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Eastern European gaming cultures. Case studies: Romania and Bulgaria

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Digital games are a complex social and technological phenomenon that is situated in cultures and societies. Current academic efforts in the field of digital games analyze the realities of the Western countries, where the market on digital games is highly developed. This paper focuses on the specificities of the Eastern European gaming culture and examines the market of digital games in Romania and Bulgaria. An online survey is carried out and the results show that Romanian and Bulgarian players are mostly men, live in metropolis (over 100,000 inhabitants) and are mostly young people aged 21-25 or teenagers. National games are known and played in very low proportions, game-players from Romania and Bulgaria preferring imported games. The authors hope that this first initiative to study gaming habits and preferences of Romanian gamers will bring digital games to the attention of academic researchers in Romania.

Keywords: cultural consuming, gamers' preferences, gaming market, cultural differences, media and new technologies consuming
Cuvinte-cheie: consum cultural, preferinţele gamerilor, piaţa jocurilor, diferenţe culturale, consum de noi media şi tehnologii

Introduction

The days of skipping ropes and children playing hide-and-seek seem to be over. Nowadays kids grow up with digital games. One out of four EU inhabitants spends regularly approximately six hours a week playing digital games (PWC data, cited by Picot *et al.*, 2008, 5). Gaming consoles as the *Sony Playstation2* are long ago lifestyle products. Beside consoles, kids own mobile phones with integrated games and are well skilled in gaming at personal computers. This is, at least, how the gaming environment appears in Western Europe.

The Eastern European gaming market is the least studied and also less present in market share statistics. Cultural specificities of Eastern European games and media consumption patterns of Eastern European gamers have not been examined by previous researches. Nevertheless, digital games are extremely complex social and technological phenomena that are situated in cultures and societies. The high price of gaming devices, the availability of playing equipment, computers and Internet accessibility are issues that can make a difference between the Eastern and the Western European gaming market. Cultural differences can also involve different preferences in genre, or gaming environment (whether they play alone or with others). On a market on which more than 95% of the products that they distribute are pirated, game distributing companies must search for ways to survive.

The current paper points out the specifics of the Eastern European market, with focus on the Romanian and Bulgarian ones. First, a summarizing description of Romanian and Bulgarian games, studios and game developers is made, based on a research of online sources (computer magazines, websites of game-producers, journalists and analysts). A second part of the paper presents cultural consuming patterns of games by Romanian and Bulgarian players, based on an explorative, non-representative online quantitative research on these two countries. The acquired data about the habits and preferences of Romanian and Bulgarian players concerning digital games are then integrated into a more general frame of the social background and general attitudes of the players.

Previous research undertaken by Metro Media Transilvania in 2004 and 2007 offers representative data concerning media consuming of Romanian children aged 6-15, but does not consider the consumption preferences of young people or older teenagers. The 2007 study shows that computer availability has risen from 2004, when only 27% of Romanian households had a personal computer, to more than a half of Romanian households in 2007 (52%). The diffusion of gaming consoles has stagnated since 2004, which is consistent with the stage of economic plateau of the console market (Metro Media Transilvania, 2007, 6). Only 9% of Romanian children aged 6 to 15 had a gaming console in their household (Metro Media Transilvania, 2006, 18).

In respect of children's leisure activities, the 2007 study demonstrates that there is a consumption difference between „traditional" media and „new" media, where „traditional" stays for television (98%), reading (56%), music (53%), and „new" for video games and computer games (45%), using the computer (39%), surfing on the Internet (30%), and watching video or DVD movies (28%) (Metro Media Transilvania, 2006, 10). Playing with friends and watching TV are the main activities that children aged 6 to 15 choose for having fun and avoiding boredom, while listening to music or gaming have only a secondary role (Metro Media Transilvania, 2006, 11).

Compared to 2004, computer activities (including gaming, Internet and other usage) has increased with 6-9 percents. A significant 45% of Romanian children aged 6 to 15 play video or computer games in their free time, but only 7% go to an Internet Café or to electronic games cafés. The study also concludes that although boys and girls tend to use computers in the same degree for non-gaming activities, boys tend to use the computer for gaming purposes more than girls do (Metro Media Transilvania, 2006, 10).

The study confirms discouraging parental attitude towards gaming, parents admitting that they sometimes argue with their children because of video games (10%) or computer games (17%) (Metro Media Transilvania, 2006, 142).

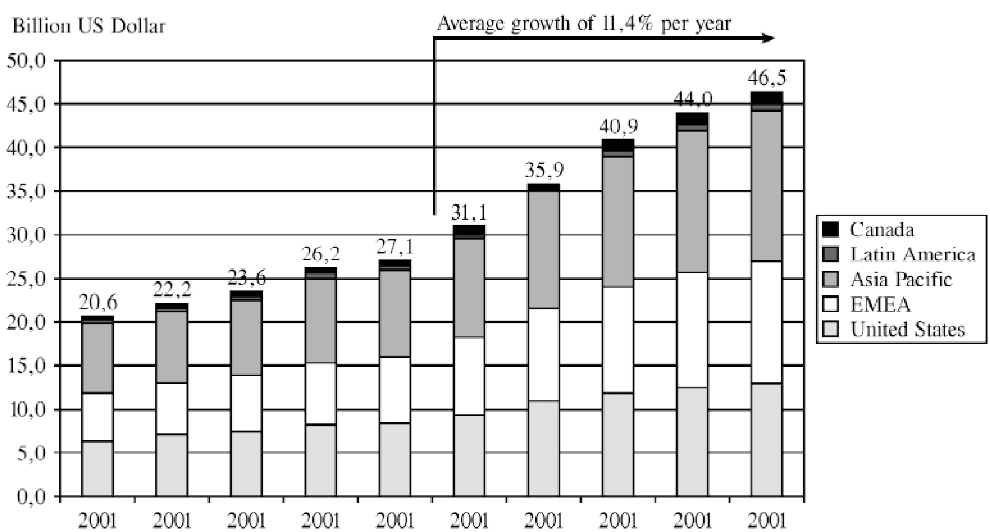
Usage of Internet among children aged 6 to 15 is fairly widespread, 73% of Romanian children aged 6 to 15 having heard about the Internet and three thirds having used it or having seen somebody using it. Some 44% of these children use the Internet, 74% at least once a week, most often at home, at school, at friends' or at neighbors' places (Metro Media Transilvania, 2006, 26). Usage of Internet is more frequent among children living in urban areas, older children (12 to 15 years old) as well as by the ones from families where at least one parent has a university degree, with higher income and with a computer in their household. In a normal day children send 103 minutes using the Internet, and age seems to be the most important determinant of the amount of time spent surfing on the Internet (Metro Media Transilvania, 2006). Statistically, gaming is the main Internet-based activity, 50% of the children playing games when using the Internet. Other activities are chatting (47%), listening to music (38%), e-mail (33%) or searching for information (31%) (Metro Media Transilvania, 2006).

For data on relevant media usage about the older population (18 years old and more), we can acquire information from the 2006 BOP study on mass media perception. The research is representative for the adult non-institutionalized population of Romania, with a tolerated error of ±2,3%. Out of the 2004 persons asked, 28% have a computer at home, while only one in four Romanian declare being able to use a computer. Education (40%), age (40%) and place of residence (20%) are the three main factors that influence the ability of using a computer. With respect of Internet usage, only 18% of adult Romanian population uses the Internet, but more than a half of computer owners have also Internet connection (Public Opinion Barometer, 2006, 28). Internet users usually spend an average of one hour and forty minutes online. Gaming/entertainment takes up the third place on the list of most chosen activities online (40%), after searching for general information (86%) and professional purposes (85%) (Public Opinion Barometer, 2006, 28)

The current research offers more detailed information about the videogame consumption of Romanian players and about their gaming preferences.

International digital games market

The computer and videogames market is the most dynamic segment of the media economy. Figure 1 presents the digital games market volume and expected development in the period 2006-2010 (PriceWaterhouseCoopers, from Picot *et al.*, 2008, 40).

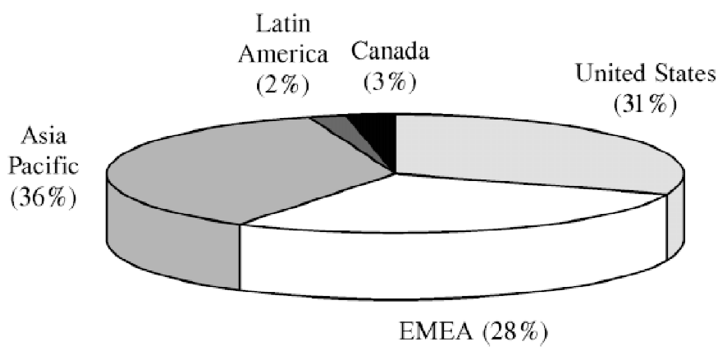


Source : PriceWaterhouseCoopers :
Global Entertainment and Media Outlook : 2006-2010.

Figure 1. *Global market volume and development*

In 2007, the worldwide market was led by the Nintendo platforms, especially the Nintendo DS and the Nintendo WII. For more than seven years, Playstation 2 is still very well sold (Picot *et al.*, 2008, 31). The introduction of new game consoles and the use of net-based games resulted in a global increase in the video game market of 14.3 per cent from 2005 to 2006. An average annual growth of approximately 9.1 per cent has been forecast for the period from 2007 to 2011 (Norvegian Report on video Games, 2007/2008). For console games, there have been release new game concepts like „SingStar" and „Guitar Hero", both being party games released with the goal of winning new targets and strengthen the Family-Entertainment sector (Picot *et al.*, 2008, 31). „Guitar Hero" was in 2006 the most sold game in the US. In the same year, Germany had 45% PC games, France only 29% and Great Britain only 22% (Picot *et al.*, 2008). In Romania and Bulgaria, the PC market is predominant. Worldwide, PC games that are not online are losing market shares. This segment has also been facing major challenges associated with illegal copying. Although the market for PC games is falling, new operating systems and other technological improvements may check this fall (Norvegian Report on video Games, 2007/2008).

In 2006, when the current field research was undertaken, the worldwide market volume was of 31,1 billion US dollars, and it splitted up as presented in the figure, which shows the market share by regions in 2006. (PriceWaterhouseCoopers, from Picot *et al.*, 2008, 40). The figure demonstrates the important role played by Asia (36%) and the United States (31), as well as by Europe. The USA was in 2006 the largest national market. The PWC statistics for Europe include Europe, South Africa and selected countries in the Middle East (EMEA), but are regarded as descriptive of the European market as a whole.



Source: PriceWaterhouseCoopers: Global Entertainment and Media Outlook: 2006-2010

Figure 2. *Market Share by Region, 2006*

On the European market of entertainment software, the biggest segments are hold by Great Britain, Germany and France, in this order (Picot *et al.*, 2008, 31). In the first quarter of 2007, the US turnover grew with 33%, while in the first half of 2007 the market in Great Britain grew with 40%.

Digital games market in Eastern Europe

General facts

According to Pavel Mezihorak (2004), the view of Eastern Europe as a space for innovative initiatives and technological competitiveness is a recent perspective, gaining strength due to the changes and developments of the last few years. If some years ago it would have been difficult to think of a competitive game that has been developed in Czech Republic, for example, now we have many Czech games on the global market, as the widely sold *Operation Flashpoint* developed by the Prague based Bohemia Interactive Studio.

Countries of the Eastern bloc did not have any digital games markets before the collapse of communism, while having state-funded film and music industries. The situation reversed after the fall of communism : lacking governmental subsidies, film and music industries declined while indigenous games emerged and competed with Western ones on the global entertainment market.

Mezihorak estimated the number of professional game developers in Eastern Europe (2004) at around one hundred. However, only few of them created competitive games or have a large number of employees. The majority of games developed in Eastern Europe at the moment are „hardcore" PC military action or FPS games.

There are no exact figures in what concerns the global market share of Eastern European developers, because publicly available statistics, as the ones carried out by Screen Digest, only show the share of major players (USA, Japan, UK, Germany, France and Canada) (Mezihorak, 2004).

Konrad Lischka (2003), a German journalist reporting on digital games, notices that the majority of developers in Eastern Europe struggle because of piracy on the home-markets. Bootlegs bear the blame that producing games for the home-market is often not profitable for local studios. With home markets saturated by illegal copies, small developers and studios find it a necessity for survival to have commercial success on foreign markets. This leads to the trend that developers often take no risk with games produced for their national market but produce directly for the Western one. Most often, Eastern European games have no reference to the culture and society in which they were produced, or if they do, the games still come up with a typical Western game design. The tactic-shooter „Vietcong" of the Czech firm *Illusion Softworks*, „Battle Isle 4" – a remittance work of the Slovakian studios *Cauldron* or „Imperium Galactica II" of the Hungarian developer *Digital Reality* are just a few examples of games with no cultural references. Other games, like „Stalker Oblivion Lost", a traditional ego-shooter developed by the Ukrainian firm ***GSC***, uses national motives by using the contaminated area around Chernobyl as plot area, and by creating strong references to Tarkovsky's 1979 movie „Stalker". However, the game uses a typical Western design. Likewise, the game „Knights of the cross", produced by the Polish *IM Group*, bases its plot on the Polish novel written by the poet Henryk Sienkiewicz. Central point is the Battle of Grunwald around the year 1410, an important event of Polish history, which led to commercial success on the home-market. On Western markets, the game succeeded to get substantial revenues. As refreshing the background has been, the gameplay was demand-oriented once again and brought nothing new.

„Tetris", a game with history first produced by the Russian Alexei Paschitnow, is now internationally known, while only few can distinguish its Russian origin. A second internationally successful game produced in Eastern Europe is, however, not in sight, unless the national markets will grow and proper budgets for digital games will be available. Lischka (2003) believes that as soon as the Eastern European game markets are big enough to guarantee survival of the local studios, digital games from Eastern

Europe might provide the other international markets with local specificities.

In the last few years, many Eastern European game producing companies entered the international market. Their activity concentrated around some successful games such as „Operation flashpoint" of the Czech company *Bohemia Interactive* or „Rage of mages" from *Buka Entertainment*.

Digital games market in Romania

Regarding Romania, only two companies succeeded to launch a game in its final form. The first one was *Active Pub* with the game „Rival Realms", a RTS with RPG elements, which was a big success in Great Britain. *Fun Labs* produced another two successful titles : „Secret Service : In Harm's Way" and „Shadow Force : Razor Unit". However, *Active Pub* disappeared after this, but *Fun Labs* have another project. It is called „Revolution", and it is a FPS which takes place in the near future and has Jack Plummer as main character, an obviously not-Romanian name. Many other projects were not put into practice because of financial problems.

In 2005, 45% of all the games that reached the consumer were bought from the shopping chain „Diverta". This holding undertook a research to find some characteristics of the Romanian digital games market.

The research showed that the consumers prefer games with an interesting story, with a good gameplay and high-quality graphics. The high difficulty of each level, the actual duration of the game and the price are important factors which have influence on the choice of the games. For example, „Sims 2" or „Medal of Honor : Pacific Assault" can be found in online shops for over 30€. „FIFA 2005" was the most expensive game that could be found on the market, with the price of 50€, and „Heroes III" – the cheapest game, costing only 7€. Most players prefer games that can be played in groups (in Internet, for example) and the ones which offer rewards. The best sold platforms for the year 2005 were PCs with 80% of all the purchases, followed by PS2 with only 15%. Other types of consoles register a stagnation, with a growth of sales as Microsoft officially launched Xbox and Xbox2 in Romania. In 2004 the best sold games were FPS games („Alien vs. Predator", „Battlefield 1942", „Bet on soldier"). In the first months of 2005, 20% of the entire car racing games and 20% of the sports games were already sold out. Meanwhile, the sales for RTS and RPG are dropping (with the exception of „WOW" and „Diablo2"). They represent only 10% of the digital games sales.

In Romania there are two different categories of consumers : the ones who buy in shops and the ones who buy on-line. These categories are not complementary. The customers who buy in real shops prefer in general the genres „Virtual Life" and „Sports" and they mostly choose famous, notorious games as „FIFA", „FIFA Manager", „The Sims", „Need for Speed", „World of Warcraft". In opposition with this tendency, the customers who buy on-line prefer obscure games, with names which do not resonate : „Worms World Party", „Tom Clancy's Sprinter Cell" and „The Devil Inside". This public category also seems to show a tendency for products with a more active gameplay, as they prefer genres such as „Action/Adventure" and „MMORPG". The fact that they buy on-line and that they are familiar with unpopular games, shows that these are people who spend much time on the Internet and are interested in this area. The fact that „Barbie as Rapunzel" is among the first five positions in the real shop top sales, could be an indication that these customers are young parents, who buy games for their little children. This demonstrates two cultural aspects : the first one is that these families have certain welfare, as they own a computer, and the second one is that the parents encourage the children to work with the computer starting with an early age. A rather low degree of discouraging parental attitude towards gaming is consistent with the findings of recent research carried out by Metro Media Transilvania (2007, 142) where only few parents admitted that they sometimes argue with their children because of video games (10%) or computer games (17%).

Price doesn't seem to be a very important factor in influencing the sales, as there can be found a wide range of prices starting from 6€ and ending with 63€. Among the top positions of the most popular games in Romania, we can find 3 games which cost 40€ or above and two which cost around 30€. These prices are high, when we take into consideration that the average loan in Romania is around 200€/month. The conclusion which can be drawn from here is that both types of customers have incomes above the average.

One outstanding fact is that almost all games are designed for only one kind of platform : the PC. This is probably the most important characteristic of the Romanian market. This fact has economical reasons : most people can't afford to buy a device strictly for entertainment as PS2, PSP or X-Box. In plus, our supposition would be that many gamers are teenagers between 13-18 years who still live with their parents and who do not have their own incomes. Maybe they can convince their parents to invest in a PC, which can also be used in a „constructive" way, and not only for playing games.

One famous Romanian game producing company is *2 bad design*, which in 2002 started a well known project : „The Hospital" (Spitalul). This project could not be brought in a final form not even until today, because of technical and financial problems. Other active projects are the „Zamolxe Graphic Engine", the multiplayer action game „Cotropitorii" and the 3D space simulator „Românii în Spatiu".

ExoSyphen Studios focuses primarily on game development, but also develop software and games for mobile platforms as well as other portable platforms and software components for third party companies. They produced the most appreciated hacking simulators in the world, according to BestGames.ro. This game is called „BS Hacker" and it is also available for Pocket PC. The first game produced by this company is called „Blue Sky : Acceptable Casualties" and was launched in November 2002. They also produced the first „Quake" port for a mobile telephone.

Another company is *Gameloft*, which was founded in 1999 and had as main activity the production of games for mobile phones and for PDAs (Palm, Pocket PC). In 2005 they registered a huge success with the launching of „Prince of Persia : Warrior Within" for Nokia NGage QD.

Games produced 100% in Romania were : „Prince Of Persia : Harem Adventure", „Prince Of Persia : Warrior Within", „Splinter Cell : Extended Ops", „Chessmaster" and an internal brand, „Block Breaker".

Concerning the Romanian academic research on digital games, to our knowledge came a study conducted in 2006 by the Department of Psychology and Educational Sciences from the Bucharest University. The paper was titled „Correlative study on the relation between the type of preferred digital game and the learning style" (Preotesiu *et al.*, 2006) and tested the hypothesis that there is a correlation between the preferences in what concerns digital games and the style of learning of children and adolescents. The study was made on a sample of students from Bucharest (gamers for at least 6 years) and confirms the correlation for the reflexive and the pragmatic learning styles but invalidates it for the activist and theoretic styles of learning. The paper was presented at the National Conference for Psychology and Educational Sciences (Bucharest, 2006).

Digital games market in Bulgaria

The Bulgarian digital games landscape could be characterised as having a variety of foreign products and a smaller amount of national games developers. Despite this fact, there are some companies which managed to establish themselves on the market and create products that came in competition with other games over the borders of Bulgaria.

The first Bulgarian digital game that entered the international market is „Tzar : The Burden of the Crown". This medieval fantasy combines elements of both RTS and RPG games and lets the player devise and adopt multiple strategies during game play. The game was released by *Haemimont Games* – probably the most famous digital games' developer in Bulgaria. The company creates all aspects of their games, from concept to graphics and programming and associates with partners like *Atari*, *CDV Software Entertainment*, *Enlight Software* and *Octagon Entertainment*. Another product of *Haemimont Games* is the adventure in the Celtic world „Celtic Kings : Rage of War", also a real-time strategy. The game was released in many European countries and was the best selling title in Spain in November 2002. Other popular games of the company are „Glory of the Roman Empire" and „Rising Kingdoms".

Another leading Bulgarian game developer is *Black Sea Studios*. The company, established by some of the programmers who worked in *Haemimont*, aims to become a centre of the gaming industry in whole South-Eastern Europe and became famous with its contract with the German distributor *Sunflowers*. The most popular game created by *Black Sea Studios* is „Knights of Honour" – a simulation in real time that deals with empire conquering.

Other types of games, created by Bulgarian companies, weren't that successful on the market. There is a great variety of Bulgarian browser games that aren't at least popular among the players. As for online games, the mostly played one is the online poker.

Bulgaria's biggest distribution firm for digital games is *Pulsar Games*. The company is official distributor for *Electronic Arts*, *Vivendi Universal*, *Lucas Arts*, *Dreamcatcher* and many others as well as sponsor of the first Bulgarian digital game „Tzar".

Although *Pulsar Games* offer a wide range of digital games, the game clubs remain their main buyers. The Bulgarian game players prefer to pay between 2 and 4 euro for unlicensed versions of the games. Despite, the leader among the games played in Bulgaria – „Warcraft" by *Blizzard Entertainment* – stimulates its clients to buy the original disc by offering the special CD key for playing online only in the licensed version. Another method against the piracy on Bulgarian market are the translated versions of the games, which could be obtained only in official shops.

„World of WarCraft" is the game that dominates the Bulgarian digital game scene. It held the first position among the mostly played games for the period March'06 – May'06. Other often played games in Bulgaria are „Lineage II", „NFS : Most Wanted" and „FIFA 06", according to a survey made by „PC Mania" Magazine (PC Mania online).

Further results of the same survey show that most of the Bulgarian players play at home and only 17% of them – in computer clubs. The most favoured game genres are real time strategy, action and role-playing games and the most favoured scenarios – science fiction, fantasy as well as World War II.

Interesting to know is that Bulgaria was the first European country to recognise eSports as official kind of sport. The country managed to get a license for the probably most successful eSports league, ESL (Electronic Sports League).

Method of research

As the field hasn't been explored before in Eastern Europe, we undertook an explorative online survey, which is therefore non-representative, and serves for giving important information for future research. Because of the personal contacts of the team with Bulgaria and Romania, we expected to have most respondents from these countries. The survey was opened for respondents in the period between the 17.06.2006 and 31.08.2006 at the link <http://www.unipark.de/uc/ik_tu_fb_medienmanagement2/239f/>. The questionnaire was available only in the

English language, which eliminated issues related with different alphabets (for Romania and Bulgaria), and possibly intervening variables caused by the translation bias.

Structure of the questionnaire

To attract the respondents' attention, we searched for an ice-breaking question and went for „Do you consider yourself to be a gamer ? ". Further on, we structured our questionnaire in categories. The first logical category was *Utilized Equipment*, containing two questions concerning the games--playing devices and the internet connection. The second category was *Gaming Practice*, in which we tried to find out the places, times and rituals of the game players, through a number of 10 questions. In the third category, *Gaming Preferences*, we tried to find out what genres and types of games Eastern European gamers favour. This category contains eight questions. The fourth category encloses questions about the opinions of our respondents, concerning game playing and reasons for it. In this category we inserted also some questions regarding the numbers of games they buy, because we considered this as a quite neutral category that could make participants respond such type of inconvenient and avoided questions. In the fifth category, we have two questions concerning *Games acquaintance* : how familiar the players are with different games and games producing companies from Eastern Europe. The last category concerns the personal background of the respondents (age, gender, urban/rural distribution, occupation, country, etc.).

Results

Survey respondents

We cumulated a number of 125 persons that completed the questionnaire till the last page, from the total sample of 326 that entered the link. The net participation number is 240 persons (100%) from which 125 (52.08%) persons completed the questionnaire. The sample is not a representative but an explorative one.

Countries : As expected, most of the respondents were from Romania (44.80%) and Bulgaria (39.20%). The presence of other countries in the sample was irrelevant, having percentages less than 2 : Croatia, Lithuania, Poland, Russia and Ukraine. There weren't respondents from other East-European countries. Because of the very low presence of other Eastern-European respondents than Romanian and Bulgarian, we cannot generalize the obtained data for the whole Eastern Europe. More appropriate, we will consider this study as a research on the Romanian and the Bulgarian markets on digital games.

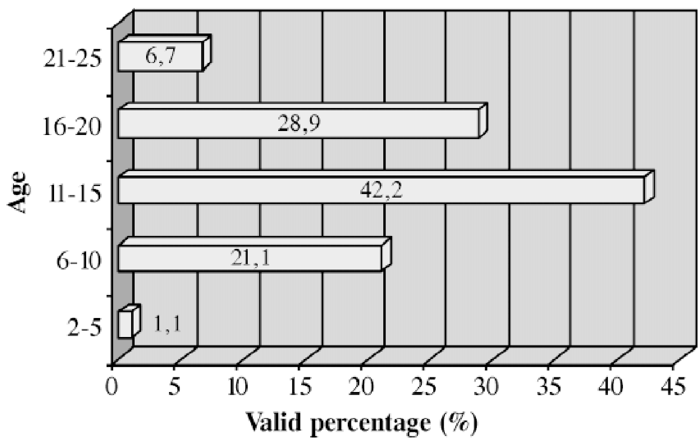
Gender : As expected, the gender gap is deeply present : 72.13% are men and only 27.87% are women.

Occupation : Nearly half of the respondents are university students, 24.17% high--school students and an equal percentage of 24.17% are working/employed. We assume that the higher percentage of university students is generated not by the fact that most players are university students, but because the members of the research team have most contacts with university students.

Rural-urban distribution : Most survey participants (73.33% of 120) live in big cities of more than 100,000 inhabitants and 21.67% live in cities of 25,000 up to 100,000 inhabitants. There are no respondents that live in rural areas.

Age : Contrary to our guess, most respondents (45,8%) are young people of age between 21 and 25. From the total of 125 respondents, teenagers come on the second scale, with 23,3%. Young people older than 26 but younger than 30 have answered our questionnaire in proportion of 15,8%, teenagers from 10 to 15 years old in proportion of 10,8%, and 8% had 36 years old or more. We cannot assume that the greater number of people of age between 21 and 25 is caused by the fact that, especially at this age people use to play digital games. More probably, we have to consider the fact that all the members of our team had contacts with individuals of this age.

The first encounter with digital games (figure 3) occurred in most cases (47,9%) between the ages of 11 and 15. A percent of 35 of the participants played their first digital games even earlier, between 6 and 10 years old. The tendency to start playing digital games earlier than some decades ago can be noticed in the results of this survey : only 11,2 percents of the respondents discovered digital games at ages over 16, while 6% encountered digital games before they reached 6 years old.



N = 125

Question : *At what age did you first play digital games ?*

Figure 3. *Age of the first encounter with digital games*

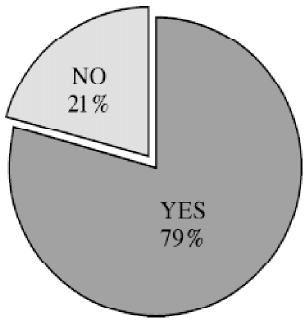
We considered that real gamers have to play digital games regularly. In order to avoid subjective appreciations of the term „regularly”, we mentioned below our question what our understanding of this term is : at least 4 hours a week. The ages of the fist encounter of digital games with the ages of regular playing correspond : 42,2% of the respondents began to play digital games on a regularly basis at the ages of 11-15.

Another 28,9% of the surveyed persons became regular gamers later, as they were 16-20 years old. In conclusion, although the biggest part of our respondents were not teenagers but university students or employed persons over 20, our respondents do play digital games since they were teenagers of 11-15 or 16-20 years old. The idea that teenage is the time to discover digital games is confirmed. Gamers start playing at early ages but do not stop after they finish high school, but continue playing, buying and enjoying them.

Equipment and gaming practice of Eastern Europeans

One essential question was what kind of devices the respondents own respectively use. We distinguished in „own” and use” because some participants might play digital games in public buildings or internet cafés. As expected the PC is the most widespread device for playing digital games in Eastern Europe. Nearly 80% of the respondents dated that they own a PC for personal use.

We nevertheless need to take into account that the survey was made online, so virtually all our respondents had access to a computer in a way or another.



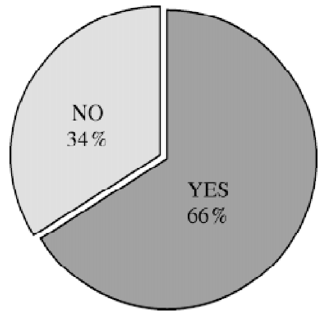
N = 125
Question : *Do you actually own a PC which allows you to play digital games ?*

Figure 4. *Percentage of PC owners*

Other gaming devices are not widespread in Eastern Europe. Only around 2% of the respondents own consoles as Xbox or Gamecube. The most popular console is Playstation2 by Sony, which is at least owned by 6,4% of the random sample. Consoles of the first generation as Playstation1, Gamecube or Dreamcast do own over 8%. These data show that beside the PC no other gaming device does preponderate. Even handheld devices are not common, only 7,2% of the respondents do own Gameboy, Nitendo PS or Playstation Portable.

What does surprise is that only 65,6% of the participants state they use a PC for gaming, while 79,2% own one. We reason that many people took part in the survey, who rarely play digital games.

The results for utilisation of consoles and handheld devices just underlines that they are not widespread in Eastern Europe. On an average less than 10% of the respondents use consoles or handheld devices. Once again only Playstation2 approves by 12% that it is the most common gaming device in Eastern Europe after the PC. For our research it was necessary to know whether the participants have access to the internet or



N = 125
Question : *Do you use a PC to play digital games ?*

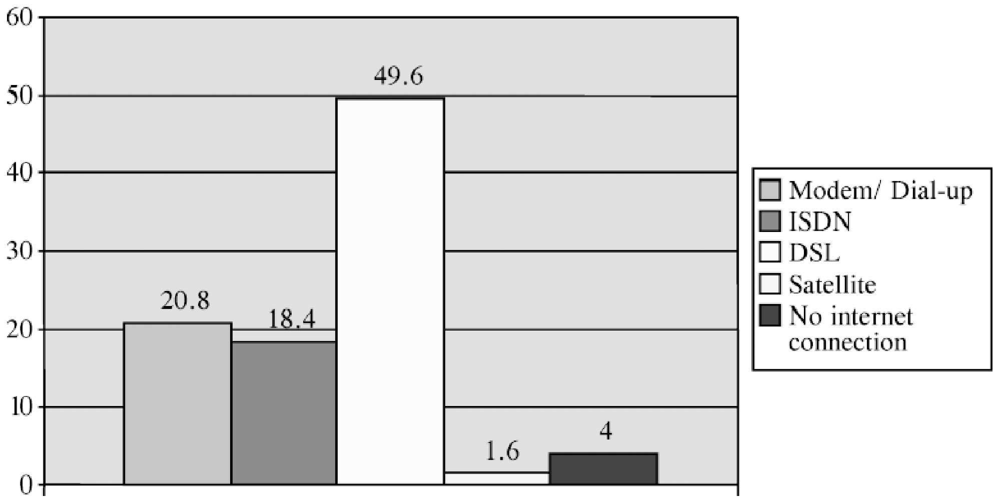
Figure 5. *Percentage of PC usage to play games*

not and additional what kind of connection they use. In a nutshell only a minority of 4% stated to have no access to internet at home. The distinct majority with over 50% even got a DSL internet access at home, which allows them to play online games. Of course these results have to be taken with a pinch of salt and can not be generalized, as only someone who regularly uses internet was able to take part in the survey.

Furthermore we focused on the gamers gaming practice and asked the respondents where they play and how often they do. At home about a third plays digital games daily and over the half of the respondents play at least several times a week.

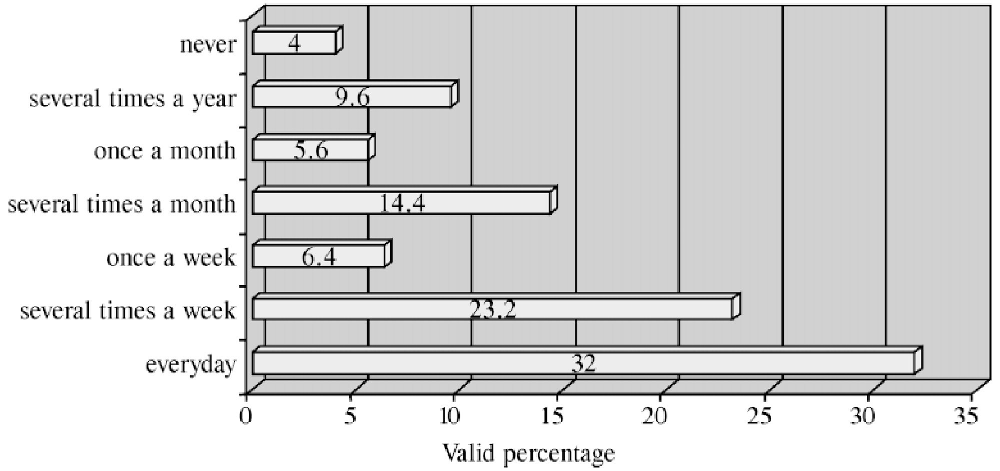
Playing digital games at internet cafés and clubs does not seem to be very attractive to the respondents, as a majority of 58% states they never play at such localisations. Playing digital games at friends seems to be quite unpopular too. Nearly a third of the respondents state they never do so. The second third plays only several times a year at their friends. Only at work the respondents play less digital games, 70% of the respondents negated that they play during their job. Probably social desirability had a strong impact on this question.

In addition, we asked the participants how often they play on each device, while we categorized into the following groups :



N = 125
Question: *What kind of internet connection do you have at home ?*

Figure 6. *Type of Internet connection used*



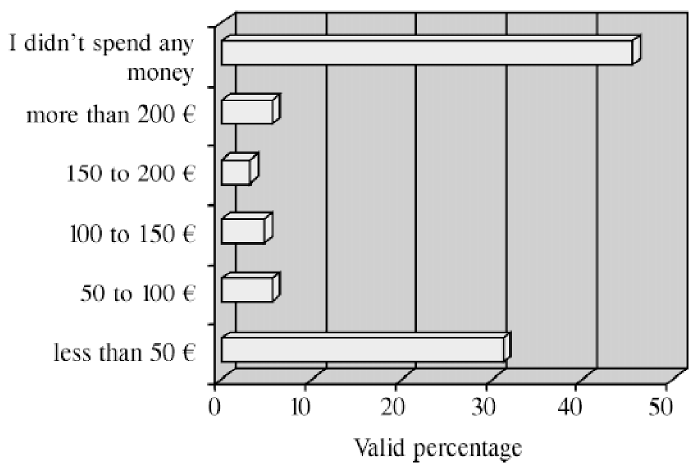
N = 125
Question: *How often do you play digital games at home ?*

Figure 7. *Gaming regularity*

PC, consoles, handheld and others. The data approves our given conclusions. About a third of the participants play digital games on their PC every day and about half of them at least several times a week. If you delete the non valid data 67,8% of the participants do never play digital games on a console, 67,5% never play digital games on handheld devices and 70,4% never play digital games on alternative devices. This underlines one more time that except the PC all devices for playing digital games are not established in Eastern Europe.

Not to lose track of our questions and to consider the social environment of our respondents we asked them with whom they play digital games most of the time. As a result we can secure that playing digital games is a rather individual experience. Nearly two-thirds state that they mainly play digital games alone. Beside that 21,7% do regularly play with their friends and 8,3% with people, who they do not know.

As we were also interested in the market structures of the Eastern European countries we asked people where they draw their games from. The given options were : computer shops, online shops, borrowing from friends and downloading from the internet. The results show that people always or at leas sometimes receive their games from downloading it online by 75,2%, borrowing it from friends by 73%, buying it from computer shops by 33,4% and buying it from online stores by only 12%. Alarming is the fact, that 43,4% of the respondents state they always download their games from the internet. Continuative, the participants should state how many games they own themselves. This question might be helpful to check afterwards whether the respondents own illegal games or strictly pay for software. A significant majority by nearly 48% declares to own between one and five digital games. Another important issue is obviously financing, so we asked the respondents to estimate how much money they spend on digital games as well as on fees for playing play online games possibly at an internet café. The results acknowledge our assumptions the East Europeans are not able to spend much money for digital games. In fact 47,5% declare that they do not spend any money on digital games. It marks the majority. These who spend money on digital games rarely disburse more than 50 euros.



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Question : *How much money did you spend on digital games in the last 6 months ?*

Figure 8. *Games expenditure*

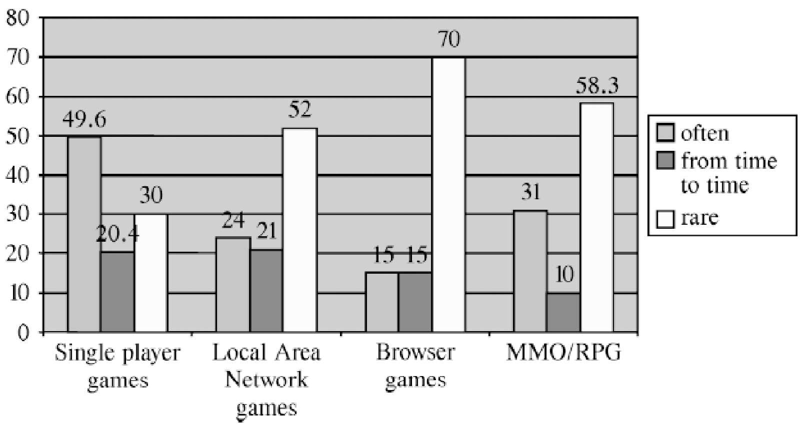
The results for the average time participants spend playing digital games throughout the week and the weekend were harmed by many incorrect entries. Some fill in letters instead of the claimed numbers, others set commas, although they were asked to neglect that. Out of the remaining valid data we know that the average time for playing digital games during the week is about 4,61 hours. Among the 97 participants who fill in the data correctly were extreme examples playing up to 35 hours a week.

Dubious entries as playing digital games for 80 hours a week were not included. A majority of 30,93% answered to play ordinary one hour during the week. These respondents can hardly be categorized as gamers. The average time for playing digital games during the weekend was 4,05 hours as 116 people who fill in the data correctly. Once again dubious values as 56 or 48 hours had to be deleted, accounted that the weekend only last 48 hours. As in the case of playing during the week, the biggest group states to play digital games in weekends for one hour with a percentage of 17,24.

Gaming preferences of Eastern Europeans

This part of the questionnaire deals with the participants' own preferences in playing digital games, such as favourite game types, genres and devices, images of the ideal game and platform and mostly played digital games.

The type of game which is played the most among the East European gamers is the Single player type of games. This answer was given by nearly the half of the respondents and followed by the Massively Multiplayer Online Role Playing games with 30%. The least played type of game is Browser games.



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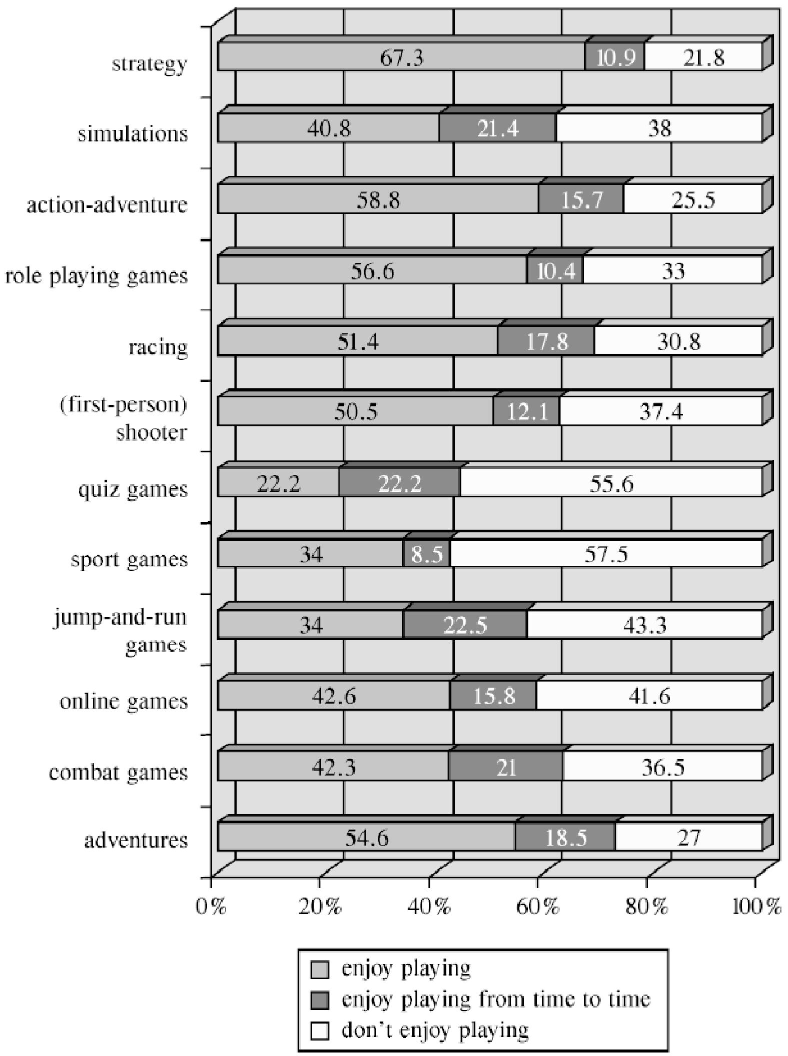
Question: *How often do you play the following types of games ?*

Figure 9. *Frequency and type of game*

As for the preferred mostly played digital game genres, the dominating answer, given by nearly three-fourths of the respondents, was the strategy genre. On second place comes the action-adventure and on the third – the role playing games. The least favoured genres are the quiz and sport, as well as the skill games.



N = 125
Question: *Which of the following game genres do you enjoy playing ?*

Figure 10. *Preferred game genres*

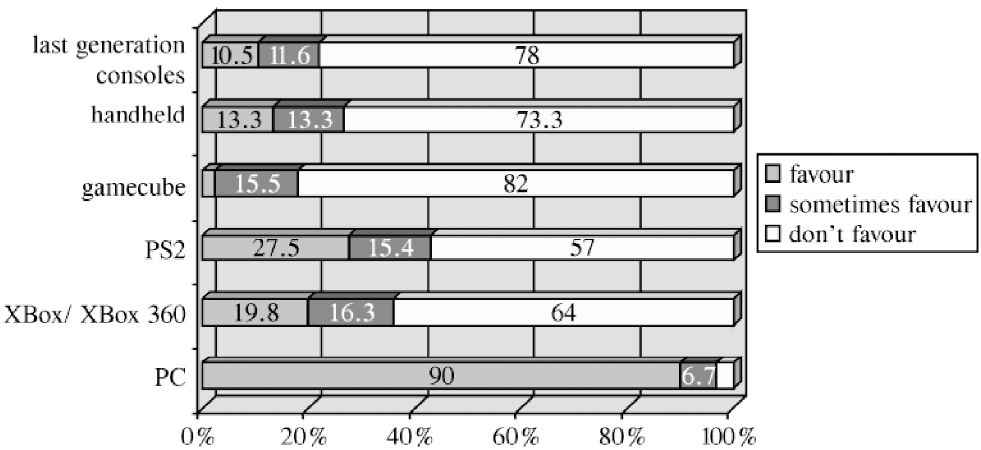
Interesting is that although the mostly played game type is the single player game, the game which was given as most played recently, is a MMORPG type of game, namely „World of Warcraft".

Most played game recently:
1. „World of Warcraft"
2. „Warcraft III: The Frozen Throne"
3. „Counter-Strike"
4. „Need for Speed Most Wanted"
5. „Solitaire"

Most played game ever :

1. „Warcraft III : The Frozen Throne"
2. „Heroes"
3. „Counter-Strike"
4. „Need for Speed"
5. „Warcraft / World of Warcraft"

Other digital games played recently by east Europeans are the „Heroes" series as well as the „Half Life" episodes. „Diablo 2" and „Solitaire" are also among the games ever played most. It has to be noted that over 50 different games were given as answers to each of these two questions. The „Warcraft" series dominated with only 10 entries out of 125. This result points out the variety of digital games played at the east European market. As expected, the game device which east Europeans favour the most is the personal computer. It was given as an answer by 90% of the participants. This result could be also certified by the fact that the market for personal computers in East Europe is the most growing one among all game devices.



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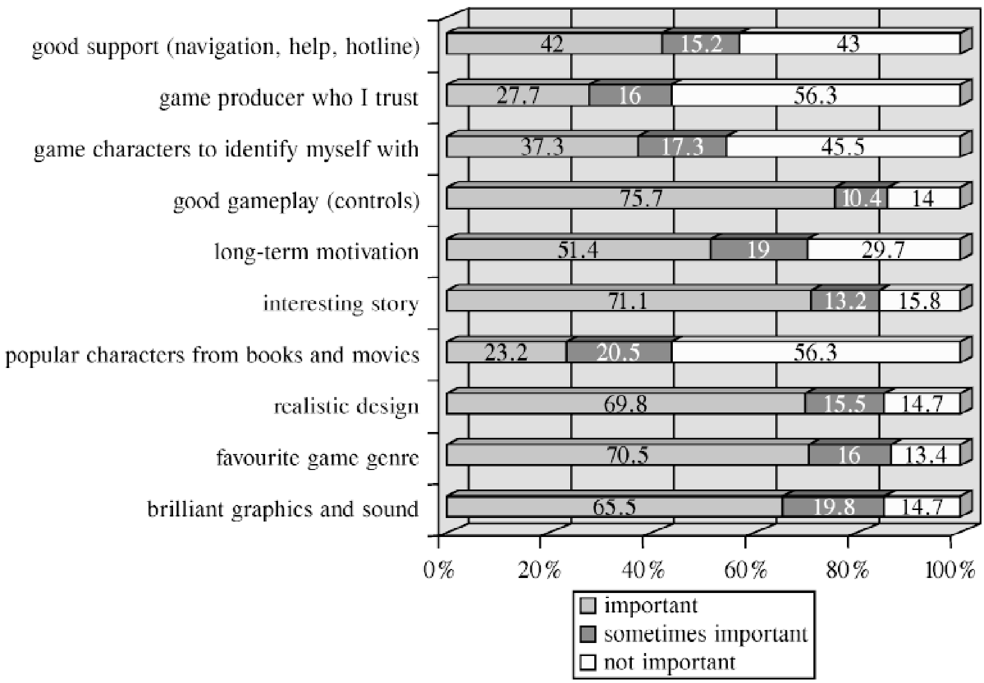
Question : *Which device for playing digital games do you favour most ?*

Figure 11. *Favoured devices*

In another part of the questionnaire the respondents had to describe their own ideal digital game by evaluating the importance of different game elements. A good gameplay as well as a favourite game genre are the elements that come on first place, both given by more than three fourths of the East Europeans. These results are interesting through the fact that they confirm the commonly accepted opinion that „the all important quality factor of a game is its gameplay, the pure interactivity of the game" (Juul, 2005, 19). However, the opinion is revised by Jesper Juul in his book „Half-Real" ; in his attempt to answer the question : „Why are video games fun ?", Juul premises that „there is ultimately no one-sentence description of what makes all games fun ; different games emphasise different types of enjoyment and different players may even enjoy the same game for entirely different reasons." (*ibid.*) Meier (*apud* Juul, 19) designer of „Civilization", considers that high-quality games are the ones whose choice provide high-quality mental challenges for players. The realistic design of the game plays also an important role in the judgement. By contrast, popular characters from books and movies and game producers are being disregarded in the game choice.

Analogue to the previous question the respondents were also asked about their ideal



N = 125

Question: *How important are each of the following elements of a digital game for you ?*

Figure 12. *What makes a good digital game*

digital game platform. It's interesting that all given elements were marked as important by over half of the respondents. The dominated ones were „good graphic and sound qualities" and „easy to configure", and the least important characteristics was „good online and multiplayer performances", contrary to the fact that World of Warcraft leads among the mostly played digital games recently.

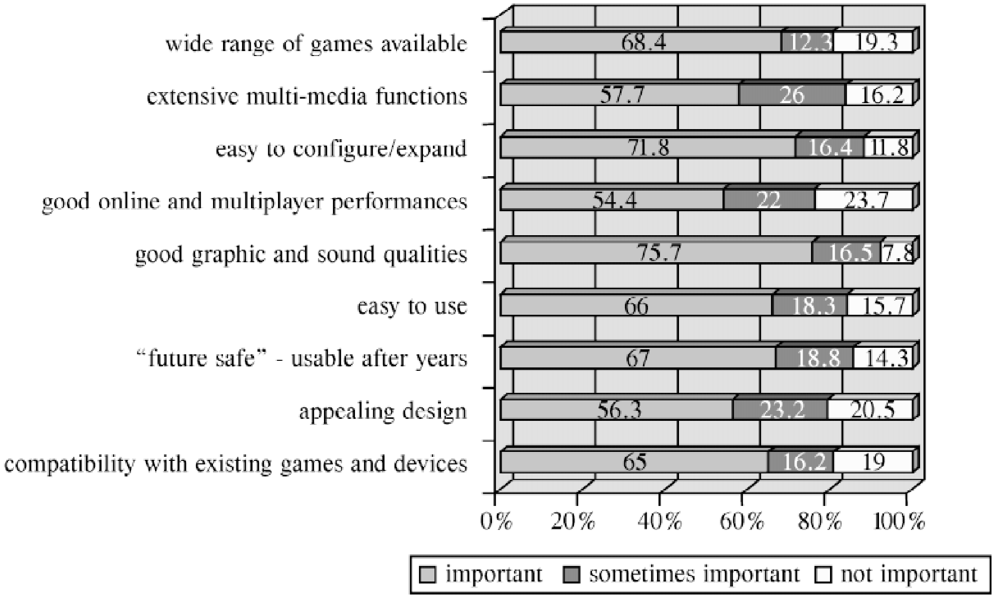
As for the question about the different price models on the hardware-software market, no strict tendency in the answers of the East European could be noticed. Though, nearly half of them prefer to spend money on expensive software and to get the hardware cheaper.

Gamer's opinions and attitudes

In this part of the questionnaire the respondents were asked to give their opinion on different statements about digital games that could be marked as typical in research studies about playing digital games.

The statements deal with some characteristics of digital games and their influence on the gamers. Interesting result could be observed concerning the statement that some games are intellectually challenging – 84 out of 116 East European agree with it.

As for assuming that digital games help people get together, nearly half of the respondents don't confirm this opinion. This could be confirmed also by the result that the statement „I play digital games so that I can chat about them with my friends" does not refer to over three fourths of the gamers. Nevertheless the bigger part of them agree that digital games help to escape from everyday problems which is a very interesting result, that indicates some particular influence, digital games could have. On the contrary, over the half of the respondents



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Question: *How important are the following characteristics for you for a gaming platform ?*

Figure 13. *Qualities for a gaming platform*

gives the opinion that they don't play digital games only to kill time and don't feel they are neglecting other preoccupations because of their passion for games.

In terms of the often discussed role of internet cafés, 97 out of 125 East Europeans wouldn't spend more time there even if they had the money and don't refer themselves to the opinion that some play games in internet cafés because they meet people there. These results accord with the fact that nearly half of the respondents don't play games in internet cafés.

The results on the statement „I enjoy playing digital games by myself more than playing with other people" don't give any strict tendency of the answers. The difference between those respondents who don't distinguish themselves with this opinion and those who agree with it isn't significant.

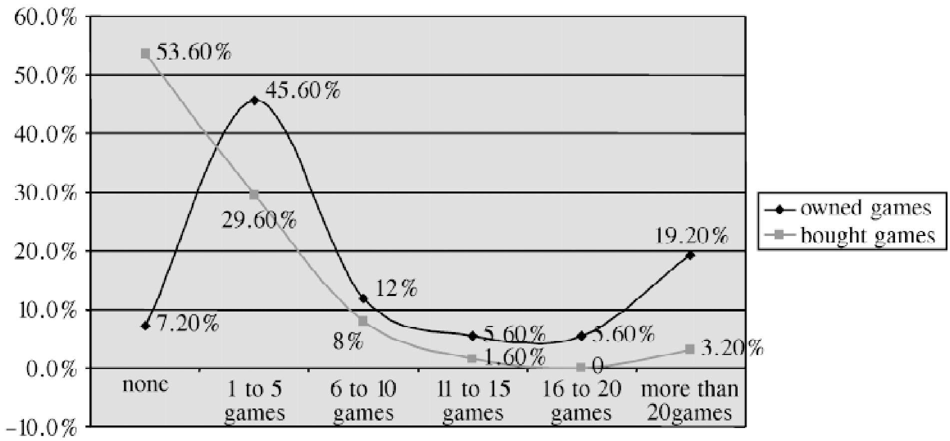
Nearly half of the East European gamers suppose games are too expensive and even more strongly disagree with the statement their parents won't agree with them playing games.

East Europeans were also asked about the emotions gaming awakes in them. The most of them are challenged, excited and involved when playing digital games. Over three fourths of the respondents say they also feel happy. On the contrary, stress, boredom and frustration are emotions gaming does not awake in them.

One of the most interesting results concerns the proportion of the bought and owned digital games. The fact that nearly 93% of the East Europeans have at least one game of their own but only 46% of them have also actually bought one, speaks for itself.

Games they „heard of"

This category contains questions regarding Eastern European games and game producing companies. How familiar are Eastern



N = 125
Issue: *Owned* vs. *bought games in the last 6 months*

Figure 14. *Owned* vs. *bought games*

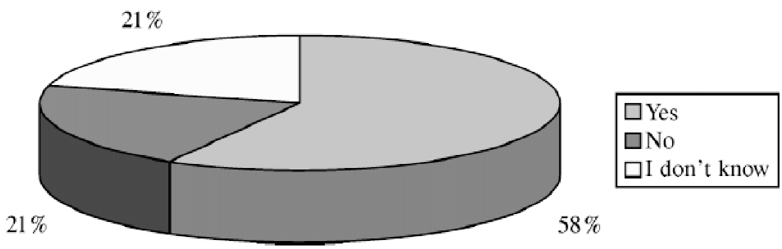
European gamers with games produced in their home country? Have they even heard about them? To find the answers to these questions, we created a table with 4 games for each of the 2 countries we expected to have more respondents, Romania and Bulgaria and also 4 games produced in Poland („Terrorist Takedown", „Xpand Rally", „GTI Racing", and „Battlestrike"). For Romania, we included „BS-Hacker", „Shadow Force: Razor Unit", „Rival Realms" and „Secret Service: In Harm's Way". For Bulgaria, the respondents had to choose between „Tsar: The Burden of the Crown", „Knights of Honor", „Celtic Kings: Rage of War" and „Glory of the Roman Empire". From the Bulgarian list, the most popular between Bulgarian players seems to be „Tzar: The Burden of the Crown": 41% of the Bulgarian respondents have heard of the game. A first general remark is that from the three countries, Bulgaria has the greatest positive percentages, meaning that Bulgarian game-players are more acquainted with national games than are Romanian or Polish players. But Bulgarian games have been voted as being heard of by non-Bulgarians as well. For the Eastern-European gamers as a whole, the most popular is not „Tzar: The Burden of the Crown" but „Knights of Honour", with 50% of the total number of respondent having heard of it.

For Romania, the percentages are insignificant. However, the most popular national games, both between Romanian players (6%) and in general (18%), is „Shadow Force: Razor Unit". „BS-Hacker" seems to be totally unknown by the Romanian public, while „Rival Realms" and „Secret Service: in Harm's Way" cumulate only 4%, respectively 3% of the national public acquaintance rate.

The question that followed (*Which of the following digital games' producing companies have you heard of?*) aimed at finding out if Eastern European game-players can recognize local game-producing companies. We introduced in table 2 Bulgarian companies (*Haemimont Games* and *Black Sea Studios*), 4 Romanian companies (*2 Bad Design*, *ExoSyphen Studios*, *Fun Lab* and *Active Pub*), 3 Polish companies (*City Interactive*, *IM Group* and *Techland*) and 3 fake companies.

We can assume that the name of the producing company is not of great interest for players. Even for players, the names of the game-producing companies can be hard to remember. However, most respondents (34%) have answered to have heard of the Bulgarian company *Black Sea Studios*, but the next best rated company is a fake one : *ProGames Studio*, with 29% of the respondent. The most recognizable games-producing company from Romania appeared to be *Fun Lab*, while the most rated Polish company was *City Interactive*. The possibility to induce in error the respondents with fake names of companies confirms that the answers are not really trustable. The formulation of the question „have you heard of" appeals to the memory of the respondents, but the answers can easily be completed from the imagination of the players, especially when the names are likely to be real (*ProGames Studio*, *DigiGames* etc.).

The next two questions were interconnected and queried gamers' level of satisfaction with the offer of the home-market on digital games. The biggest part of respondents (37,6%) rated that the market for digital games in their home country doesn't provide them with all the games they want. An equal percent of 28,8% respondents either consider the home market satisfactory in terms of digital games offer, or they do not have an opinion (*I don't know*). The big percentage of non-response data (*I don't know*, almost 30%) makes the results at this question hardly relevant. As for the equipment for playing digital games available on their home market, 52,2% of the respondents consider it satisfactory and sufficient, while 20% don't know and other 20% believe it is insufficient.



N = 125
Question : *Does the market for digital games in your home country provide you all the equipment you want ?*

Figure 15. *Satisfied with the range of equipment on the home market*

Conclusions and recommendations for further research

In our research project we used an explorative online survey in order to analyze the preferences, the habits, the motivations and the behavior of digital game-players from Eastern Europe. Due to personal contacts, we reached a significant number of Bulgarian and Romanian gamers.

The results of the survey suggest that Romanian and Bulgarian players are mostly men, live in metropolis (over 100.000 of inhabitants) and are young people in the age of 21 to 25 or teenagers. They first started to play digital games as they were 11-15 and most of them became regular players at the same age.

If they do play games produced in their home country, Bulgarians play mostly *Tzar : The Burden of the Crown*. Romanians play national games in a very low proportion, and the game that enjoys the greatest popularity is *Shadow Force : Razor Unit*. Although few Polish gamers answered our query, many of our respondents have answered to have heard of games produced in Poland, the most votes having *GTI Racing*.

Bulgarian, Polish and Romanian game producing companies are heavily recognized by the participants and easily jumbled with names of fake companies. Eastern European gamers, in the case of Romania and Bulgaria, do not consider the offer of digital games available on their home markets satisfying, but are content with the offer of playing equipment.

The context of digital games begins before the games are marketed, circulated and finally reach the hands of players, and digital games themselves have many different types and genres. Studies with pretence of comprehensiveness can therefore not reach a high depth of analysis, and future studies should try to focus on a specific aspect of the broad digital games spectrum. We hope our report draws a helpful picture of the Eastern European market for digital games, delivers new insight about local peculiarities and serve as a fundament for further studies.

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