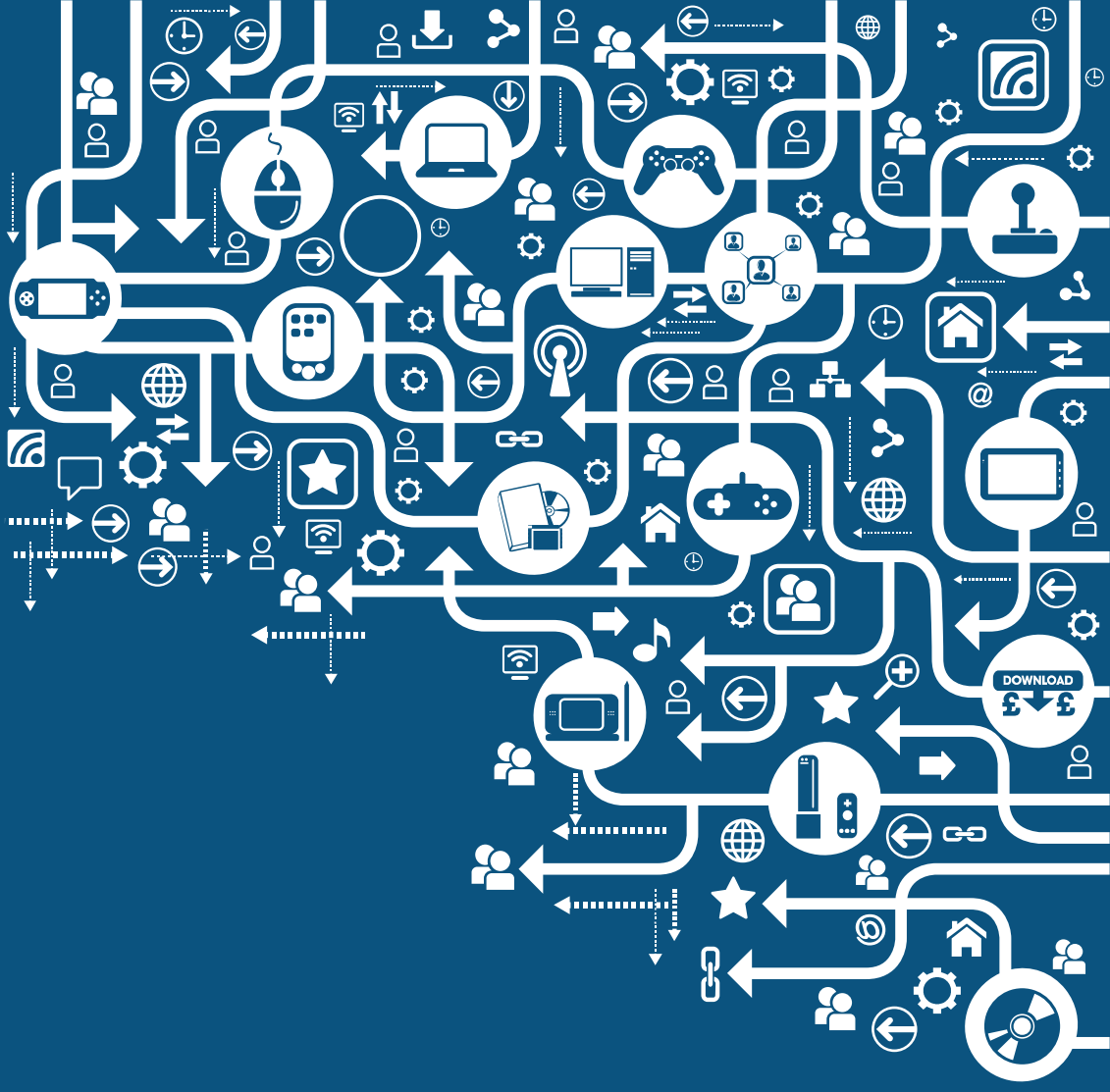

VIDEOGAMES IN EUROPE:
CONSUMER STUDY

Italy

November 2012

Ipsos MediaCT
The Media, Content and Technology Research Specialists

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RESEARCH OVERVIEW

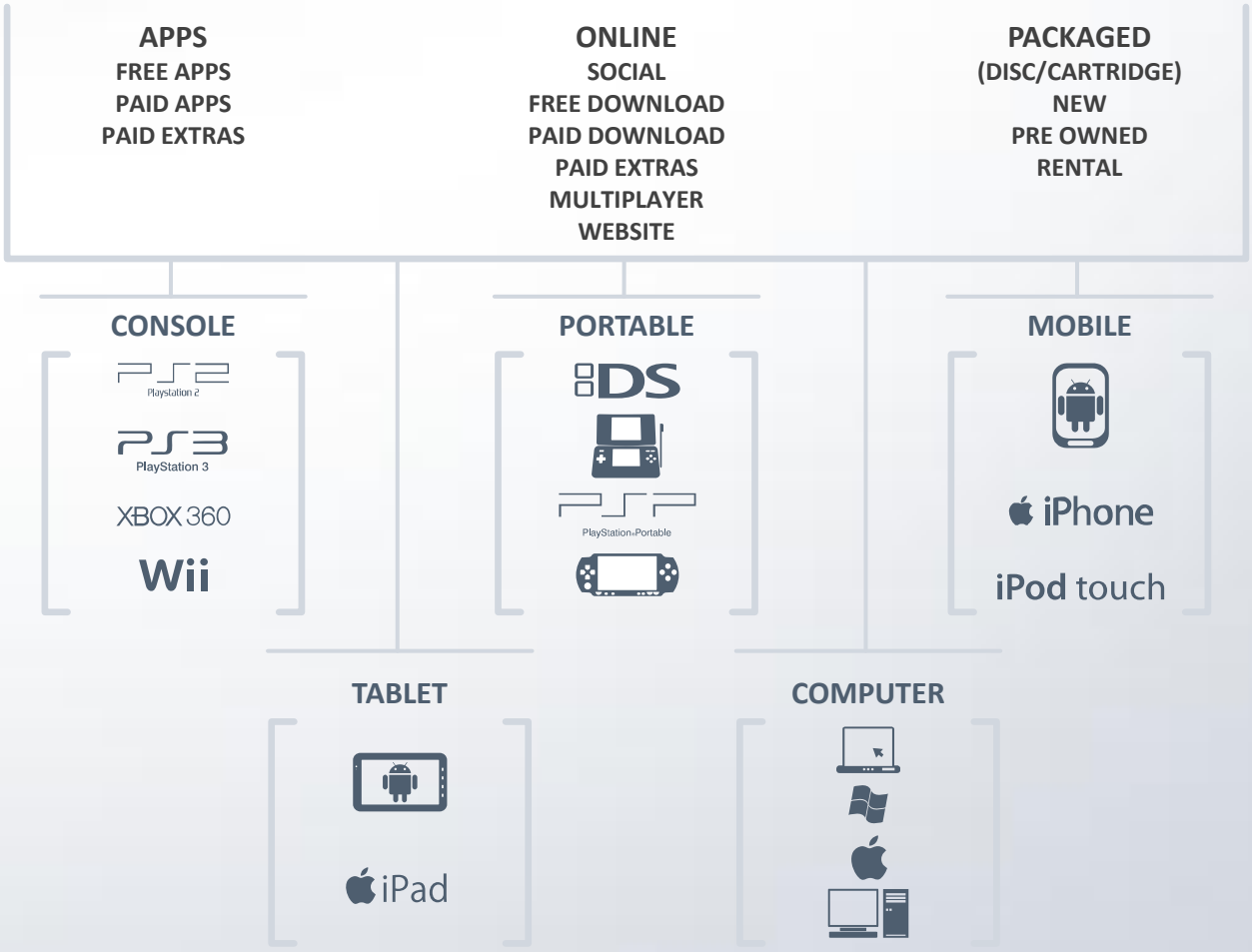
The European Consumer Study is a multi-country survey run by Ipsos MediaCT, in partnership with the Interactive Software Federation of Europe (ISFE). It is designed to provide a better understanding of the societal context in which games are being played today in 16 European countries. The study used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

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

In Italy, 1,319 respondents completed an online survey over a two week period in October 2012.

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

GAMING FORMATS AND DEVICES COVERED

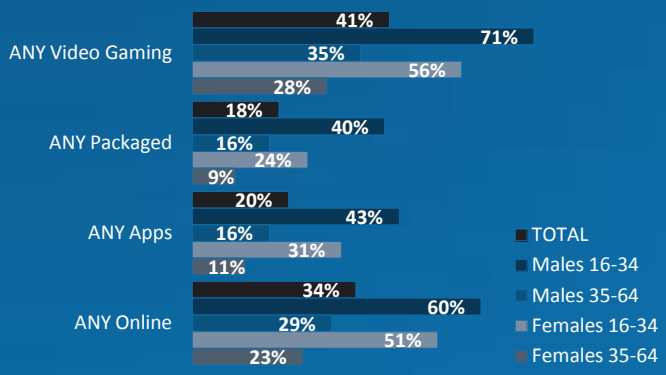


OVERVIEW OF GAMING

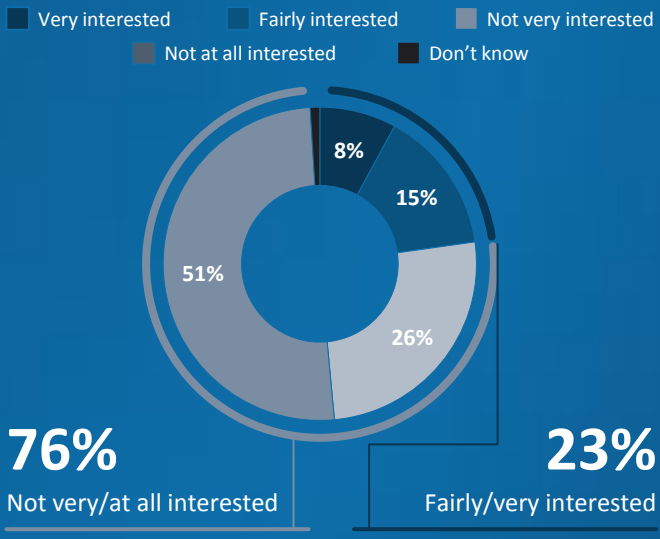
41%

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

TYPES OF GAMES PLAYED: BY AGE AND GENDER



PERCEPTIONS OF GAMING



76%
Not very/at all interested

23%
Fairly/very interested

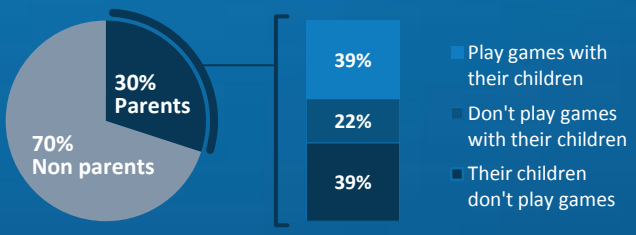
TOP 3 WORDS ASSOCIATED WITH GAMING

		ALL ONLINE	GAMERS
1	Fun	31%	50%
2	Entertaining	22%	33%
3	Good at providing escapism	21%	33%

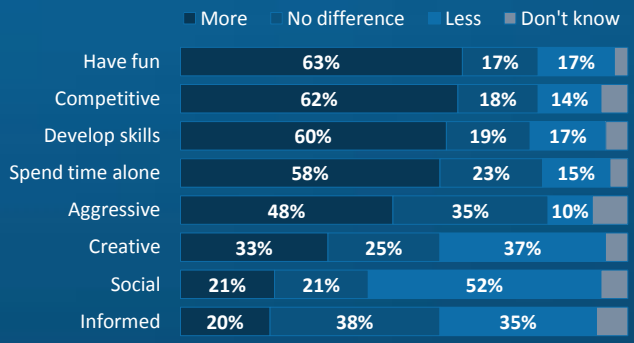
GAMING AND THE FAMILY

61%

of parents have children who play games



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



PEGI RATING SYSTEM

46%
aware of PEGI age rating symbols

28%
aware of PEGI content symbols

74%
agree PEGI ratings should apply to app games

74%
agree PEGI ratings should apply to games on social network sites

% AGREE WITH STATEMENT THE MOST

35%	The age rating system for videogames should be stricter overall than that used for movies
44%	The age rating system for videogames and movies should be the same
5%	The age rating system for movies should be stricter overall than that used for videogames
17%	Don't know

KEY HEADLINES

1 Incidence of gaming amongst the online population is at 41%

The largest gamer group is males aged 35-44, although the profile of gamers is fairly evenly distributed across age and gender.

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

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

2 23% of the online population are very or fairly interested in gaming

Gaming is perceived as a 'fun' and 'entertaining' activity by the overall online population.

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

There is a strong interest in technology amongst gamers (75% vs. 48% non-gamers).

Gamers are also more likely to be interested in going out to bars and clubs (48% vs. 24% non-gamers) and taking part in sport (59% vs. 42% non-gamers).

3 39% of parents play games with their children

Health/fitness and educational benefits are acknowledged by a 12-14% of parents playing games with their children.

Many parents see gaming as having a positive impact on their child(ren). 60% believe gaming helps their child develop their skills more.

A third believe it encourages them to be more creative, while 6 in 10 say it encourages them to spend time alone.

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

1 in 4 parents of children aged 10-15 never buy that child's games. The same is true for 1 in 10 parents of children aged 6-9.

2 in 5 parents of children aged 10-15 describe themselves as 'not at all' or 'not very' knowledgeable about the games that child plays.

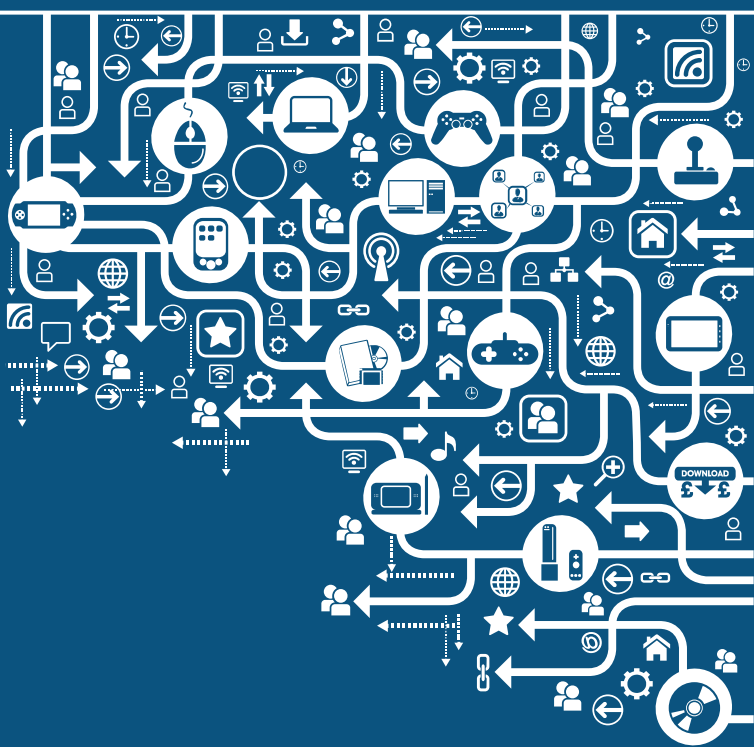
4 in 10 children aged 6-9 and half of children aged 10-15 are sometimes/often playing games with an age rating higher than their age.

5 46% of the online population recognise PEGI age rating symbols

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

35% believe that the age rating system for games should be stricter than movies.

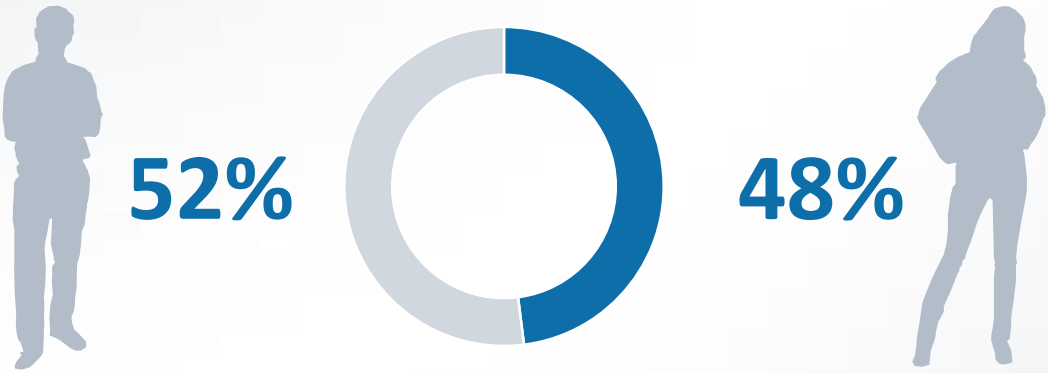
GAMING: WHO, WHAT AND HOW?



WHO PLAYS VIDEOGAMES? (ALL ONLINE RESPONDENTS)

41%

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

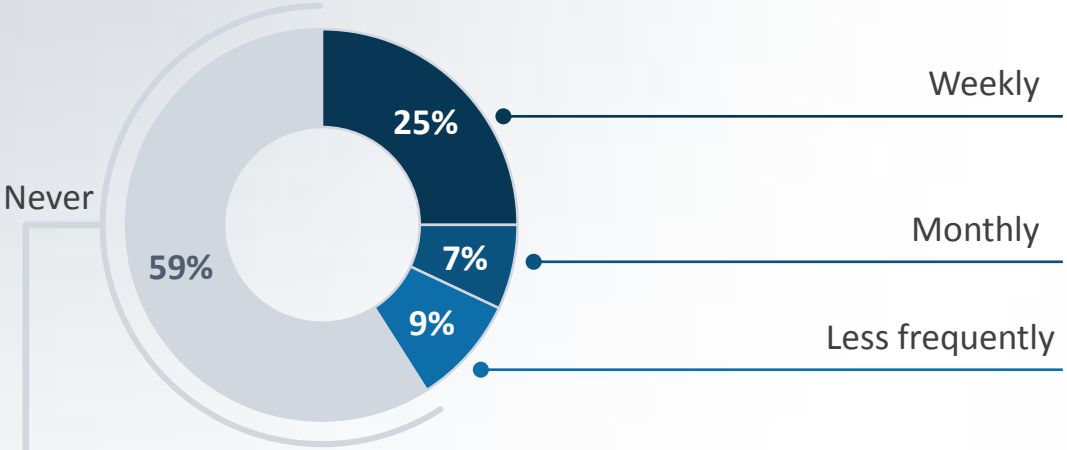


5%	16-19	5%
6%	20-24	5%
12%	25-34	11%
15%	35-44	13%
8%	45-54	9%
5%	55-64	4%

Incidence of gaming amongst the online population in Italy is at 41%.

The largest gamer group is MALES AGED 35-44, although the profile of gamers is fairly evenly distributed across age and gender.

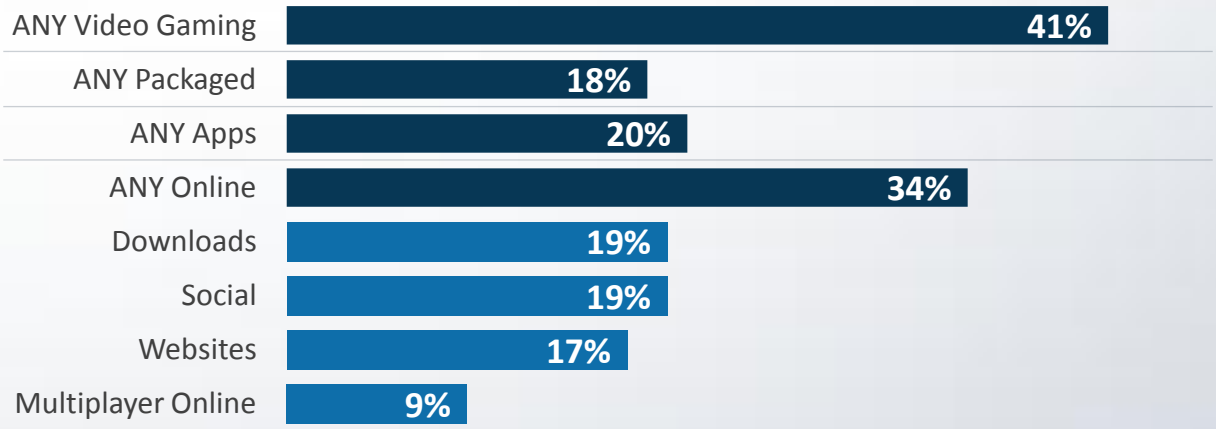
FREQUENCY OF GAMING (ALL ONLINE RESPONDENTS)



TOP 5 REASONS FOR NOT GAMING

1	Not interested in them	62%
2	More interested in other hobbies	34%
3	No time to play them	21%
4	Too old to play them	15%
5	Don't have a console at home	11%

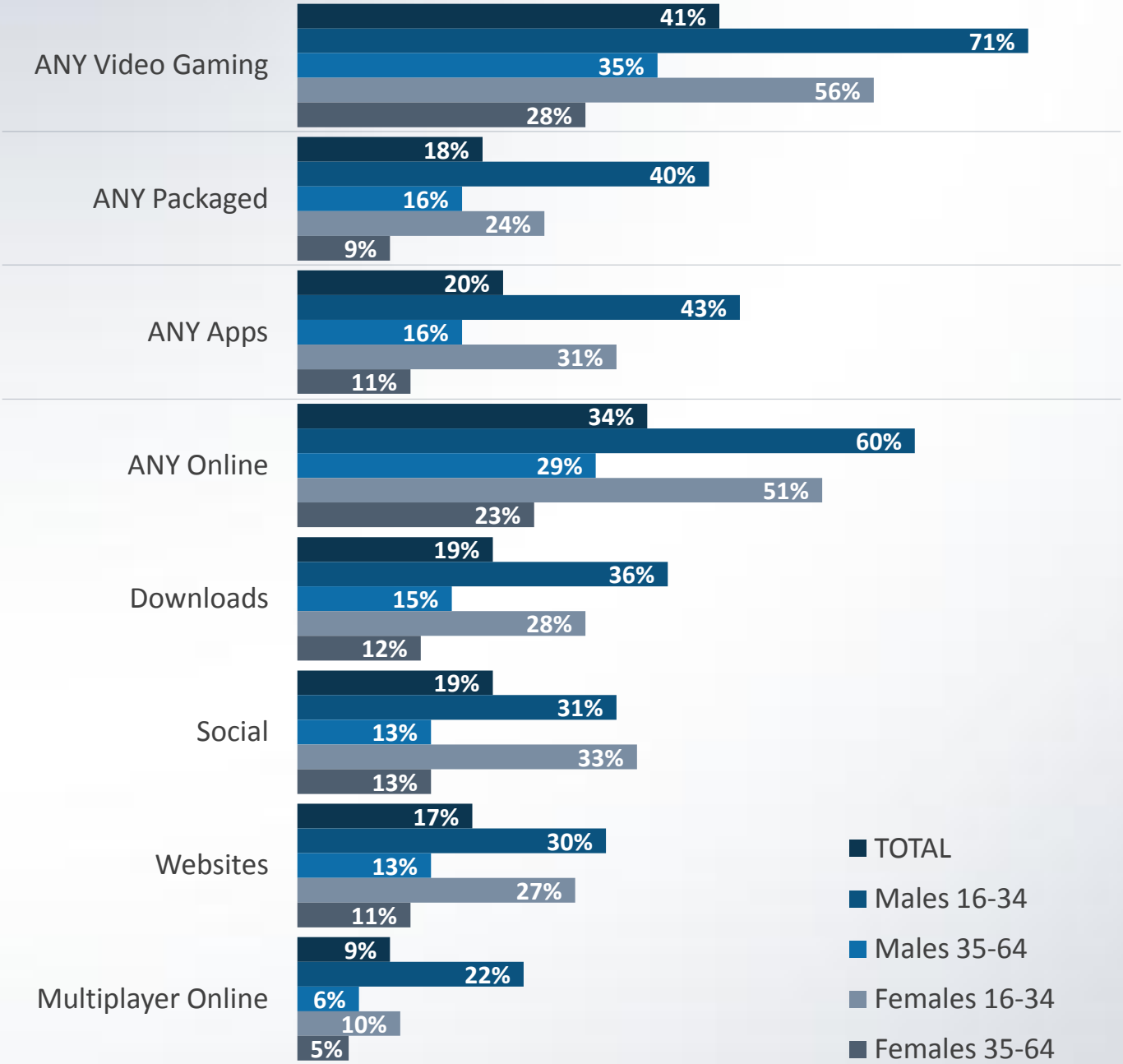
TYPES OF GAMES PLAYED (ALL ONLINE RESPONDENTS)



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

ONLINE is the most popular form of gaming amongst the online population in Italy.

TYPES OF GAMES PLAYED:
BY AGE AND GENDER



Across nearly all categories gamers are most commonly MALES AGED 16-34, with the dominance most pronounced in Packaged games (40% vs. 18% Total).

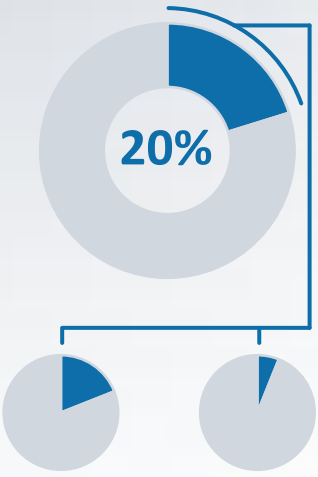
FEMALES AGED 16-34 are more active in all forms of gaming than males 35-64.

The incidence of SOCIAL gaming is slightly higher amongst females in the 16-34 age group (33% vs. 31% males).

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

% of the online population playing each type of game

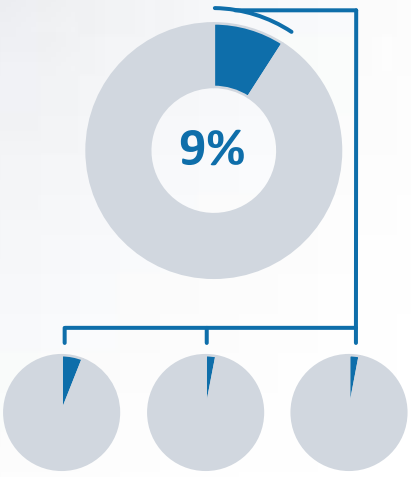
Apps



Free **19%**

Paid for **6%**

Multiplayer online

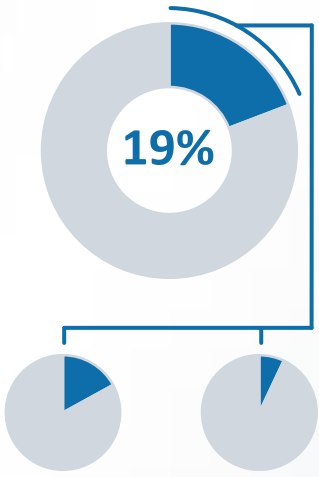


Free **6%**

Paid for **3%** **Paid for game*

Paid for **3%** **Paid to play online*

Downloads



Free **17%**

Paid for **7%**

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

28%

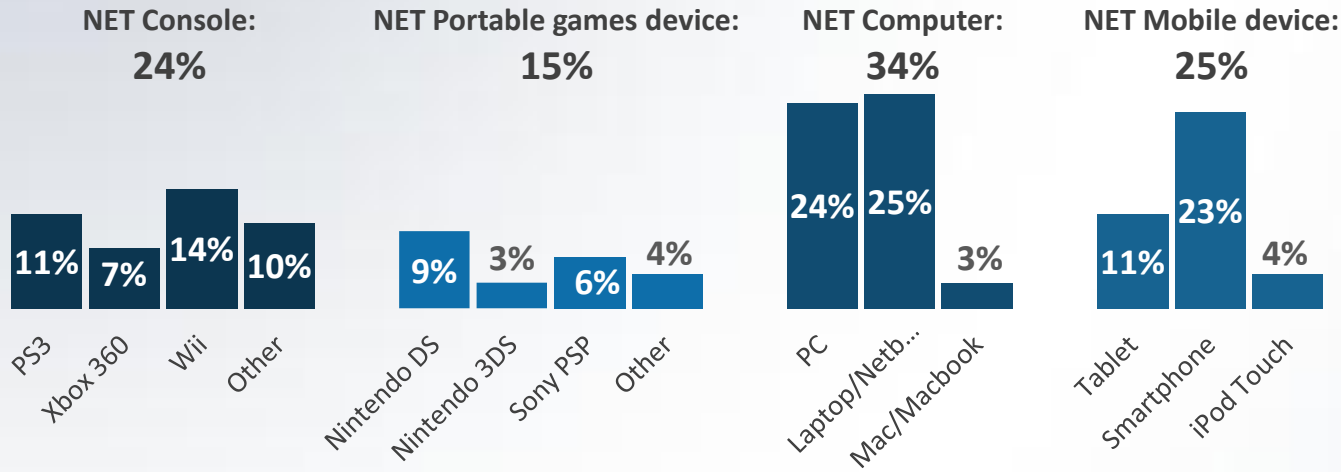
Have bought a game

- **17%** New games on disc or cartridge
- **9%** Secondhand games on disc or cartridge
- **6%** Games apps
- **4%** Online games (download/subscription/extras)

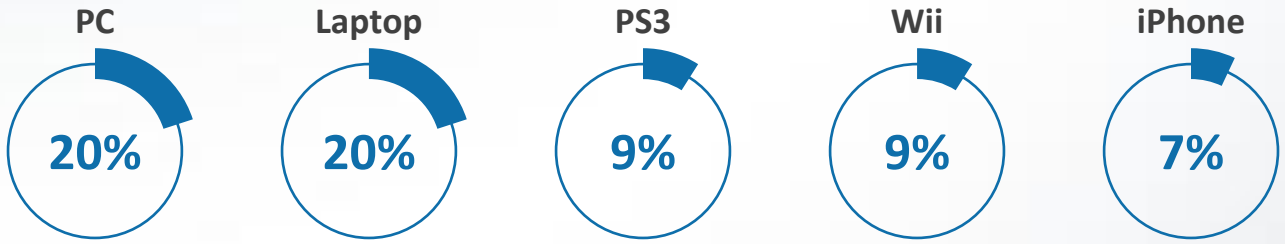
Around a quarter of those playing APP games have played a game that was paid for. For DOWNLOADS, the number is closer to 1 in 3.

28% of the online population have bought a game in the last 12 months.

DEVICES USED TO PLAY GAMES (ALL ONLINE RESPONDENTS)



MOST USED (ALL GAMERS)



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

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

23% have used a SMARTPHONE to play a game in the past 12 months, more than any of the individual gaming devices.

Computers are also the most used device amongst those gaming, although the Wii is relatively popular amongst parents who play games with their children.

82%

of gamers play games online

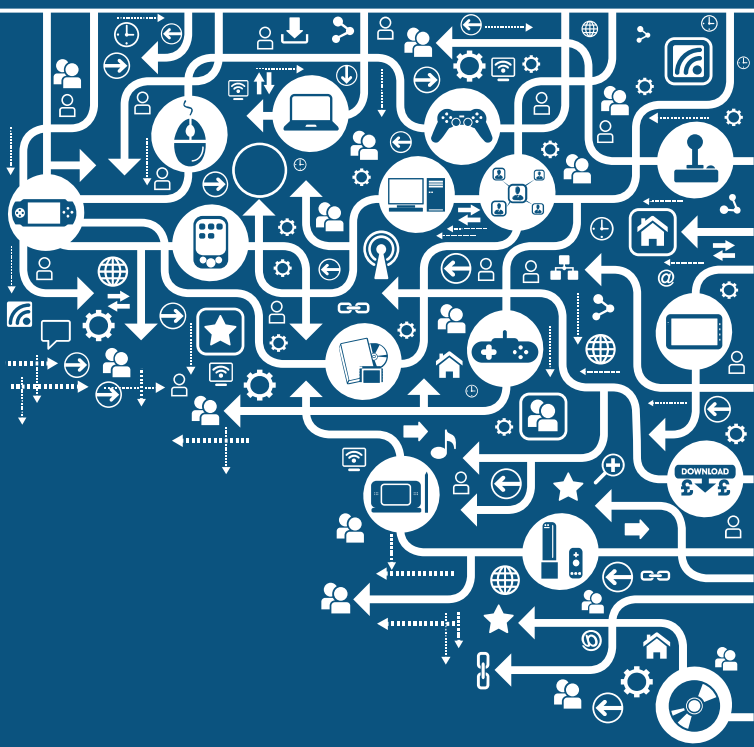
WHEN PLAYING CONNECTED TO THE INTERNET, WHO DO YOU PLAY WITH? (ALL GAMERS)

- **32%** Always play on my own
- **24%** Play on my own most of the time
- **18%** Sometimes on my own/sometimes with other online players
- **5%** Play with other online players most of the time
- **3%** Always play with other online players
- **17%** Never play games online

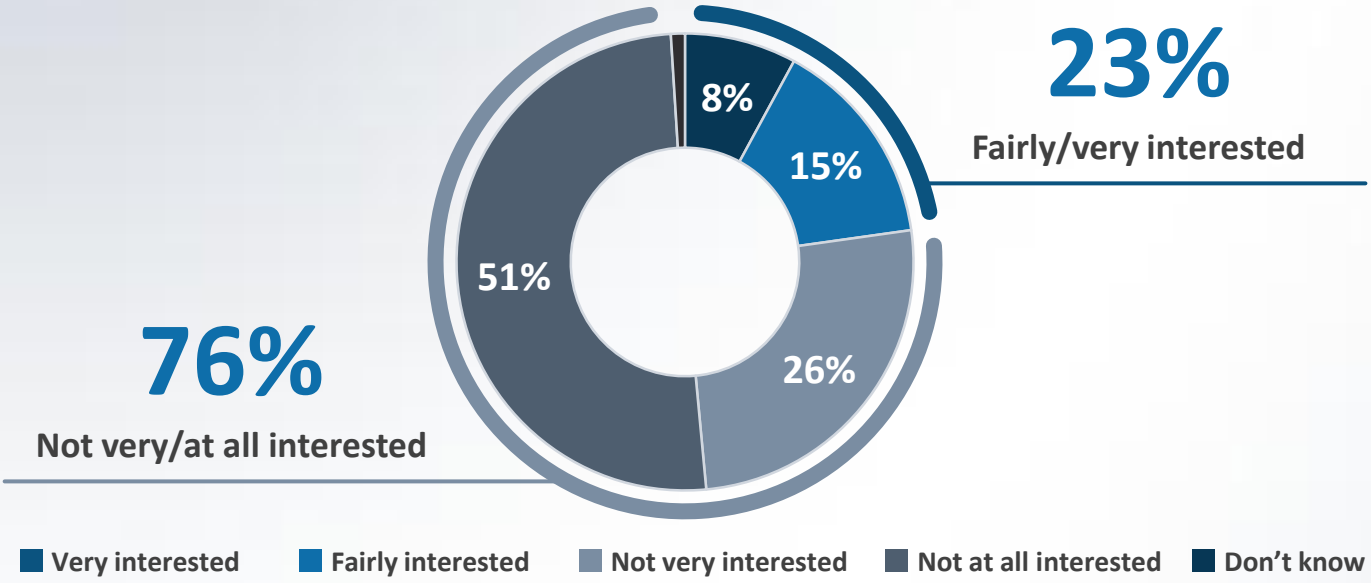
WHEN PLAYING WITH OTHERS ONLINE, WHO ARE THE OTHERS?

- **42%** Friends (met in real life)
- **37%** Online strangers
- **31%** Friends (not met in real life)
- **30%** Family/relatives

PERCEPTIONS OF GAMING



INTEREST IN GAMING (ALL ONLINE RESPONDENTS)



WORDS ASSOCIATED WITH GAMING: TOP 5 SELECTED

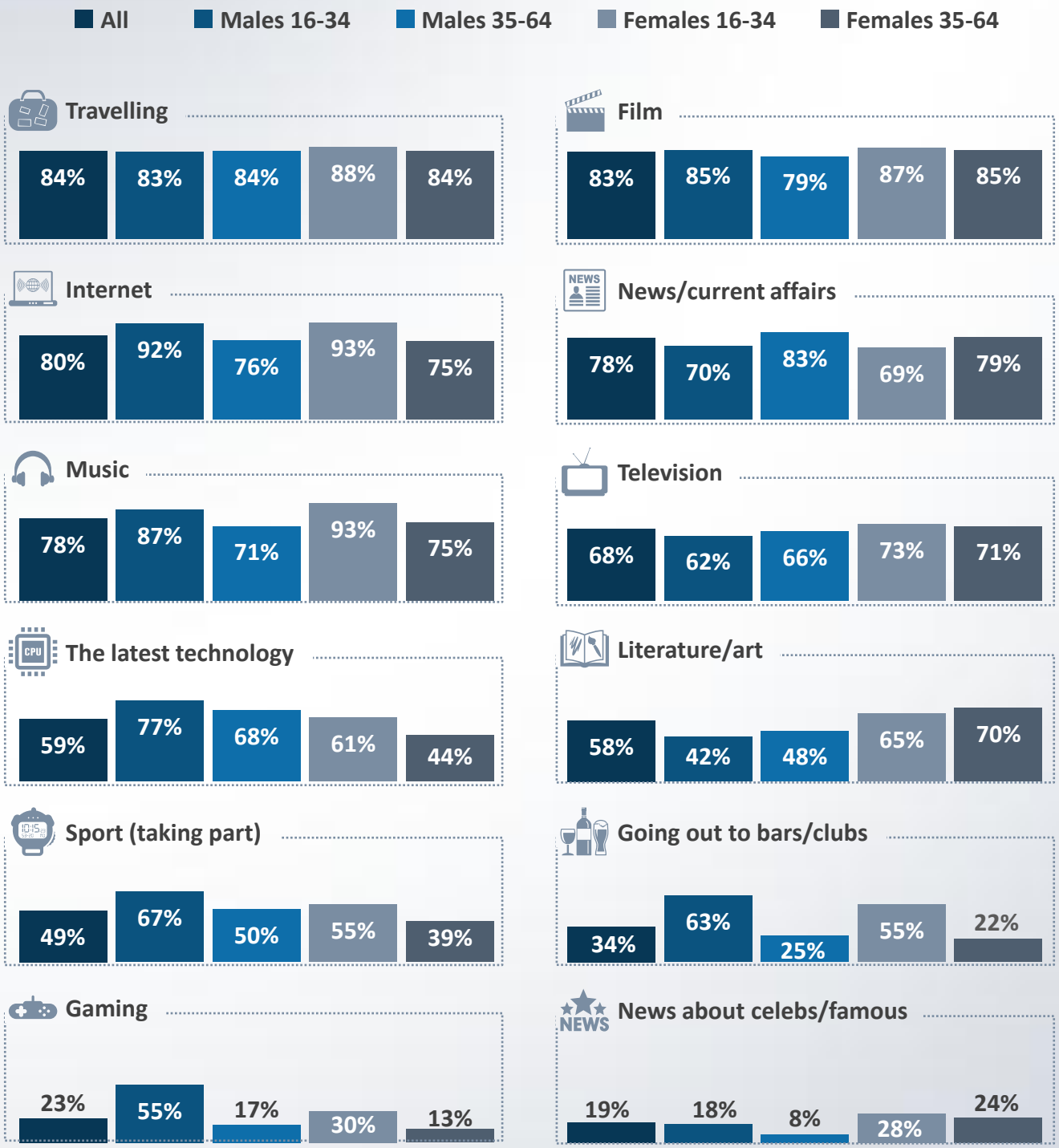
		ALL ONLINE	GAMERS
1	Fun	31%	50%
2	Entertaining	22%	33%
3	Good at providing escapism	21%	33%
4	Competitive	18%	28%
5	Immersive	13%	24%

23% of the online population say they are very or fairly interested in gaming.

Gaming is perceived as a FUN activity by the majority of gamers.

A third of gamers also consider gaming to be ENTERTAINING and GOOD AT PROVIDING ESCAPISM.

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



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

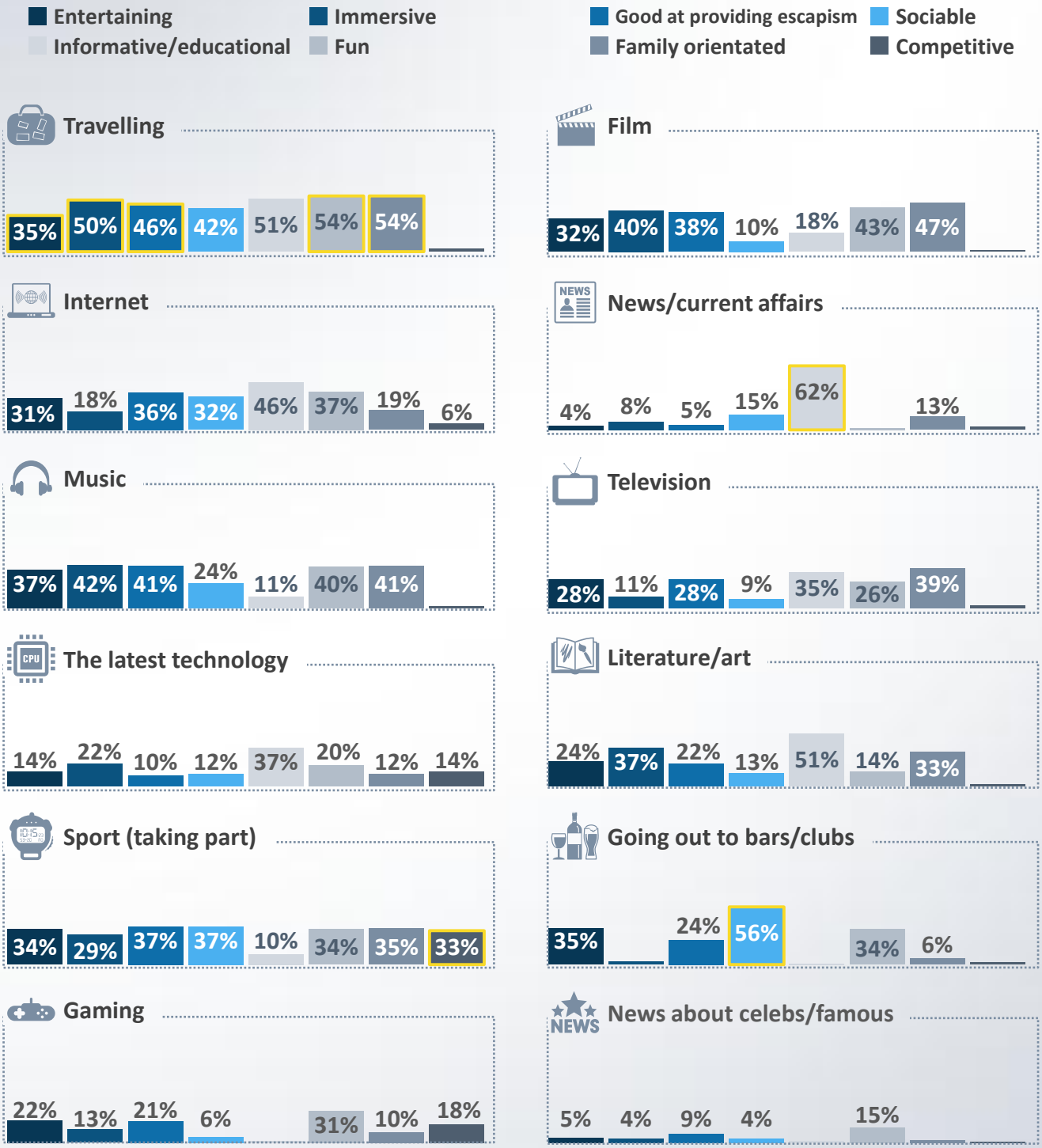
A higher percentage of gamers than non-gamers are interested in nearly all of the activities.

There is a strong interest in TECHNOLOGY amongst gamers (75% vs. 48% non-gamers).

Gamers are also more likely to be interested in GOING OUT to bars and clubs (48% vs. 24% non-gamers) and taking part in SPORT (59% vs. 42% non-gamers).

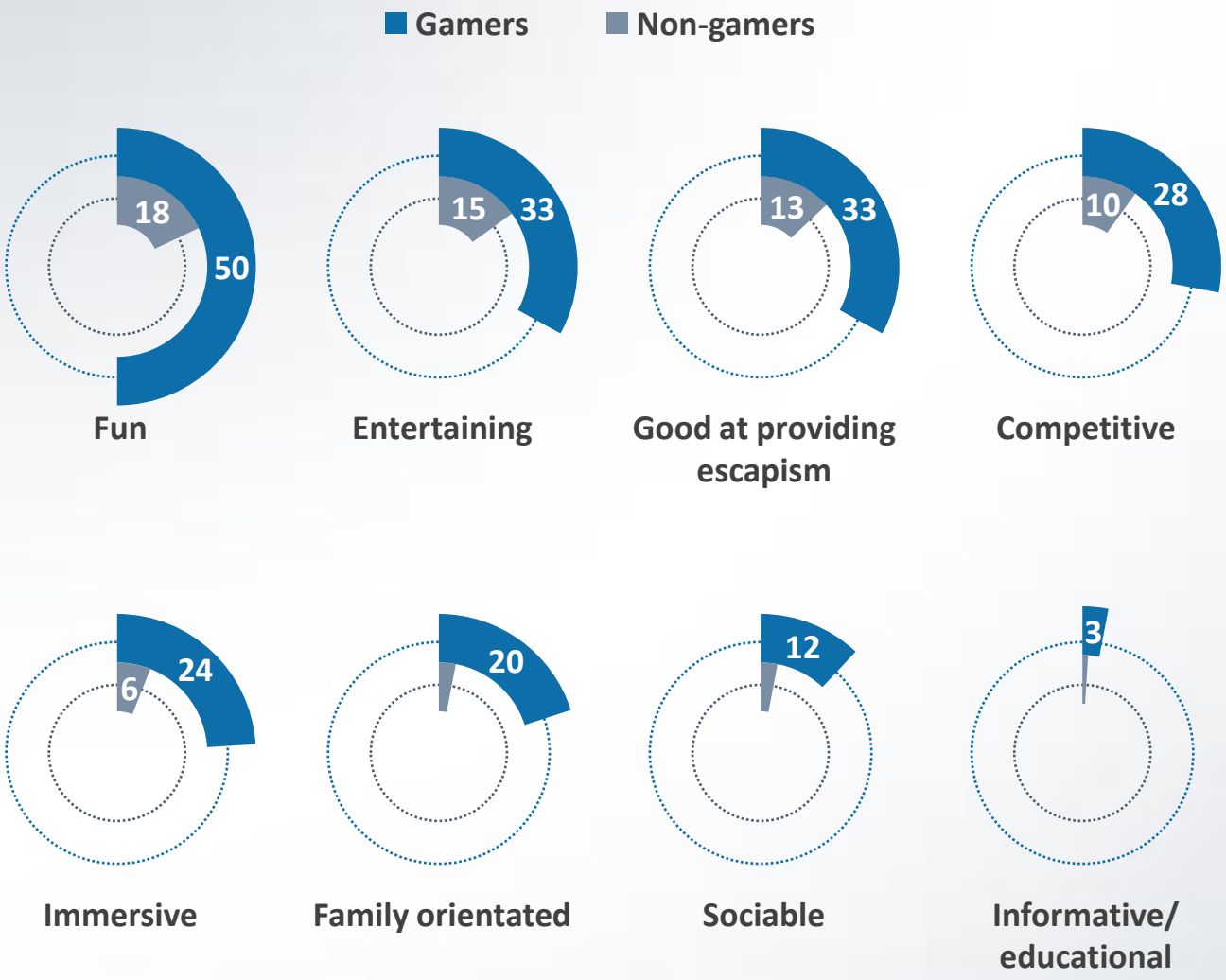
WORDS ASSOCIATED WITH MEDIA/ACTIVITIES

(ALL ONLINE RESPONDENTS)



Most commonly selected category for each word

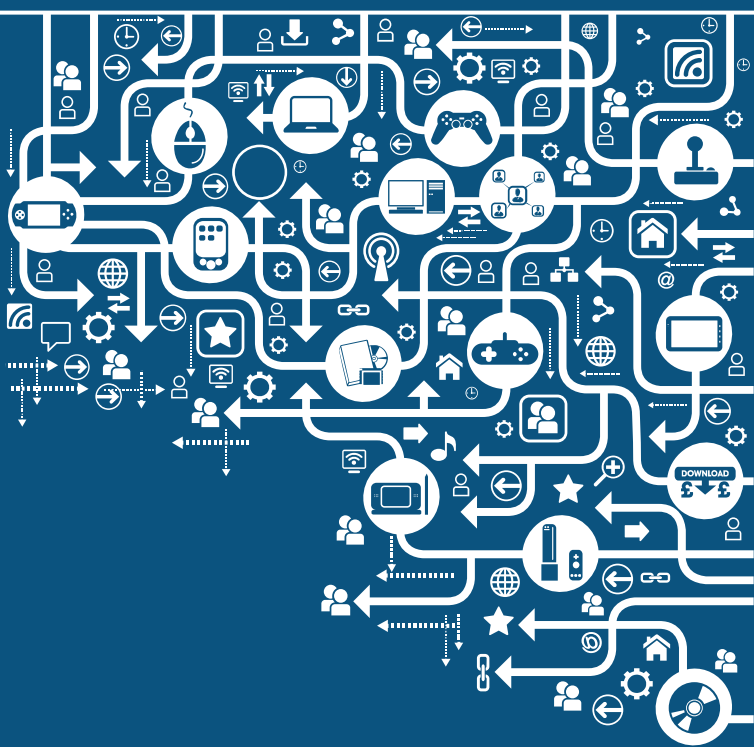
WORDS ASSOCIATED WITH GAMING:
DIFFERENCE BETWEEN GAMERS AND NON-GAMERS



A fifth of gamers describe gaming as a **FAMILY ORIENTATED** activity, an aspect that is rarely acknowledged by non-gamers.

Only 18% of non-gamers consider gaming to be a **FUN** activity.

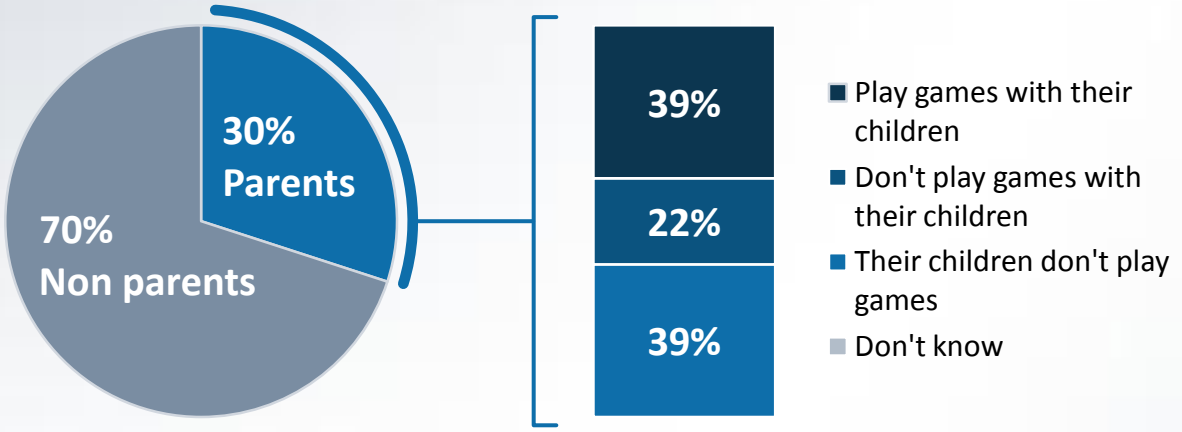
GAMING AND THE FAMILY



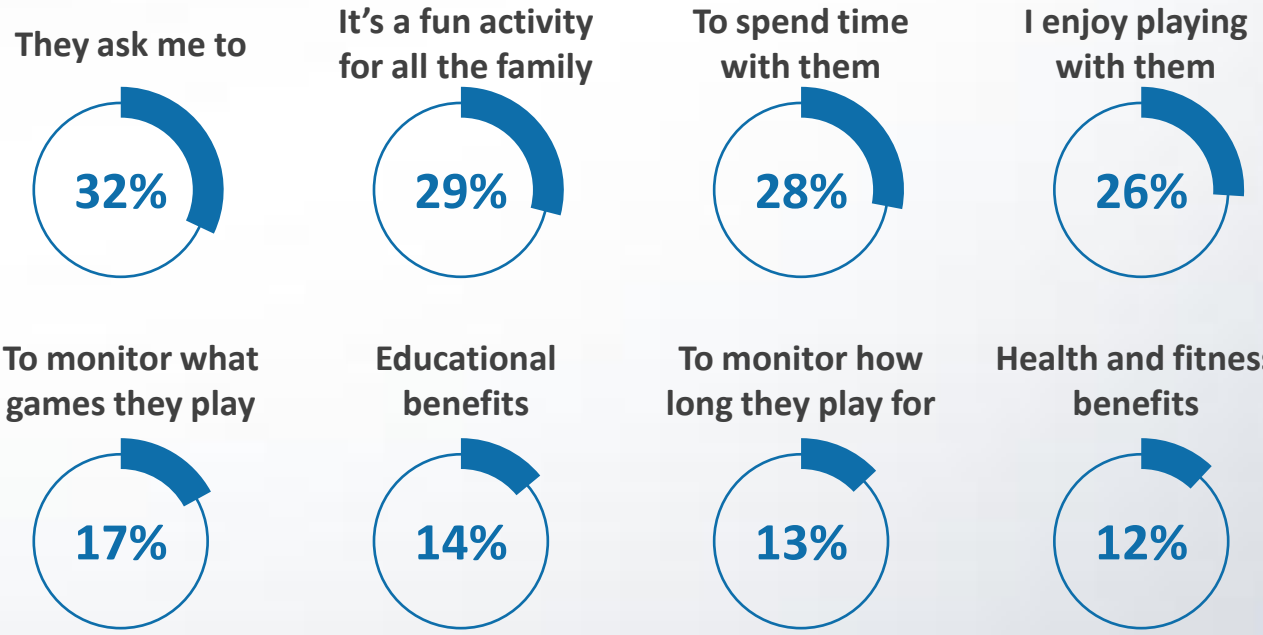
PARENTS AND CHILDREN WHO PLAY GAMES (ALL ONLINE RESPONDENTS)

61%

of parents have children who play games



REASONS PARENTS PLAY GAMES WITH THEIR CHILDREN



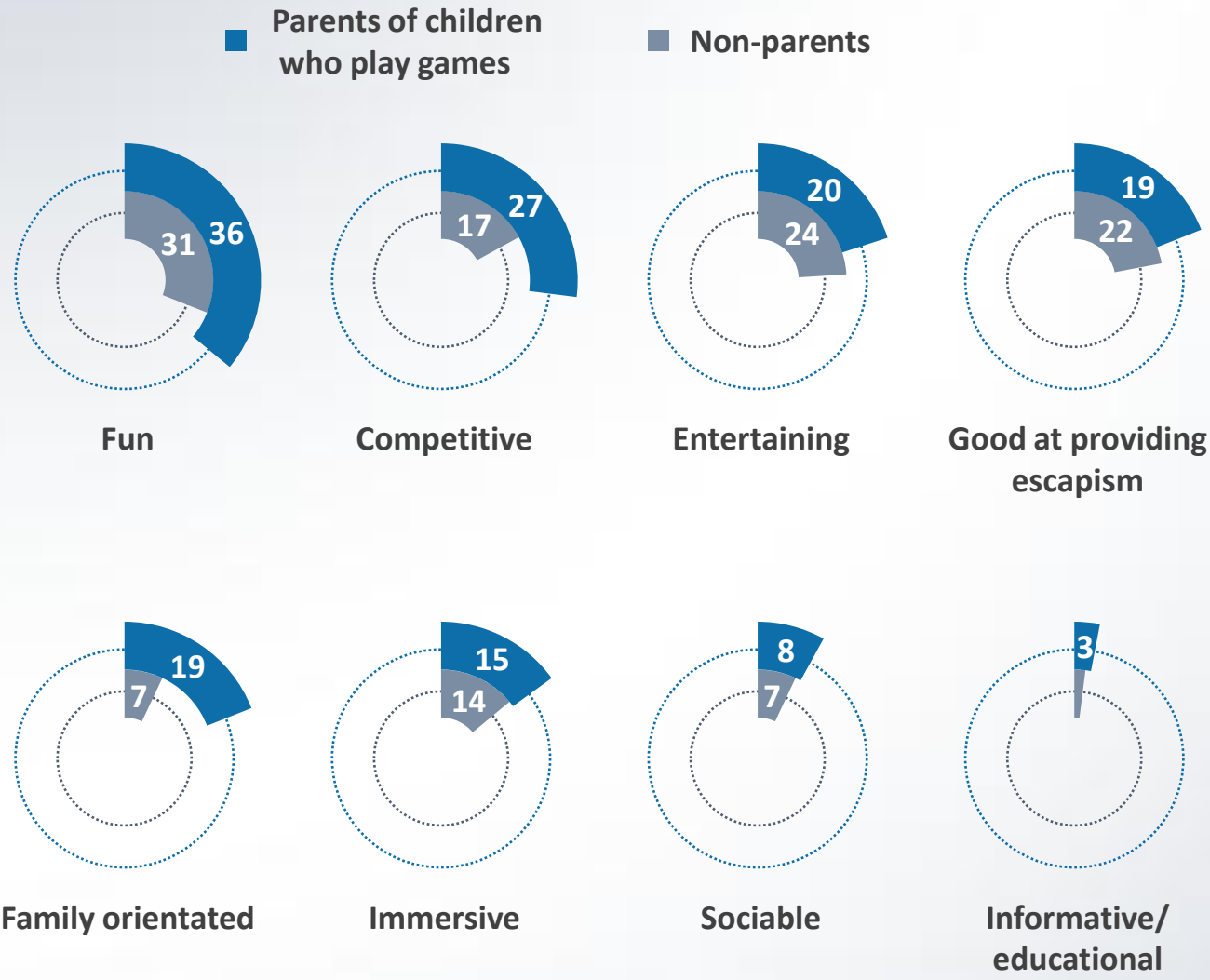
6 in 10 parents have children that play games. The majority of these play with their children (39% parents play games with their children vs. 22% don't).

The most common reason parents play games with children is because THEY ARE ASKED TO.

HEALTH/FITNESS and EDUCATIONAL benefits are acknowledged by a 12-14% of parents playing games with their children.

WORDS ASSOCIATED WITH GAMING:

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

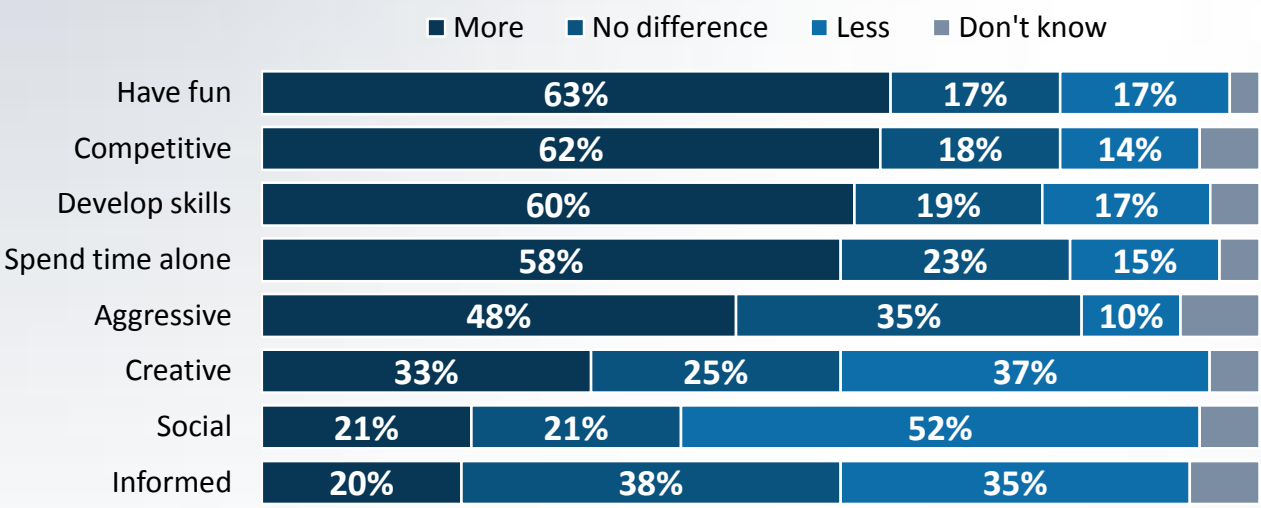


Parents of children who play games are more likely to describe gaming as **FUN** and **COMPETITIVE** than non-parents.

They are also nearly three times as likely to describe gaming as a **FAMILY ORIENTATED** activity.

EFFECT OF GAMES ON CHILDREN:

(PARENTS OF CHILDREN WHO PLAY GAMES)



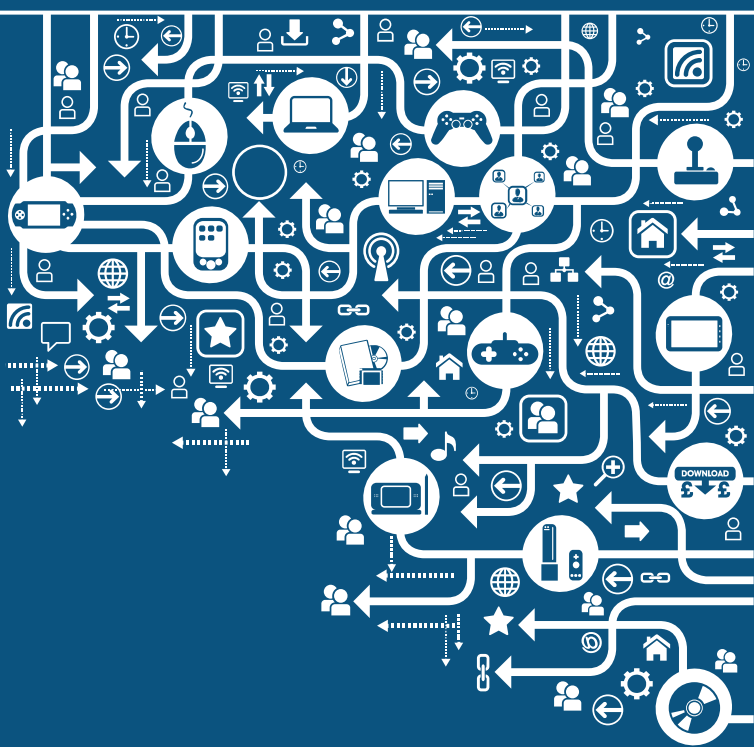
WORDS ASSOCIATED WITH GAMING:

PARENTS OF CHILDREN WHO PLAY GAMES		PARENTS OF CHILDREN WHO DON'T PLAY GAMES
Informative/educational		Informative/educational
3%	vs.	2%
Family orientated		Family orientated
19%	vs.	13%

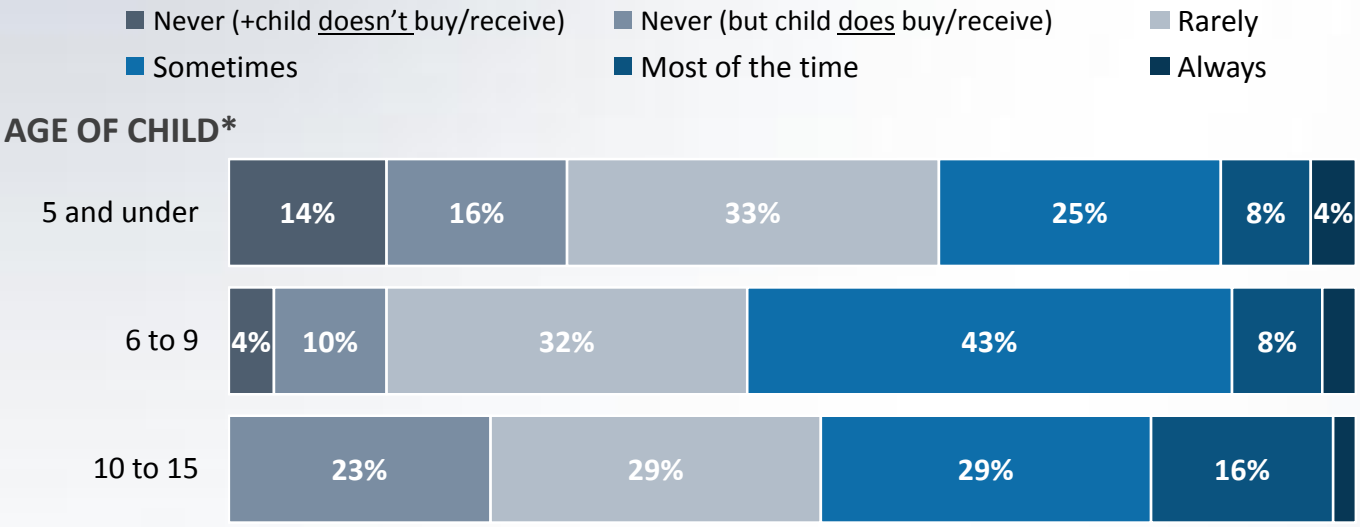
Many parents see gaming as having a positive impact on their child(ren). 60% believe gaming helps their child DEVELOP THEIR SKILLS more.

A third believe it encourages them to be more CREATIVE, while 6 in 10 say it encourages them to SPEND MORE TIME ALONE.

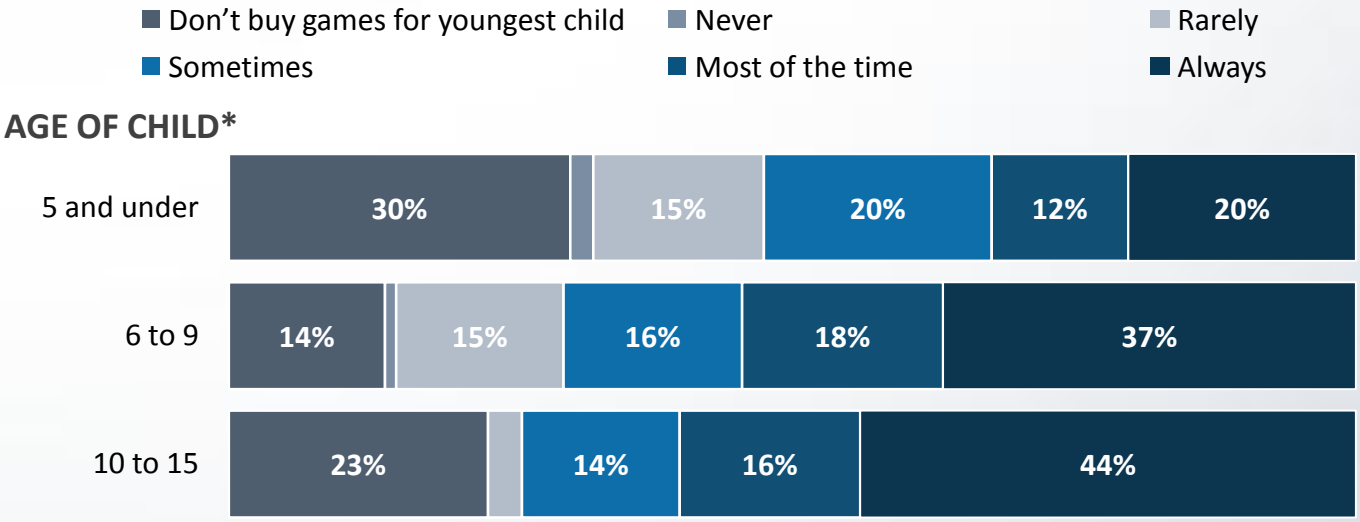
SUPERVISION



WHETHER PARENTS BUY THEIR YOUNGEST CHILD'S GAMES



WHETHER THE CHILD IS PRESENT DURING PURCHASE

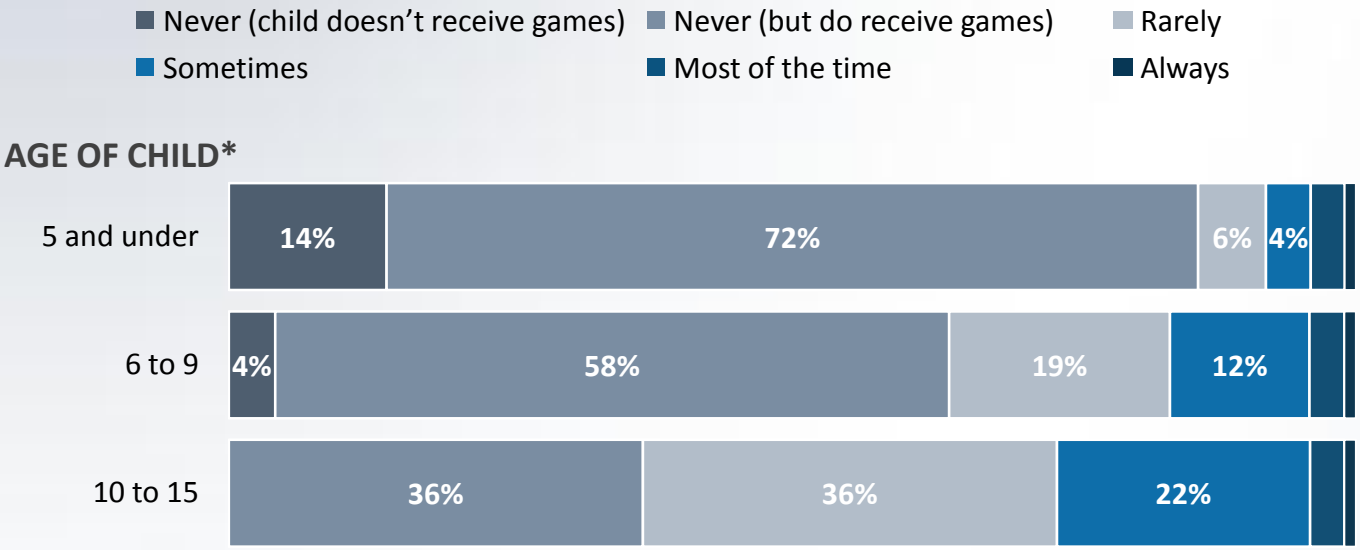


**Parents were asked in reference to their YOUNGEST child only*

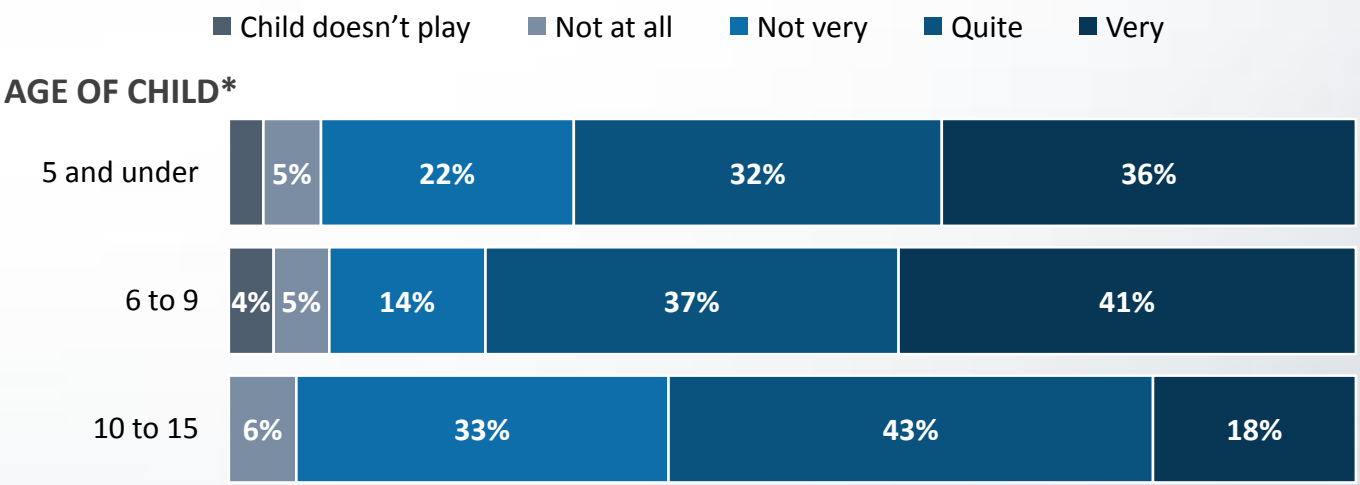
The vast majority of children aged 6 and above are buying or receiving games.

1 in 4 parents of children aged 10-15 never buy that child's games. The same is true for 1 in 10 parents of children aged 6-9.

WHETHER CHILD BUYS THEIR OWN GAMES



HOW KNOWLEDGEABLE PARENTS ARE ABOUT THE GAMES THEIR CHILD PLAYS

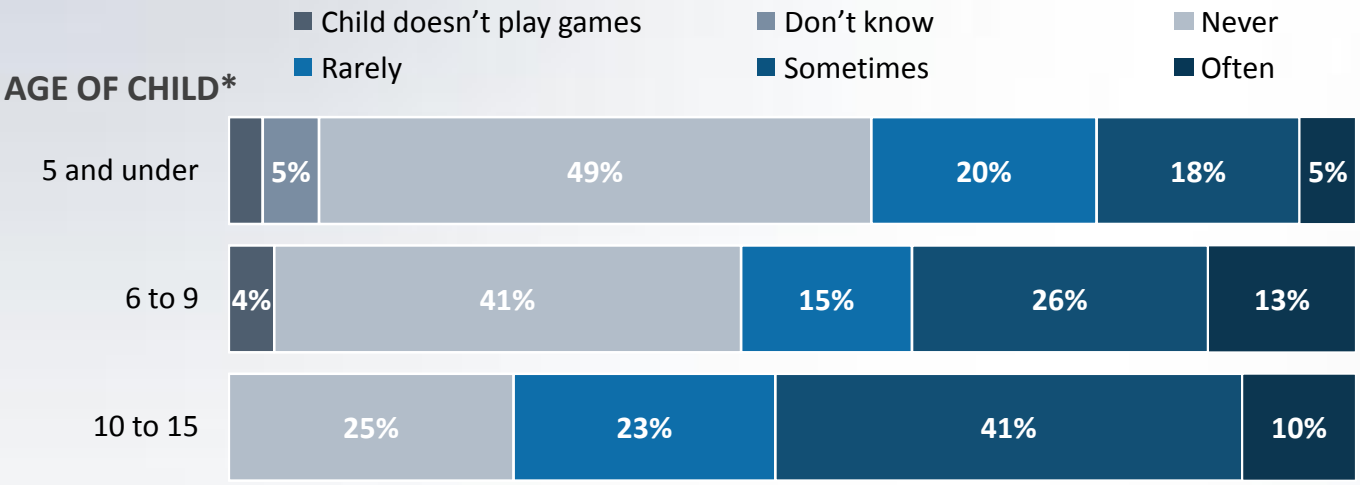


**Parents were asked in reference to their YOUNGEST child only*

58% of children aged 6-9 have never bought a game for themself, compared to 36% of children aged 10-15.

2 in 5 parents of children aged 10-15 describe themselves as 'not at all' or 'not very' knowledgeable about the games that child plays. The same is true for 1 in 5 parents of children aged 6-9.

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

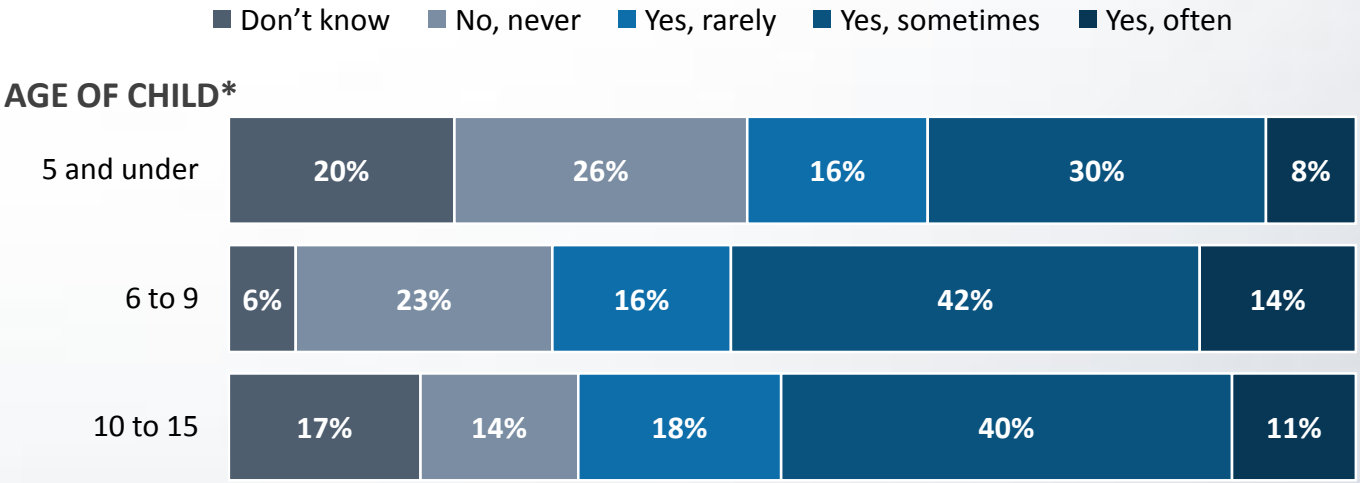


WHETHER CHILD PLAY GAMES WITH HIGHER AGE RATING THAN THEIR AGE AT A FRIEND'S HOME **

34%
Aged 5 and under play games at a friend's home

44%
Aged 6-9 play games at a friend's home

67%
Aged 10-15 play games at a friend's home



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

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

4 in 10 children aged 6-9 and **HALF** of children aged 10-15 are sometimes/often playing games with an age rating higher than their age.

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

FOR CHILDREN AGED 5 OR UNDER

35%

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

WHAT RESTRICTED

- **19%** Online access through the console
- **17%** Games played by age rating
- **12%** Amount of play time

22% use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

FOR CHILDREN AGED 6-9

27%

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

WHAT RESTRICTED

- **18%** Online access through the console
- **11%** Games played by age rating
- **8%** Amount of play time

25% use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

FOR CHILDREN AGED 10-15

34%

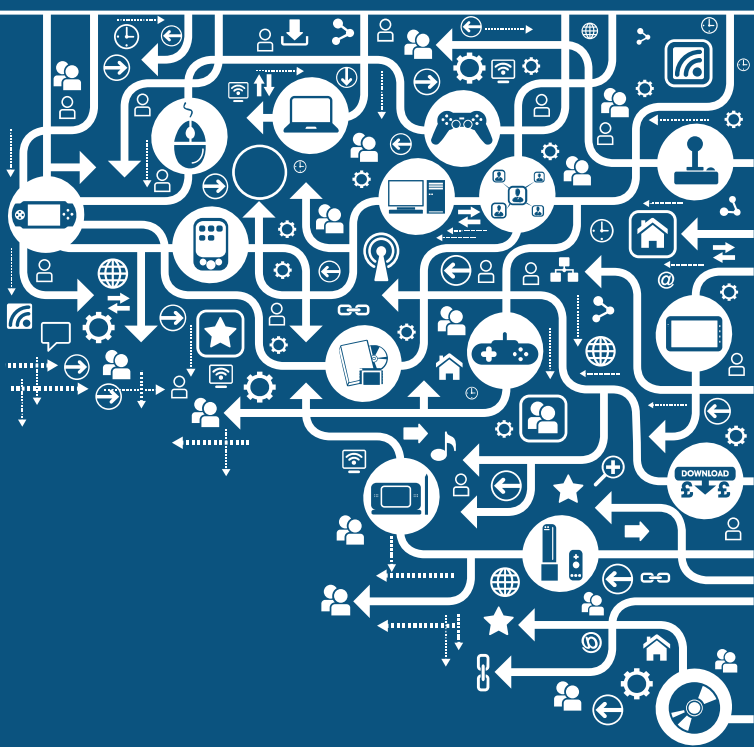
use parental control settings to limit what their youngest child can access on their games consoles

WHAT RESTRICTED

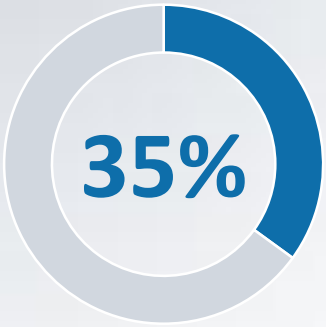
- **18%** Online access through the console
- **12%** Games played by age rating
- **8%** Amount of play time

28% use parental control settings to limit the amount of time their children spend online or to prevent them from accessing certain programs and websites

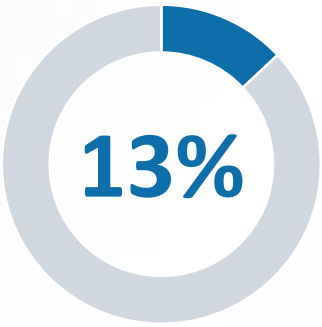
PEGI RATING SYSTEM



AWARENESS OF RATING SYSTEMS (ALL ONLINE RESPONDENTS)



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



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

46%

aware of PEGI age rating symbols

28%

aware of PEGI content symbols

EXTENT TO WHICH THE SYMBOLS ARE...

PEGI AGE RATING SYMBOLS

Clear | Useful

PEGI CONTENT SYMBOLS

Clear | Useful

% NET Fairly/Very

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

Only a THIRD of the online population are aware of an age rating system for games.

Awareness of the PEGI age ratings increases to 46% after prompting with images.

The vast majority of respondents agree that both sets of symbols are CLEAR and USEFUL .

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

74%

agree PEGI ratings should apply to app games

74%

agree PEGI ratings should apply to games on social network sites

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

	% AGREE WITH STATEMENT THE MOST
35%	The age rating system for videogames should be stricter overall than that used for movies
44%	The age rating system for videogames and movies should be the same
5%	The age rating system for movies should be stricter overall than that used for videogames
17%	Don't know/none of these

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

35% believe that the age rating system for games should be stricter than movies. Only 5% believe the ratings for movies should be stricter.

FOR MORE INFORMATION

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