



## 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).

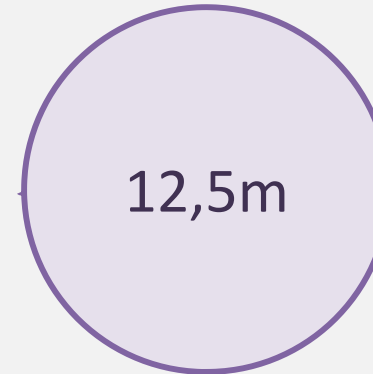
## CONTEXT – NUMBER OF KIDS PLAYING VIDEO GAMES AND DEVICES USED

### European Overview – Q2 2019



76%

of children ages 6 to 15 play on any device



#### DEVICES PLAYED



72%



40%



52%



51%



58%

69%

Key:



Console Handheld Compute



Tablet Smartphone



Number of gamers from main GameTrack measurement survey - Q2 2019

Device usage from GameTrack - Q2 2019

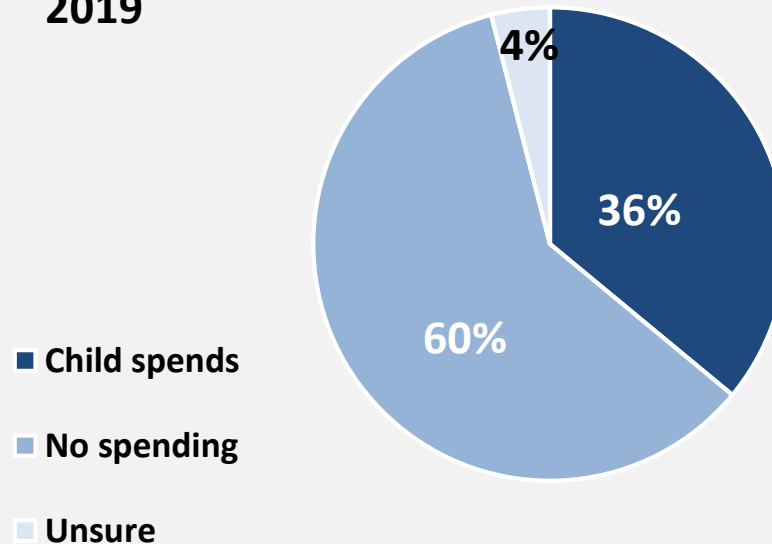
All Children aged 6 to 15 years old from GameTrack Q2 2019. Europe (3,078), UK (626), France (628), Germany (609), Spain (624), Italy (591)

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?

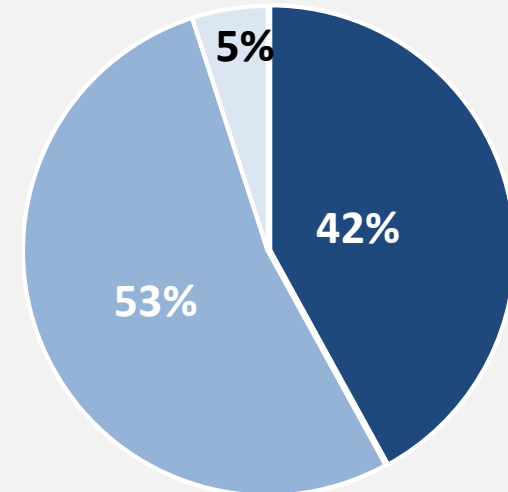


2019



2018

(Excludes Italy)



▲▼ Sig different vs last year @ 95% CI

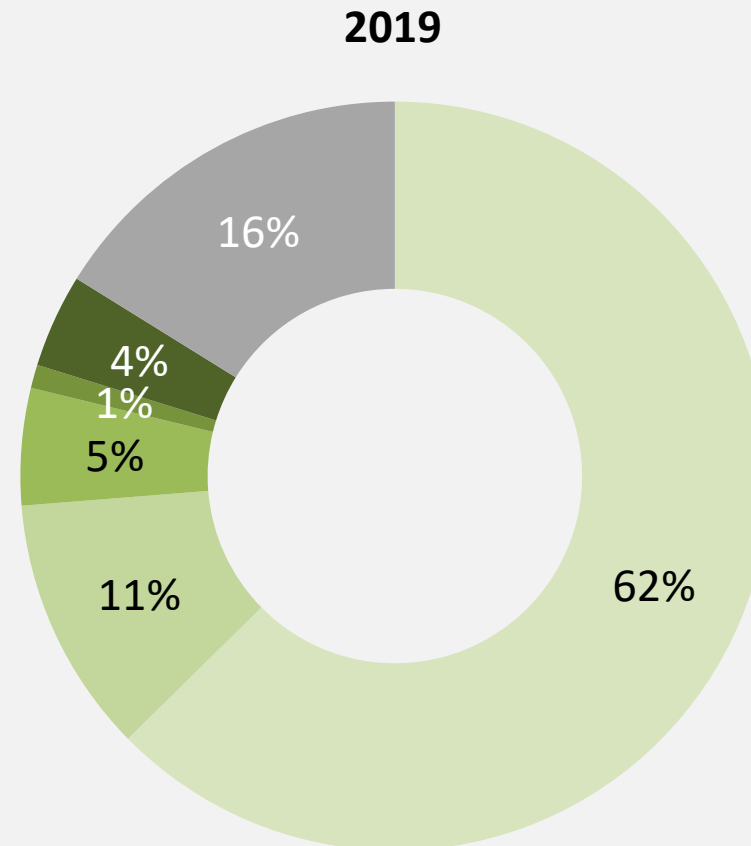
\*As the 2018 data doesn't include Italy in the sample the results are not directly comparable

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



- €1-20
- €21-40
- €41-60
- €61-80
- €80+
- Don't know

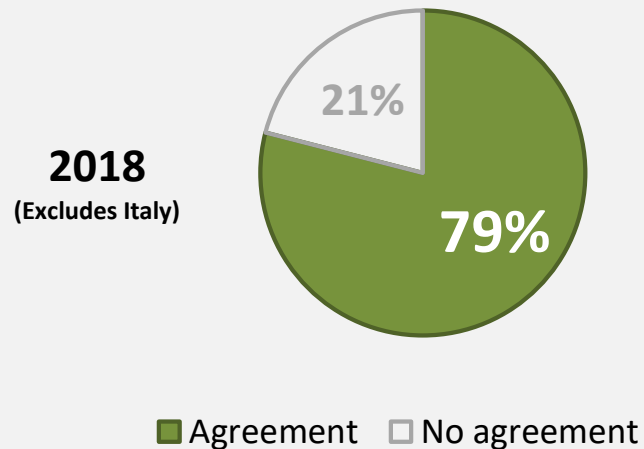
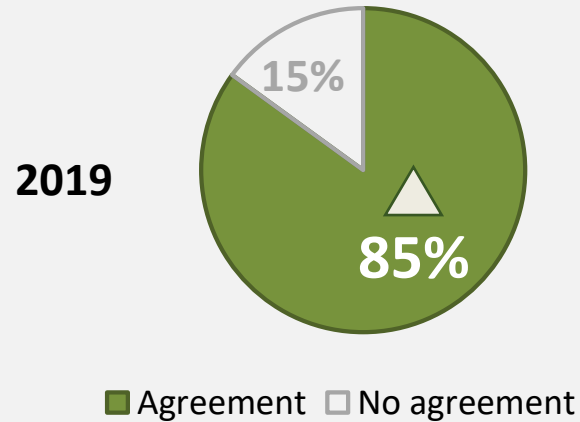


AMOUNT SPENT BY SPENDING BANDS ACROSS ALL PLATFORMS AND ALL TYPES OF TRANSACTIONS

## AGREEMENTS PARENTS - CHILD ON IN-GAME SPENDING – OVERALL

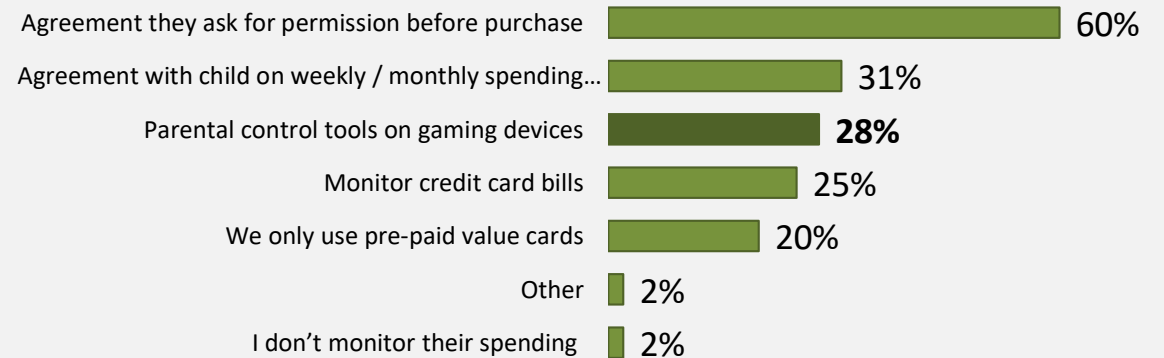
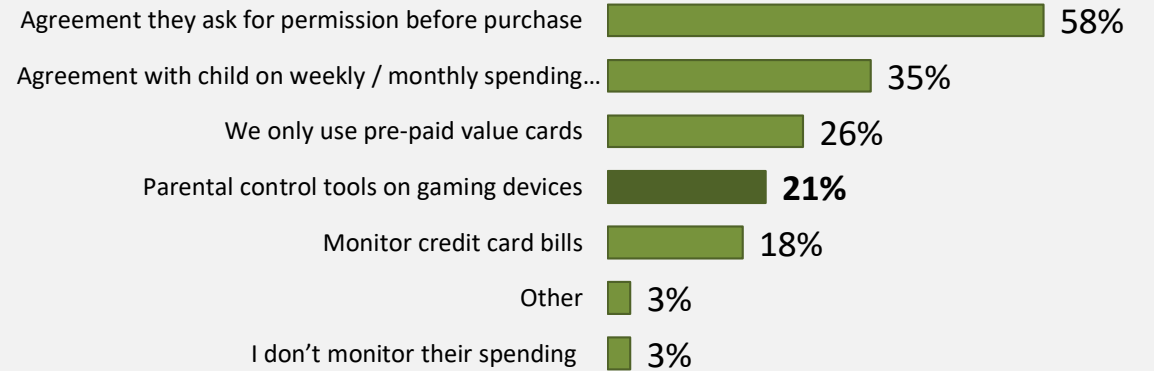


AMONG THOSE, WHOSE CHILD SPENDS MONEY IN-GAME, THE MAJORITY HAVE AN AGREEMENT WITH THEIR CHILD (WHICH INCREASES TO 85% IN 2019). AMONG THOSE WHO HAVE AN AGREEMENT, OVER HALF MAKE SURE THEIR CHILD ASKS PERMISSION BEFORE MAKING PURCHASES. USAGE OF PRE-PAID VOUCHERS HAS INCREASED YEAR-ON-YEAR.



▲ ▼ 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

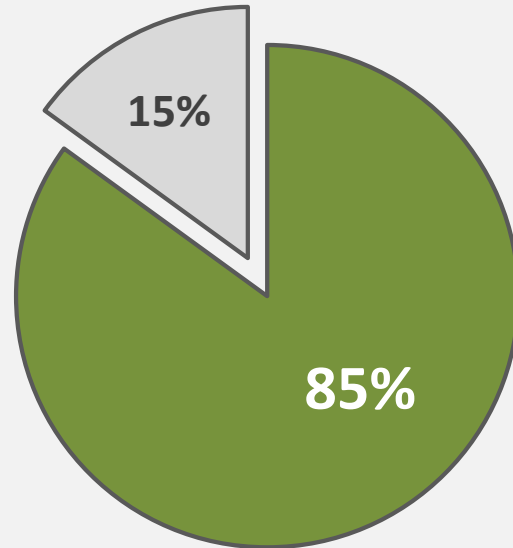
BASE: ALL WHOSE CHILD SPENDS MONEY IN GAME:

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