

AUG, 2017

Computer Game U&A STUDY IN FRANCE

Prepare for



Conducted by



Objectives

Business Objectives

- To support Taiwanese enterprises to expand their business in French market

Research Objectives

- To understand French consumers' usage & attitude towards computer games
- To identify the potential business opportunity in France
- To gain French consumers' perception towards Taiwanese products



Research Methodology

Research Methodology : Online Survey

Area: Region of France, covering 13 metropolitan regions and 5 overseas regions

Sampling method: Quota Sampling

Respondent Criteria:

- 18 – 55 years old, male & female
- Played browser game or online game continually over 6 months in P1Y
- Played 2 different or more computer game in P1Y
- Decision Maker of computer game

Sample Size & Quota: n= 300, under 95% confidence level, the margin of error is +/- 5.7%

Complete Sample	Male	Female	18 – 22 years old	23 – 35 years old	36 – 55 years old	North	Central	East	West	South & Overseas
n=300	135	165	34	98	168	42	89	64	87	18
100%	45%	55%	11%	33%	56%	14%	30%	21%	29%	6%

Interview Length & Fieldwork Period:

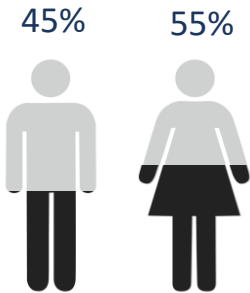
- Averagely 13 min per interview
- Interview Period: 12-18 May, 2017

Data Collection: Field is done by Ipsos contracted online panel provider under Ipsos' supervision

Respondent Profile

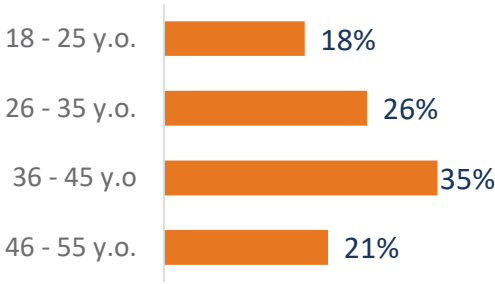
Base: n=300

Gender



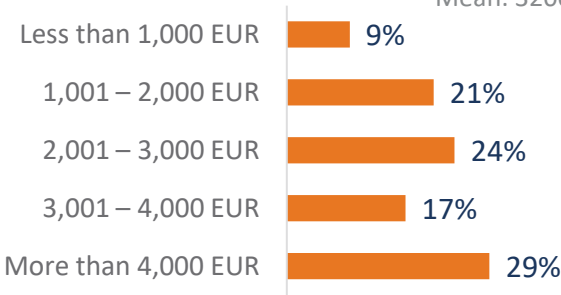
Age

Mean: 36.5 y.o.
Female Gamer: 36.2 y.o.
Male Gamer: 36.9 y.o.

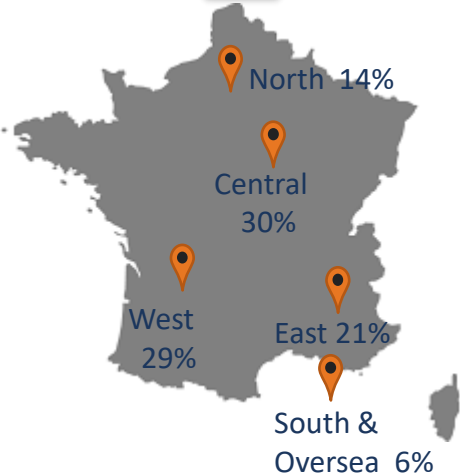


Monthly Household Income

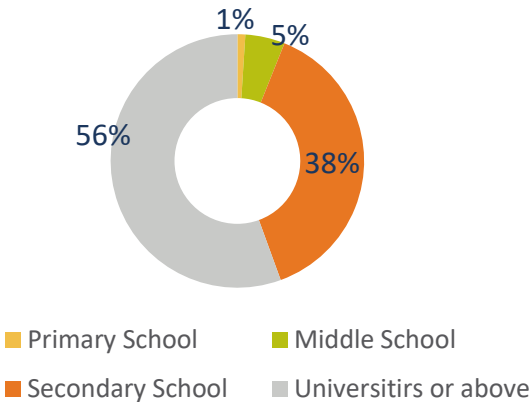
Mean: 3200 EUR



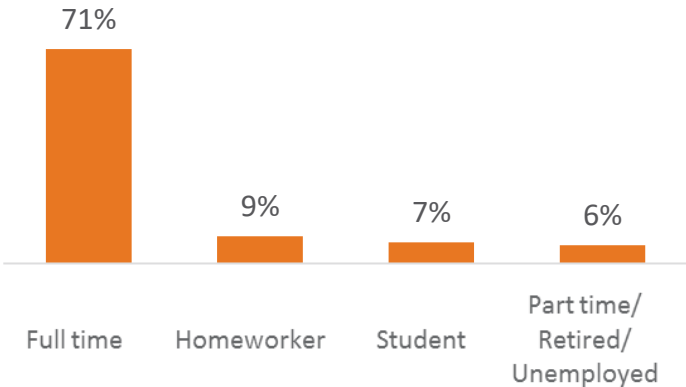
Area



Education Level



Occupation



Terminology

- **Computer Gamers:** Have ever played Browser Game or Online Game continuously over 6 months in recent 12months.
- **Browser game:** A browser game is a computer game that is played over the Internet using a web browser. Browser games can be run by using standard web technologies or browser plug-ins.
- **Online game:** A video game that is either partially or primarily played through the Internet or another computer network. Online games are ubiquitous on modern gaming platforms, including computers, consoles and mobile devices. But we didn't include mobile gaming in this research.
- **In-game Purchases:** Items or points that a player can buy for use within a virtual world to improve a character or enhance the playing experience. The virtual goods that the player receives in exchange for real-world money are non-physical and are generally created by the game's producers.
- **Massively Multiplayer Online Game (MMOG):** MMOG is capable of supporting large numbers of players, typically from hundreds to thousands, simultaneously in the same instance (or world).
- **Action:** Complete challenges by fighting with enemies, and use a character of your choice to represent yourself and jump into the action.
- **Adventure for single player:** Starts with a back story of your character, and you have to figure out how to complete the mission.
- **Rhythm:** Gameplay focuses on tapping/swiping in time with music or as prompts appear on the screen, e.g. Dance, Guitar, Music, etc.
- **Puzzle:** Puzzle games where players must match like things together through swapping, shooting, manipulation, or other mechanisms. There are many levels, from beginner to expert, and games usually have colored shapes and simple actions. More brain games, with no action involved.
- **Racing:** Allows the user to control a vehicle in a competitive race event.
- **Role Playing (RPG):** get to act out the main character, be the hero, etc., and make decisions that go along with the games' story lines.

Terminology (cont'd)

- **Simulation game:** Characterized by putting the user in control of a confined social environment, acting as leader or planner., e.g. taking control of simulated vehicles, including tanks, ships, and aircraft.
- **Sports:** Replicate the gameplay of traditional sporting events or centers around team management, e.g. baseball, basketball, soccer, and more.
- **Real-Time Strategy game (RTS):** usually need to build up inventory of items, armies and players can play at once without taking turns.
- **Stealth Shooter game:** tasks the player with using stealth to avoid or overcome antagonists. Games in the genre typically allow the player to remain undetected by hiding, using disguises or avoiding noise.
- **Combat game:** the player controls an on-screen character and engages in close combat with an opponent, which can be either an AI or controlled by another player.
- **First-person shooter (FPS):** centered around gun and other weapon-based combat in a first-person perspective; that is, the player experiences the action through the eyes of the protagonist.
- **Survival horror** focuses on survival of the character as the game tries to frighten players with either horror graphics or scary ambience.
- **Virtual world:** a computer-based simulated environment populated by many users who can create a personal avatar, and simultaneously and independently explore the virtual world, participate in its activities and communicate with others.

KEY FINDINGS

- **U&A towards Computer Games**
- U&A of Paid Game Players
- Business Opportunity in Computer Gaming



HOLISTIC INSIGHT # 1

Males and younger gamers are the main stream among computer gamers, they are willing to spend more time for relaxation, and they prefer to play MMOG or RPG. On the other hand, females tend to play casual game like Puzzle.

Compare with males, less females pay for games, also they are less likely to do in-game purchase. No matter browser or online games, males spend more time and play more frequently than females.

DEMOGRAPHICS SEGMENTATION

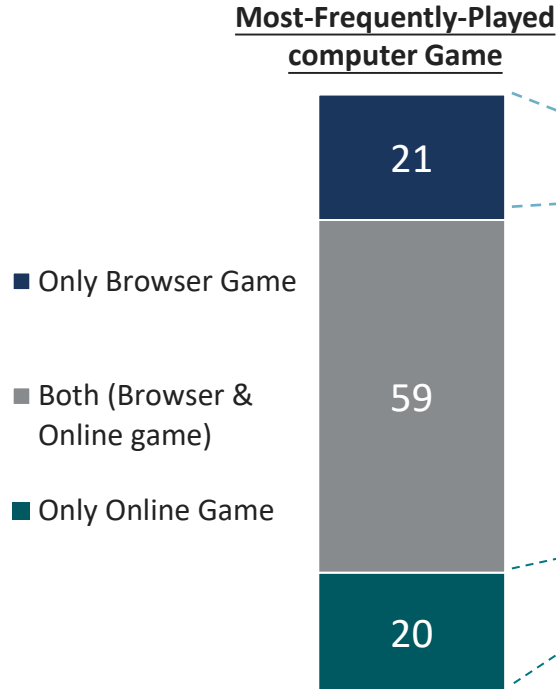
	Total Market(N=300)		Female Gamer (N=165)		Male Gamer(N=135)	
Average Age	36.5		36.2		36.9	
Paid for computer Games	35%		26%		44%	
Play Frequency 1 week Mean=	Browser 5.2 days	Online 5.0 days	Browser 5.1 days	Online 4.9 days	Browser 5.3 days	Online 5.1 days
Everyday	44	41	44	40	44	43
5~6 times a week	23	23	21	22	24	23
3~4 times a week	20	18	18	19	22	17
Twice a week	8	11	8	12	7	11
Once a week or less a week	6	6	8	7	3	7
Play Time Mean=	Browser 68.9 mins	Online 77.4 mins	Browser 62.9 mins	Online 71.2 mins	Browser 76.1 mins	Online 83.9 mins
<30 mins a time	19	17	25	23	12	11
30-60 mins a time	47	41	46	41	48	40
1-3 hours a time	28	32	23	25	33	39
>3 hours a time	7	10	6	11	7	10
Top 3 Most Time Taken Genres	Mean= 3.26 games		Mean= 3.06 games		Mean= 3.51games	
1	Puzzle		Puzzle		RPG	
2	RPG		RPG		Sport	
3	MMOG		Simulation game		MMOG	

* Demographics reflect computer gamers aged 18-55 years old.

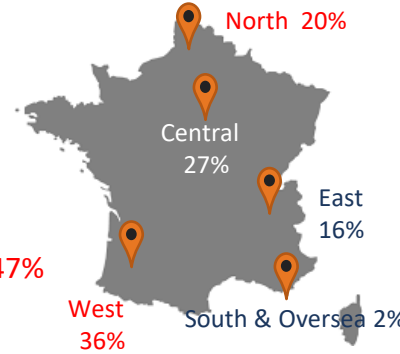
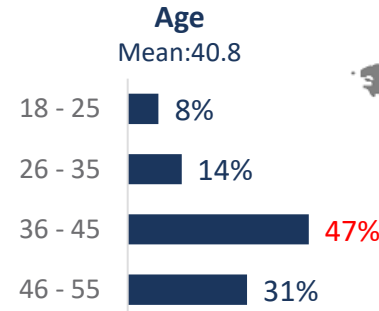
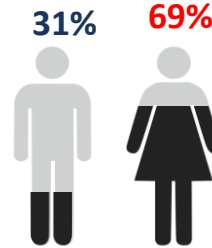
Among all computer gamers, over half of them play both browser and online games. Those only playing browser games skew to female and 36-45 y.o. while those only playing online games appear to be younger.

PROFILE OF DIFFERENT TYPE OF USERS

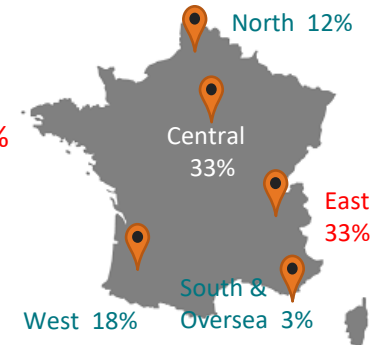
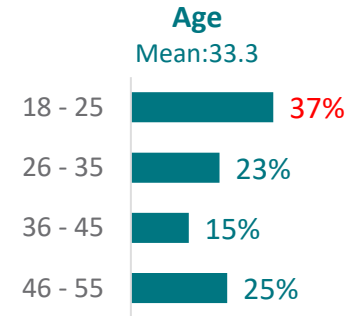
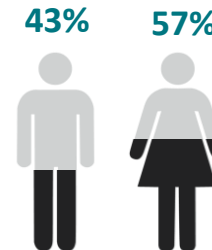
N=300, (%)



N=64,
Browser Game Player



N=60, (%)
Online Game Player



Over half of gamers play computer games as a means of relaxation, particularly for 36-55 y.o. adults.

Marketing

WHY TO PLAY COMPUTER GAMES

N=300, (%)



5% Connect or interact with friends

4% game is cheap or free

3% Challenge myself

3% There's browser version of my favorite game

- 59% play computer games for relaxation, particularly for 36-55 age group (68%) and those living in north area (71%).
- On the other hand, 26-35 y.o. are more likely to play games to kill some time (22%).

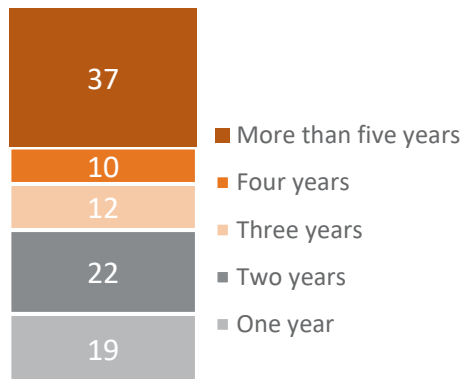
Almost half of computer gamers have played computer games for more than 4 years, and 39% gamers prefer to play with single mode, they are more females and above 45 years old.

HOW TO PLAY COMPUTER GAMES

N=300, (%)



How long have played computer games

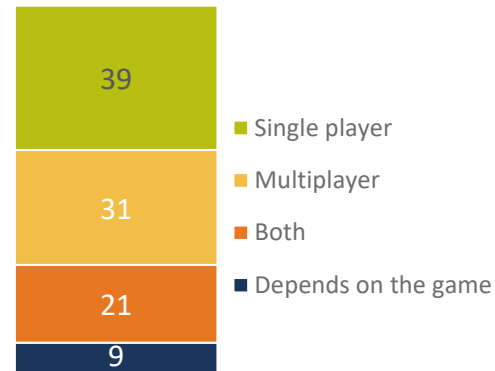


47% gamers have played computer games for more than 4 years

- Particularly for male (56%) and elderly gamers (46-55 y.o.:55%) also gamers who play browser (59%) or online(61%) games more than one hour at a time.



Single-Player vs. Multiplayer



39% tend to choose “Single-Player Mode” when playing computer games, particular for female and elderly players.

- More younger gamers(18-25 y.o.:49%) and gamers who only play online gamers(53%) prefer to play with “Multiplayer mode”.

Above 40% of gamers have played browser or online games on a daily basis, averagely play 5 times a week.

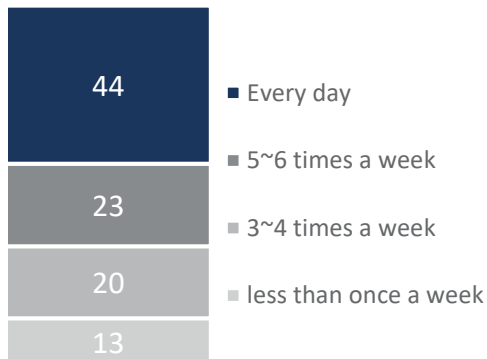
FREQUENCY OF PLAYING GAMES

(%)



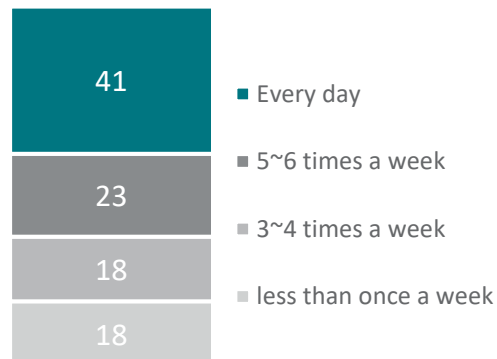
How often to play browser game a week

Browser gamer n=240



How often to play online game a week

Online gamer n=236



44% play browser game almost everyday

- Particularly for who play more different kinds of browser games (play 5+ kinds of games: 57%), also who play browser game longer (5+ years: 53%)

41% gamers play online games everyday

- Particularly for who play online game over 60 mins at a time (54%).

Computer gamers averagely spend around 70 mins on games each time, particularly for males and younger gamers (18-25 y.o.).

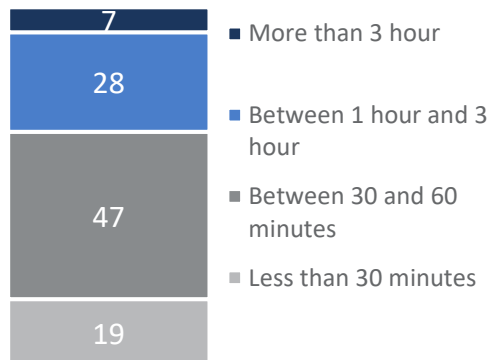
TIME TAKEN FOR EACH TIME

(%)



How long to play browser game every time

Browser gamer n=240

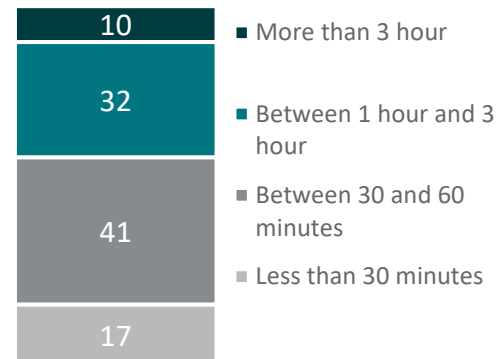


Gamers averagely spend **69** mins at a time on browser games

- 34% gamers usually take over 1 hour to play browser game each time, particularly for younger group (18-25 y.o. :32%)

How long to play online game every time

Online gamer n=236



Gamers averagely spend **77** mins at a time on online games

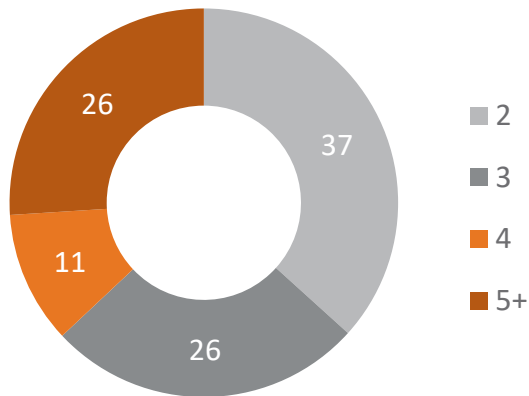
- 42% gamers usually take over 1 hour to play online game each time, particularly for males (49%) and 18-25 y.o.(54%)

Most of gamers play multiple games at once and tend to choose 2 different games in each genre, especially when playing browser games.

NUMBER OF COMPUTER GAMES PLAYING IN P1Y

N=300, (%)

How many different computer games played in P1Y



Averagely, each gamer have played

3 *different computer games across all relevant genres over P1Y*

How many different games in each genre played in P1Y

- **Browser gamers** would try 2 different games in each genre and even more when playing RPG games (22% play 3+ games).
- Also, Male and 18-25 y.o. players tend to play more different kinds of Role-playing (RPG), Action, Adventure, and Real-time Strategy(RTS).
- **Online gamers** tend to stick to one game in each genre, only around 15% have tried more than 3 different online games in each genre.

Females express higher interest and spend more time on Puzzle game while males prefer sports and MMOG games more. RPG is an all time favorite in both genders.

COMPUTER GAME GENRE ANALYSIS

N=300, (%)



Top 10 Most time taken computer Game genres



- Female(22%) and 46-55 y.o(25%) spend more time to play Puzzle games; on the other hand, more males and younger gamers tend to play Sport and Massively Multiplayer Online game (MMOG).*
- Gamers who only play browser game spend more time to play Puzzle(27%) and RPG(14%), while those who only play Online Game play more Massively Multiplayer Online game(12%) and FPS(12%).*

WoM and game forum are two primary information sources for computer games. Light gamers tend to listen to family or friends' recommendation, while heavy user prefer to take game forum's discussion as reference.

INFORMATION CHANNELS

N=300, (%)



- *31% would get game related information from friends/ family recommendation, especially females(38%) and light browser gamers (who play browser game twice a week or below:56%; play below 30 mins each time:50%).*
- *Secondary information channels is Game forum(29%), particularly for males (37%), and those have university or above education level (35%). Besides, more heavy players (play browser game 5 times or above a week:36%, play online game everyday:37%; play browser game above 60 mins each time:50%) also tend to get information from Game forum.*

Most computer gamers like to have interaction with other players, especially with friends/family. Echo to this, above half of gamers think what friends/family are playing matters to them and like to discuss with or recommend games to their friend/family.

FRIENDS' / FAMILY'S INFLUENCE

N=300, (%)



51% think whether computer game played by friends or family matters to them

- Particularly for under 35 y.o. (61%) and people living in North (62%) & Central (63%), also heavy gamers (higher playing frequency or play 60+ mins at once)



72% would discuss or recommend the game to friends or family

- Particularly for males (77%), younger gamers (18-25 y.o. 87%) and who with university or above education level (76%)

TV is not only one of the main information source for gamers, it is also an influential touchpoint to let gamers start trying a new game.

LIVE BROADCAST

N=300, (%)



43% play a new computer game due to watching live broadcast or game related TV show

- *43% of gamers will try a new game because of watching live broadcast or game related TV show.*
- *Particularly for 18-25 y.o. (64%), people living in North (62%) & Central (52%), also who play more kinds of game in the past one year.(play 5+ kinds of games:53%)*

Game accessories market growing fast in recent years, around 70% French have ever purchased it, especially gaming controller or gamepad.

GAME ACCESSORIES

N=300, (%)



- **70%** of gamers would use accessories when playing computer games, especially for males (80%) and younger gamers 18-25 y.o.(92%).
- More females (38%) and age above 36 (40%) gamer have never purchased game accessories.

Level of challenge and exquisite design are the impact factors on choosing computer games. However, the factors may change when choosing different kinds of game.

FACTORS WHEN CHOOSING GAMES

N=300, (%)



- *Compare with other age groups, more gamers under 36 think highly of Story background(17%).*
- *However, **79%** consider these factors would be different when choosing different kinds of games, especially for younger gamers (under 36 :85.6%).*

KEY FINDINGS

- U&A towards Computer Games
- **U&A of Paid Game Players**
- Business Opportunity in Computer Gaming



HOLISTIC INSIGHT # 2

Around one third of online gamers are paid gamers who are mainly males and most of them also have in-game purchase experience.

Free trial and free virtual currency can attract gamers, but personal preference is still the major reason when choosing paid games.

35% of online gamers have ever paid for it. Their characteristic is different from who only play free online games. Payers are more males and heavy players; also they spend more time on RPG, MMOG and RTS games.

SPEND SEGMENTATION

	Total Online Game Player (N=236)	Free Online Game Player (N=154)	Paid Online Game Players (N=82)
Average Age	35.3	36.2	33.6
% Male	49%	42%	62%
In-Game Purchase	60%	46%	87%
Play Frequency	Mean= 5.0 days	Mean=4.9 days	Mean=5.2 days
Every day	41%	40%	44%
3-6 times a week	40%	40%	43%
2 times or less a week	19%	20%	13%
Play Time	Mean=77.4 mins	Mean= 69.1mins	Mean= 92.9mins
<30 mins a time	17%	23%	6%
30-60 mins a time	41%	44%	35%
1-3 hours a time	32%	23%	49%
>3 hours a time	10%	10%	10%
Top 3 Most time taken Played Genres	Mean= 3.26 games	Mean= 3.05 games	Mean= 3.95 games
1	Puzzle	Puzzle	RPG
2	RPG	RPG	MMOG
3	MMOG	Action	RTS

- Free game players (65% of the market) : express spending no money on online games
- Paid game players (35% of the market): express ever paid for online games

35% of online gamers have ever paid for downloading online games, particularly for males and heavy players, who play more on MMOG and RPG games.

EVER PAID FOR ONLINE GAMES

N=236, Online Gamer (%)



35% have ever paid for online games

- *In demographic segmentation, males (44%), 26-35 y.o. (46%), people living in Central area (49%) and university or above education level (43%) are more willing to pay for online games.*
- *In play segmentation, more heavy players (play more kinds of game, play for longer period or spend more time at once) are paid gamers.*
- *Paid gamers who focus more on MMOG (46%) and RPG (46%); on the other hand, free gamers play more casual games such as Puzzle (89%).*

46% free gamers and 87% paid gamers make in-game purchase. In total, 60% of them have ever had this experience, particularly for younger, heavy gamers and MMOG and RPG players.

IN-GAME PURCHASE FOR ONLINE GAMES

N=236, Online Gamer(%)



60% have ever had in-game purchase

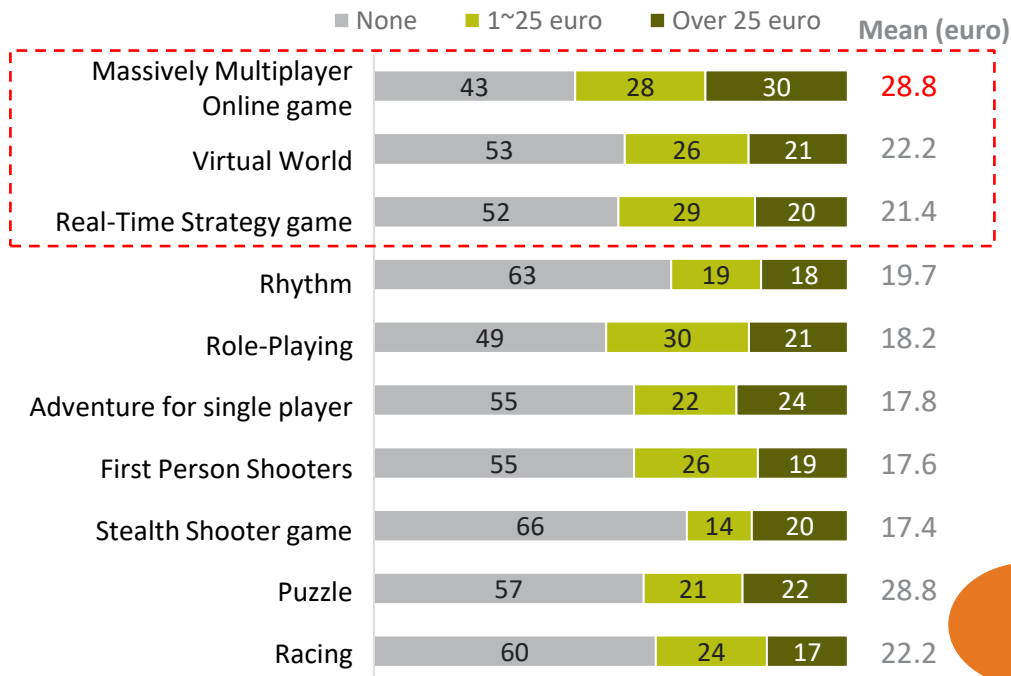
- *60% have in-game purchase experience, particularly for age under 46 (66%), university or above education level (68%), higher household income level(72%) as well as heavy players are more willing to have in-game purchase.*
- *In-game purchase players takes more time on MMOG (81%) and RPG (75%), while people who never have in-game purchase experience tend to play more on casual games like Puzzle (75%).*

Gamers have spent more on core games such as MMOG, virtual world and RTS, and credit card is their preferred payment method.

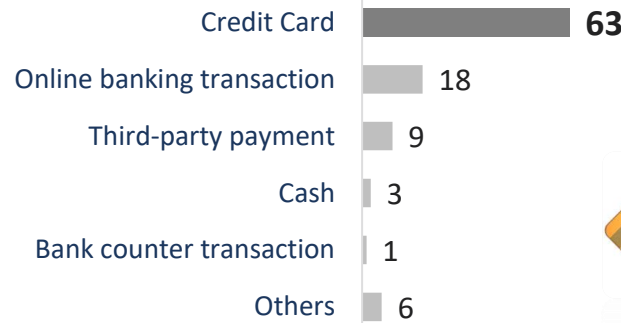
EXPENDITURE & PAYMENT METHOD

n=153, (%), who play paid online game or had in-game purchase

Expenditure for each game in P6M



Payment



63% usually pay by "Credit Card"

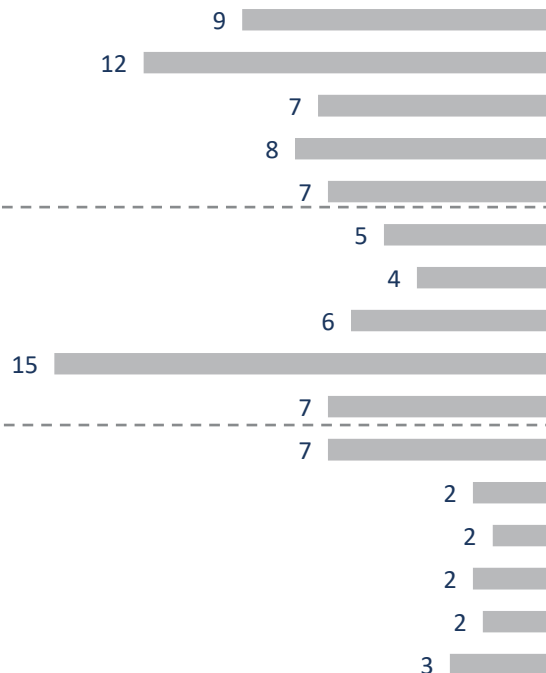


Though puzzle games take more people's time, in online gaming space, core games contribute the most to the revenue. Above half of players have ever paid for MMOG and RPG, followed by RTS, Action and Virtual world.

MOST-FREQUENTLY PLAYED & EVER PAID ONLINE GAMES

Games which takes more time(SA)

Base: All gamers, n=300, (%)



Massively Multiplayer Online game

Role-Playing (RPG)

Real-Time Strategy game (RTS)

Action

Virtual World

Adventure for single player

Combat game

First Person Shooters (FPS)

Puzzle

Simulation game

Sports

Racing

Rhythm

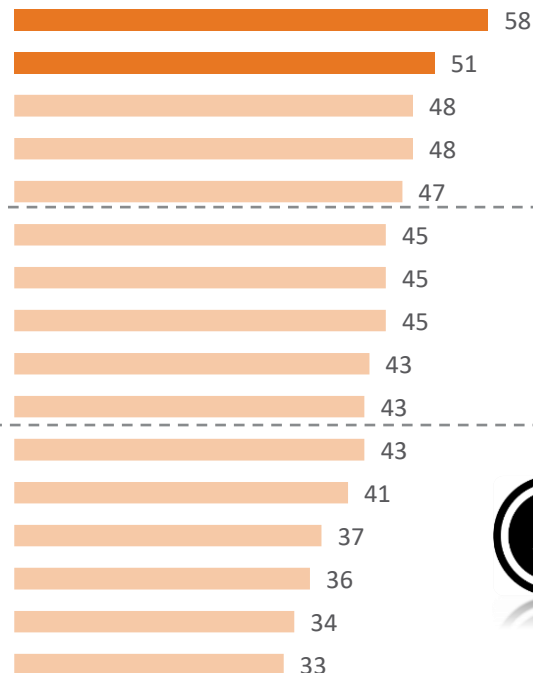
Survival Horror

Stealth Shooter game

Educational

Games Ever Paid(MA)

Base: Online Paid & IAP gamer, n=153, (%)



Except basing on personal preference, paid game players choose paid games by difficulty & entertaining level and other's recommendation.

FACTORS ON CHOOSING PAID GAME

N=82, who play paid
online game(%)



- *All genders, age groups as well as areas share the similarities when choosing paid games.*

Free trial and free virtual currency are two ways that a freemium computer game can adopt to reach a large and wide audience. Around 60% of gamers have ever played a new game because of being offered free trial or free virtual currency.

USAGE INTENTION TOWARD DIFFERENT TRIGGERS

N=300, (%)



57% play a new computer game due to accepting free trial provided by developer

- Particularly for age under 46 (61%) and people living in North (71%) & Central (66%).



60% play a new computer game due to acquiring free virtual currency or virtual equipment provided by developer

- Particularly for age under 35 (73%) and people living in North (71%) & Central (69%)

KEY FINDINGS

- U&A towards Computer Games
- U&A of Paid Game Players
- **Business Opportunity in Computer Gaming**



HOLISTIC INSIGHT # 3

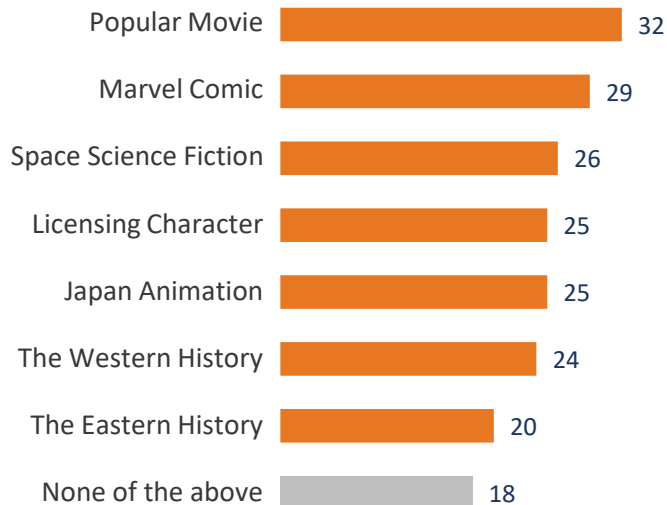
Every special topic or characters share similar percentages of attractiveness.

Most gamers have ever noticed the game developers but currently Taiwan game developers only gain little awareness.

Every topic or character have around 20%~30% percentages be mentioned by computer gamers, which indicates every topic or character have their way to impress gamers.

TOPIC OR CHARACTERS WILL AROUSE INTEREST

N=300, (%)

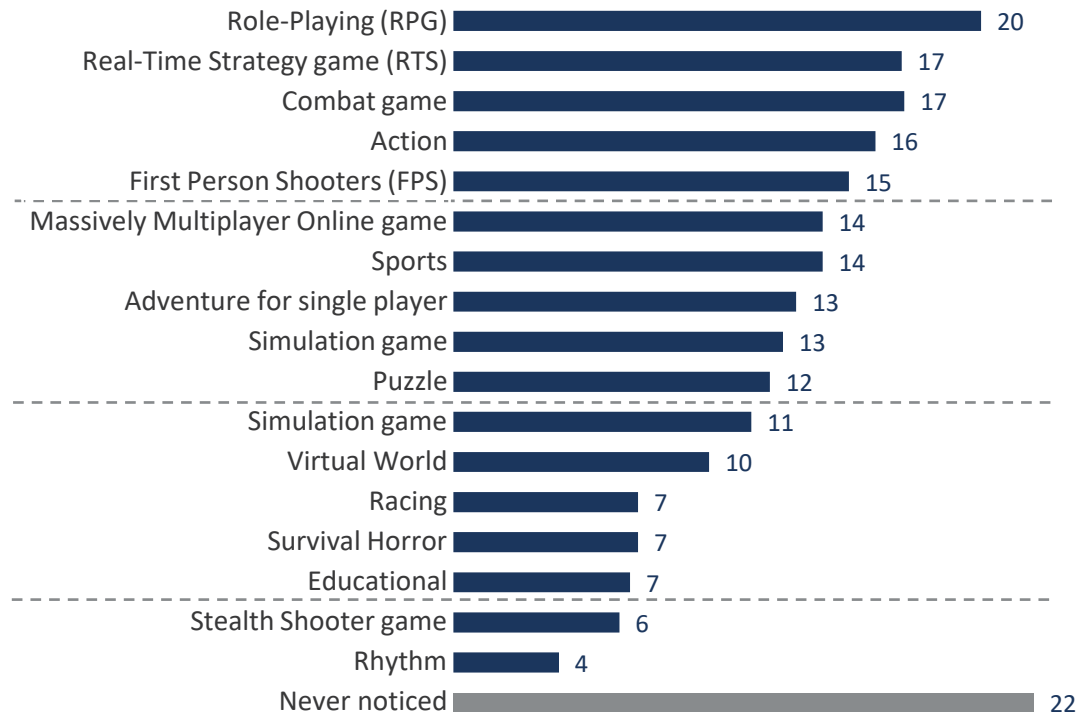


- Basically, special topic or characters arouse more interest among gamers under 46 (88%) and less interest among 46-55 y.o. (61%).
- Gamers under 36 y.o. are more interested in Popular Movie (44%) and Japan Animation (33%). While Marvel Comic attracts more 18-25 y.o. (38%), Eastern History can target at 26-35 y.o. (29%).
- Males get more interested in Marvel (36%) and Space Science Fiction (38%) topic.

Overall, 78% of computer gamers have ever noticed the game developer, particularly for males and 18-25 y.o., and when choosing MMOG or combat games.

AWARENESS OF DIGITAL GAME DEVELOPER

N=300, (%)



- More males (89%), 18-25 y.o. (91%), and people living in Central (83%) would be more likely to notice game developers.*
- Those aged 18-35 would pay more attention to the developers of Massively Multiplayer Online game (22%) and Combat game (24%).*

What can we learn from this survey?

- *Conclusion*

Conclusion

The males are the core players in online/browser games.

- No matter browser or online games, males spend more time and play more, in contrast, fewer females pay for games, also they are less likely to do in-game purchases.
- Browser game players center on 36-45yo, while online game players center on 18-25yo.

Users usually play games every day.

- Around 40% of browser/online gamers play games every day to relax or kill time.
- Gamers averagely spend 69/77 mins at a time on browser/online games, and those aged 18-25 spend a longer time.

WoM and game forums are two essential information sources for computer games.

- It is worth noting that TV plays a role in a game trial. 43% of gamers claim they will try a new game because of watching a live broadcast or game-related TV show.
- Therefore, cooperation with the YouTubers/streamers contributes to uplift the brand/game awareness and enhance playing willingness.
- Besides, Free trial and Free virtual currency are two ways that a freemium computer game can adopt to reach a large and wide audience.

Around 35% of players ever play paid online games.

- The males (44%), 26-35 y.o. (46%), living in the Central area (49%) and university or above education level (43%) are more willing to pay for online games.
- Though puzzle games take more people's time, gamers spend more on MMOG, virtual world and RTS games, and credit card is their preferred payment method.
- Exquisite design, personal preference are general influential consideration factors in selecting computer games, however, paid game players choose paid games by difficulty & entertaining level. Furthermore, gamers under 36 think highly of Story background(17%).