
PhonepayPlus

Survey conducted by Jigsaw Research



Online Gaming and Payment Platforms

Survey amongst adults and children who pay to play

PhonepayPlus
April 2012





Background and objectives

Summaries and conclusions

Main findings

1. Sample breakdown and profile
2. Types of games played
3. Attitudes to online gaming
4. Payments and platforms
5. Payments satisfaction and complaints

Introduction:
Background and objectives
Summaries and conclusions



Background and aims

- PhonepayPlus is the regulatory body for premium rate services in the UK. Its work covers in-app micropayments and is interested in the content of pay to play apps
- PhonepayPlus wants to explore the rapidly-growing area of online social gaming
- It is particularly interested in payments for access to, or enhancement of, online social games to understand:
 - who pays in terms of profile
 - what their experience of payment has been

Specific objectives

- There are a number of specific objectives:
 - How accurately are adult games targeting adults and children's games targeting children, and what level of overlap there is
 - What is the relative uptake of different payment platforms; what is the profile of users of different platforms and is there any cross-over in usage?
 - Are users aware of different 'exchange rates' and is this an issue for them?
 - To what extent have problems with payment been incurred, what are the expectations of redress and what are the experiences of complaints?

Summary - online game playing

- Three-quarters of adults surveyed had played online games in the past six months; and of those with children under 16, two-thirds reported that their children had played online games
 - The children's figure is higher amongst eligible ages (89% of our children's sample, aged 7-15, had played)
 - Adult gamers more likely to be younger and higher SEG but no significant gender bias. Child gamers are more male-biased and also higher SEG
- Most popular categories of games are:
 - For adults: challenge, virtual towns, shooting and role play/strategy
 - For children: characters/pets, virtual towns and shooting
 - Some overlap with children accessing adult categories, but 'shooting' is the only category equally played by both
- There is a high satisfaction with the experience of gaming
 - For the small minority who are dissatisfied, it is mainly because of the entertainment value or technical issues
 - Most feel confident as users including with problem-resolution
- Concerns about children playing are greater; main issues are:
 - Exposure to unsuitable people or content, or too much time spent playing



Online gaming becoming increasingly ubiquitous but not many issues/problems reported

Summary - online game payments

- One-quarter of all adults paid to play (one-third of all adult gamers) and one in six of those with children at home said their children paid to play (more than one in five of child gamers)
 - Half of our 7-15 year old child sample had paid to play
- In terms of how they paid:
 - Main payment platforms were PayPal (prime for adults) or credit/debit card (prime for children) and then pre-paid card (higher for children). Parents/guardians make the payments for children in the majority of cases.
 - Some cross-over in platform use, particularly for adults (22%)
 - Overall, use of premium text and call is relatively low
 - Methods chosen based on convenience and security
- In terms of payment details:
 - Mostly single transactions - both for game access and enhancements
 - A range of payment levels exist but only one in ten pays more than £10/mth
- Profile of those who pay to play is similar to all players
 - Main differences for adults paying via premium text/phone is that they are more likely to be younger, playing across multiple categories of games and also earning credits



A significant minority are paying to play, although use of PRS at low levels

Summary - Satisfaction with payments and problems/ complaints

- High satisfaction with payment experience across all platforms amongst adults
- However, slightly higher payment problems for those who have paid by premium text/call
 - More likely to perceive the cost as too high
- Fewer than one in ten adults have thought about complaining and only 3% have actually complained
 - Children are significantly more likely to have experienced issues or problems with payment but they are just as unlikely as adults to have actually complained (only 6% have done so)
- In terms of complainants' experience, some never received a response but most had positive experiences to share
- For most, however, the perceived hassle about complaining outweighs any perceived benefit
 - Particularly since amounts of micropayments perceived to be small



Little evidence of dissatisfaction or problems with payments and thus resorting to complaining is rare

- The proportion of people who pay to play online games is high
 - Although it's important to bear in mind that respondents for this survey were recruited via an online panel and will be more predisposed towards online gaming than average
- Interestingly, the profile of adult online gamers who pay to play is not as male orientated as might be expected
 - 52% of adult gamers are female
 - Although there are considerable differences in the games they choose to play and pay for
 - And there is a gender bias among children with 59% of child gamers being male
 - And a high proportion of adults and children from social grades AB pay to play online games
- PRS usage is at quite a low level among online gamers who pay to play
 - 7% of both adults and children use this payment method
- Problems with payments are at a reasonably low level and providers normally resolve the issue to the satisfaction of the complainant
 - Although adult PRS users are more likely to perceive payments costs as “too high”

Main findings



Sample breakdown and profile



Key audiences covered in the survey - adults

% Breakdown

The objective of the survey was to identify and understand better those who PAY TO PLAY online games

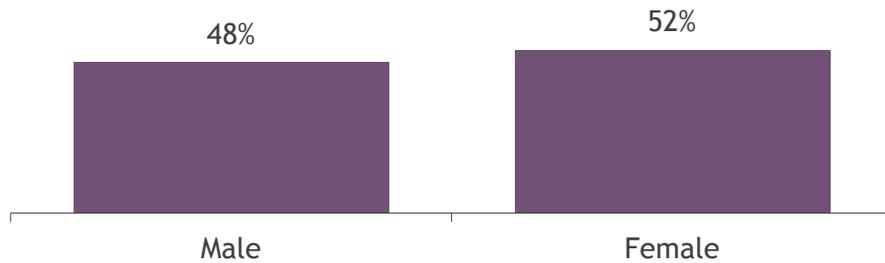
Throughout this report we focus on the following audiences:

- All adults from an online consumer panel
- Those who played online games in the past six months
- Those who paid to play online games in the past six months
- Those who paid to play online games in the past six months using premium text/call payment platform

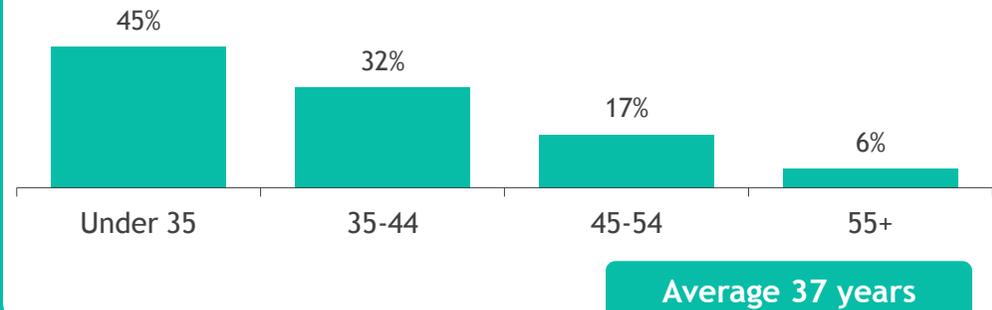


Demographic breakdowns amongst adults who pay to play

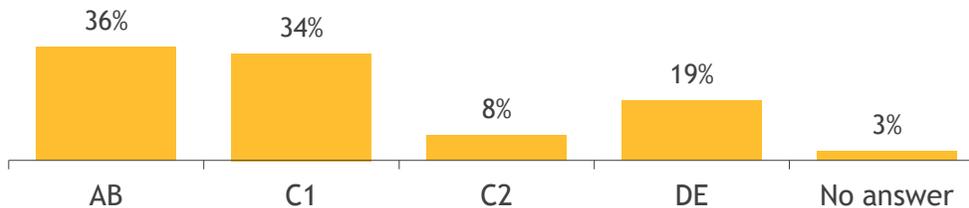
Gender



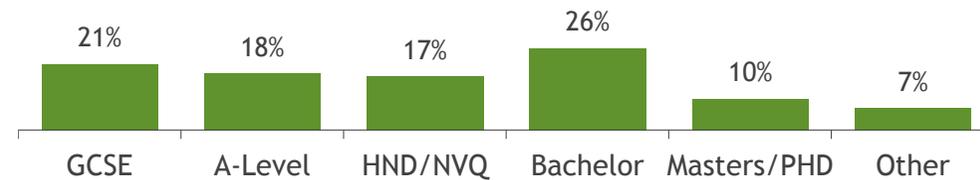
Age



Social grade



Highest level education



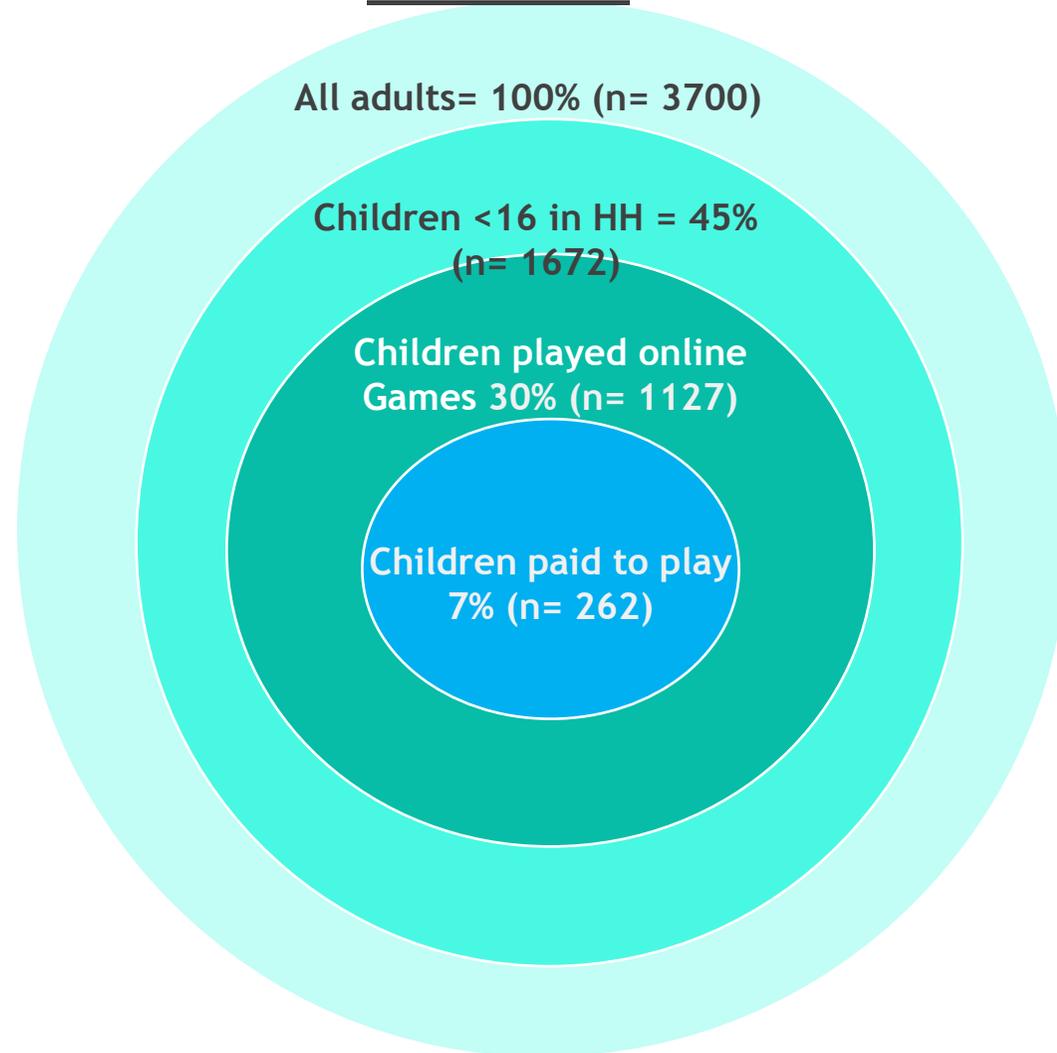
We also asked adult respondents about children in their household

We also asked adults about children in their household and whether they play online games and pay to play

Therefore, where relevant we also focus on:

- Adults whose children have played online games in the past six months
- Adults whose children have paid to play online games in the past six months
- **Adults whose children paid to play online games in the past six months using premium text/call payment platforms:** unfortunately fewer than ten respondents qualified, making it statistically unreliable to report on this sub-group.

% Breakdown



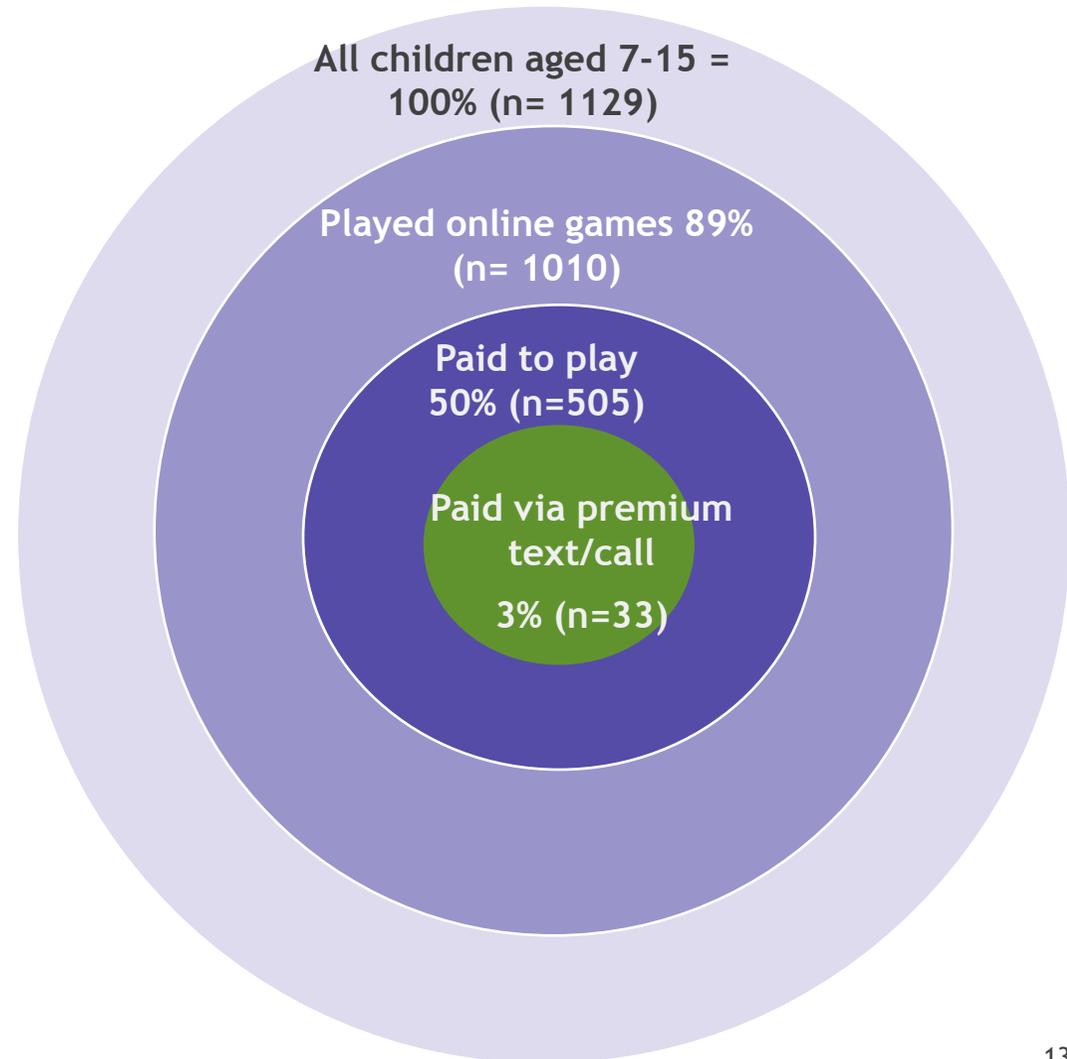
Key audiences covered in the survey - children

The objective of the children's survey was to identify and understand better children who **PAY TO PLAY** online games

Throughout this report we focus on the following audiences:

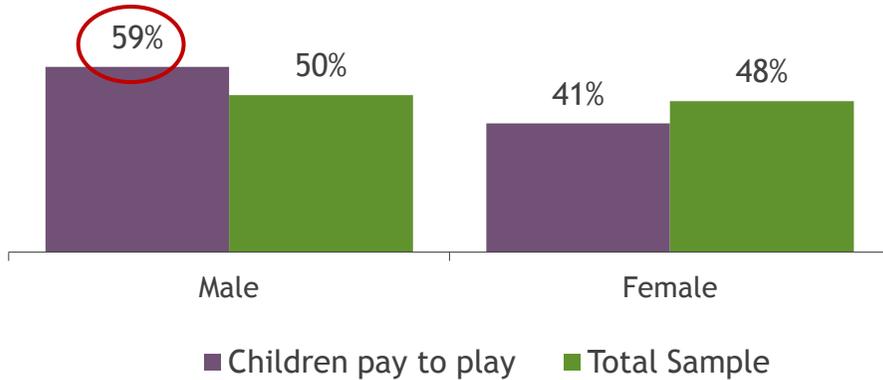
- All children aged 7-15 from an online consumer panel (younger age group helped by their parents to complete the survey)
- Those who played online games in the past six months
- Those who paid to play online games in the past six months
- Those who paid to play online games in the past six months using premium text/call payment platform

% breakdown

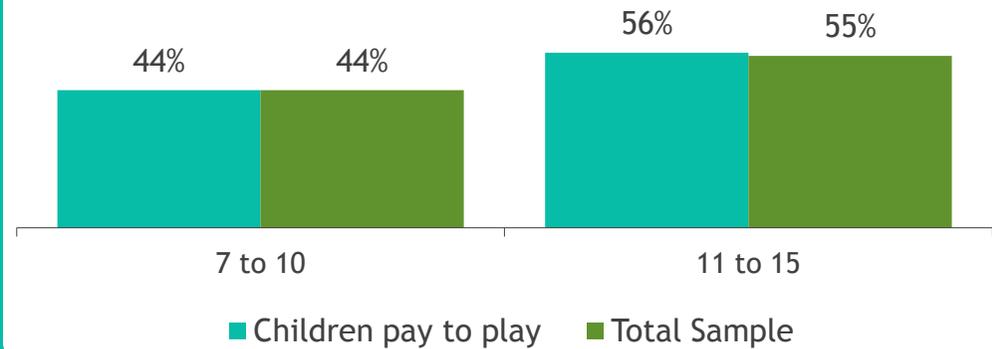


Demographic breakdowns amongst children who pay to play

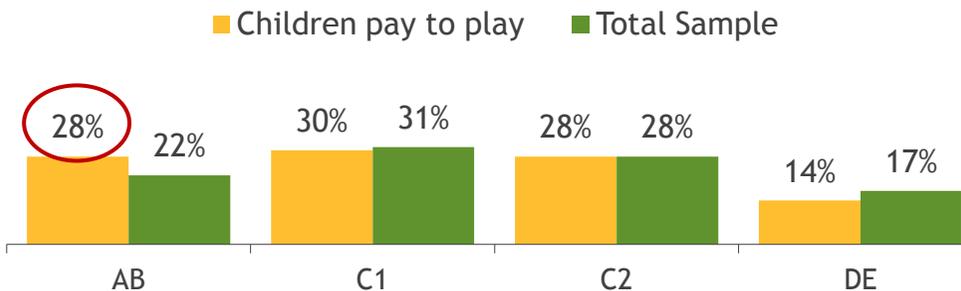
Gender



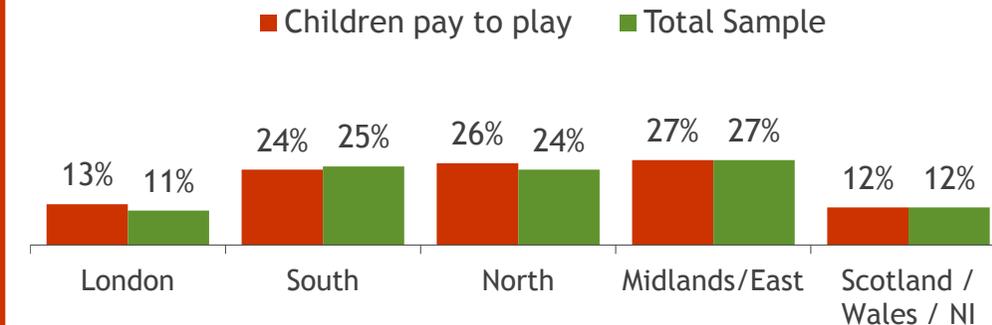
Age



Social grade (of parent)

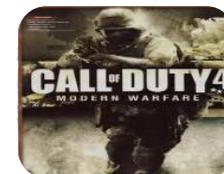


Region



Classification (SQ1-4) - Base = total qualifying sample (household with children aged 7-15) (n=1129); All children who have played and made payments for online games in past 6sixmonths (n=501)

Types of games played



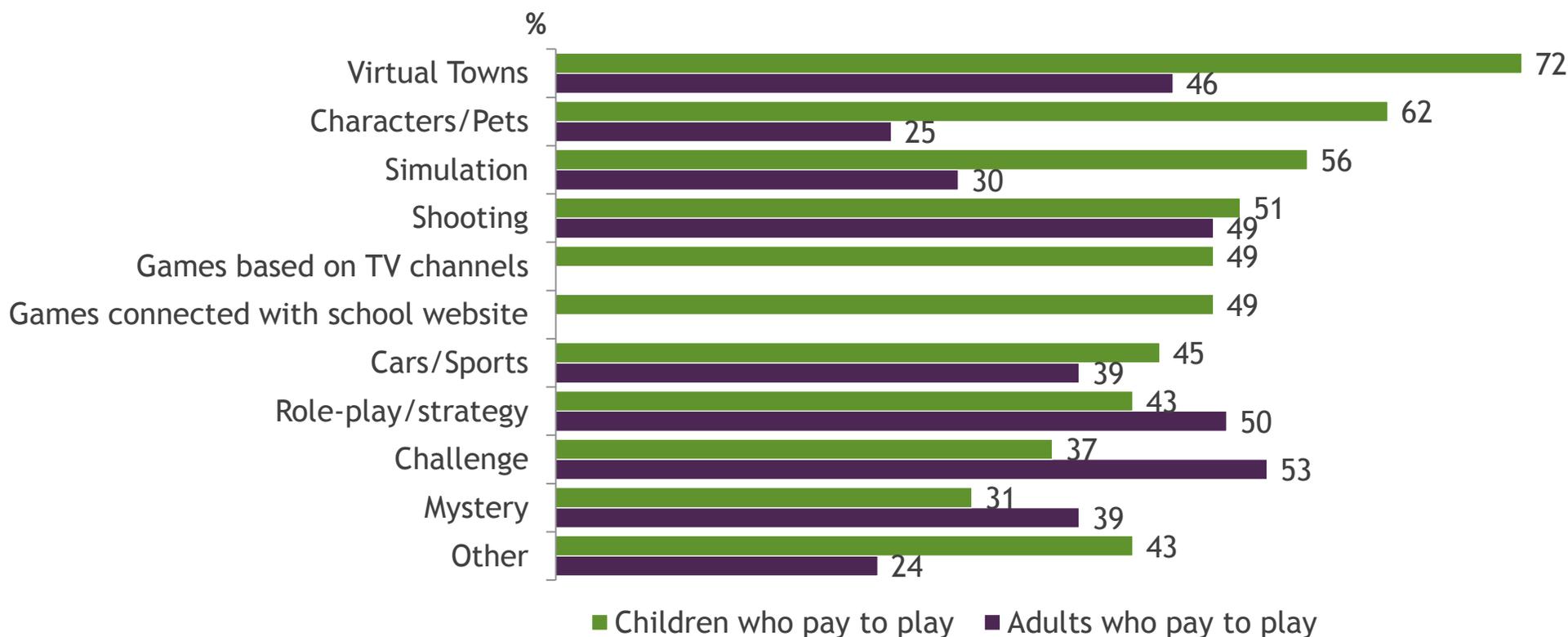
Challenge games are played by two in five adults; a quarter enjoy virtual towns, shooting, role-play, sports or mystery

75% used online games/activities
in last six months
Average # categories = 2.3



Looking at those who pay to play, children are significantly more likely than adults to play games about virtual worlds/characters/pets and cars/sports. Adults are more likely than children to play ‘role-play,’ “challenge” and ‘mystery’ games. Activity is most similar for ‘shooting’ games.

Categories of online games/activities played in last six months, amongst children and adults who pay to play



S1 Have you used any of the following types of online games or activities in the last six months?

Base: All adults who have PAID to play online games or activities in the last six months (n=905)

Base: All children (aged 7-15 who have PAID to play any online games or activities in the last six months (n=501)

Older boys are more likely than adults to use role-play, shooting and sports/car games. Most young girl gamers who pay to play, play character/pet games. Younger gamers who pay to play likely to play games associated with TV or school. Older girls have similar mystery/challenge incidence to adults

Game categories played (amongst children and adults who pay to play)

| | CHILDREN | | | | ADULTS | | |
|-------------------------------|-----------|------------|-------------|--------------|--------|-------|--------|
| | MALE 7-10 | MALE 11-15 | FEMALE 7-10 | FEMALE 11-15 | ALL | MALE | FEMALE |
| | (114) | (183) | (104) | (100) | (905) | (435) | (470) |
| ROLE PLAY / STRATEGY | 36% | 60% | 23% | 40% | 50% | 59% | 41% |
| SHOOTING | 46% | 83% | 22% | 26% | 49% | 69% | 30% |
| FOOTBALL/CAR RACING/SPORTS | 52% | 61% | 30% | 26% | 39% | 50% | 28% |
| VIRTUAL TOWNS / VILLAGES | 75% | 60% | 79% | 83% | 46% | 37% | 55% |
| CHARACTERS OR VIRTUAL PETS | 68% | 39% | 92% | 65% | 25% | 21% | 29% |
| SIMULATION / VIRTUAL WORLDS | 52% | 57% | 52% | 63% | 30% | 29% | 31% |
| MYSTERY SOLVING | 31% | 30% | 27% | 38% | 39% | 39% | 41% |
| CHALLENGE | 39% | 34% | 36% | 44% | 53% | 46% | 59% |
| BASED ON TV CHANNELS | 60% | 31% | 67% | 49% | NA | NA | NA |
| CONNECTED WITH SCHOOL WEBSITE | 58% | 38% | 61% | 45% | NA | NA | NA |
| OTHER | 48% | 44% | 38% | 43% | 24% | 22% | 26% |

S1 Have you used any of the following types of online games or activities in the last six months? If so, please type in each specific games/activities you used in the appropriate boxes. Respondents self-classified their games into the genres provided

Base: All children (aged 7-15 who have PAID to play any online games or activities in the last six months (n=501); all adults who have PAID to play any online games or activities in the last six months (n=905)

Top three games played - adults and children (based on adults talking about the games their children play)

- **Role-play/strategy**
 - *Adults* - World of Warcraft, Call of Duty/Black Ops, Mafia Wars
 - *Children* - World of Warcraft, Sims, Call of Duty
- **Shooting**
 - *Adults* - Call of Duty/Black Ops, Grand Theft Auto, Halo
 - *Children* - Call of Duty/Black Ops, Grand Theft Auto, Halo
- **Cars/sports**
 - *Adults* - Need for speed, Gran Turismo, Forza
 - *Children* - Super Marios/Mario, Need for speed, F1/Formula 1
- **Virtual towns**
 - *Adults* - Farmville, Sims/Sims3, Cityville
 - *Children* - Farmville, Club Penguin, The Sims/Sims3
- **Characters/pets**
 - *Adults* - The Sims/Sims pets, Moshi Monsters, Neopets
 - *Children* - Moshi Monsters, Club Penguin, Bin Weevils
- **Simulation**
 - *Adults* - Sims/The Sims, Sim City, Civilisation
 - *Children* - Sims/Sim City
- **Mystery**
 - *Adults* - CSI, Professor Layton, Cluedo
 - *Children* - very unlikely to play
- **Challenge**
 - *Adults* - Scrabble, Monopoly, Bejewelled
 - *Children* - Monopoly, Scrabble, Chess
- **Other**
 - *Adults* - Solitaire, Angry Birds, Poker
 - *Children* - Cbeebies, kids TV related games

Respondents self-classified their games into the genres provided - this explains why some classified a given game in different genres (e.g. Club Penguin in Virtual towns and in Characters/pets)

Top games played - children aged 7-15 talking about the games they play

- **Role-play/strategy**
 - *World of Warcraft; Toontown; Dark Orbit*
- **Shooting**
 - *Call of Duty; Grand Theft Auto; Halo; Paintball*
- **Cars/sports**
 - *F1; Dune Buggy; Forza*
- **Virtual towns**
 - *Club Penguin; Farmville; Habbo*
- **Characters/pets**
 - *Moshi Monsters; Bin Weevils; Miss Bimbo*
- **Simulation**
 - *Sim City; Sims; The Sims*
- **Mystery**
 - *Acrane; Crime Evidence; Cluedo*
- **Challenge**
 - *Monopoly; Zuma; Uno; Bejewelled*
- **Games based on TV channels**
 - *Cbeebies; CBBC; Disney; Nickelodeon; Cartoon Network*
- **Games or activities connected with school website**
 - *Fronter; iBoard; Starfall*

Although there is significant crossover in the games played by adults and children, 'shooting' is the only category played equally by both

More 'Adults'

More 'Children'



S1 Have you used any of the following types of online games or activities in the last six months?

Base: All adults who have PAID to play online games or activities in the last six months (n=905)

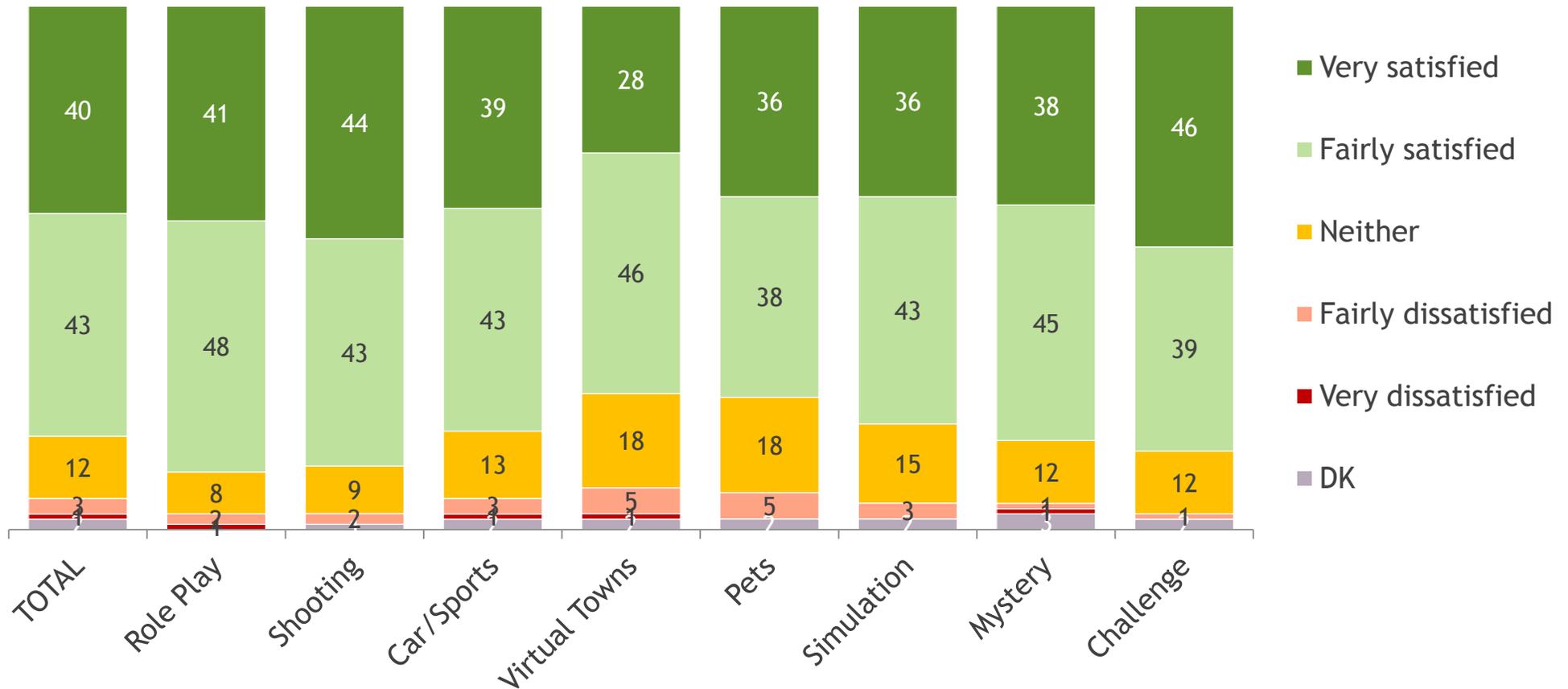
Base: All children (aged 7-15 who have PAID to play any online games or activities in the last six months (n=501)

Attitudes to online gaming



More than eight in ten adults satisfied with gaming experiences; little difference between game categories

Satisfaction with experience of game/activity



Adult dissatisfaction tended to be focused on the entertainment value of games or technical issues rather than payments

Those who are dissatisfied with a particular game/activity experience mostly said that was because the game was “boring” or became so after a time playing it

Other reasons involved technical problems (slow, crashing, bugs) or inherent game qualities (poor/ unrealistic graphics, lack of detail)

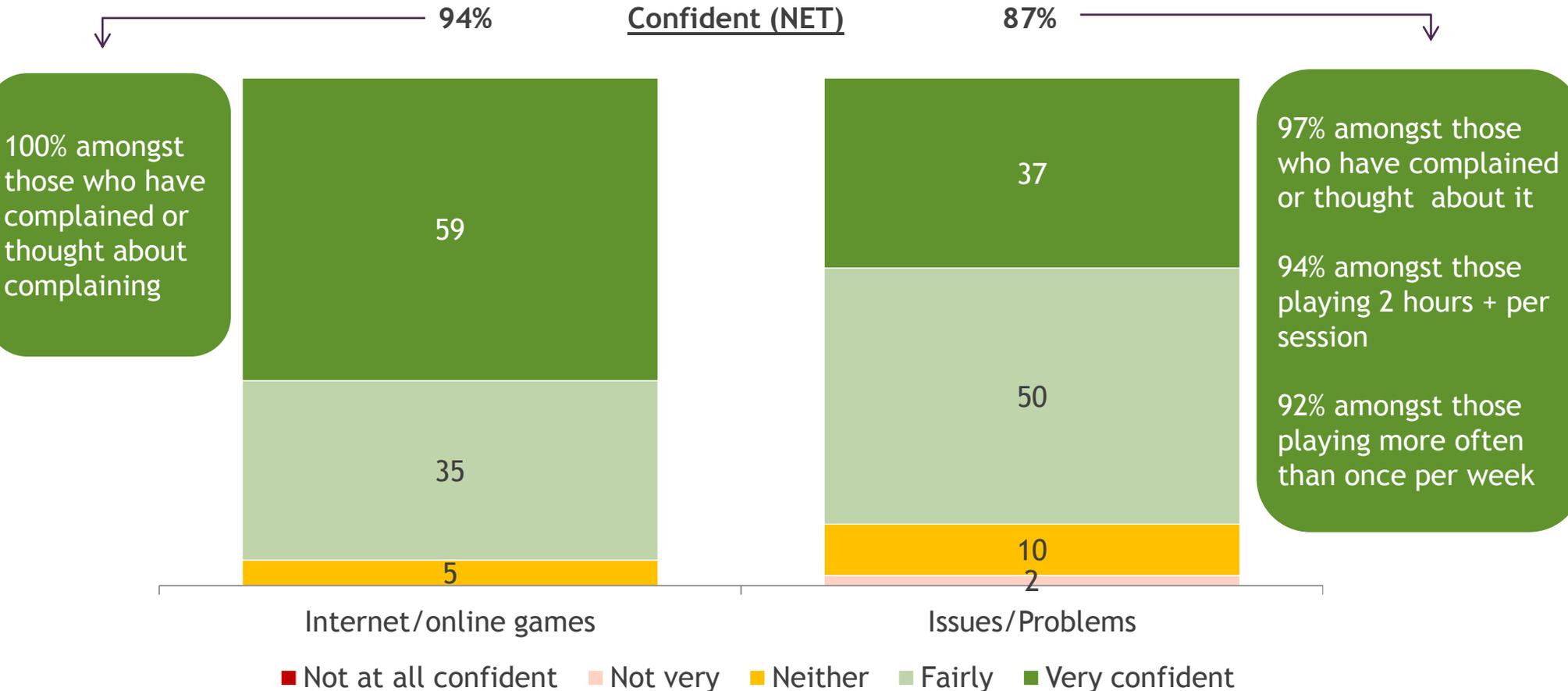
Only a handful of comments related to payments - these focused on being frustrated at having to pay for the better features or to progress to further/better levels

*“A lot of it now relies on credits being bought to advance in the game whereas this was not the case a few years ago”
(Mafia Wars)*

“It is advertised as a free game but to get anywhere in it you have to put in money to pay for items to get promoted”

More than nine in ten adults who pay to play games are confident internet/online game users; most also feel able to deal with issues/problems

Confidence playing internet/online games and resolving issues/problems

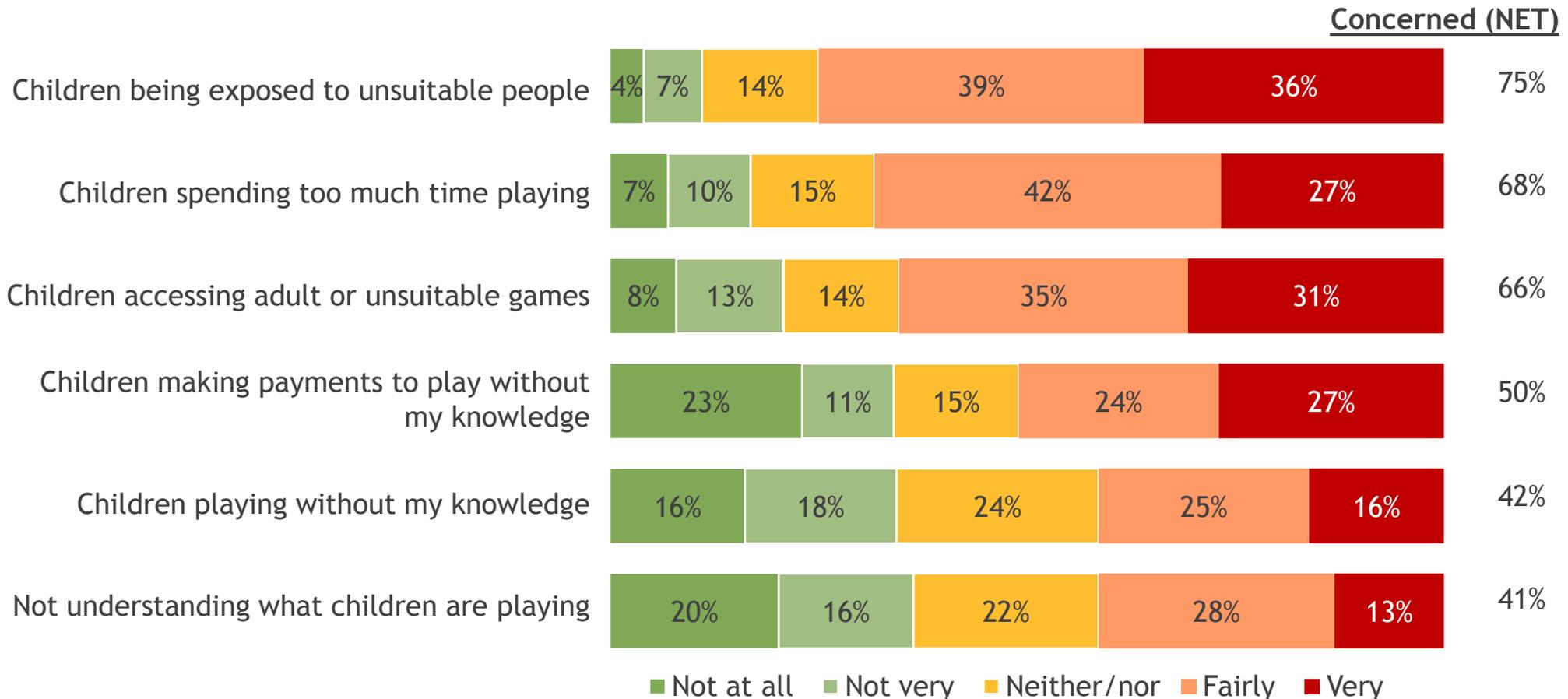


Base = all adults who have played and made payments for online games in past six months (n=905)
 C4 Overall how confident do you feel as an Internet user, including your confidence in using online games and activities? C5 How confident do you specifically feel in dealing with any issue or problem you might have with a specific internet site or mobile/tablet application which offers games and activities?

25

Parents have a number of concerns about their children playing online games; paying without their knowledge is a mid-order concern

Level of concern about children participating in online games/activities:



Base = all adults whose children have paid to play games/activities in past six months (n=245)

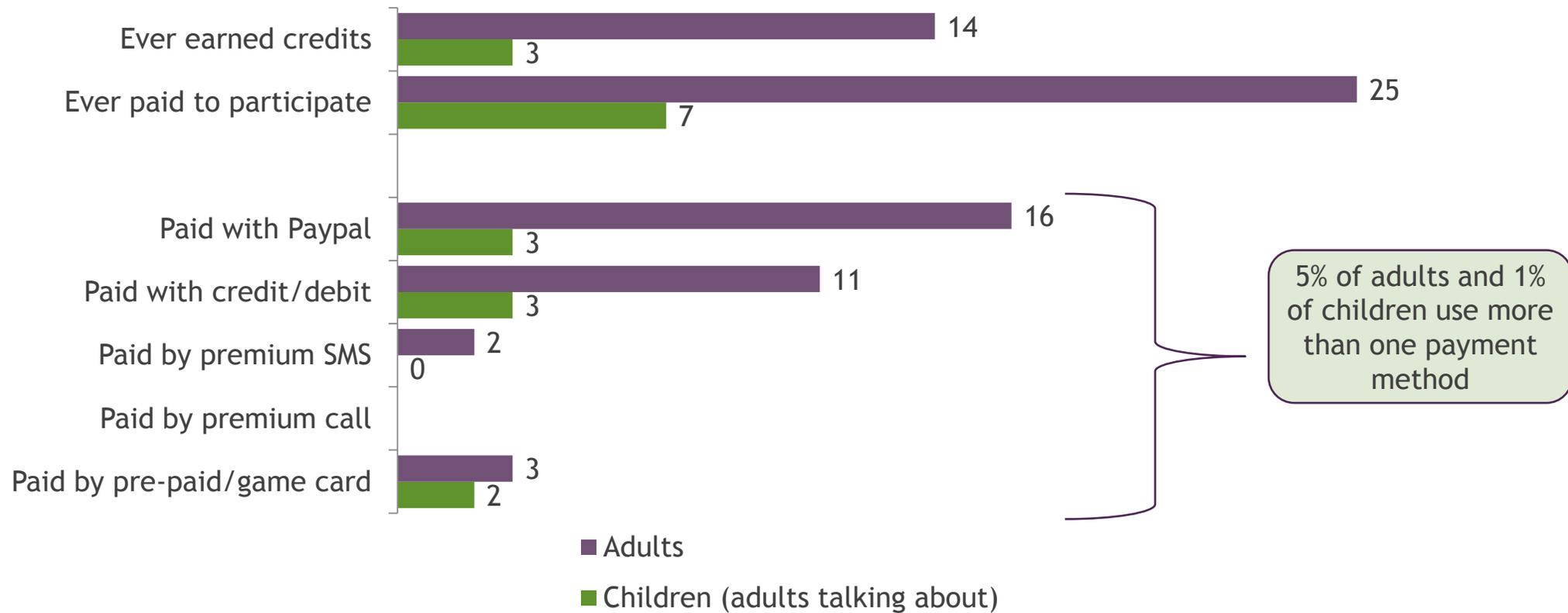
K1 How concerned are you about the following when your children play online games or participate in online activities?

Payments and payment platforms



A quarter of adults have paid to play or participate in online games/activities; mostly using PayPal or credit/debit

Amongst a sample of adults in our online panel...



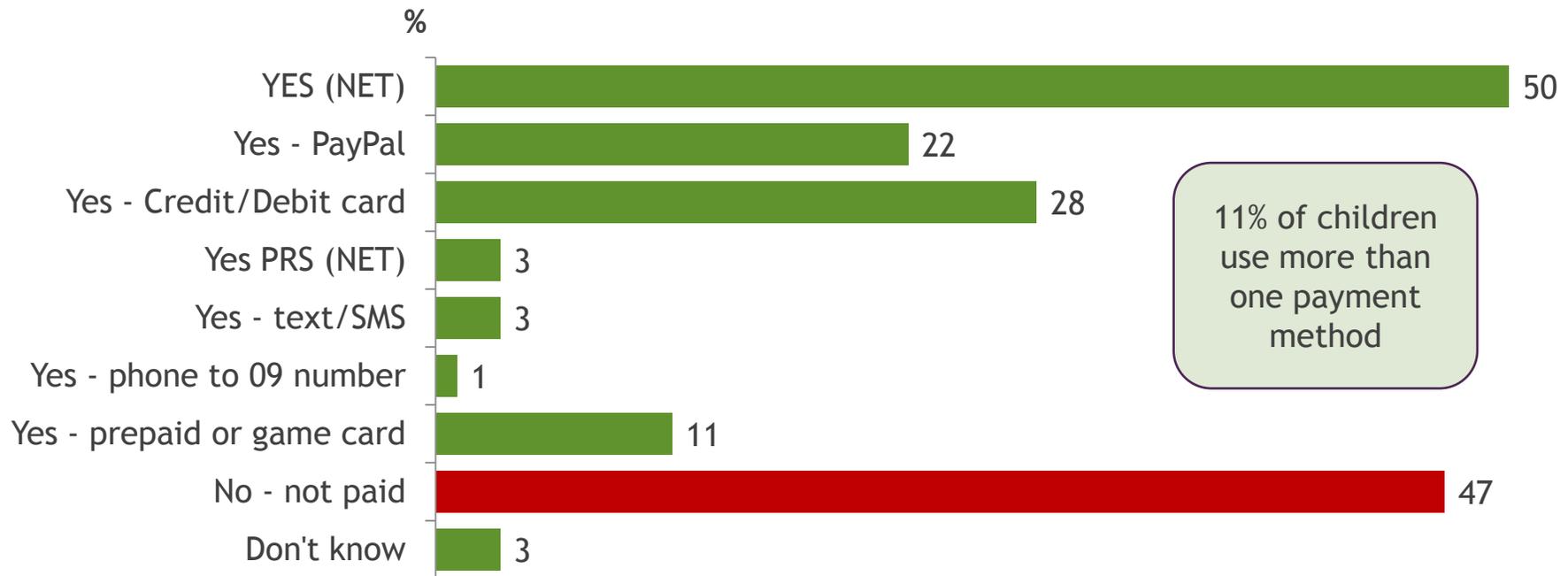
Base = all adults in pre-screened sample from online consumer panel n=3864/3700

S2/6a Have you ever earned credits to use on these online games/activities through actions such as filling out online questionnaire or clicking a pop up ad etc.?

S2/6b Have you paid any money to play these games or participate in these activities in the last six months? If so, how have you done this?

Half of children who play online games have paid to play in the last six months; credit/debit and PayPal most likely

Amongst all children (aged 7-15) who play online games

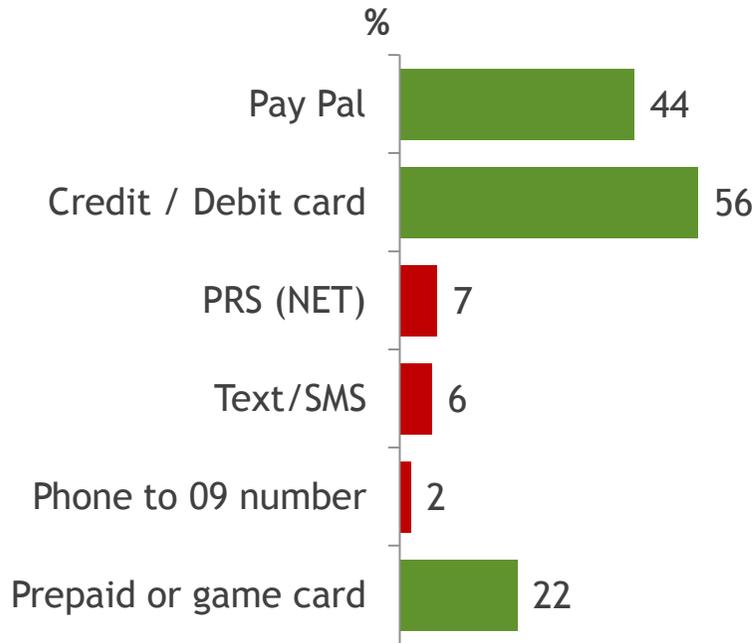


Base = all children (aged 7-15) who have used any online games or activities in the last six months n=1010

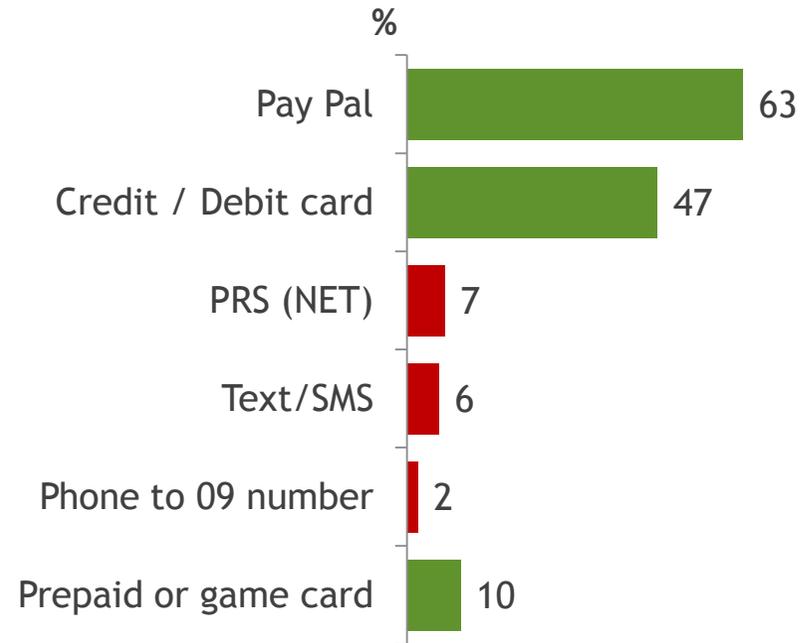
S2A Have you or anybody else paid any money for you to play these online games or participate in these online activities in the last six months? For example paying to play the game itself (e.g. upgrades to full access) or buying things to use in the game or activity? If so, how have you done this?

Child gamers who pay to play are more likely to rely on (parents') credit/debit card or game cards; more adults have access to PayPal

Amongst all children (aged 7-15) who pay to play online games



Amongst all adults who pay to play online games



Around one in five children/adults who pay to play, use more than one payment method

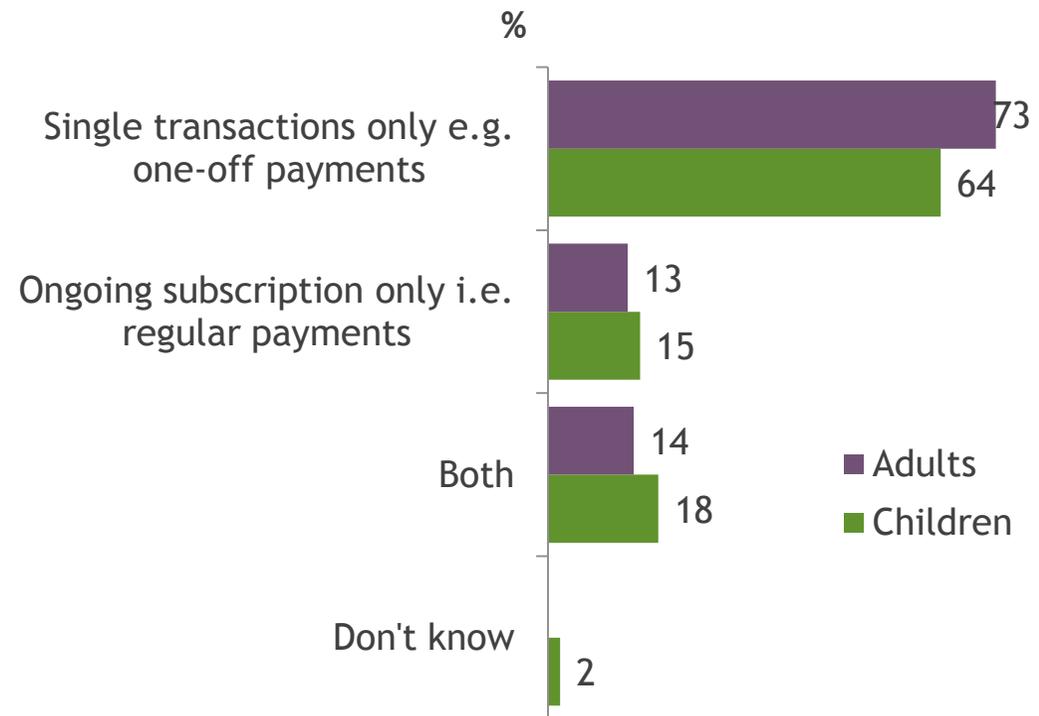
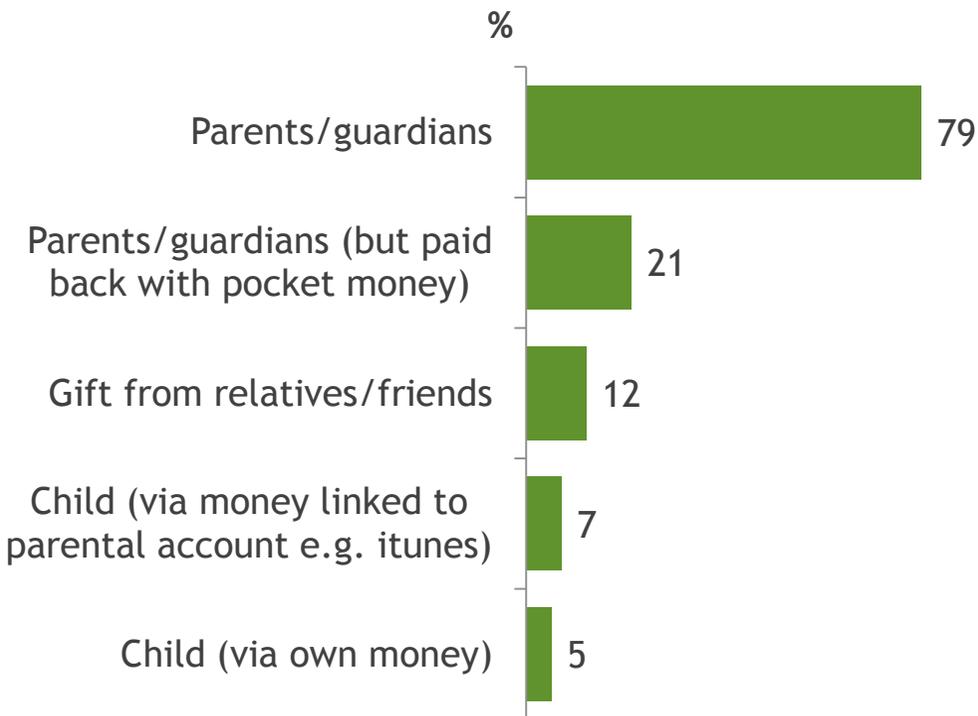
Base = all children (aged 7-15) who have paid to play any online games or activities in the last six months n=505; all adults who have paid to play any online games or activities in the last six months (n=950)

S2A Have you or anybody else paid any money for you to play these online games or participate in these online activities in the last six months? For example paying to play the game itself (e.g. upgrades to full access) or buying things to use in the game or activity? If so, how have you done this?

In the majority of cases, a parent pays for children. Most are single transactions, for either children or adults

Who makes the payments?

Mode of payment



Base = all children (age 7-15) paying to play online games n=501; All adults paying to play online games n=905
 QS4 Which of the following best describes who in your home makes the payments?
 QS6 Were the payments for...?

Reasons for choosing methods of payment focus on ease, convenience, safety and security. For their children, adults have an added focus on controlling the costs...

Adults

“I thought that it was the safest method to pay, as if something were to happen I would be able to use the Dispute Centre to get a refund.”

“Whatever is easiest at the time. PayPal is always easier, as you don't have to remember credit card details, but credit card is also easy if pay pal not accepted.”

Children (adults talking about their children)

“Bought a prepaid card for a subscription to an online game (Moshi Monsters) for my child; easy to do and not locked in to any subscription or direct debit.”

“Because it was the only choice other than credit card - and I don't trust them with my details on their xbox!”

Amongst children themselves, reasons for choosing methods of payment focus on ease/convenience, safety/security of method along with a sense of parental financial control and product supervision

*“Credit card transactions are very safe”
“Because it is an easy and convenient method of payment”*

“PayPal is easy and doesn't involve giving bank details”

“Because it is easiest. Just need to buy the card and type in the code. Don't have to ask parents for permission or to use their mob or PayPal account”

“Method suited the game”

“Buy a pre paid card as and when needed, that way we don't run up any bills. My parents pay for this as a treat or reward if I have done something good”

“I have to pay for my games but don't have a card”

“I don't have a bank account so I cannot use PayPal. I don't have a bank card so my mum or dad uses there card to pay for things. I give them the money back from my pocket money if I have any left”

“Paid online once but found it tricky to cancel it after a while. Now we use membership cards”

“My mum says I have to learn values and that paying her back is a way to learn. She has an account and pays my games from it”

“Parents like to be in control”

“Dad doesn't like me using money on the internet”

“My parents wanted to monitor what the game was and how much it cost and that it was from a trustworthy website”

“Easier to pay by debit and pay back with pocket money”

“Because my mum wont allow any other way”

“So my mum can keep an eye on what I am doing”

“Mum likes to control what I pay for. She pays with her card because its easy to do it and I pay back”

Amongst children, older boys are significantly more likely to have paid to play than younger males or females

Sub-group differences - paying to play

| | MALE 7-10 | MALE 11-15 | FEMALE 7-10 | FEMALE 11-15 |
|----------------------------------|-----------|------------|-------------|--------------|
| | (243) | (288) | (225) | (254) |
| YES (NET) | 47% | 65% | 46% | 39% |
| YES - PAYPAL | 20% | 24% | 25% | 19% |
| YES - CREDIT/DEBIT | 25% | 41% | 23% | 21% |
| YES - PRS (NET) | 2% | 5% | 2% | 4% |
| YES - TEXT | 2% | 4% | 2% | 4% |
| YES - PHONE TO 09 NUMBER | 0% | 2% | 0% | 0% |
| YES - PRE PAID OR GAME CARD | 11% | 16% | 8% | 7% |
| NO - NOT PAID TO PLAY | 51% | 33% | 52% | 56% |
| DON'T KNOW | 2% | 3% | 1% | 4% |
| USE MORE THAN ONE PAYMENT METHOD | 9% | 16% | 11% | 10% |

Base = all children (aged 7-15) who have used any online games or activities in the last six months n=1010

S2A Have you or anybody else paid any money for you to play these online games or participate in these online activities in the last six months? For example paying to play the game itself (e.g. upgrades to full access) or buying things to use in the game or activity? If so, how have you done this?

Adults who pay via premium text/call tend to be younger and slightly less confident online in general

Profile of “adults who pay to play” - demographics

| | ALL WHO PAY TO PLAY | PAYPAL | CREDIT/DEBIT | PREMIUM TEXT/CALL | PREPAID/GAME CARD |
|-----------------------------------|---------------------|--------|--------------|-------------------|-------------------|
| | (905) | (564) | (426) | (59) | (93) |
| MALE | 48 | 46 | 54 | 49 | 67 |
| FEMALE | 52 | 54 | 46 | 51 | 33 |
| <35 | 45 | 47 | 42 | 69 | 45 |
| 35-44 | 32 | 31 | 34 | 22 | 41 |
| 45-54 | 17 | 16 | 18 | 7 | 10 |
| 55+ | 6 | 6 | 6 | 2 | 4 |
| AB | 36 | 34 | 37 | 34 | 29 |
| C1 | 34 | 33 | 37 | 32 | 41 |
| C2 | 8 | 9 | 7 | 3 | 8 |
| DE | 19 | 20 | 17 | 24 | 18 |
| CONFIDENT INTERNET USER | 94 | 94 | 95 | 88 | 97 |
| CONFIDENT DEALING PROBLEMS/ISSUES | 87 | 86 | 89 | 88 | 94 |

Similar to those using prepaid/game cards, adults who pay via premium text/call tend to play more categories. They are much more likely to earn credits to use on gaming

Profile of “adults who pay to play” - game categories played

| | ALL WHO PAY TO PLAY | PAYPAL | CREDIT/DEBIT | PREMIUM TEXT/CALL | PREPAID/GAME CARD |
|--------------------------|---------------------|--------|--------------|-------------------|-------------------|
| | (905) | (564) | (426) | (59) | (93) |
| ROLE PLAY / STRATEGY | 50 | 54 | 50 | 64 | 69 |
| SHOOTING | 49 | 49 | 53 | 64 | 71 |
| CAR/SPORTS | 39 | 41 | 40 | 49 | 61 |
| VIRTUAL TOWNS | 46 | 51 | 46 | 61 | 54 |
| CHARACTERS/PETS | 25 | 29 | 23 | 46 | 33 |
| SIMULATION | 30 | 33 | 30 | 53 | 43 |
| MYSTERY | 39 | 42 | 41 | 54 | 42 |
| CHALLENGE | 53 | 56 | 52 | 64 | 61 |
| OTHER | 24 | 24 | 27 | 25 | 37 |
| MEAN # CATEGORIES PLAYED | 3.56 | 3.80 | 3.62 | 4.85 | 4.71 |
| EVER EARNED CREDITS | 37 | 46 | 30 | 68 | 42 |

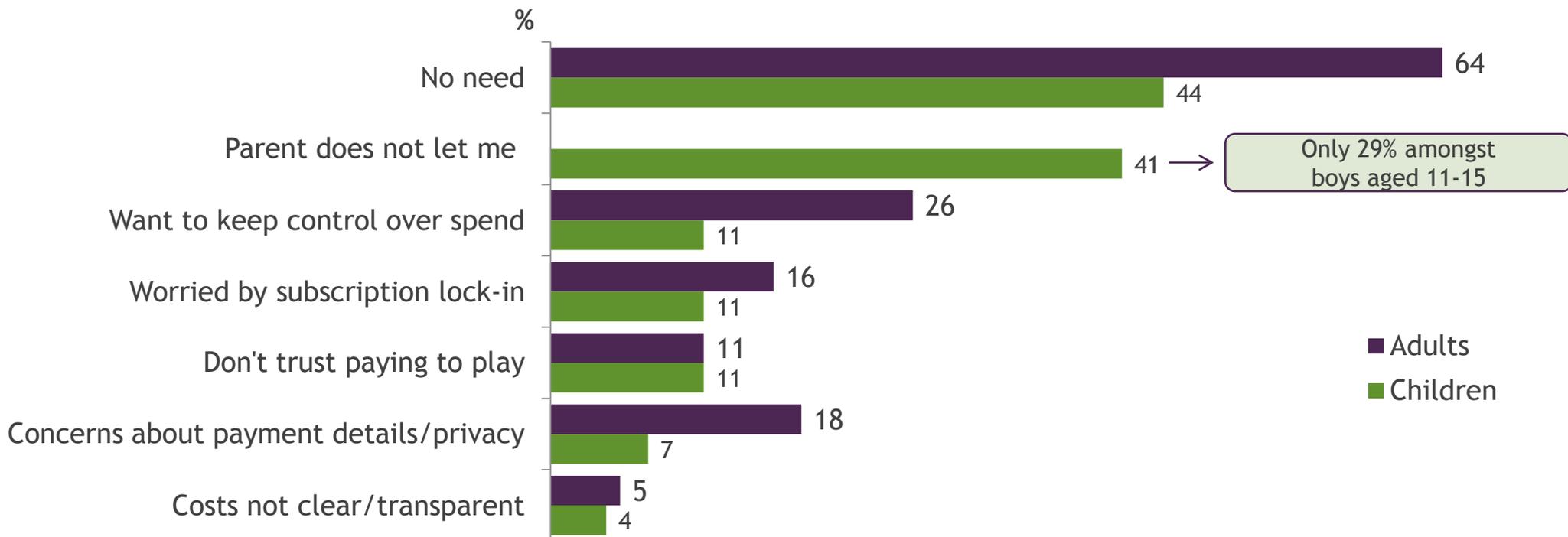
Adults who pay to play using premium texts/calls or prepaid/game cards are likely to use these in addition to more popular platforms like PayPal or credit/debit

Crossover of payment methods used (adults)

| | PAYPAL | CREDIT/DEBIT | PREMIUM TEXT/CALL | PREPAID/GAME CARD |
|-------------------|--------|--------------|-------------------|-------------------|
| | (564) | (426) | (59) | (93) |
| PAYPAL | | 34% | 54% | 40% |
| CREDIT/DEBIT | 26% | | 41% | 39% |
| PREMIUM TEXT/CALL | 6% | 6% | | 12% |
| PREPAID/GAME CARD | 7% | 8% | 19% | |
| Use more than one | 31% | 39% | 61% | 59% |
| Mean methods used | 1.39 | 1.5 | 2.25 | 1.95 |

Key reasons children don't pay to play are either a lack of need or refusal of parental permission; children are less likely than adult non-payers to mention payment/privacy concerns

Reasons not chosen to pay any money to play or participate



Base = all children (aged 7-15) NOT paying to play online games n=479; All adults NOT paying to play online games n=80
 Q53 Why have you or anybody else chosen not to pay any money to play these games or participate in these activities in the last six months?

What payments are for - Adults

The two key purchases were:

The game itself

- Access the full game/subscriptions
- To download/buy it for keeps

Add-ons and upgrades

- Credits, levels, extra content
- Accessories, weapons, maps, supplies

“Add on levels and characters”

“Buy more gold and more energy so I could keep playing otherwise you have to wait”

“For weapons and ammo and armour”

“Buy the game in full not trial”



What payments are for - adults talking about their children

Children are very likely to be purchasing subscriptions or memberships for games

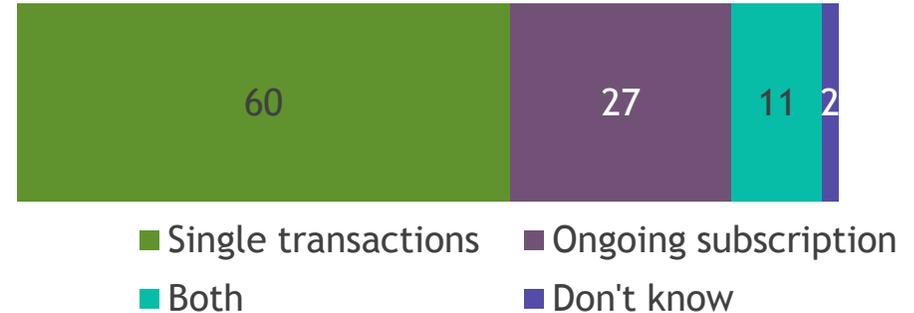
This fits with their consumption of character/virtual pet type of games which often offer additional benefits and online communities to members

“On-going membership to unlock certain features in the game.”

“Extra benefits in game, access to members only sections.”

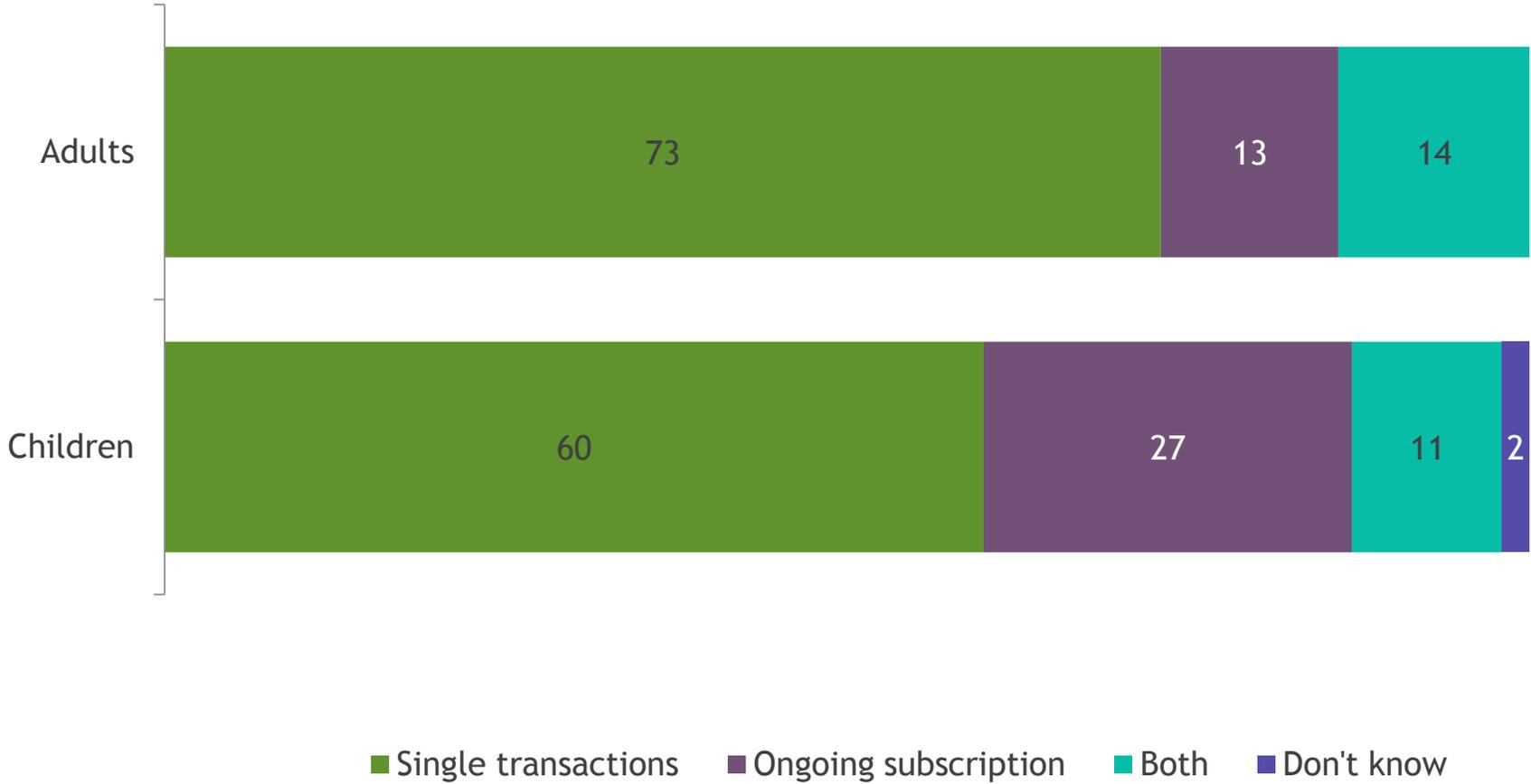
“Moshi Monsters membership”

“Membership which meant they could buy clothes for the penguins etc.”



Majority likely to make payments as 'one-off' transactions, although a quarter of children pay on-going subscriptions

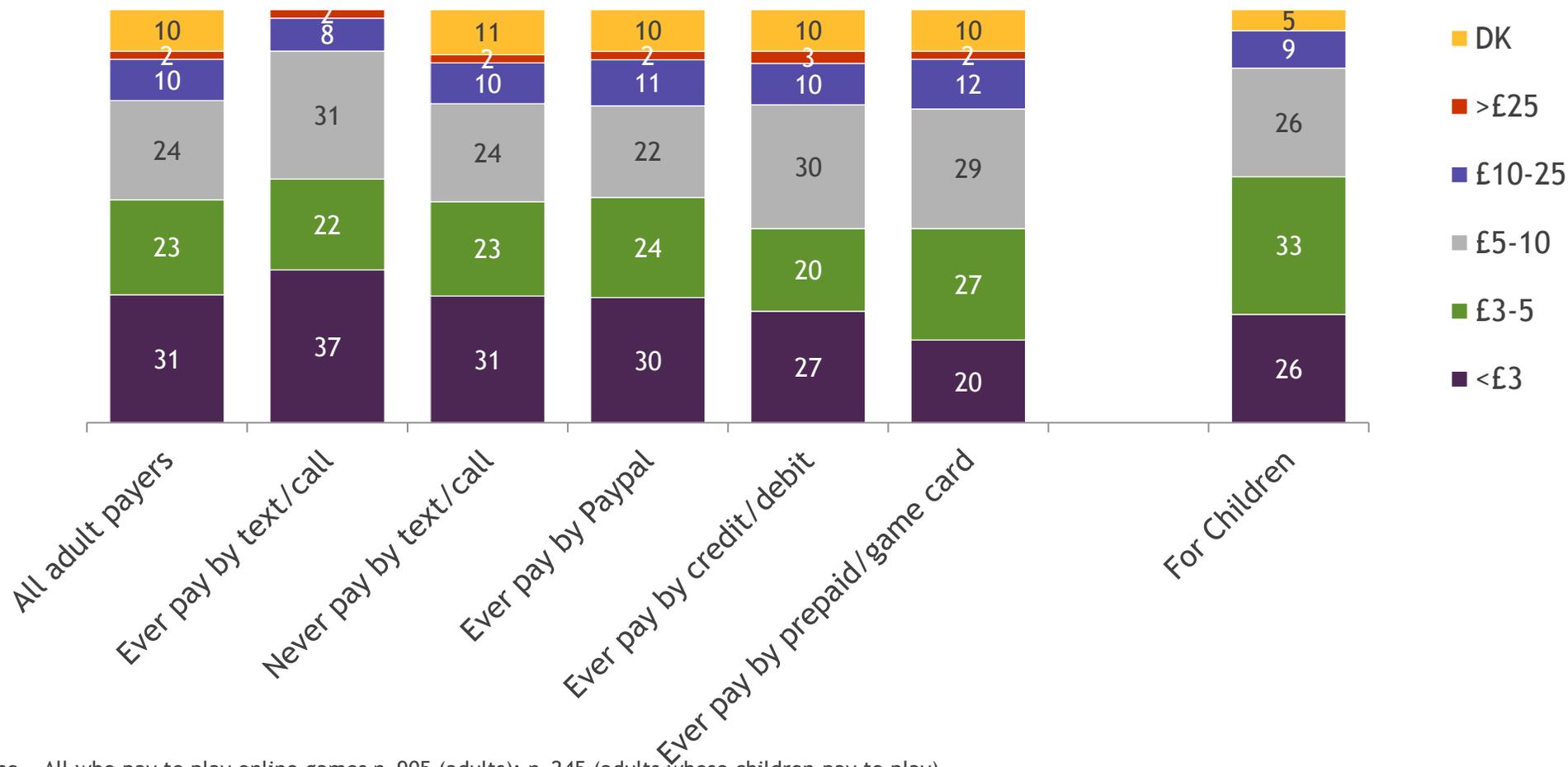
What payments were for



Base = All paying to play online games n=905 (adults) n=245 (adults whose children pay to play)
S2d Were your payments for...?

Amongst adults, a range of payment levels exist, although only 1 in 10 pays more than £10 per month

Typical monthly payments to pay/participate in online games/activities



Base = All who pay to play online games n=905 (adults); n=245 (adults whose children pay to play)

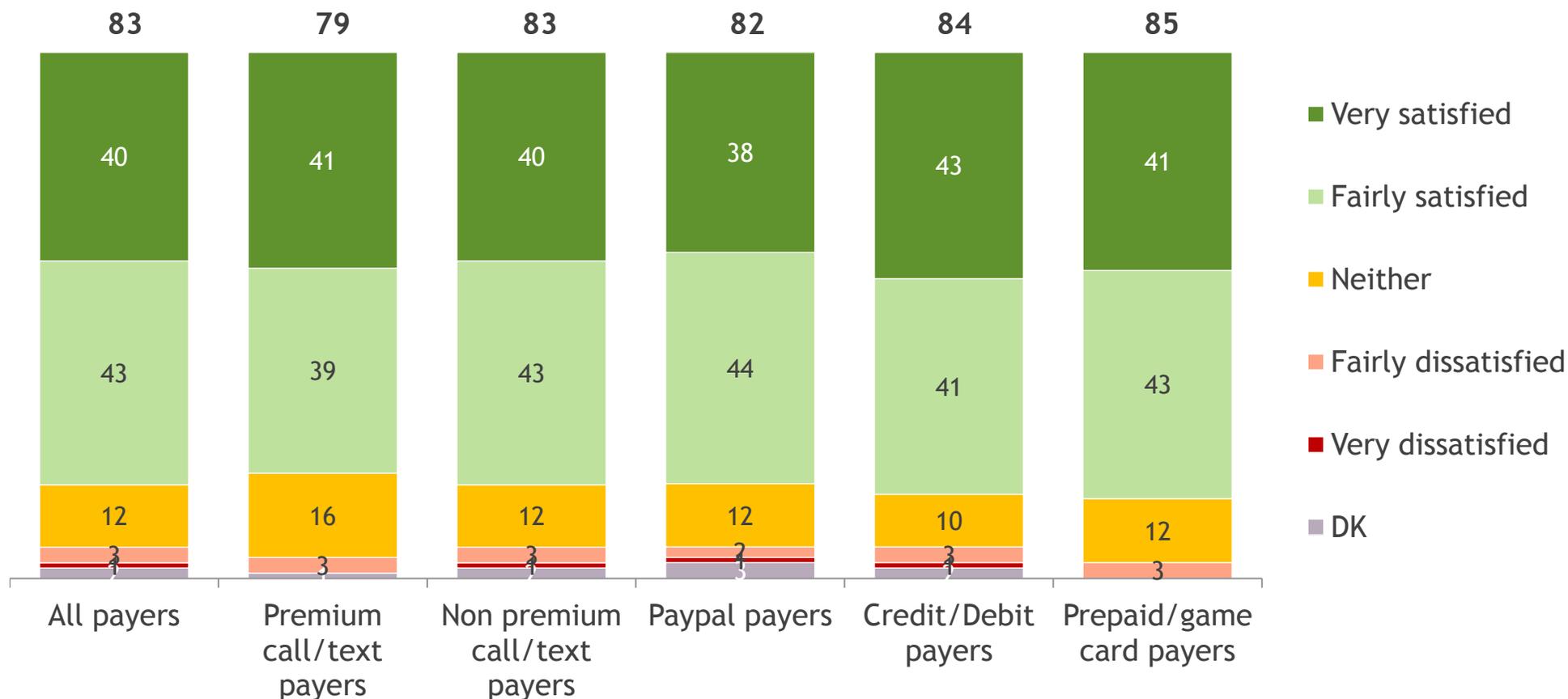
P1/K1 Which of the following ranges comes closest to what you pay/what your household pays for your children in a typical month to personally play these games or participate in these activities?

Payments satisfaction and complaints



Amongst adults there is little difference in overall satisfaction in gaming between those using different payment methods

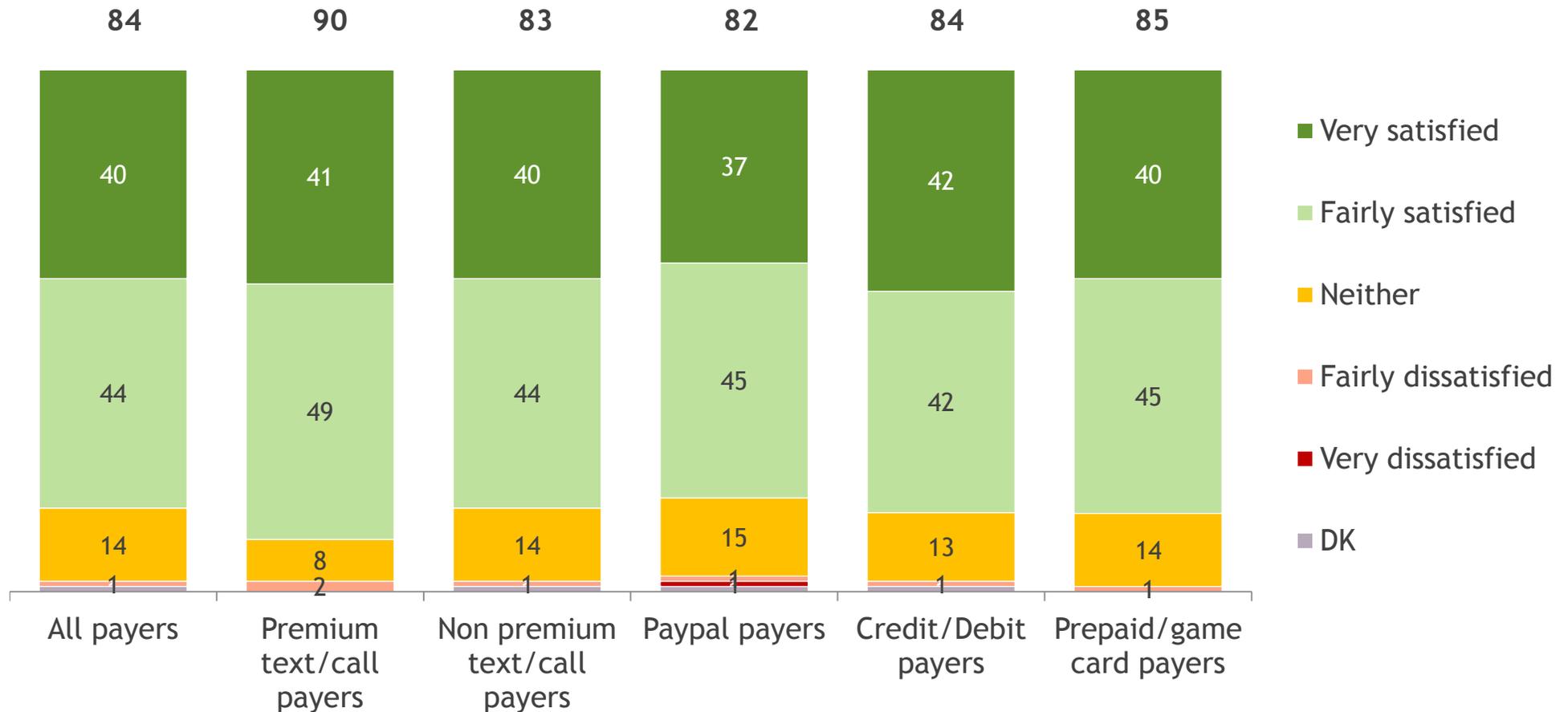
Satisfaction with experience of game/activity



Base = all responses (across multiple games) n=4315 (based on adults)
 U5 In general, how satisfied have you been with your experience of this game/activity?

Also no significant differences for adults in satisfaction with payment experiences specifically

Satisfaction with payment experiences

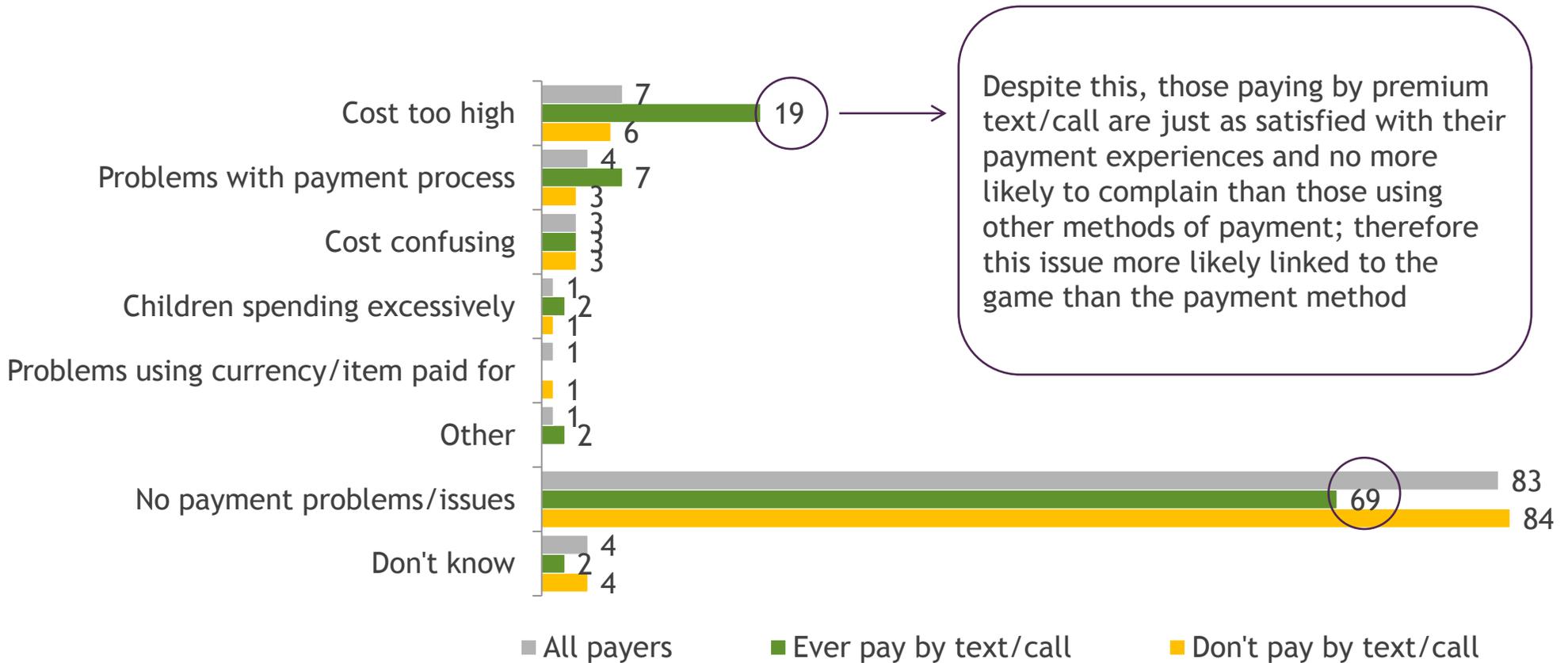


Base = All adults paying to play online games / activities in past six months n=905

P3 And generally how satisfied are you with your payment experiences i.e. your experience of paying to play these games or participate in these activities?

Adult PRS users are more likely to perceive payments costs as “too high”

Experience of issues or problems when paying to play games / participate in activities



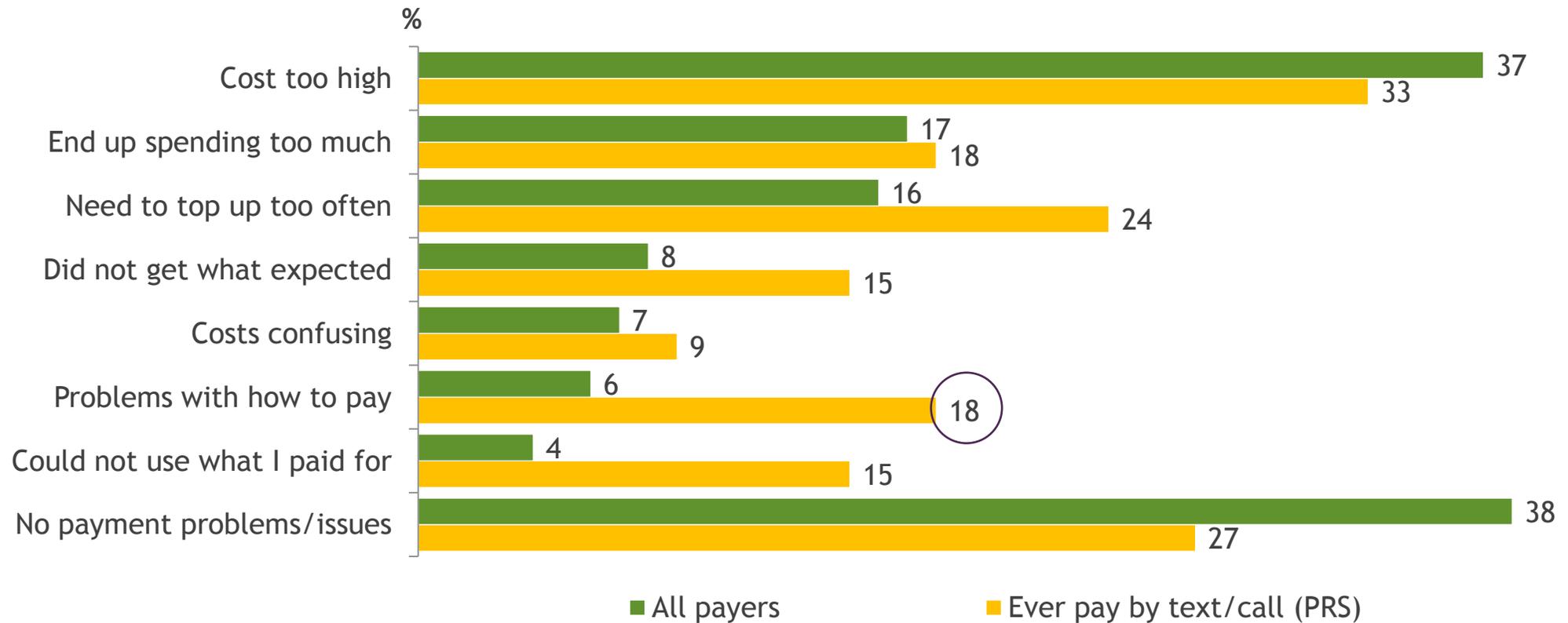
Base = all who play n=905; All who have paid to play using premium text/call in past six months n=59;

All who have not paid to play using premium text/call in past six months (n=846)

P5 Have you ever had any of the following issues or problems when paying to play these games or participate in these activities?

Actual cost is the key issue for children. Some indication (**low base of PRS payers**) that PRS payers may be more likely to have problems with how to pay - but not to have problems in general

Experience of issues or problems when paying to play games / participate in activities



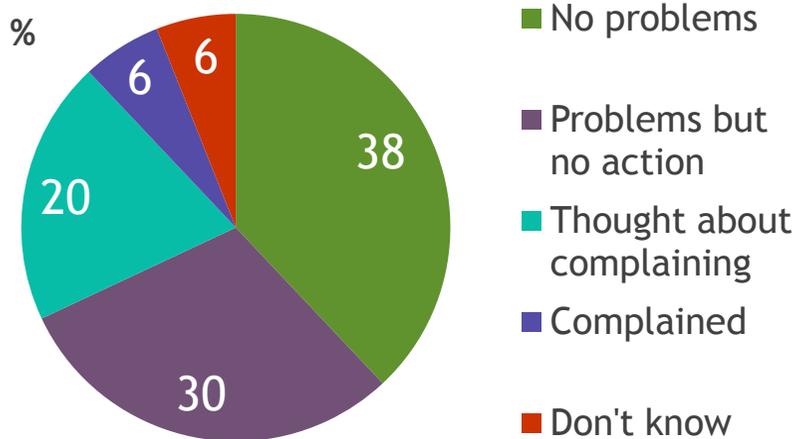
Base = All children (aged 7-15) who pay to play (n=501); who have paid to play using premium text/call in past six months n=33 (**CAUTION LOW BASE**)

P4 Have you ever had any of the following issues or problems when paying to play these games or participate in these activities?

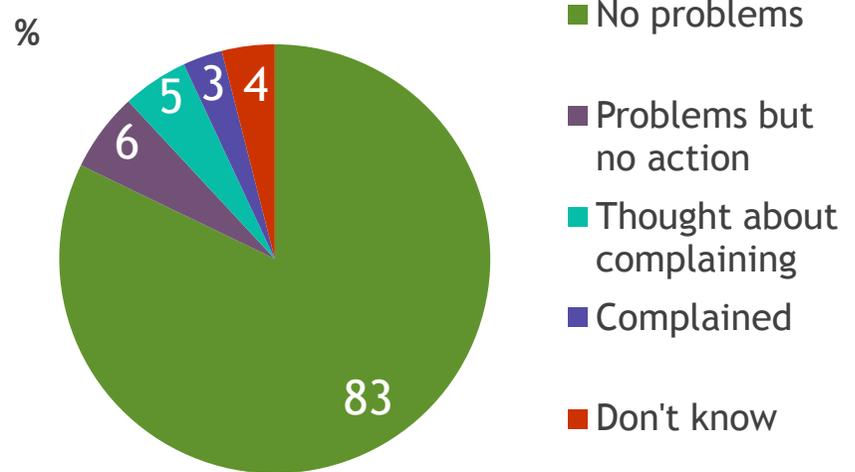
Children are significantly more likely to have experienced issues or problems; but still as unlikely to actually complain

Experience of issues or problems when paying to play games / participate in activities

* Children who pay to play



Adults who pay to play



* Children who pay to play includes both those paying themselves and those having games paid for by their parents

Base = all children (aged 7-15) who pay to play (n=501); All adults who pay to play (n=905)

P4 Have you ever had any of the following issues or problems when paying to play these games or participate in these activities?

P6 Have you ever complained or thought about complaining because of these problems?

23 adults had complained about problems when paying to play or participate in games/activities

Although some never received a response, several had positive feedback to share



“I explained in the bill the charges were not clear and they rectified the bill and rewarded me £30 voucher”



“I complained to World of Warcraft Europe...my account had been compromised ,they helped me get it back and everything else but I had to mess about changing passwords etc.”



“I contacted Nexon and told them about the issue and they resolved it fairly quickly”



“I complained to Sony who apologised and offered free PlayStation plus access”



“Reported error to PayPal, it was a genuine mistake and wanted an exchange not refund, got completely ignored by facebook”



“Complained to games website, was given a credit for one game”

46 adults had thought about complaining but had not done so

For most, the perceived “hassle” of complaining outweighs any presumed benefits



“Too long a process”

“Did not have the time”

“Too much hassle”



“I didn’t know who to complain to and whether it would achieve anything”

“Because I doubt it would make any difference”



“Could not be bothered as the sum was so small”

“The overall charges were not worth the hassle of spending ages in a queue on the phone”

32 children had complained about problems when paying to play or participate in games/activities

Variable response to complaints; some avoidance of responsibility is apparent



“Complained to Facebook and was told it was the game company’s issue so complained to company and told it was Facebook’s error”



“My mum complained about auto renewal and it was switched off”



“I complained to Bin Weevils and Moshi Monsters because I thought I was only paying for one month’s membership but ended up having to pay for two as it wasn’t clear. Now we only use membership cards”



“They took money and then did not give access for several days”



“I was paying monthly for Moshi Monster subscription but they couldn’t do the challenges (the main thing you pay for). They replied that they could do nothing to help me”



“Emailed to game provider, got free upgrades and also vouchers for next time wished to play”



“The option to renew by PayPal was absent, but on emailing Club Penguin I was told it was down to payment method trials and given a special link to make my payment, which I was happy with”

Base = all complaining about issues or problems experienced when paying to play games/activities n=32
P7 Please outline who you complained to and what the outcome was

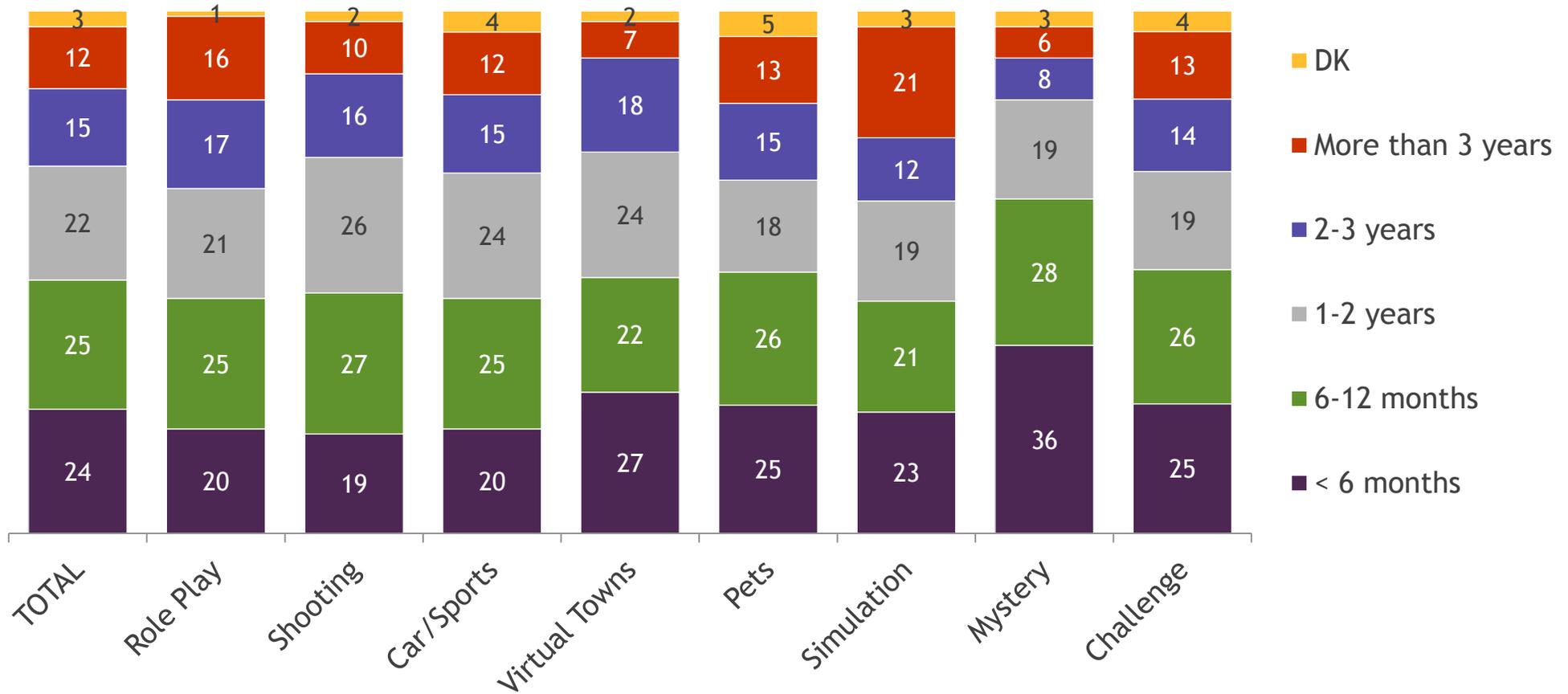
Appendix:

What games are used and how- in more detail



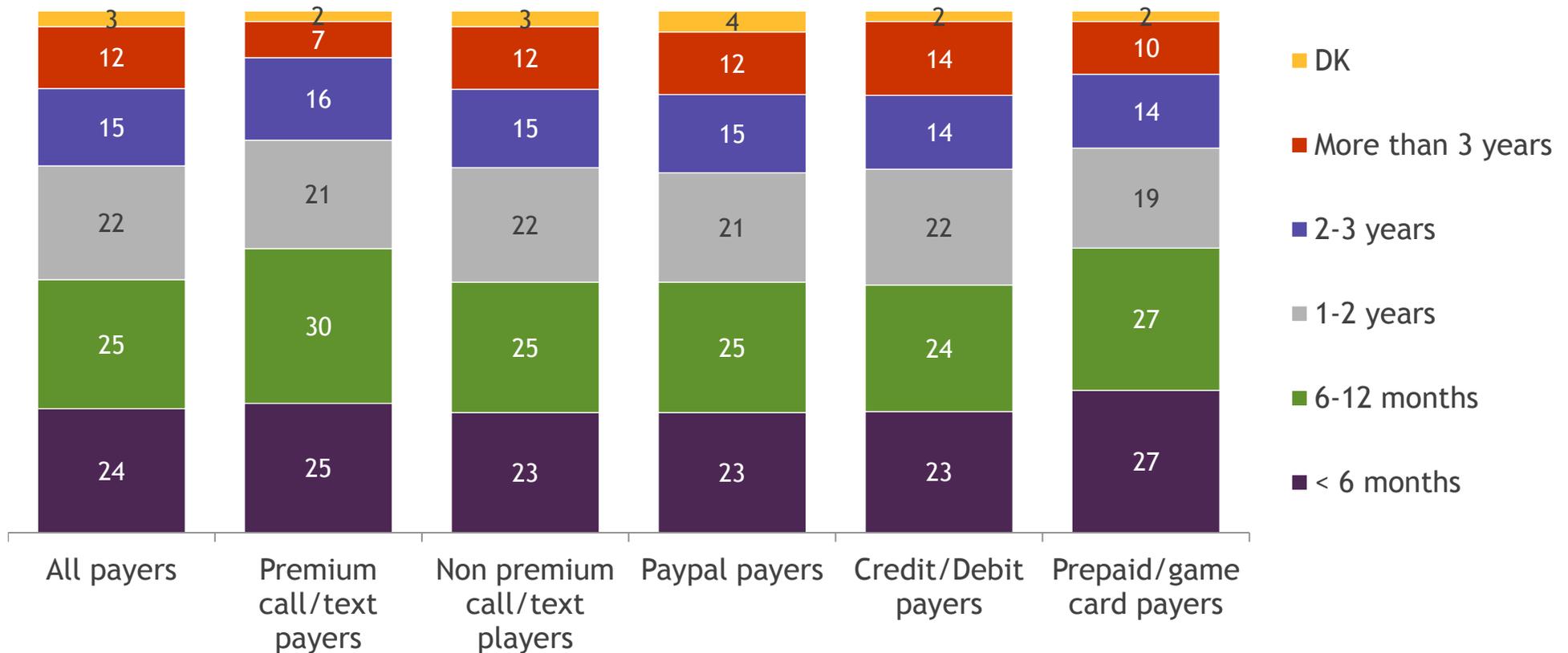
Amongst adults, simulation games have the greatest longevity of play; mystery games the shortest

Approximate time playing game



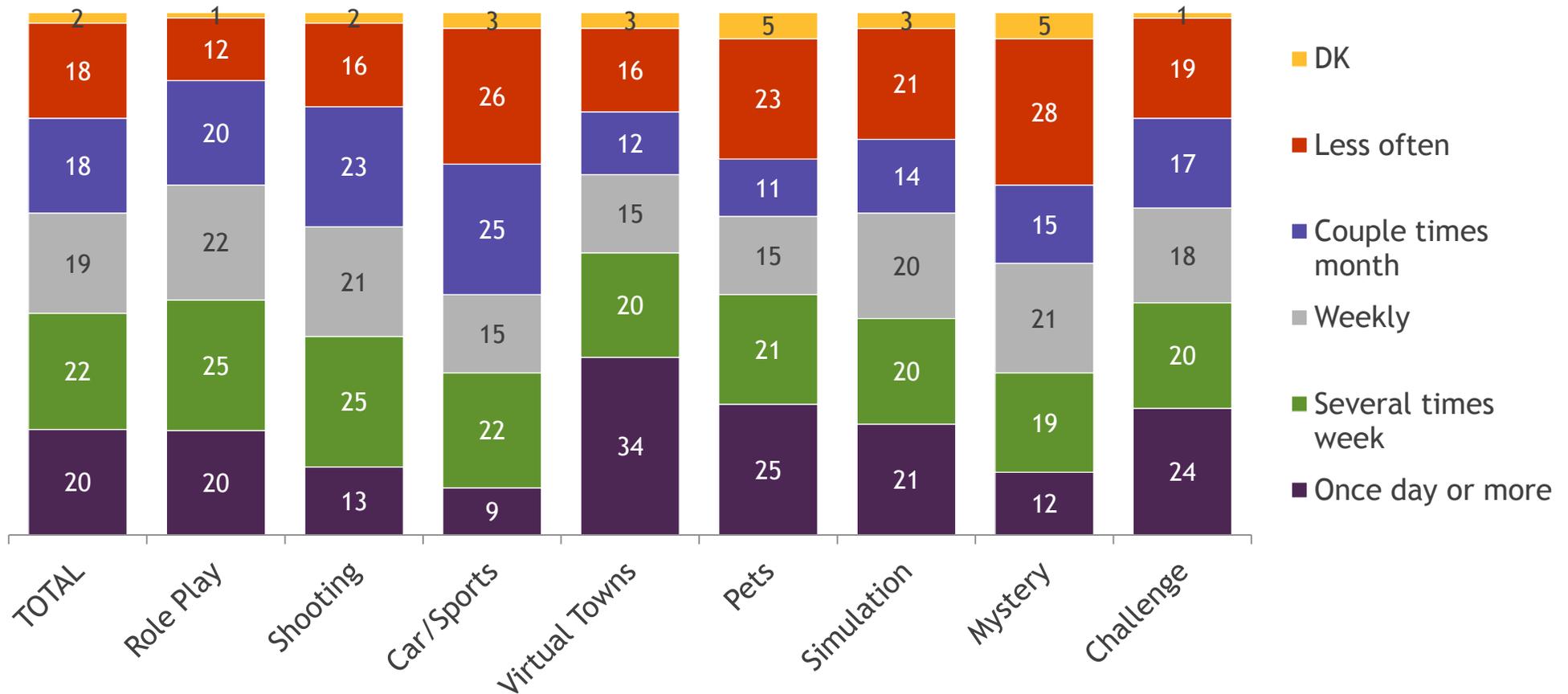
No real differences in playing time by payment method amongst adults

Approximate time playing game



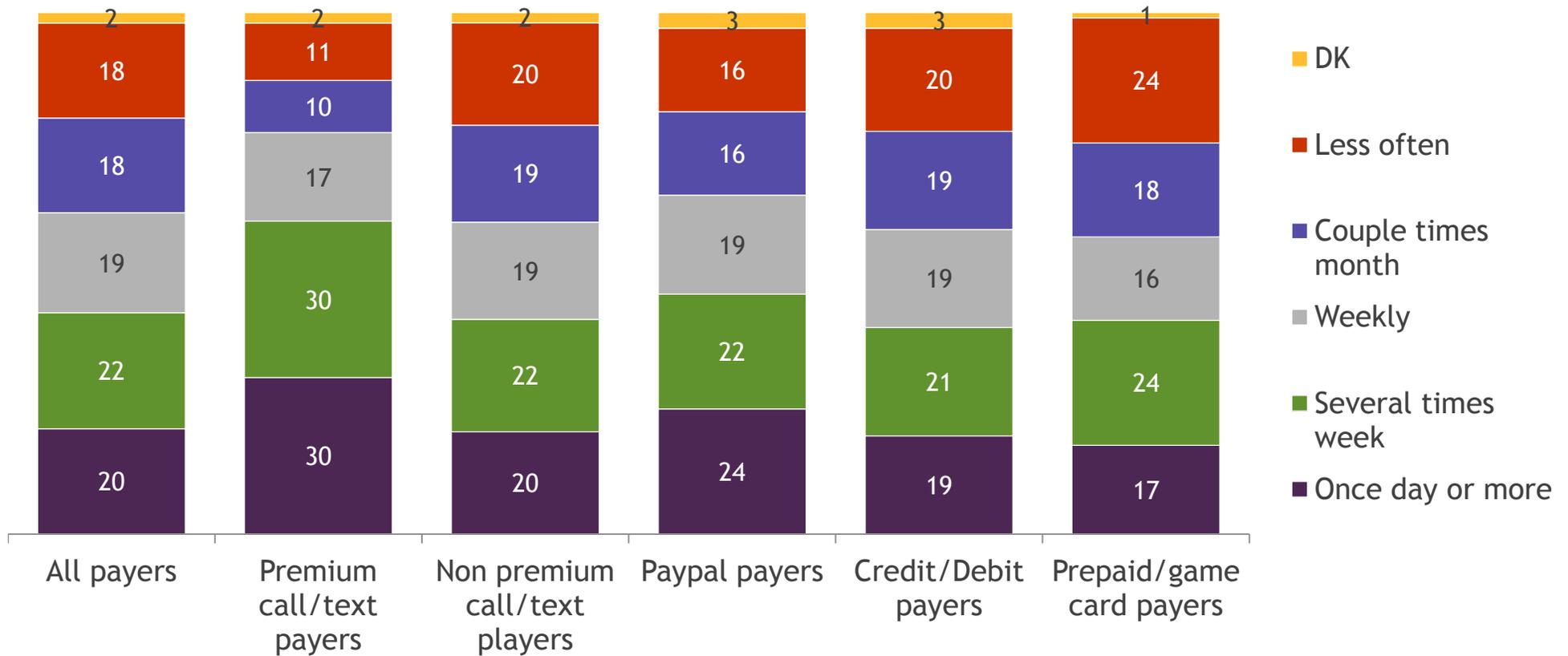
More than one in three adults play 'virtual towns/villages' once per day or more often; cars/sports and mystery are less frequent

Approximate regularity playing game



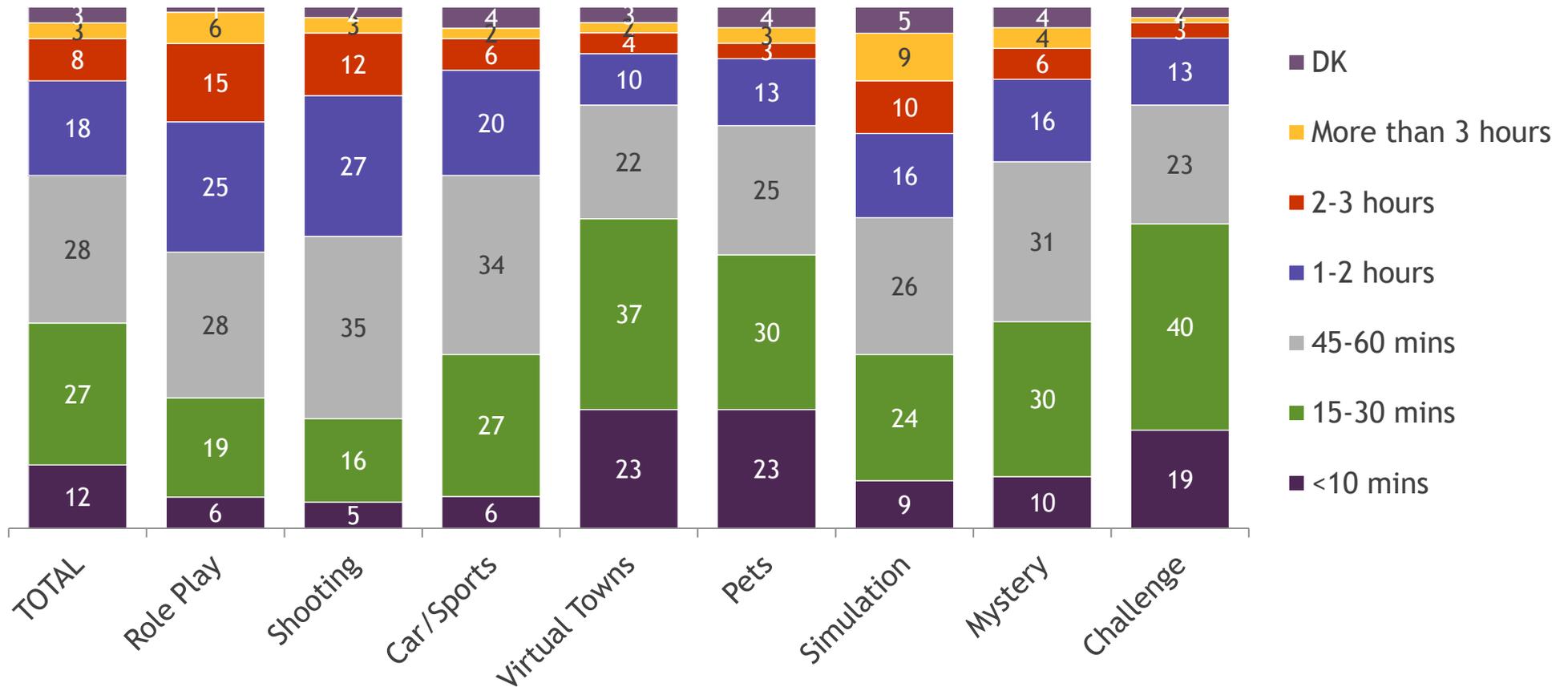
Adults who pay by premium call/text tend to be more regular gamers; 60% play several times per week or more

Approximate regularity playing game



Role-play, shooting and simulation engage adults for longest; those playing virtual towns/pets more likely to dip into the game (probably with greater frequency)

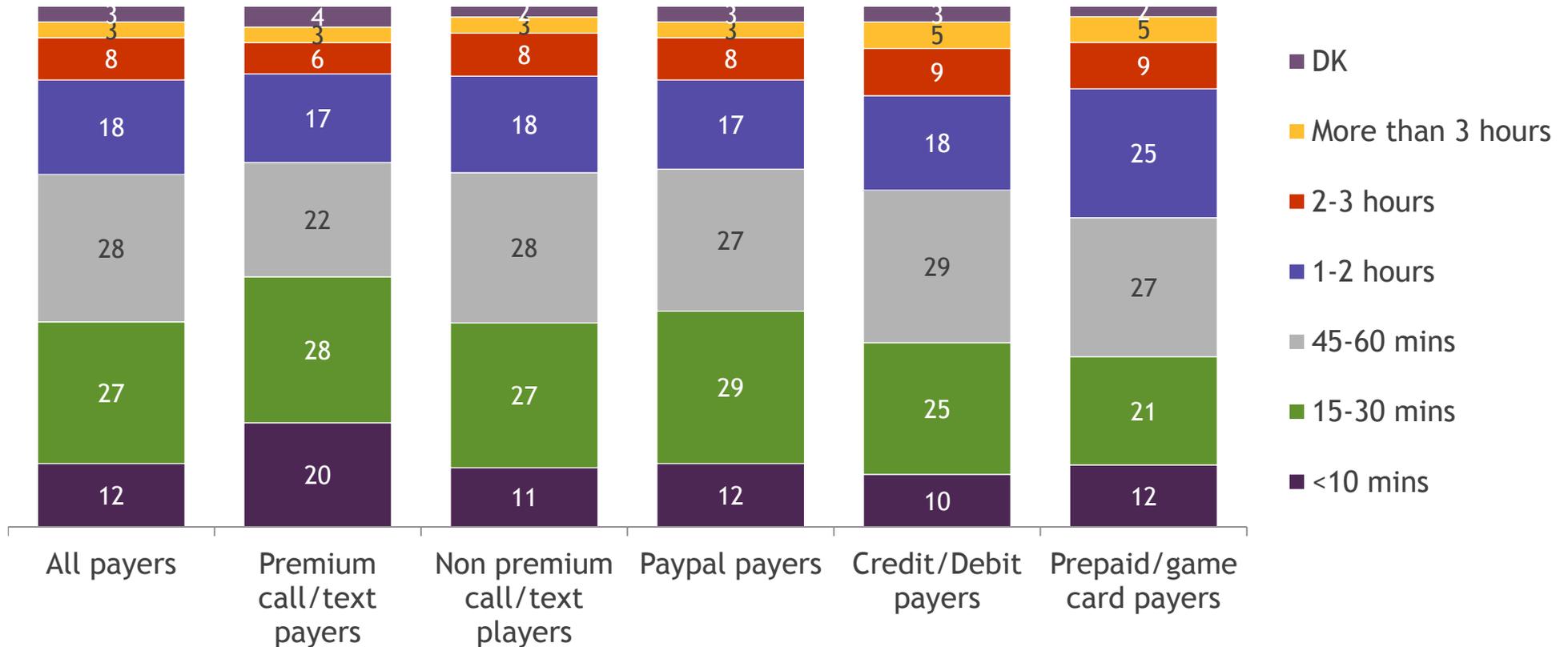
Average length playing session



Base = all responses (across multiple games) n=4315 (based on adults)
 U3 What is the average length of each of your playing/activity sessions?

Adults who pay by premium call/text tend have a slightly lower average gameplay time

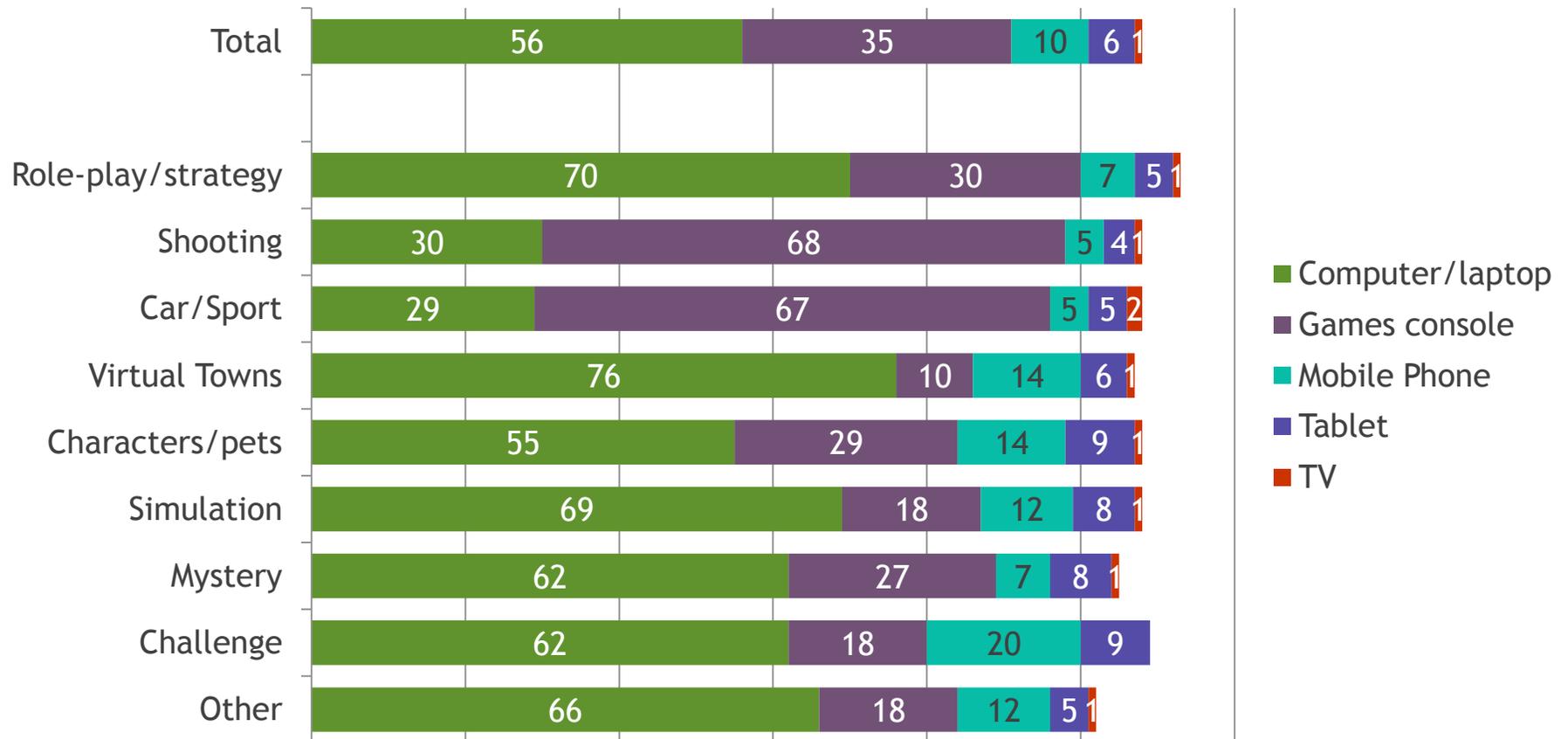
Average length playing session



Base = All responses (across multiple games) n=4315 (based on adults)
 U3 What is the average length of each of your playing/activity sessions?

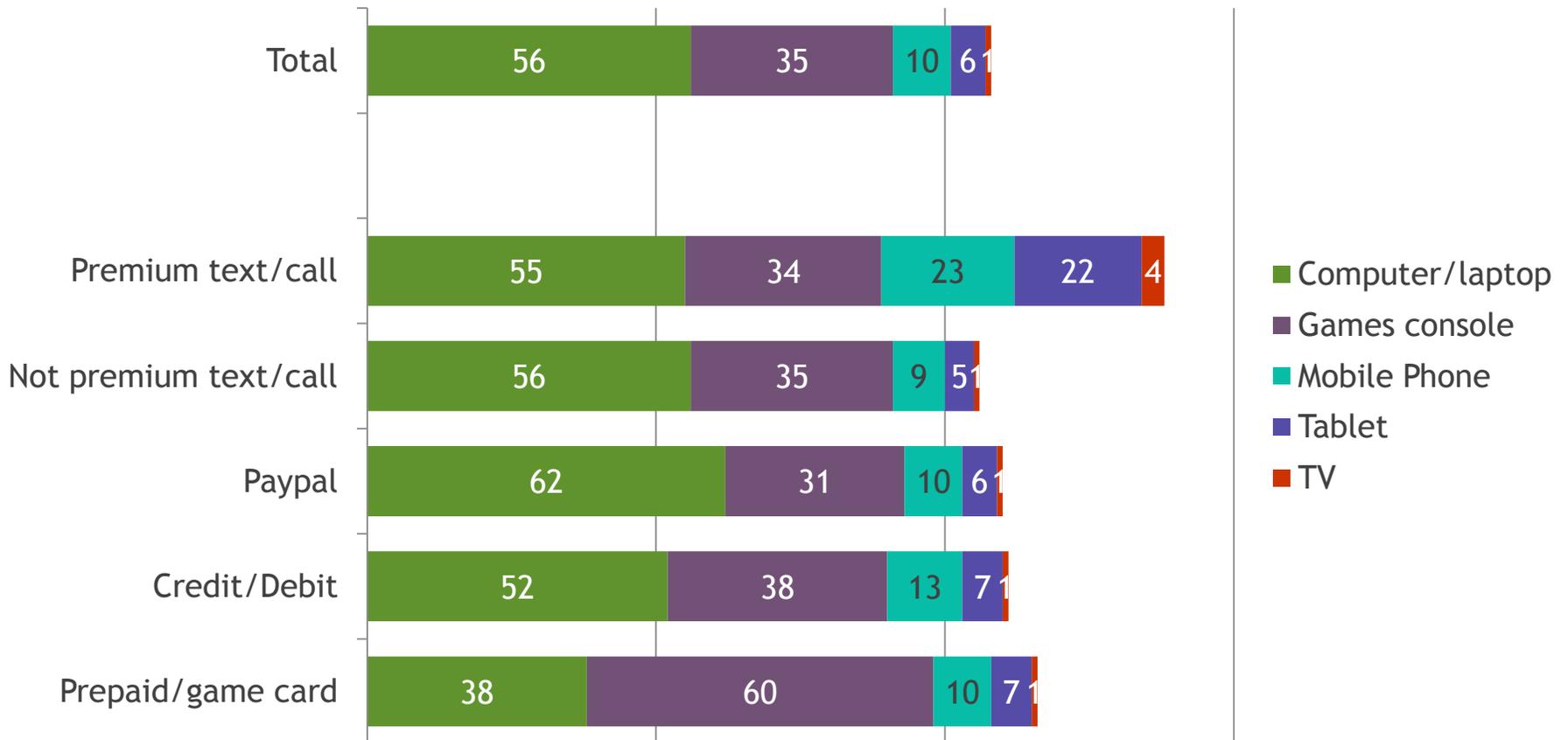
Amongst adults, shooting and car/sport very likely to be played on consoles. Challenge and simulation (including virtual towns or pets) seem suited to mobiles/tablets

Means of access - game category differences



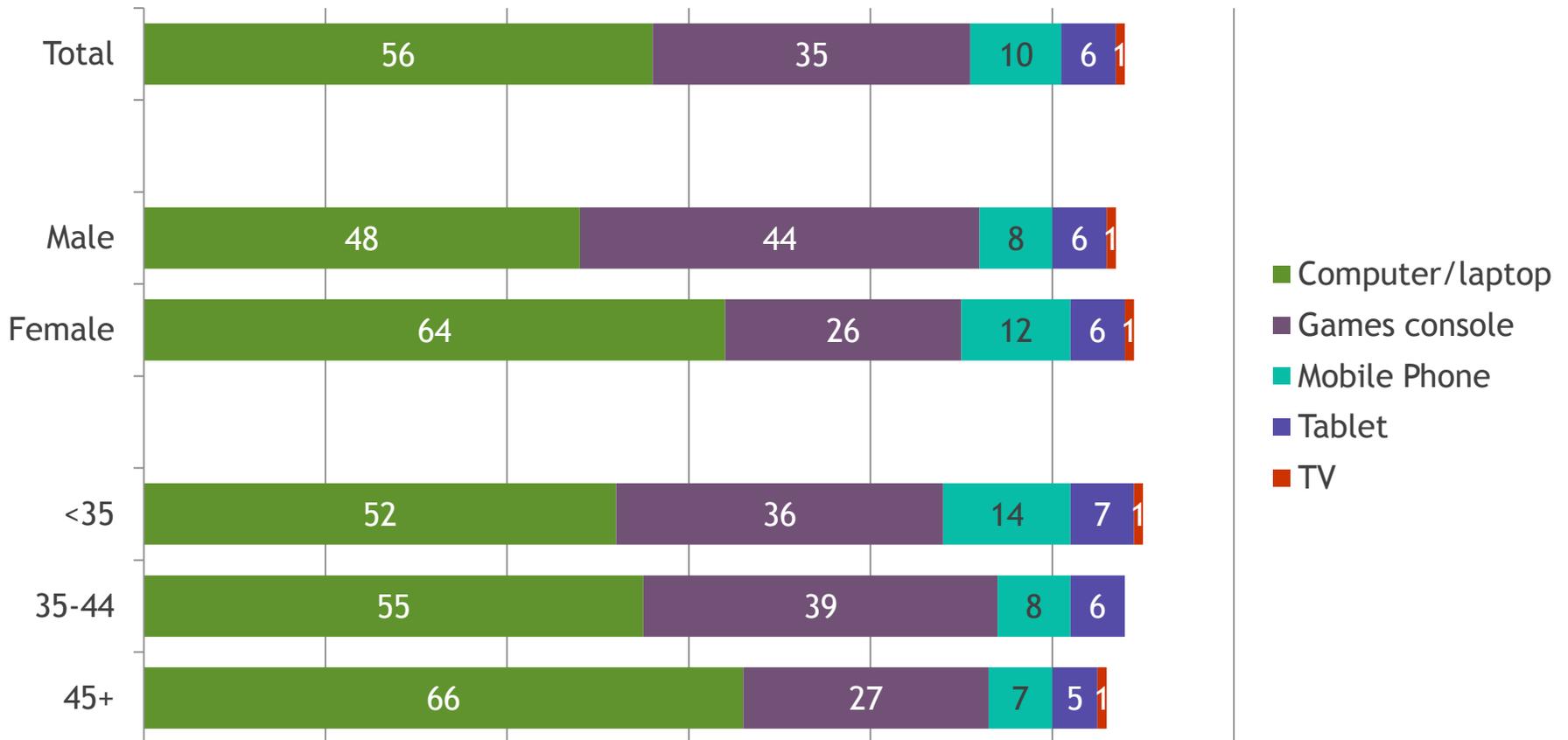
Adults who pay by premium text/call significantly more likely to access games via mobile or tablet

Means of access - payment method differences



Adult males more likely than adult females to play on consoles. Under 35s lead the way with mobile phone and tablet play.

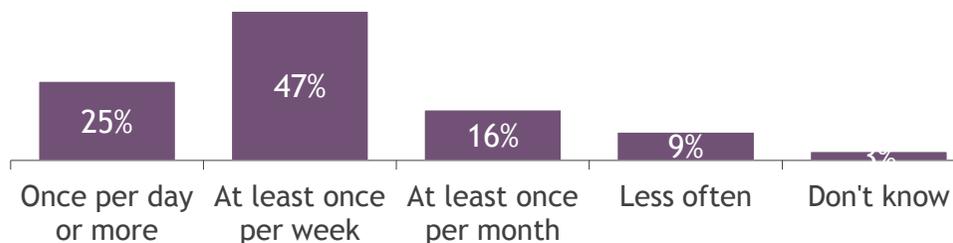
Means of access - demographic differences



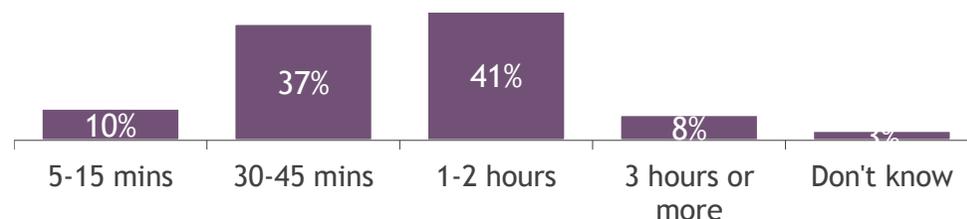
Base = all responses (across multiple games) n=4315 (based on adults)
 U4 How do you normally access this game or activity on the internet?

Snapshot of children's gaming behaviour (amongst children who pay to play)

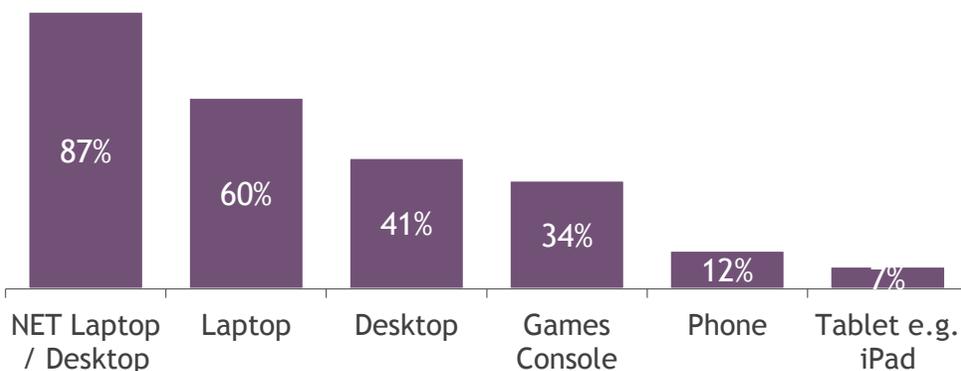
Frequency of play



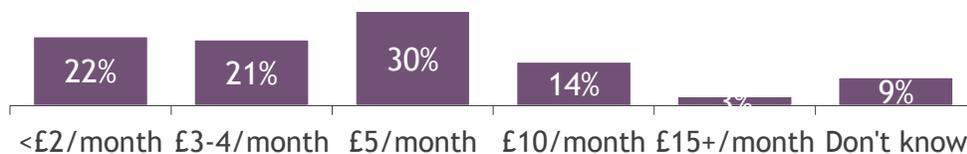
Average length session



How access games



How much paid in typical month



Older boys play for longer than others (even adults) and are more likely to be using portables (console/phone/tablet).
Older children spend more than adults on online games

Snapshot of child gaming behaviour (amongst children who pay to play)

| | MALE 7-10 | MALE 11-15 | FEMALE 7-10 | FEMALE 11-15 | ADULTS |
|-----------------------|-----------|------------|-------------|--------------|--------|
| | (114) | (183) | (104) | (100) | (905) |
| PLAY WEEKLY OR MORE | 74% | 69% | 81% | 67% | 61% |
| PLAY LESS OFTEN | 24% | 26% | 18% | 32% | 37% |
| | | | | | |
| PLAY < 1 HOUR PER DAY | 65% | 26% | 64% | 50% | 67% |
| PLAY > 1 HOUR PER DAY | 33% | 69% | 36% | 47% | 30% |
| | | | | | |
| USE LAPTOP OR DESKTOP | 89% | 77% | 98% | 93% | 56% |
| USE GAMES CONSOLE | 29% | 56% | 13% | 23% | 35% |
| USE PHONE | 10% | 15% | 8% | 14% | 10% |
| USE TABLET E.G. IPAD | 7% | 9% | 6% | 3% | 6% |
| | | | | | |
| PAY < £5 / MONTH | 52% | 38% | 46% | 42% | 54% |
| PAY £5 / MONTH | 28% | 30% | 39% | 25% | 24% |
| PAY > £10 / MONTH | 16% | 21% | 7% | 25% | 11% |
| Don't know | 4% | 12% | 9% | 8% | 10% |