



 **EUROPE:**

GameTrack In-Game Spending Recontact Study





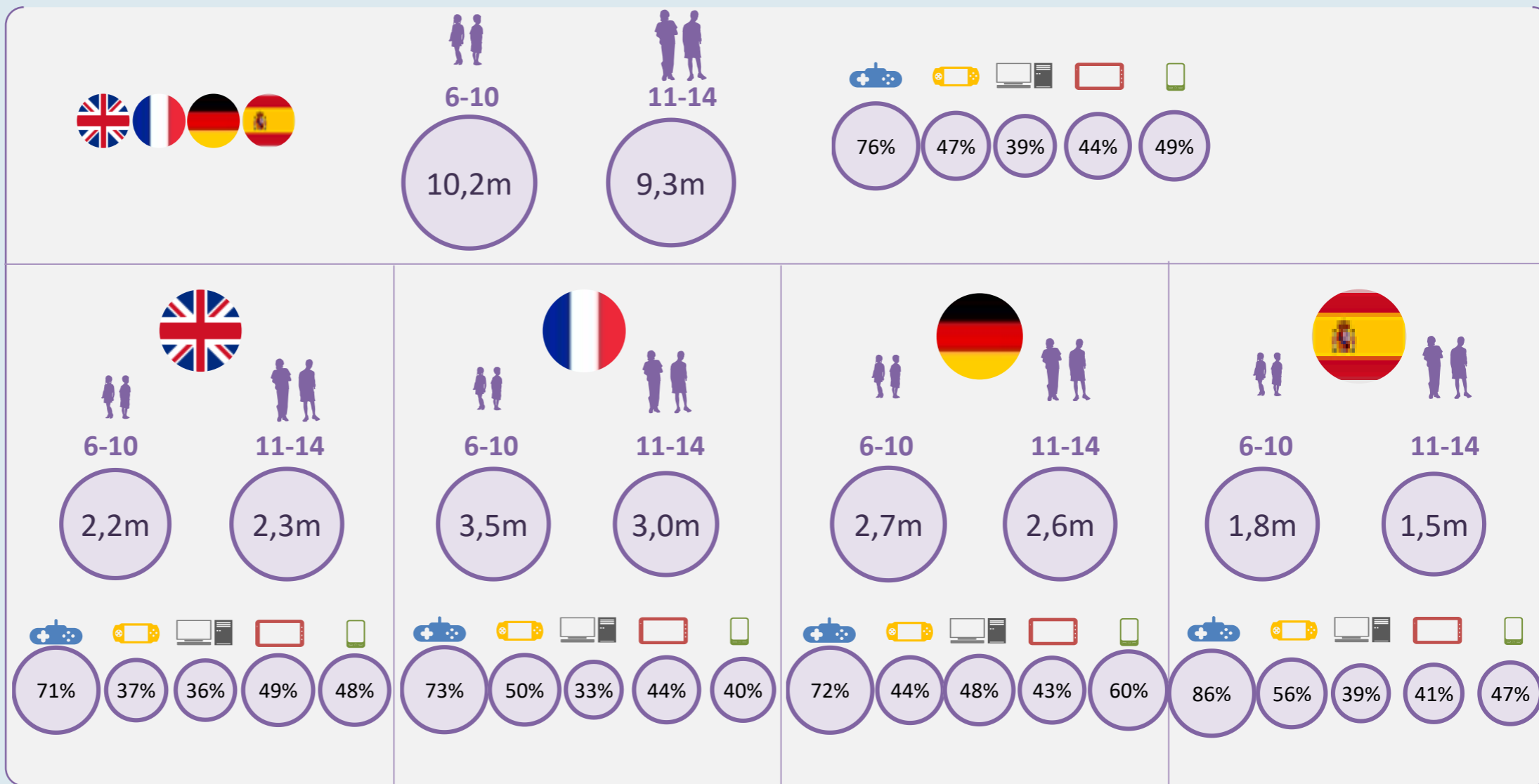
KEY TAKEOUTS – In-game spending re-contact Study:

- 6-14 year olds in Germany, Spain, UK and France tend to be gamers – **there are nearly 20m across these 4 European markets in total**. They play a variety of devices but **around three-quarters play consoles, which have best-in-class parental controls**.
- Around **2 in 5 parents of gaming children claim that their child spends money in-game**, and a small minority are very frequent spenders.
- **The vast majority (8 in 10) of parents whose children spend money in-game have an agreement of some kind with the child**, but this mainly consists of a verbal agreement with **few using formal parental controls**.



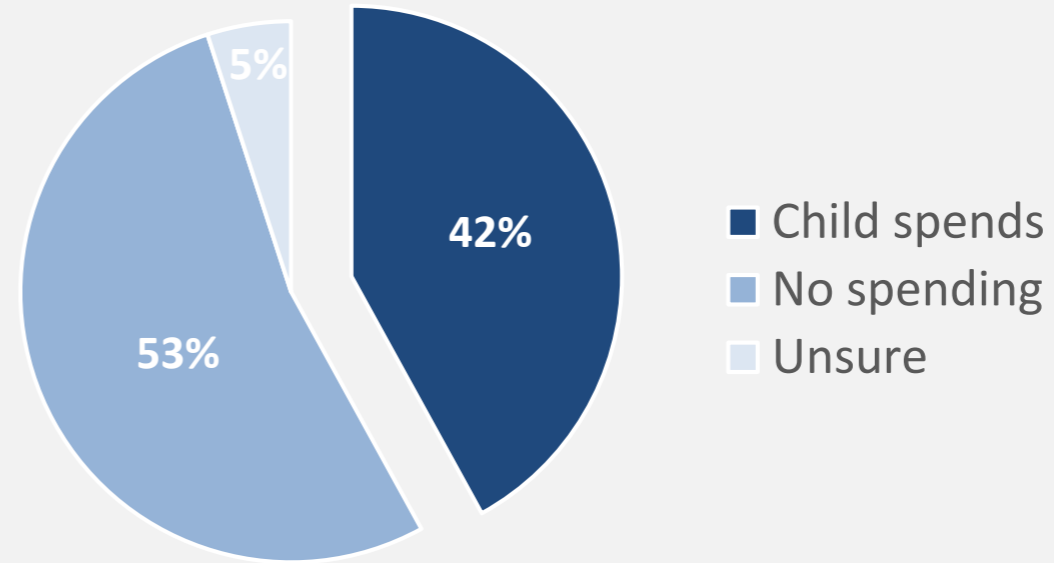
THERE ARE NEARLY 20M 6-14 YEAR OLD GAMERS ACROSS THE 4 EUROPEAN MARKETS ACCORDING TO GAMETRACK DATA. AROUND THREE QUARTERS PLAY GAMES ON A CONSOLE WHICH HAVE BEST-IN-CLASS PARENTAL CONTROL TOOLS.

CONTEXT – NUMBER OF KIDS PLAYING GAMES AND DEVICES USED



ACCORDING TO PARENTS, JUST UNDER HALF OF KIDS AGED 1-15 PLAYING GAMES SPEND MONEY IN-GAME. THIS IS HIGHEST IN SPAIN WHILE UK, FRANCE AND GERMANY SHOW A SIMILAR INCIDENCE OF IN-GAME SPENDING. IMPORTANTLY ONLY A SMALL PERCENTAGE ARE NOT AWARE OF THEIR CHILD'S SPENDING.

DOES YOUR CHILD SPEND MONEY IN GAME?

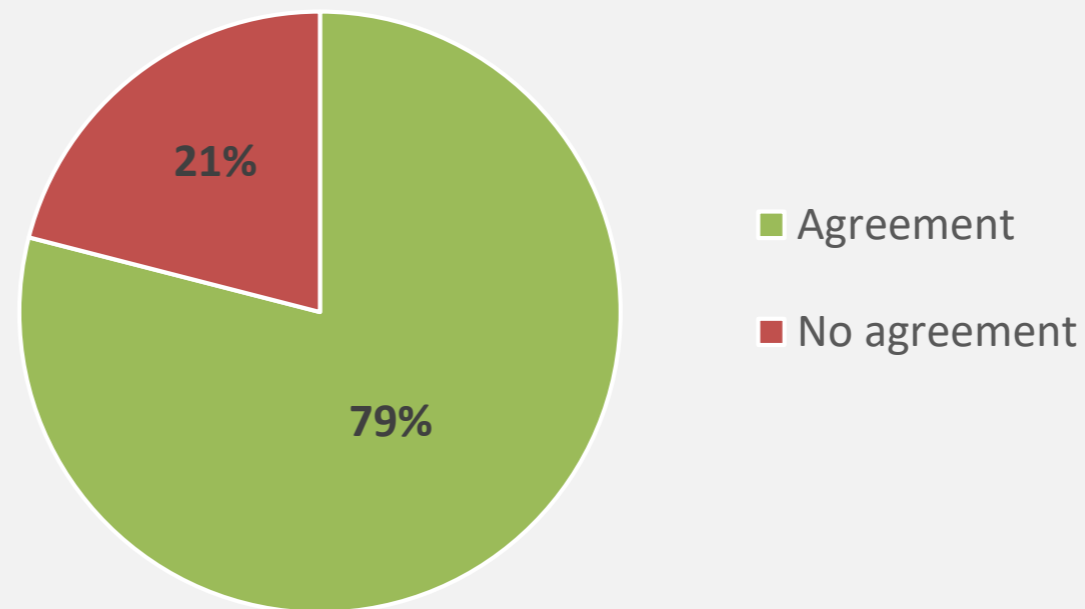


	UK	FRANCE	GERMANY	SPAIN
Child Spends	40%	34%	36%	58%
No Spending	57%	63%	60%	33%
Unsure	2%	3%	4%	9%

Q: Does your child/children ever spend money in-game?
 Base: Parents whose children play games.
 Europe (962), UK (238), France (330), Germany (294), Spain (100)

NEARLY 8 IN 10 PARENTS WHOSE CHILD PLAYS GAMES HAS AN AGREEMENT WITH THE CHILD ABOUT THEIR IN-GAME SPENDING.

DO YOU HAVE AN AGREEMENT WITH YOUR CHILD?

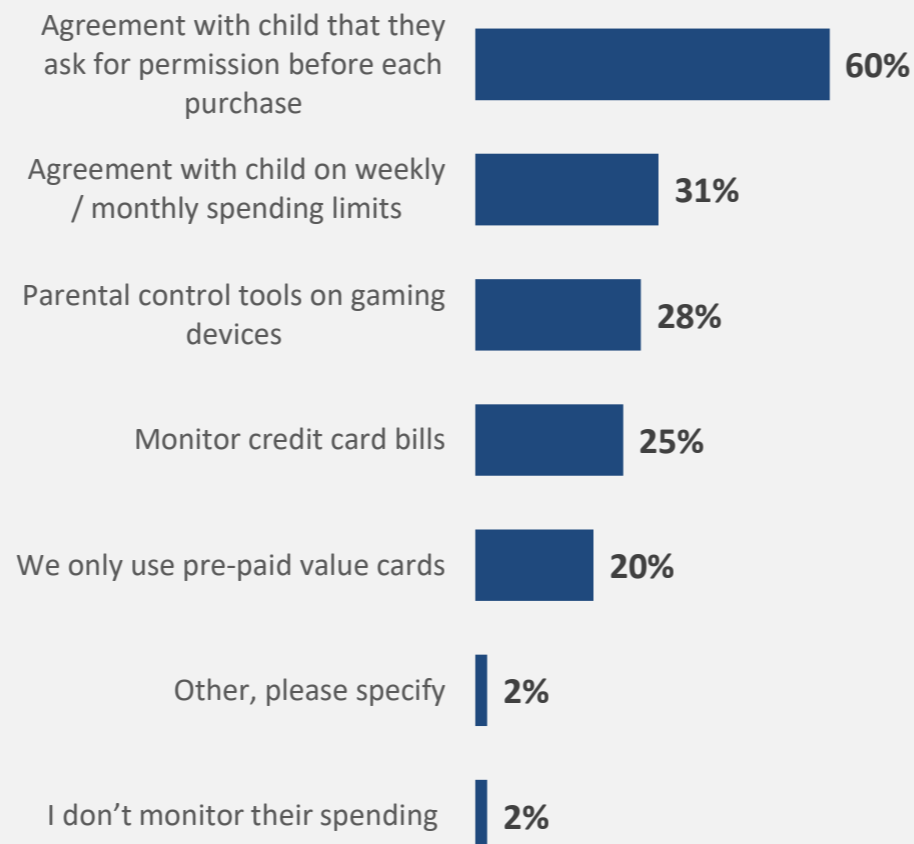


	UK	FRANCE	GERMANY
Agreement	83%	83%	91%
No Agreement	17%	17%	9%

Do you have any agreement with your child/children on in-game spending?
 Base: Parents whose children play games, and spend money within the game.
 Europe (378), UK (102), France (110), Germany (107)
 NB: Base size <100 for Spain so not reported

AN AGREEMENT WITH THE CHILD IS THE MOST USED METHOD TO CONTROL IN-GAME SPENDING, WITH ONLY AROUND 1 IN 4 USING PARENTAL CONTROLS.

METHODS TO CONTROL IN GAME SPENDING



	UK	FRANCE	GERMANY
Agreement with child that they ask for permission before each purchase	57%	67%	61%
Agreement with child on weekly / monthly spending limits	24%	32%	29%
Parental control tools on gaming devices	30%	25%	30%
Monitor credit card bills	25%	15%	23%
We only use pre-paid value cards	18%	14%	24%
Other, please specify	4%	2%	1%
I don't monitor their spending	2%	2%	2%

Do you use any of the following methods to manage or monitor your child's/children's in-game spending?

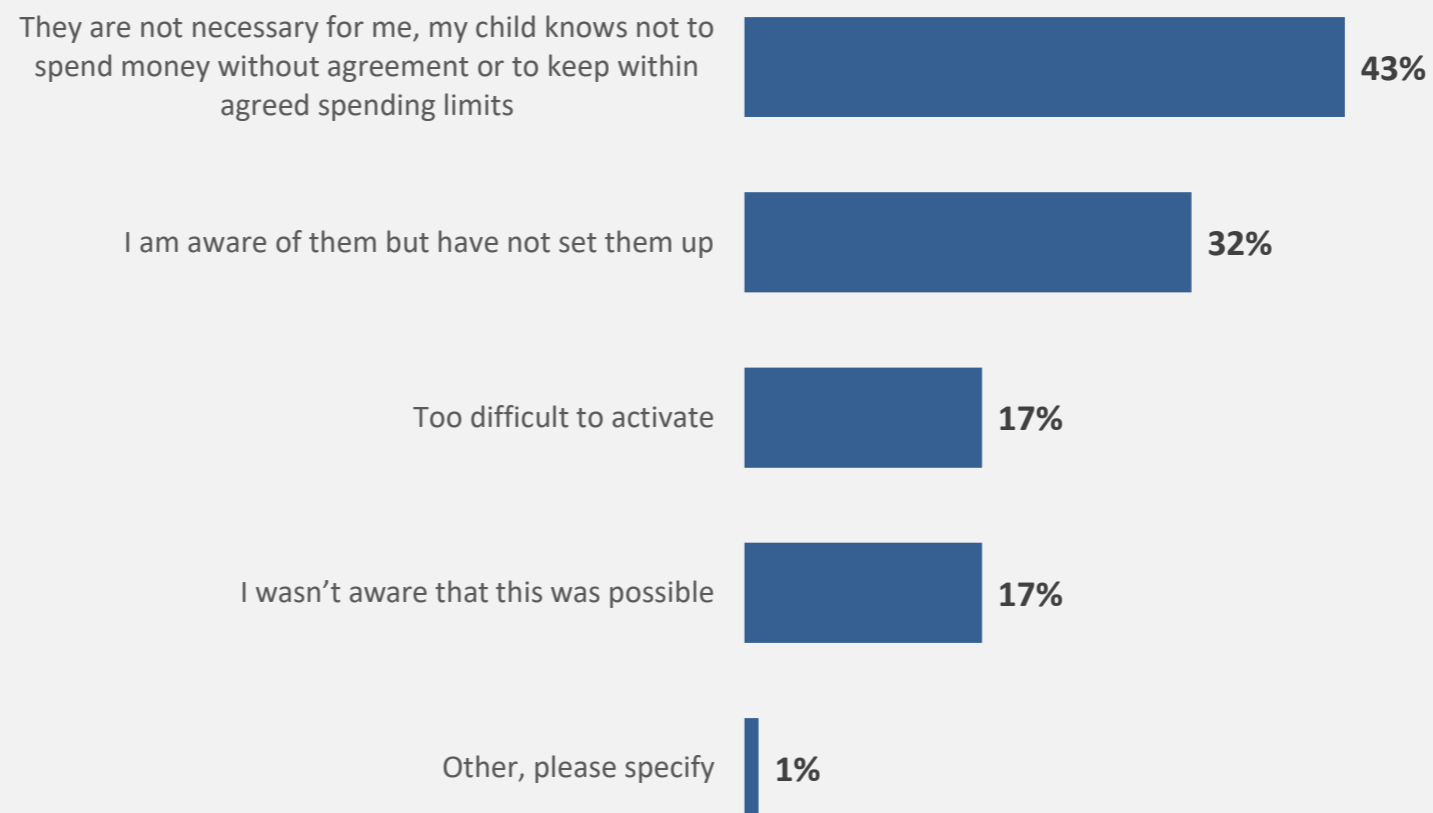
Base: Parents whose children play games, and spend money within the game.

Europe (378), UK (102), France (110), Germany (107)

NB: Base size <100 for Spain so not reported

PARENTS GENERALLY FEEL THAT AGREEMENT WITH THE CHILD IS SUFFICIENT TO CONTROL THEIR SPENDING, HOWEVER AROUND 1 IN 5 WERE NOT AWARE OF THE POSSIBILITY AND A SIMILAR NUMBER CONSIDER IT TOO DIFFICULT TO ACTIVATE.

REASONS FOR NOT USING PARENTAL CONTROLS



Why do you not use parental controls on gaming devices to monitor or manage your child's spending?

Base: Parents whose children play games, and do not use parental controls

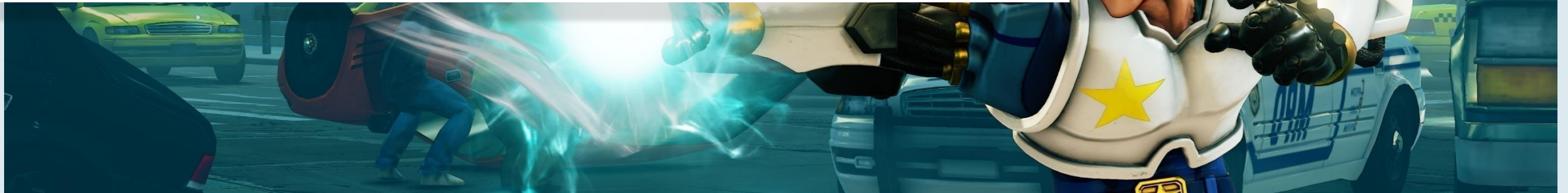
Europe (275)

NB: Base size <100 for each country individually so not reported



Study details

- All respondents are parents of a child aged up to 15 years old who plays games.
- Data were weighted using GameTrack measurements to be representative of the population on 3 attributes: Demographics (age/gender), household composition (age of children), and whether the parent responding to the survey is a gamer themselves.
- Weighting was also applied to ensure that results shown at a total European level are equally weighted across each market. I.e., each individual country contributes 25% of the results shown at European level.
- Fieldwork conducted in May 2018





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