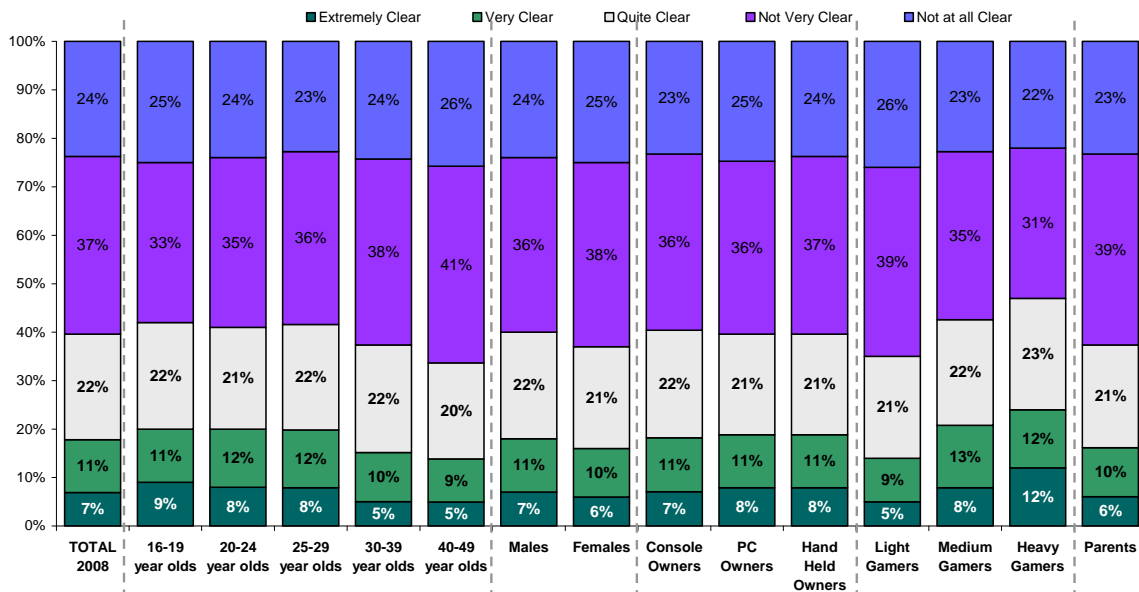


In line with the relatively low levels of awareness, there appears to be a relatively high degree of ambiguity surrounding the PEGI Online descriptor among these European gamers; while 18% consider its meaning to be clear ('extremely' or 'very' clear), 61% feel it is unclear ('not very' plus 'not at all' clear).

*Germany does not currently operate under the PEGI system.

Total European Gamers– Breakdown by Demographics:

Thinking about whether it is clear what this symbol means, on a scale of 1 to 5 where 1 is extremely clear, and 5 is not at all clear, how clear is the meaning of this symbol?
Base: All respondents

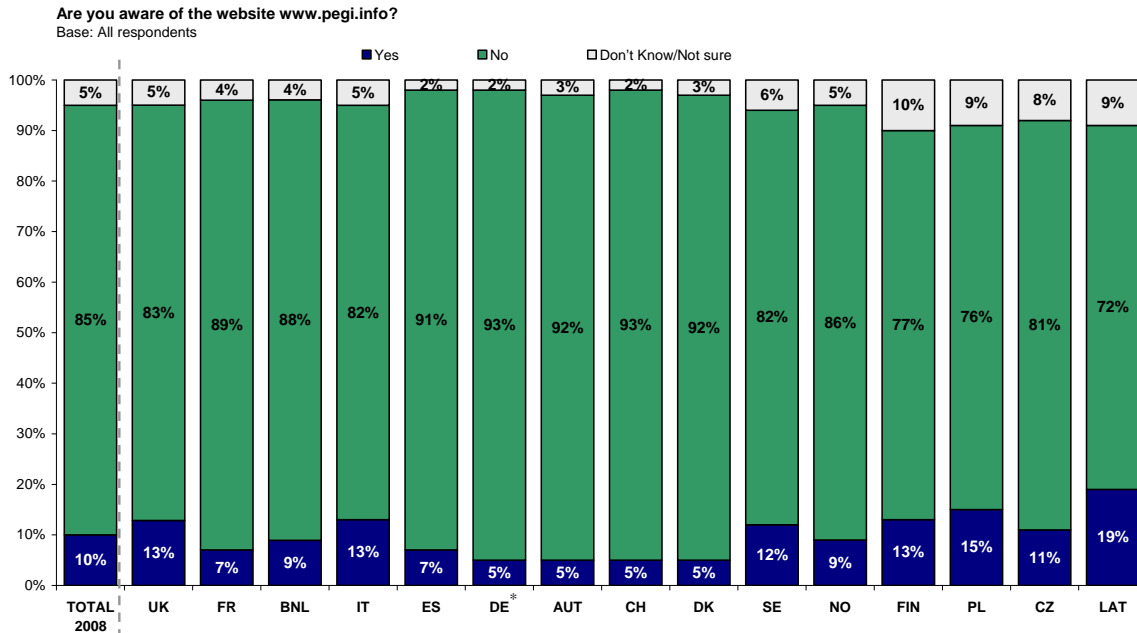


The perceived clarity of the PEGI Online descriptor is relatively uniform among 16-29 year olds (20% 'extremely' plus 'very' clear), but drops off further among 30-49 year olds (14-15% clear).



► Awareness Of The PEGI Website

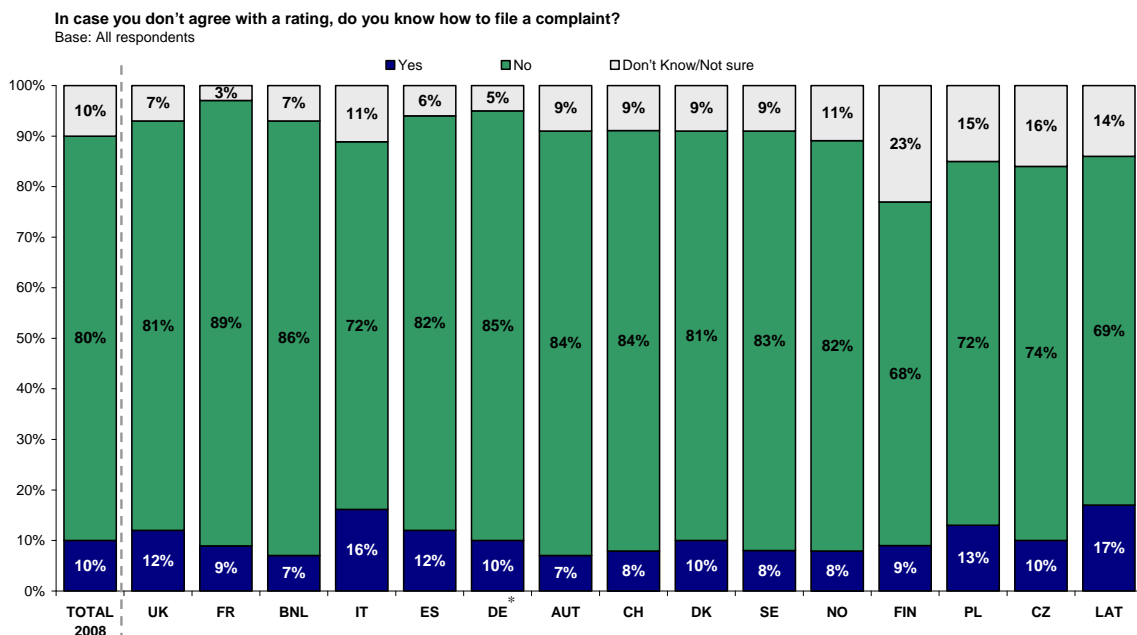
Total European Gamers– Breakdown by Country:



Overall, just one in ten (10%) European gamers are familiar with the PEGI website. Awareness peaks in the Eastern European and Baltic states of Poland (15%) and Latvia (19%), but dips to one in twenty (5%) in Germany (where PEGI systems are not adopted as standard), Austria, Switzerland and Denmark.

► Filing a Complaint

All European Gamers– Breakdown by Country:



Should the need arise, one in ten (10%) European gamers believe they know how to file a complaint against a video game age rating, reaching slightly higher levels in Latvia (17%) and Italy (16%).

*Germany does not currently operate under the PEGI system.

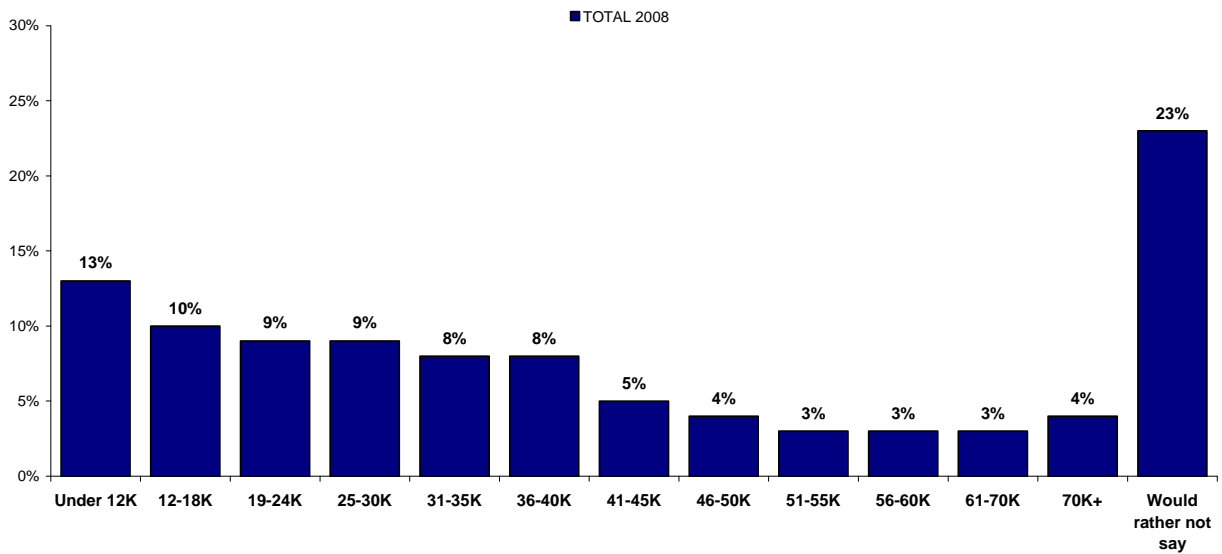


SECTION 8: APPENDIX – DEMOGRAPHIC INFORMATION

► **Profiling Gamers: Income**

Total European Gamers:

In which of the following brackets does your annual household income (before taxes) fall? IN EUROS
 Base: All respondents



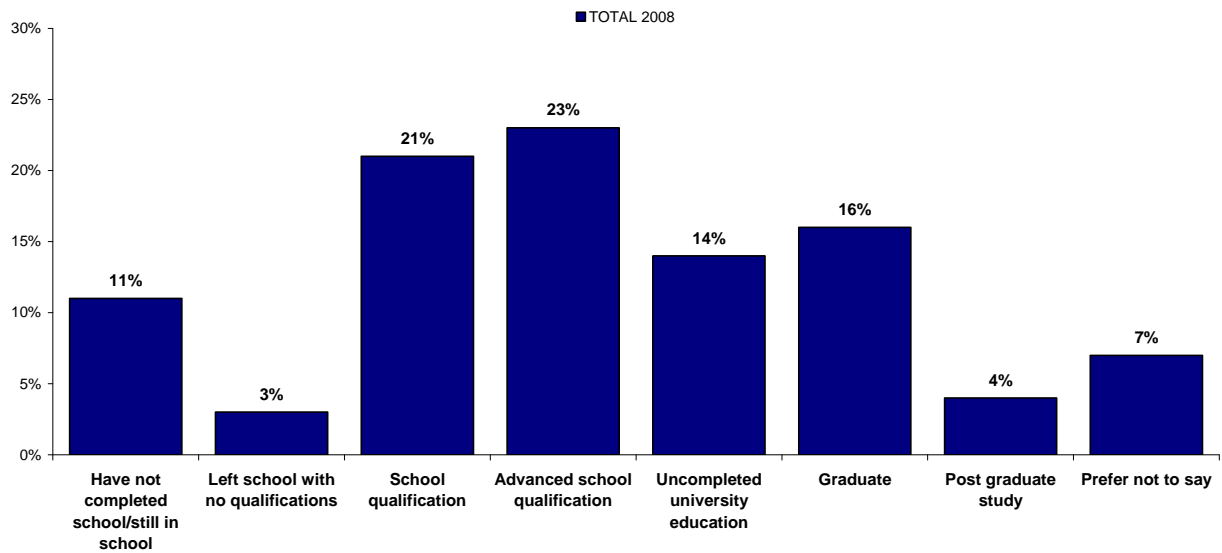
These European gamers represent a broad cross section of income levels, from relatively low household incomes (under €12k per annum; 13%) to over €70k per annum (4%).



► Profiling Gamers: Education

Total European Gamers:

What was the last level of education you completed?
Base: All respondents

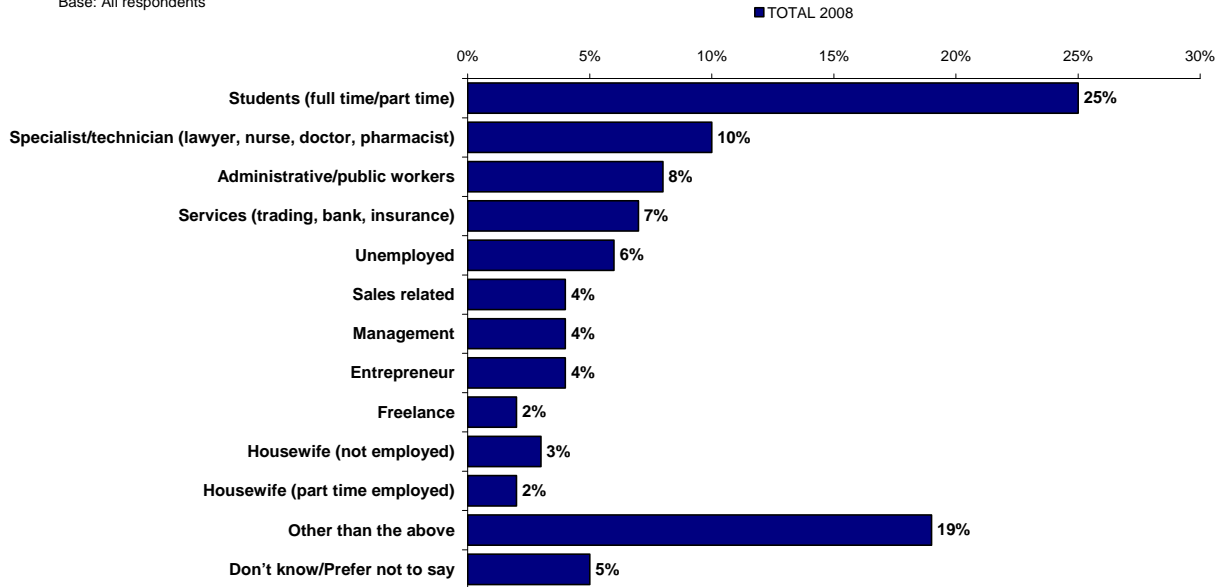


Similarly, when asked about their education, gamers across Europe have achieved a range of qualifications, with younger respondents often still completing their school education, while older respondents have a greater range of qualifications behind them (from achieving a school leavers qualification to going on to postgraduate study at university).



► Profiling Gamers: Occupation

What is your current occupation?
Base: All respondents



Furthermore, European gamers represent a broad spectrum of professions – ranging from students (25%), to medical / legal professionals (10%) to entrepreneurs (2%).

