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).

European Overview – Q2 2019

76% of children ages 6 to 15 play on any device

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Console</td>
<td>72%</td>
</tr>
<tr>
<td>Handheld</td>
<td>40%</td>
</tr>
<tr>
<td>Computer</td>
<td>52%</td>
</tr>
<tr>
<td>Tablet</td>
<td>51%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>58%</td>
</tr>
</tbody>
</table>

11,6m 6-10 video game players
12,5m 11-15 video game players

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.

*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.

Q3. In an average month, how much money does your child/children spend in-game? Please include across all the games they play and any devices they play on. Your best estimate is fine. Base: Parents whose children play games, and spend money within the game. 2019 Bases: Europe (455), France (125), Germany (127), Spain (62), Italy (86)
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.

METHODS TO CONTROL IN GAME SPENDING

- Agreement they ask for permission before purchase: 58%
- Agreement with child on weekly / monthly spending: 35%
- We only use pre-paid value cards: 26%
- Parental control tools on gaming devices: 21%
- Monitor credit card bills: 18%
- Other: 3%
- I don’t monitor their spending: 3%

2019
- Agreement: 85%
- No agreement: 15%

2018 (Excludes Italy)
- Agreement: 79%
- No agreement: 21%

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

**Sig different vs last year @ 95% CI

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


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

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

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

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

Q: Do you have any other comments about children spending money in-game?
BASE: ALL RESPONDENTS: Europe (1118)