



EUROPE:

In-Game Spending Study

GameTrack Nov 2019

KEY TAKEOUTS: In-game spending study:

- Three quarters of 6-15 year olds in Germany, Spain, Italy, UK and France are video game players, these account for **over 24 million across these 5 GameTrack European markets** in total. They play a variety of devices but around 7 in 10 gamers play on either consoles or smart devices.
- Around **a third of parents allow their children to spend money in-game**. The majority of children spends less than 20 GBP/EUROS each month.
- In-game **spending by children has decreased** from 42 % (2018) to 36 % (2019).
- **Increase of agreements to spend money in a game**: the vast majority (8 in 10) of parents whose children spend money in-game have an agreement of some kind with the child, this has seen a significant increase in the last year (**from 79% to 85%**).
- 1 in 5 use **parental controls tool to control spending**
- **Two-thirds of people have heard of PEGI** at European level and is stable and remain consistent with last year.



THREE-QUARTERS OF CHILDREN AGED 6 TO 15 PLAY VIDEO GAMES ON ANY DEVICE ACROSS GAMETRACK EU MARKETS IN Q2 2019 - JUST OVER 24M PLAYERS. THE MOST POPULAR DEVICES ARE CONSOLES AND SMART DEVICES (TABLETS OR SMARTPHONES).

CONTEXT – NUMBER OF KIDS PLAYING VIDEO GAMES AND DEVICES USED

European Overview – Q2 2019



76%

of children ages 6 to 15 play on any device

6-10
video game players

11-15
video game players



DEVICES PLAYED



69%

Key:

Console Handheld Compute
Tablet Smartphone



Number of gamers from main GameTrack measurement survey - Q2 2019
Device usage from GameTrack - Q2 2019

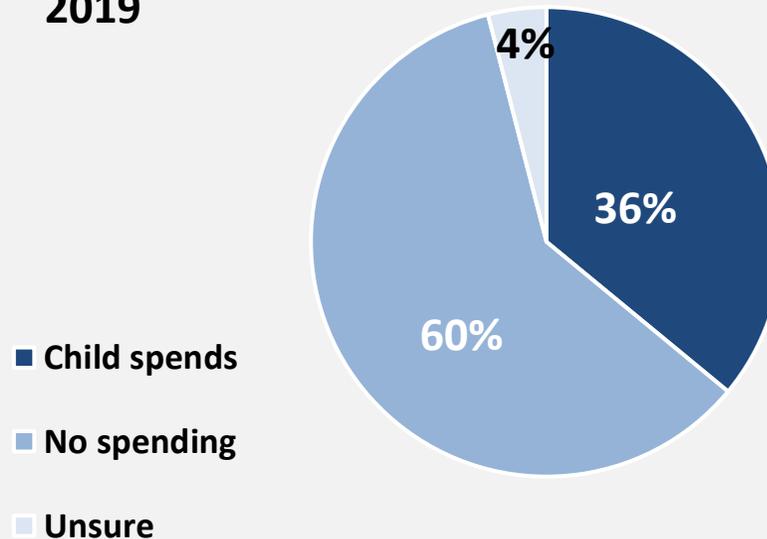
All Children aged 6 to 15 years old from GameTrack Q2 2019. Europe (3,078), UK (626), France (628), Germany (609), Spain (624), Italy (591)

ACCORDING TO PARENTS, JUST OVER A THIRD ALLOW THEIR CHILDREN TO SPEND MONEY IN-GAME WHICH IS LOWER THAN LAST YEAR. THERE IS A SIMILAR INCIDENCE OF IN-GAME SPENDING ACROSS COUNTRIES. LESS PARENTS ACROSS THE GAMETRACK EU COUNTRIES ARE ALLOWING THEIR CHILDREN TO SPEND MONEY IN GAME.

DOES YOUR CHILD SPEND MONEY IN GAME?

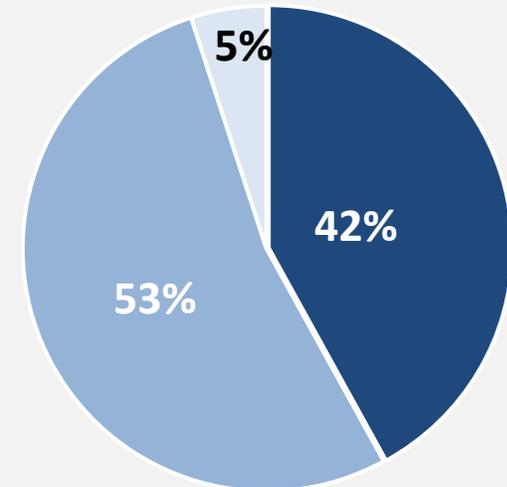


2019



2018

(Excludes Italy)

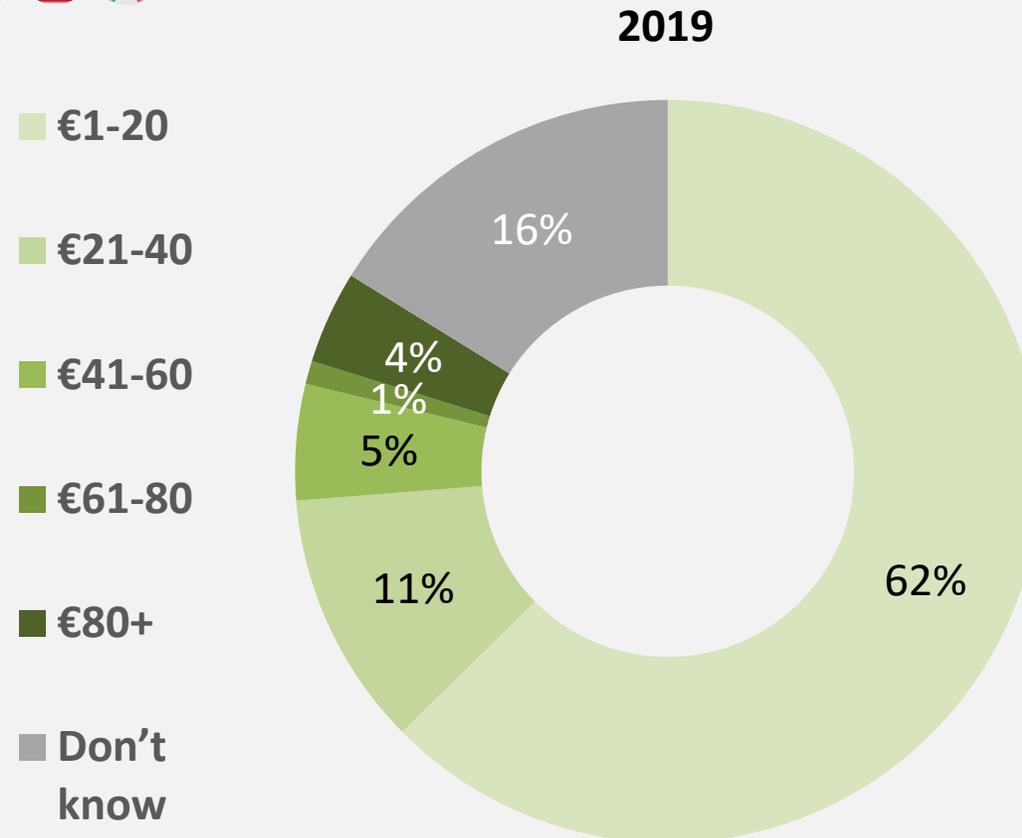


▲▼ Sig different vs last year @ 95% CI

*As the 2018 data doesn't include Italy in the sample the results are not directly comparable

AMONG THOSE WHOSE CHILDREN SPEND MONEY, 62% CLAIMED THEY SPEND LESS THAN £/€ 20 PER MONTH ON AVERAGE – THE MOST POPULAR MONTHLY BUDGET FOR IN-GAME EXTRAS. DESPITE THIS, 16% STILL DON'T KNOW THE AMOUNT SPENT BY CHILDREN ON IN-GAME EXTRAS.

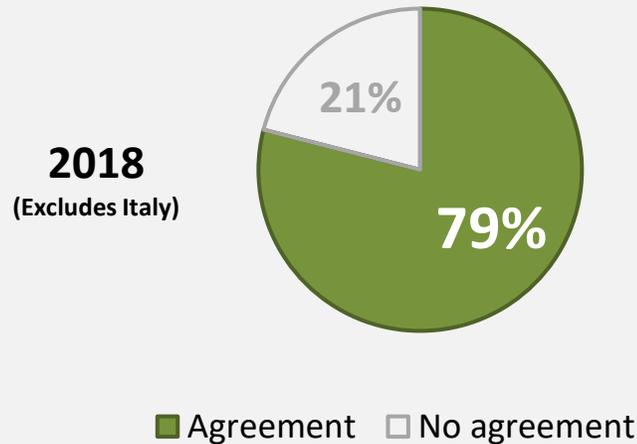
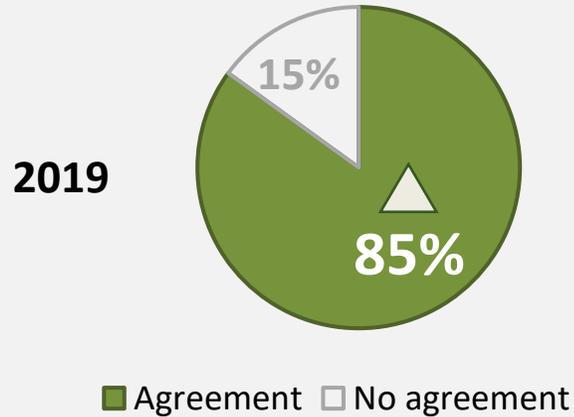
AVERAGE MONTHLY SPEND IN-GAME



AMOUNT SPENT BY SPENDING BANDS ACROSS ALL PLATFORMS AND ALL TYPES OF TRANSACTIONS

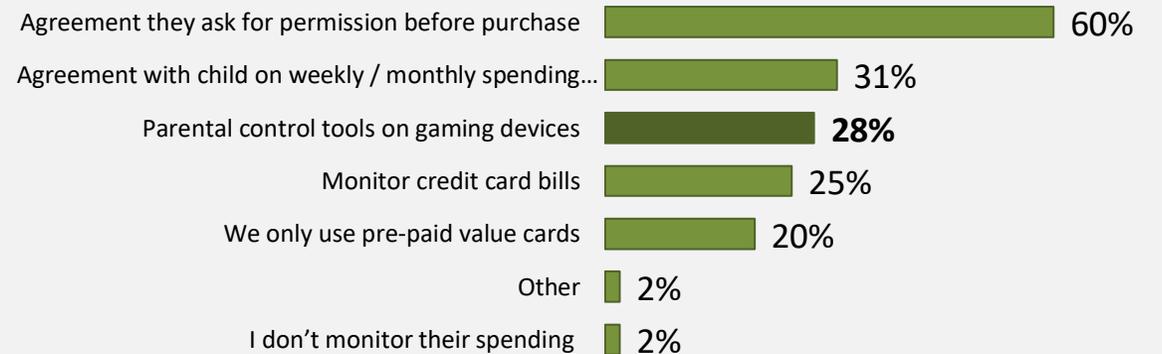
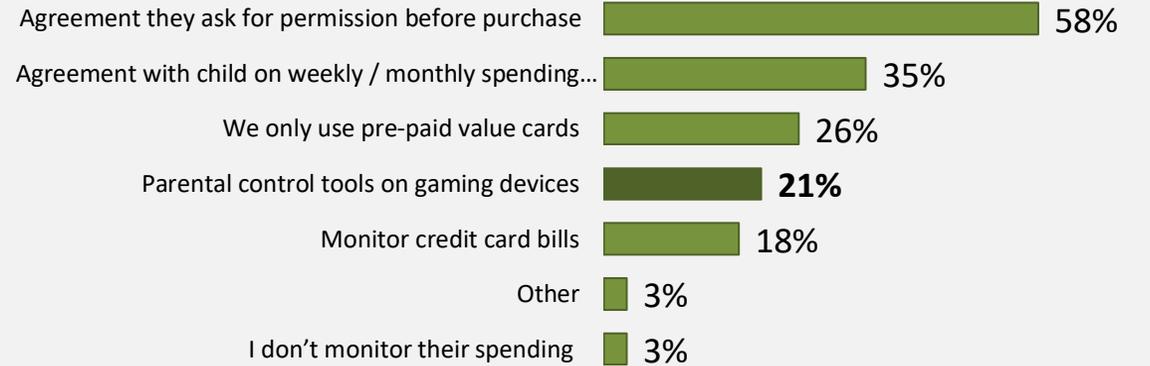
AMONG THOSE, WHOSE CHILDREN SPEND MONEY IN-GAME, THE VAST MAJORITY - 85% - HAVE AN AGREEMENT WITH THEIR CHILD. AMONG THOSE WHO HAVE AN AGREEMENT, 97% CLAIMED THEY USED SOME METHOD TO MANAGE OR MONITOR THEIR CHILD'S IN-GAME SPENDING.

AGREEMENTS PARENTS - CHILD ON IN-GAME SPENDING – OVERALL



▲ ▼ Sig different vs last year @ 95% CI

METHODS TO CONTROL IN GAME SPENDING



*As the 2018 data doesn't include Italy in the sample the results are not directly comparable

Do you have any agreement with your child/children on in-game spending?

*This question was a multi-coded question

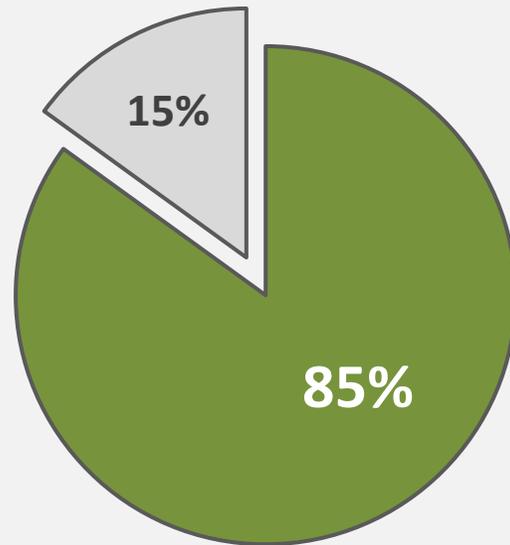
BASE: ALL WHOSE CHILD SPENDS MONEY IN GAME:

2018 Bases: Europe (378). 2019 Bases: Europe (455)

NB: Base size <100 for individual countries is not reported.

THE COMMENTS ABOUT NOT HAVING AGREEMENTS DEFENDED THEIR ANSWERS WITH MANY TALKING ABOUT TRUST, EDUCATION AND POCKET MONEY / THE CHILD SPENDING THEIR OWN MONEY.

NON AGREEMENTS – PARENTS COMMENTS



- Agreement
- No agreement

“As long as it's pocket money then they can spend it how they want”
- Parent from GB

“He is given pocket money and he takes on this sum to refund us these purchases (made on my PayPal account)”
- Parent from FR

“It is part of education to give trust”
- Parent from DE