

Prepared for:



PlayStation gamer research

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1 Introduction

Background, methodology and sample approach

Background

DJS Research (DJS) was commissioned to conduct a survey to assist the CMA's inquiry into the anticipated acquisition by Microsoft Corporation of Activision Blizzard Inc.

The research focused on the gaming habits and purchasing behaviour of PlayStation users whose account was used to play Call of Duty between July 2021 and June 2022.

Sample source and design

The CMA requested a non-identifiable customer list from Sony. This included PlayStation account holders where the account had been used to play Call of Duty between July 2021 and June 2022. In order for the record to be retained in the sample frame, the PlayStation account was required to have been used to play Call of Duty for 10 hours or more, and/or they had spent at least \$100 in the time period.

A probability sample of around 50,000 records was selected, stratified on time spent online and time spent offline playing Call of Duty. Customer contact details including name and email address were requested for this sample.

The survey was administered online via email invites and was described as being around a five-minute questionnaire. An incentive of £10 was offered following an initial soft launch (where a £5 incentive was offered) and up to six reminders were issued to encourage a response.

Research design

DJS worked with the CMA to finalise the questionnaire which was then piloted via 19 telephone interviews, whereby respondents could provide feedback and questions were tested for understanding (cognitive testing).

Issued sample & respondents

40,000 sample records were emailed in batches:

- 4,000 on 31st October (£5 incentive)
- 10,000 on 2nd / 3rd November, this was split into four batches of 2,500 which were sent at different times (£5 incentive)
- 11,000 on 4th November (£10 incentive)
- 15,000 on 9th November (£10 incentive)

In total, 1,397 responses were achieved and the average time taken to complete the survey was five minutes and 46 seconds.

Sample breakdown and response rate

Sample breakdown

Of the 40,000 email invitations issued by DJS, 25 did not have a PlayStation account, 201 were ineligible due to being under the age of 18, and 96 were not Call of Duty gamers. This resulted in 322 screen outs and a total of 1,397 interviews being completed. The eligibility rate was 81%.

Table 1: Breakdown of sample

Sample breakdown	Number	%
Interview complete	1,397	3%
Screen outs (ineligible)	322	0.8%
No PlayStation account	25	0.1%
Under 18	201	0.5%
Non-Call of Duty gamer*	96	0.2%
Eligibility rate (Number of completes/ number of completes + screen outs)	-	81%

*Call of Duty not selected at S03 (n=95), or no Call of Duty games for PlayStation selected at Q06 (n=1)

Response rate

The overall response rate achieved was 4.4%, with 1,397 responses obtained. The overall quality of the sample was high, with a small proportion of emails being undelivered or 'bounced' emails.

Table 2: Response rate

Response rate	Number	%
Interview complete	1,397	-
Emails sent	40,000	-
Emails bounced	728	1.8%
Number of delivered emails	39,272	-
Eligibility rate	-	81%
RESPONSE RATE	-	4.4%

Response rate = number of completes / (number of delivered emails x eligibility rate)
Number of delivered emails = number of emails sent - number of emails bounced

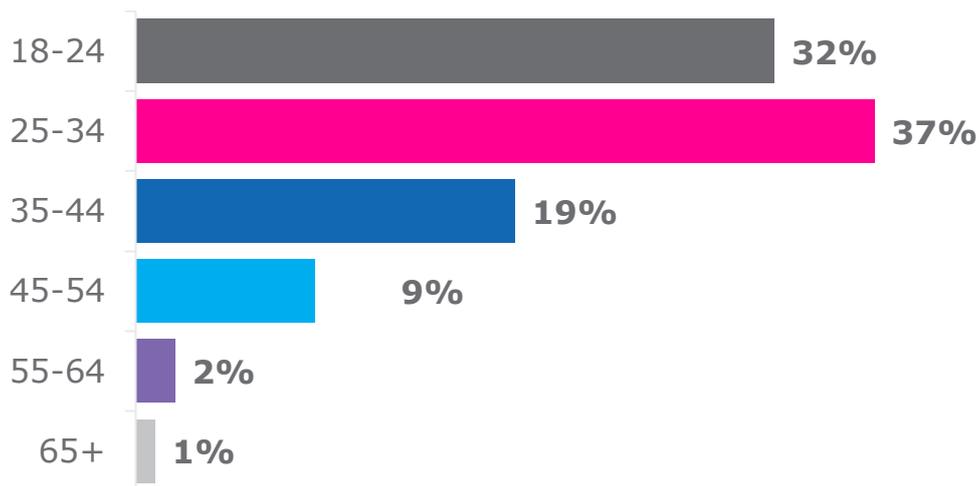
Analysis

All results presented in this report are unweighted and further economic analysis conducted by the CMA will assess the need for various types of weights and apply these, as appropriate.

Demographics

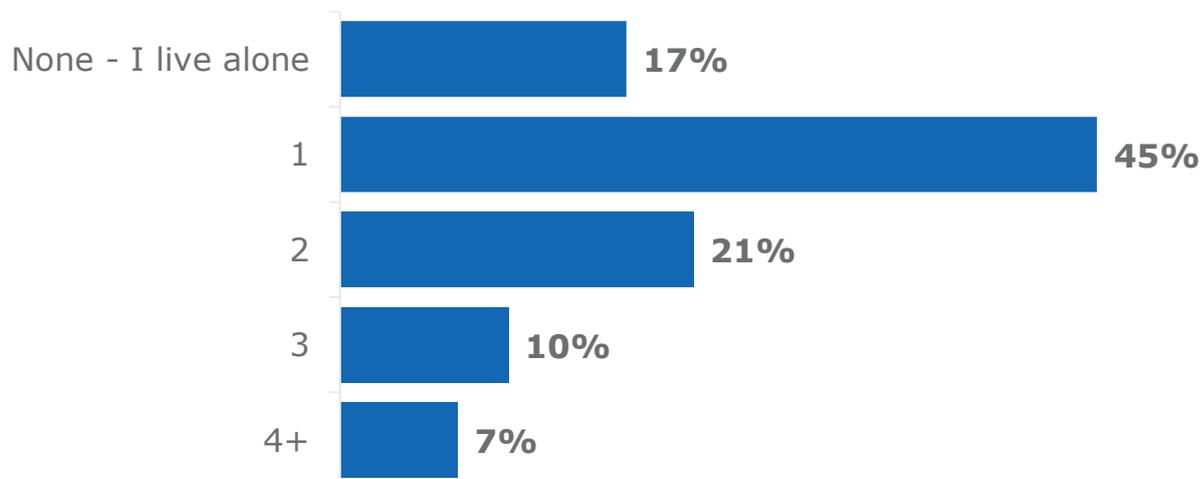
The following charts provide an overview of the demographic breakdown of the survey respondents. This is provided in order to place the respondents in context and has not been used for analysis purposes.

Age



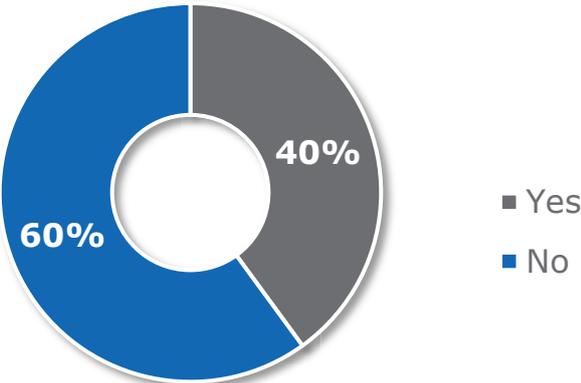
Source: S02. How old are you? **Base:** all respondents (n=1,397).

How many other adults do you live with?



Source: D01. How many other adults do you live with? **Base:** all respondents (n=1,397).

Adults you live with who play video games



Source: D02. Are there any other adults who play video games in your household besides you?
Base: those who do not live alone (n=1,156).

2 Summary of key findings

Sample overview

DJS sent 40,000 invites to a sample of PlayStation account holders. We achieved 1,397 responses, which equates to a 4.4% response rate, taking into account the eligibility rate (81%).

Gaming consoles and Call of Duty gaming

Console ownership

The most popular PlayStation consoles owned were PlayStation 5 and PlayStation 4. Around three in ten also own an Xbox, and a third own another console (mostly a gaming PC or Nintendo Switch).

Main gaming device & usage

Gamers who own more than one console were more likely to say that they use their PlayStation as their main gaming device 'almost all of the time' (65%) compared with those who use an Xbox (40%) or another console (37%) as their main gaming device.

Future console purchases

Three quarters expected to buy a PlayStation next, with few saying that they planned on purchasing an Xbox (6%), Nintendo (6%), or other consoles.

Factors influencing console purchase

The availability of games on PlayStation was overall the most influential factor to gamers when making a console purchase.

Three quarters of those who said game availability influenced them toward buying a PlayStation, also said that it was Call of Duty in particular that influenced them towards this purchase. This was closely followed by PlayStation Exclusive games, with seven in ten saying that this had influenced their decision to purchase a PlayStation.

Call of Duty gaming

The most commonly owned Call of Duty game on PlayStation was Warzone (2020, free version), followed by Modern Warfare (2019). Gamers who own an Xbox or PC were most likely to have one or more of the older titles from the Call of Duty series.

The majority owned both pre-2020 and post-2020 Call of Duty games for PlayStation, whereas just under a quarter of those who own an Xbox owned both pre-2020 and post-2020 Call of Duty games.

Just over half of the gamers surveyed said they play games from the Call of Duty series several times a week or more (53%), with the most common frequency being to play several times per week (up to and including five times per week), at around three in ten (31%).

Hypothetical scenarios

Looking back to the purchase of their most recent PlayStation console

Respondents were asked to think back to when they bought their most recent PlayStation console.

Call of Duty game not available on PlayStation

The first hypothetical scenario asked what gamers would have done if the most recent Call of Duty game they owned at the time had not been available on PlayStation but had been available on Xbox and PC.

In this scenario, just over half of gamers would have bought only the PlayStation (53%) and around three in ten would have bought another device (31%), most commonly an Xbox (61%). The most common response concerning the effect of this on their Call of Duty gaming was to have played only older Call of Duty games that they already owned (41%).

Call of Duty game is still available – but with fewer features

Gamers were also asked what they would have done at the time of their last PlayStation purchase if the most recent Call of Duty game they owned at the time had still been available on PlayStation, but with less content. In this scenario, around two thirds would have bought only the PlayStation (67%), and around one in five would have bought another device (21%), most commonly an Xbox (64%).

Looking forward

Respondents were asked to look forward to future Call of Duty game releases.

Likelihood of buying Call of Duty gaming releases

Just over half (52%) would be 'very likely' and a further third (33%) would be 'likely' to buy future Call of Duty game releases. Overall, 85% would be likely to buy future Call of Duty game releases.

Future Call of Duty game releases not available on PlayStation

Respondents were asked what they would do if they were to find that future Call of Duty game releases were not available on PlayStation

The most common course of action in response to this scenario would be to 'play only Call of Duty games I already own, but not future releases' (34%). Just over one in five say they would stop playing Call of Duty altogether (21%), and just under a quarter (24%) would buy another device (either an Xbox or PC) at their next gaming device purchase.

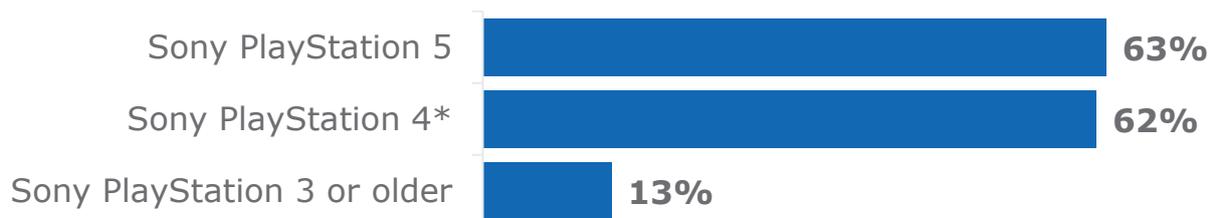
3 Survey results

Gaming consoles: ownership, usage and purchasing factors

PlayStation console owned

Respondents were asked which PlayStation consoles they own. Around two thirds of gamers own a PlayStation 5, with a similar proportion owning a PlayStation 4. Just over one in ten own a PlayStation 3 or older.

Figure 1: PlayStation consoles owned

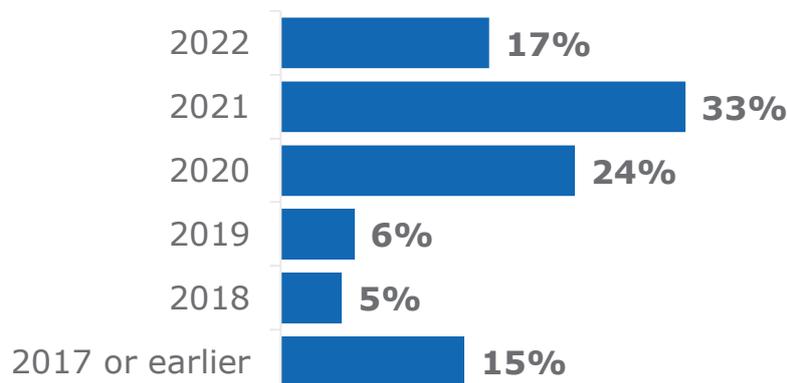


Source: Q01A. Which of the following PlayStation devices do you use?

Base: all respondents (n=1,372). *including Pro or Slim

Respondents were also asked in which year they purchased their most recent PlayStation. Around a third of gamers bought their most recent PlayStation in 2021, followed by just under a quarter who purchased their PlayStation in 2020.

Figure 2: Year of most recent PlayStation purchase



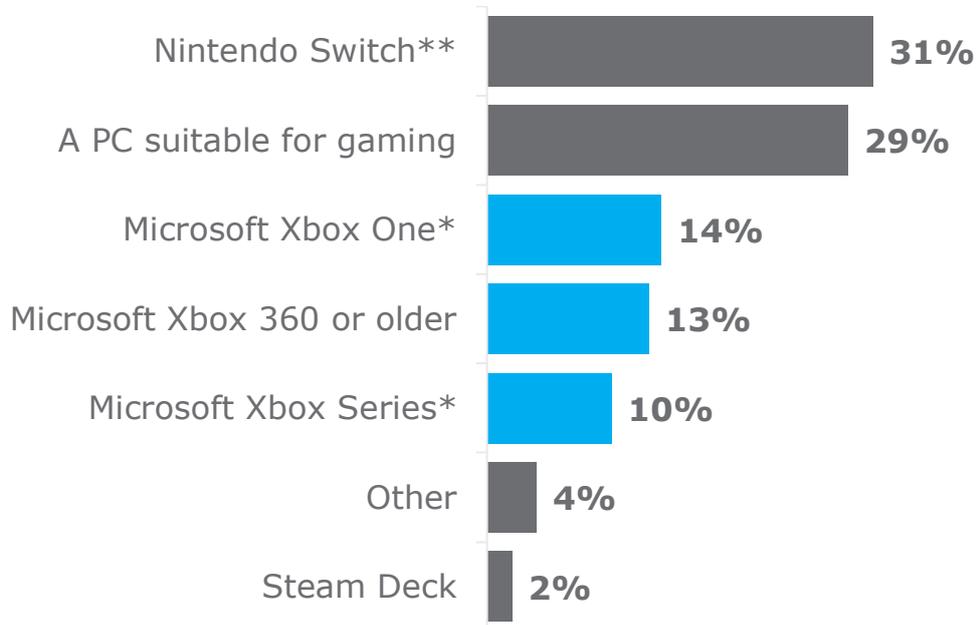
Source: Q08. In what year did you buy your most recent PlayStation?

Base: all respondents (n=1,397).

Other gaming devices owned

In addition to the PlayStation, a Nintendo Switch was the most popular gaming device owned, followed by a PC suitable for gaming. Overall, 29% of gamers owned an Xbox (NET)¹.

Figure 3: Other gaming devices owned



Source: Q01B. Do you own any other gaming devices? **Base:** all respondents (n=1,397).

*including X or S **including Lite or OLED. MULTICODE question.

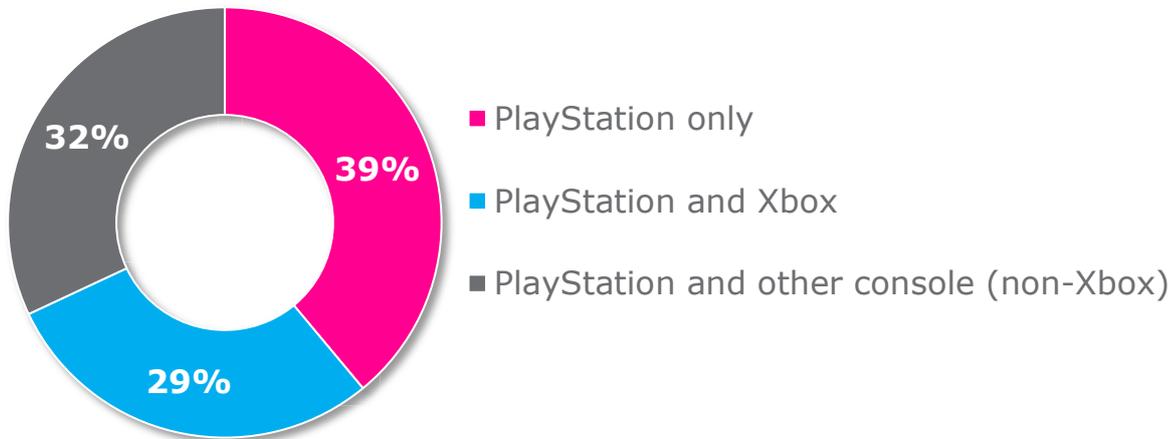
'None of the above' is not displayed which represents 39% of the 1,397 respondents.

¹ A NET is a calculation that represents the proportion of respondents who have selected one or more answers. For multicode questions, the NET is equal to or less than the sum of the categories, as respondents are only counted once. For example here, if a respondent owns both an Xbox 360 and Xbox Series, they will only be counted once in the NET: Xbox figure.

Consoles owned

Of the gamers surveyed, around four in ten own only a PlayStation, just under three in ten own both a PlayStation and an Xbox, and just under a third own both a PlayStation and another console.

Figure 4: Consoles owned

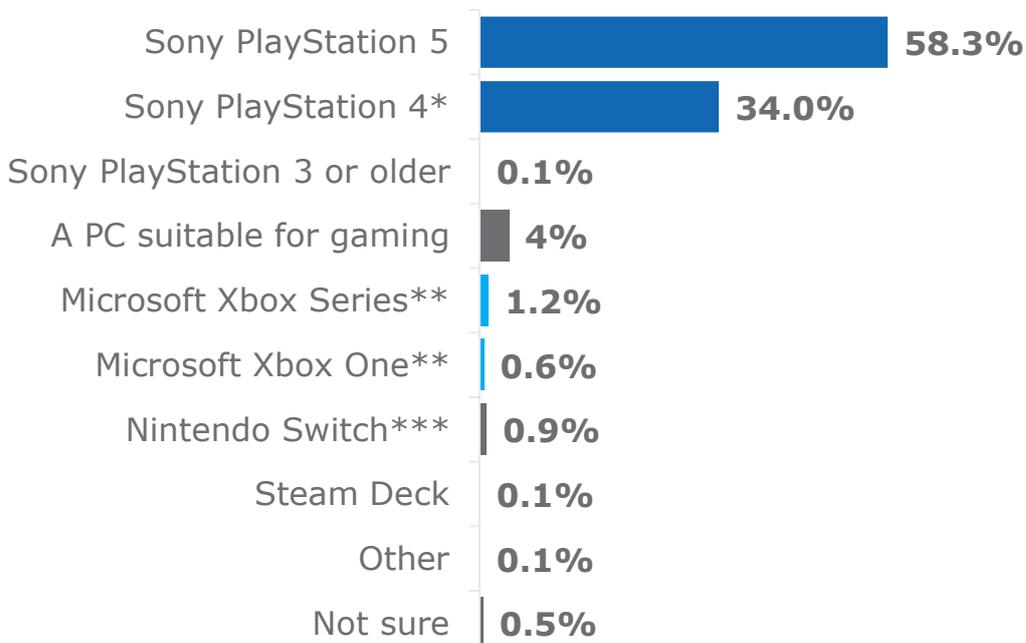


Source: Q01B. Do you own any other gaming devices? **Base:** all respondents (n=1,397).

Main gaming device & usage

Around nine in ten PlayStation account holders said they would consider a PlayStation to be their main gaming device (92%). The most common console gamers use as their main gaming device is a PlayStation 5, followed by a PlayStation 4. Overall, just 2% consider an Xbox to be their main gaming device.

Figure 5: Main gaming device

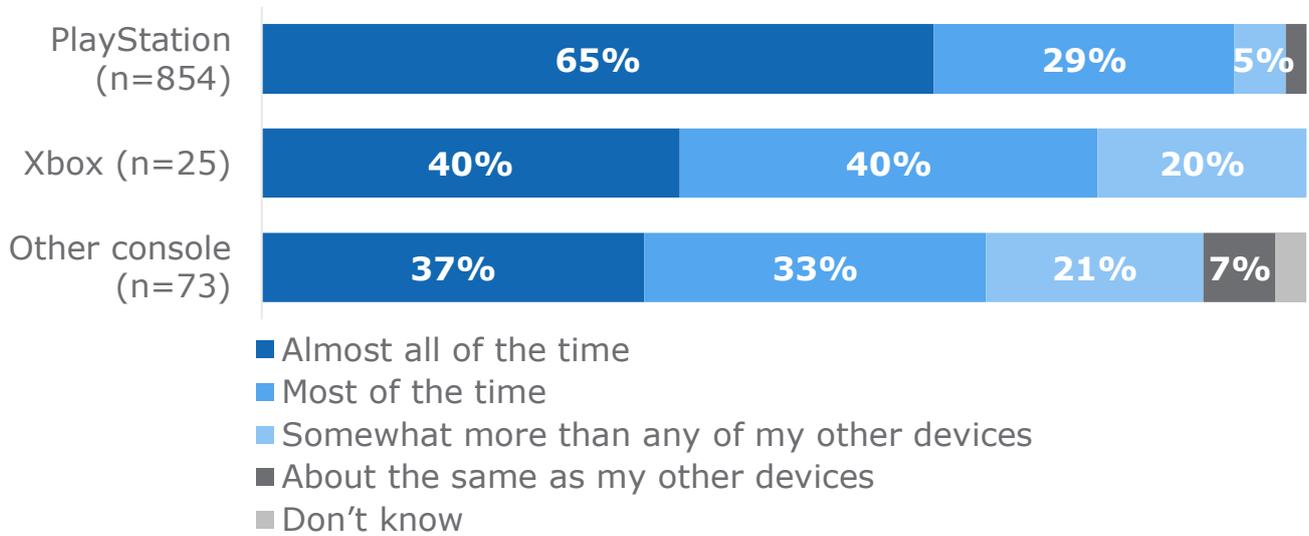


Source: Q02. Which, if any, of these devices would you characterise as your main gaming device? **Base:** all respondents (n=1,397), *including Pro or Slim **including X or S ***including Lite or OLED.

Usage of main gaming device

Of the respondents who use a PlayStation as their main gaming device, two thirds said they use their main device 'almost all of the time', compared with around four in ten of those who use either an Xbox or PC as their main device.

Figure 6: Usage of main device

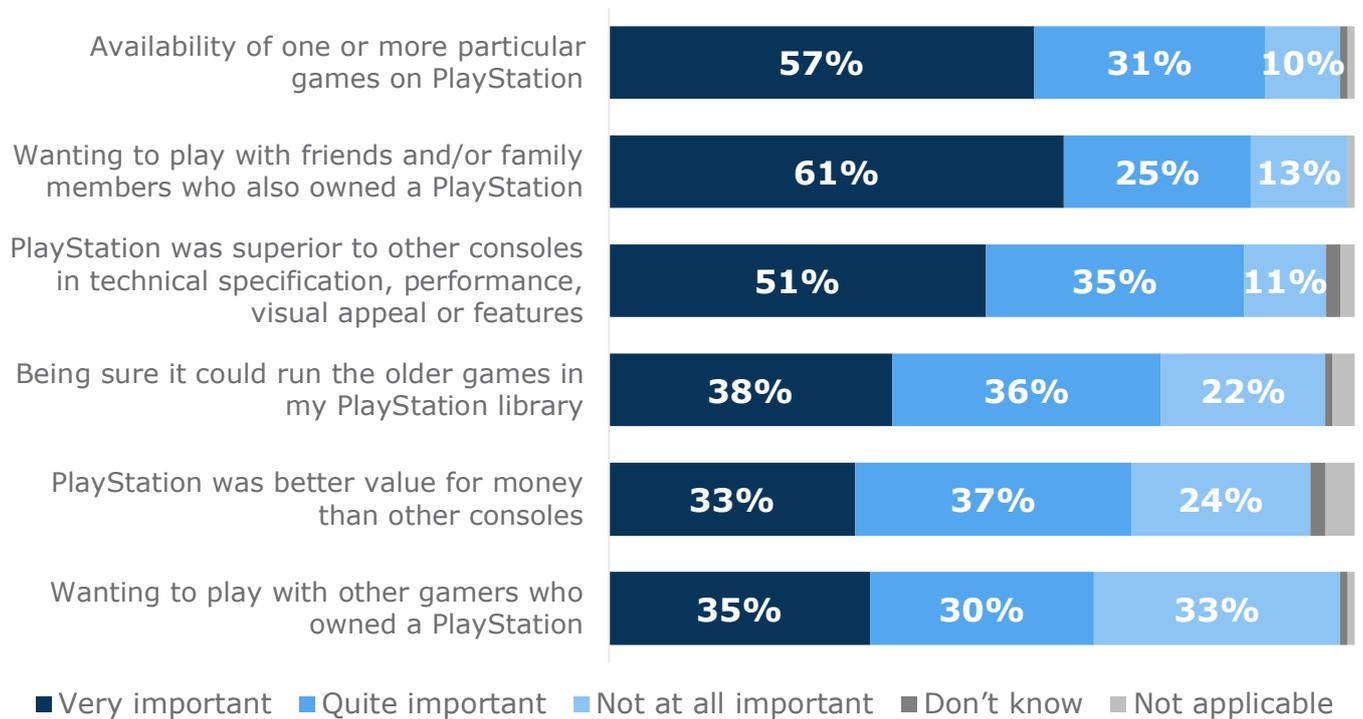


Source: Q03. Do you use your _____ for gaming ...? **Base:** those who have more than one console (n=952). Figures 3% and under are removed for neatness.

Console purchasing factors

The availability of games on PlayStation was found to be overall the most important factor to gamers when considering making a console purchase. However, the factor which the highest proportion of gamers said was 'very important' was wanting to play with friends or family members who also owned a PlayStation.

Figure 7: Factors influencing PlayStation purchase



Source: Q04. How important were the following factors in your choice of purchasing a PlayStation (rather than a different gaming console or device) for video gaming?

Base: all respondents (n=1,397). Figures 4% and under are removed for neatness

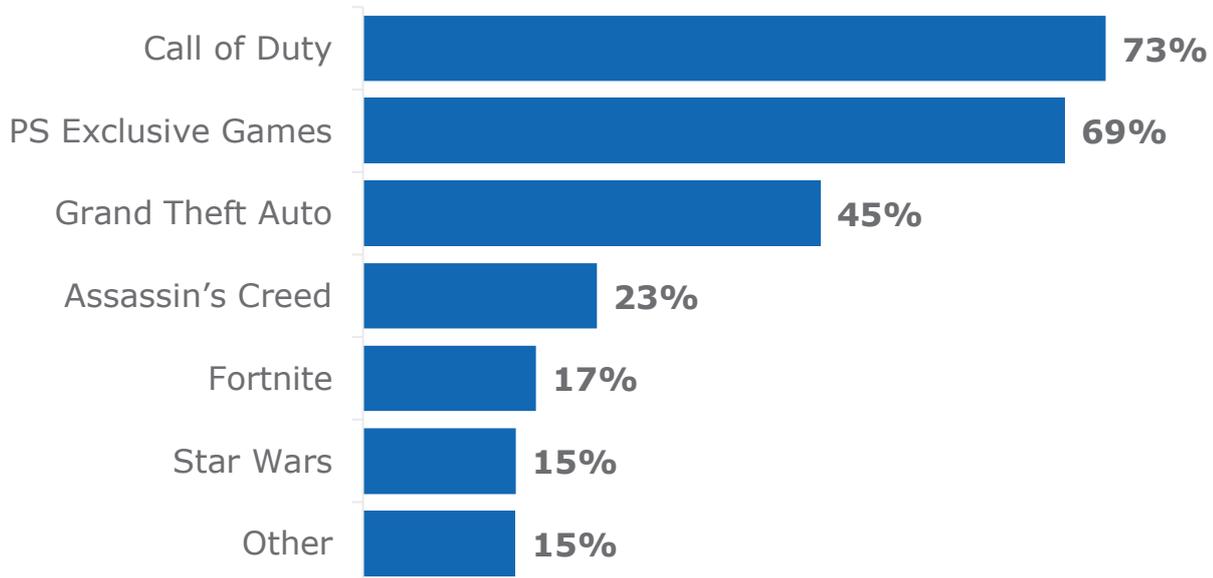
Table 3: Importance of factors influencing PlayStation purchase

	NET: Important (Quite+Very important)
Availability of one or more particular games on PlayStation	88%
Wanting to play with friends and/or family members who also owned a PlayStation	86%
PlayStation was superior to other consoles in technical specification, performance, visual appeal or features	86%
Being sure it could run the older games in my PlayStation library	74%
PlayStation was better value for money than other consoles	70%
Wanting to play with other gamers who owned a PlayStation	65%

Game availability

For respondents who said game availability influenced them towards buying a PlayStation, Call of Duty played a key role in purchasing behaviour. Just under three quarters of this demographic said that it was Call of Duty in particular that influenced them towards buying a PlayStation. This is closely followed by PlayStation Exclusive games, at around seven in ten.

Figure 8: Game availability

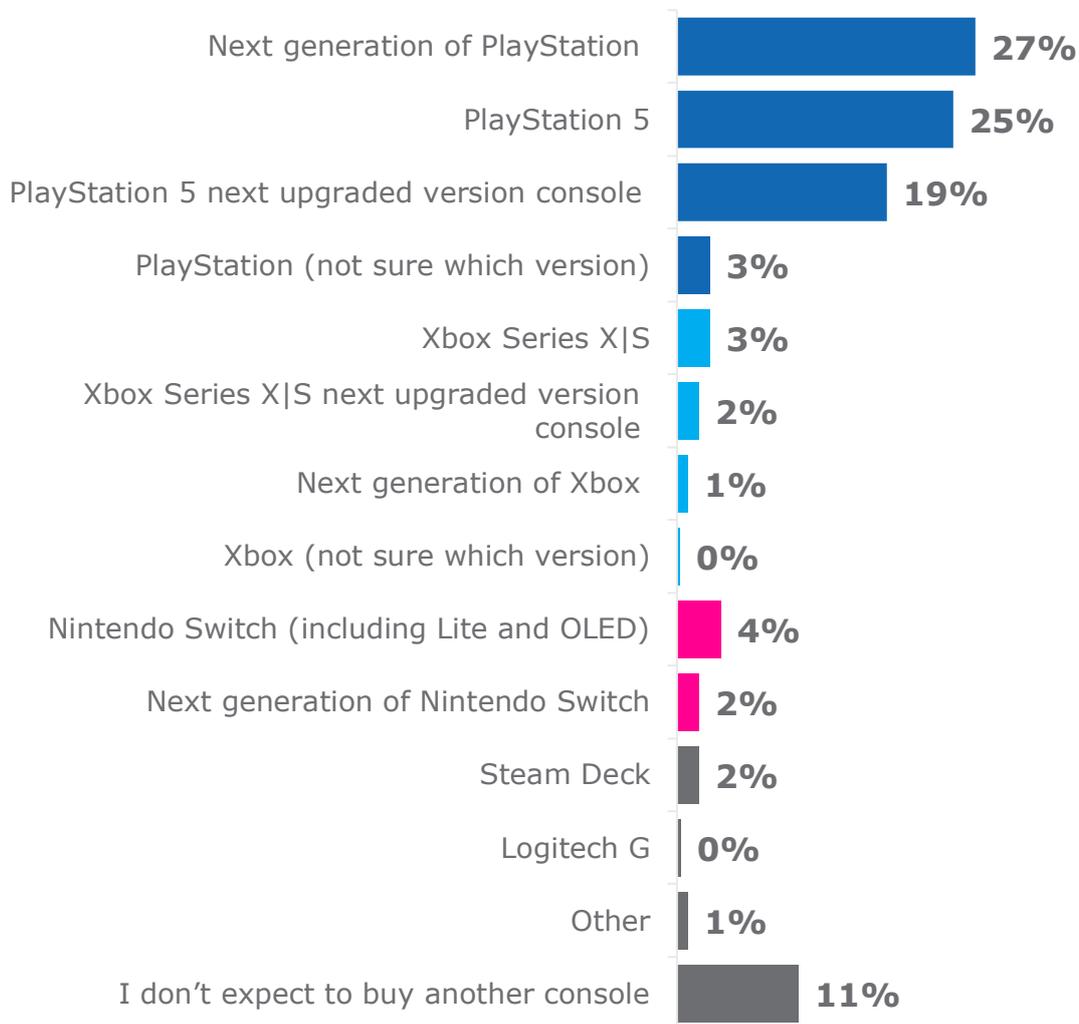


Source: Q05. The availability of which particular game(s) influenced you towards buying a PlayStation? **Base:** those who say that the availability of a particular game is very or quite important (n=1,226). PS Exclusive Games include: Ghost of Tsushima, Uncharted, Last of Us, God of War, and Marvel Spiderman.

Future console purchases

Around three quarters of gamers said they would be likely to purchase a PlayStation when looking to buy their next gaming console (74%). A small proportion of gamers said they would be likely to buy an Xbox or Nintendo next (6% for each).

Figure 9: Console likely to buy next



Source: Q09. Which console do you think you are likely to buy next, assuming that the following consoles are available or become available during the time periods indicated?

Base: all respondents (n=1,397).

Call of Duty gaming

Call of Duty game ownership

Of the gamers surveyed, the most commonly owned Call of Duty game on PlayStation was Warzone (2020, free version), followed by Modern Warfare (2019). Gamers who own an Xbox or PC were most likely to have one or more older titles from the Call of Duty series on these devices.

Table 4: Titles owned

	On PlayStation 100% of respondents own a PlayStation	On Xbox *29% of respondents own an Xbox	On a suitable PC for gaming *29% of respondents own a PC
Call of Duty: Modern Warfare II (2022)**	59%	3%	3%
Call of Duty: Vanguard (2021)	53%	2%	1%
Call of Duty: Black Ops Cold War (2020)	67%	4%	2%
Call of Duty: Warzone (2020, free version)	82%	7%	5%
Call of Duty: Modern Warfare (2019)	72%	5%	2%
Call of Duty: Black Ops 4 (2018)	55%	4%	1%
Call of Duty: WWII (2017)	57%	5%	1%
Call of Duty: Infinite Warfare (2016)	44%	6%	1%
One or more older titles from the Call of Duty series	67%	11%	5%

Source: Q06. Which of the following games do you have <and on which devices>?

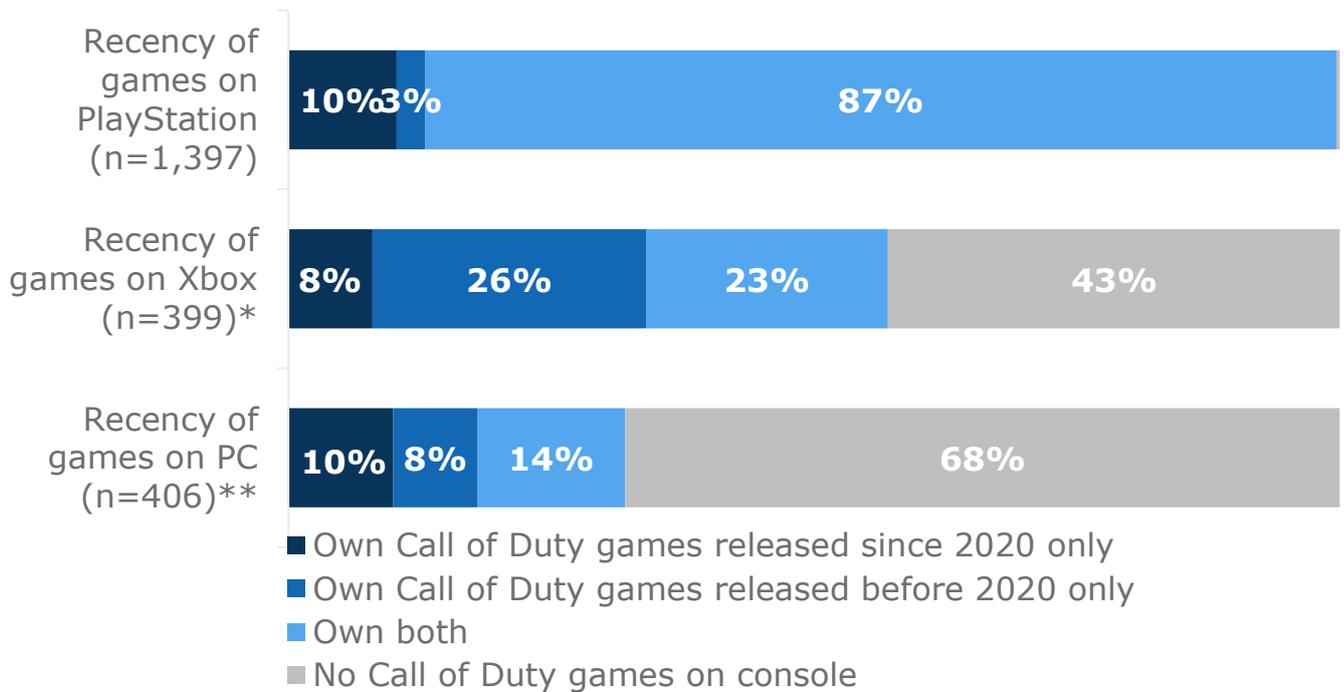
Base: all respondents (n=1,397) *As only 29% of respondents own an Xbox and only 29% own a gaming PC, the percentages in these columns are on a very different basis to those in the PlayStation column and not comparable on a game-by-game basis.

**including the beta version, released in October 2022

Recency of games owned

The majority of gamers owned both pre-2020 and post-2020 Call of Duty games for PlayStation, whereas just under a quarter (23%) of those who also own an Xbox owned both pre-2020 and post-2020 Call of Duty games. Of those who own an Xbox, just over a quarter (26%) only owned pre-2020 Call of Duty games. This suggests that those who own an Xbox are more likely to have purchased more recent Call of Duty games for their PlayStation. Those who own a PC, are less likely to own any Call of Duty games for their PC (68% do not own any Call of Duty games for PC).

Figure 10: Recency of games owned

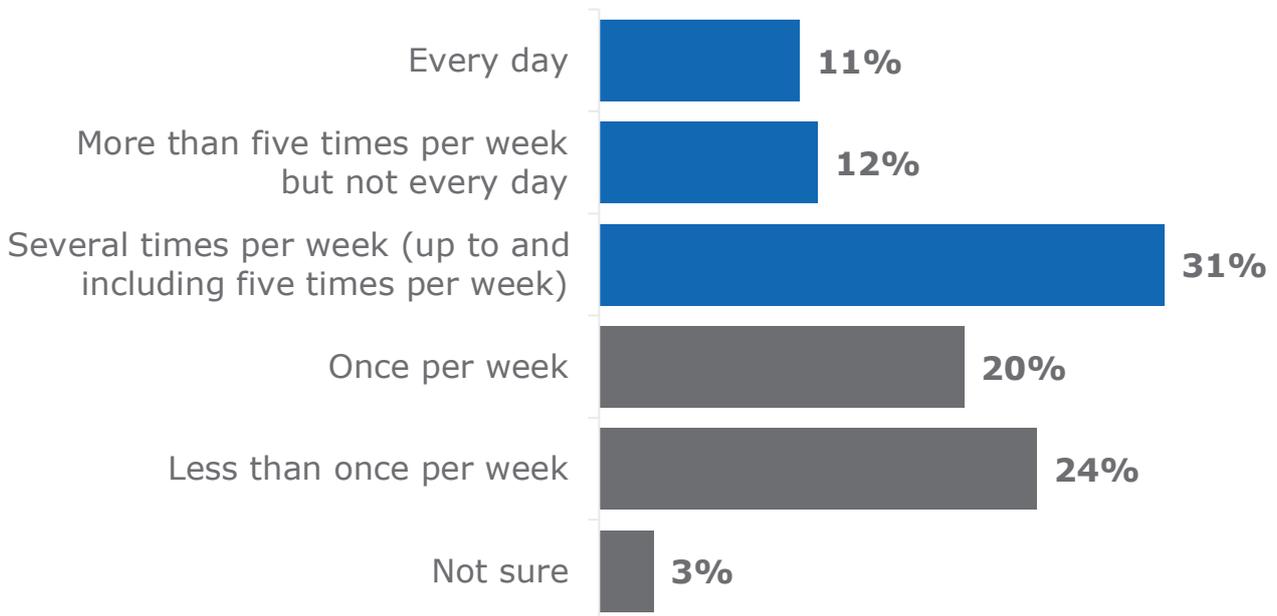


Source: Q06. Which of the following games do you have <and on which devices>? **Base:** those who own each console. *71% of our sample do not own an Xbox **71% of our sample do not own a PC

Time spent playing games from the Call of Duty series

When asked about the amount of time they spend playing games from the Call of Duty series, just over half said they played Call of Duty several times a week or more (53%). The most common frequency is to play several times per week (up to and including five times per week), at around three in ten (31%).

Figure 11: In a typical week...



Source: Q07. In general, how often do you play games from the Call of Duty series in a typical week?

Base: all respondents (n=1,397). N.B Respondents were asked to choose from the following categories, which have been clarified in the chart (less than once per week, at least once per week, several times per week, more than five times per week, every day, not sure)

Hypothetical scenarios

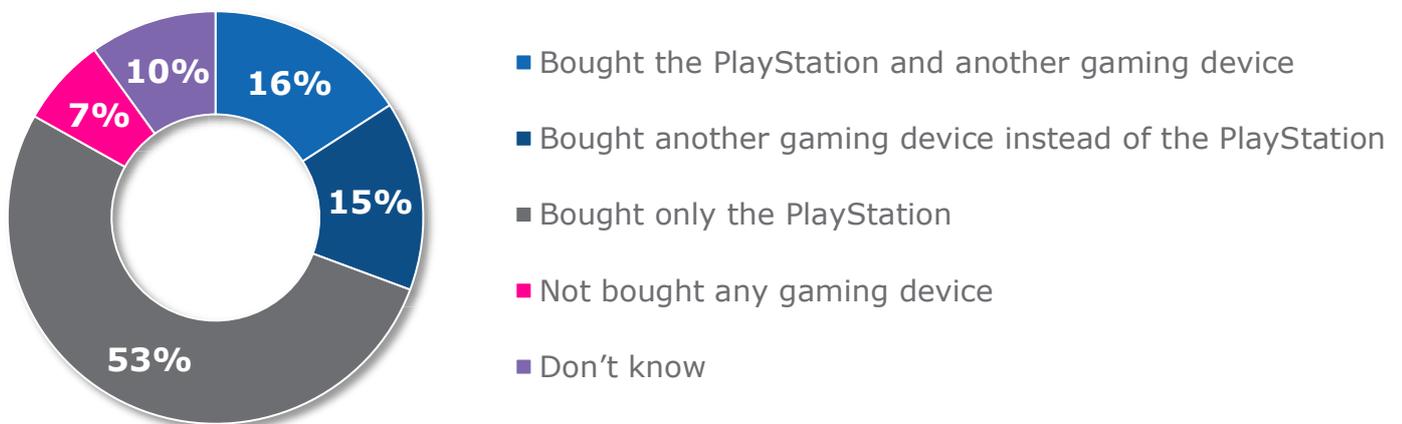
The following sections focus on purely hypothetical scenarios, looking back at past purchasing behaviour and then looking forward to future purchasing behaviour. The aim of presenting these hypothetical scenarios to respondents is to encourage them to consider what course of action they would have taken or would take when faced with the following circumstances.

Looking back to the purchase of their most recent PlayStation console

The first hypothetical scenario asked what gamers would have done if the most recent Call of Duty game they owned at the time had not been available on PlayStation.

In this scenario, just over half of gamers would have bought only the PlayStation (53%), and around three in ten would have bought another device (31%). Just under one in ten would have not bought any gaming device (7%).

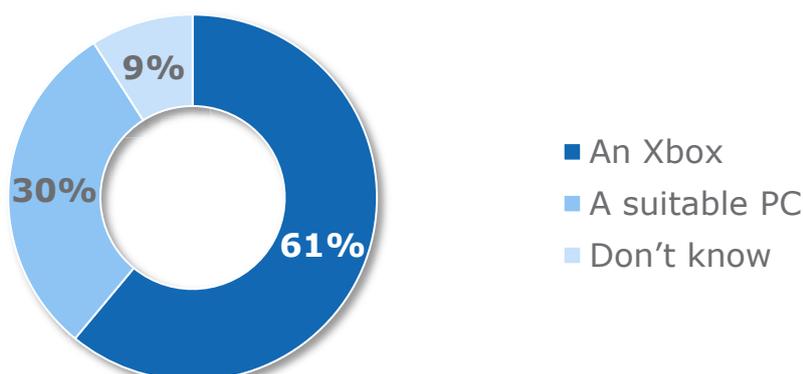
Figure 12: Actions they would have taken



Source: Q10. If the most recent Call of Duty game you owned at that time had not been available on PlayStation, but had been available on Xbox and PC as they are today, do you think you would have...? **Base:** all respondents (n=1,397).

Those who would have purchased another gaming device (31%) were then asked which device they would have purchased, with just over six in ten (61%) saying they would have bought an Xbox.

Figure 13: Other gaming device they would have bought

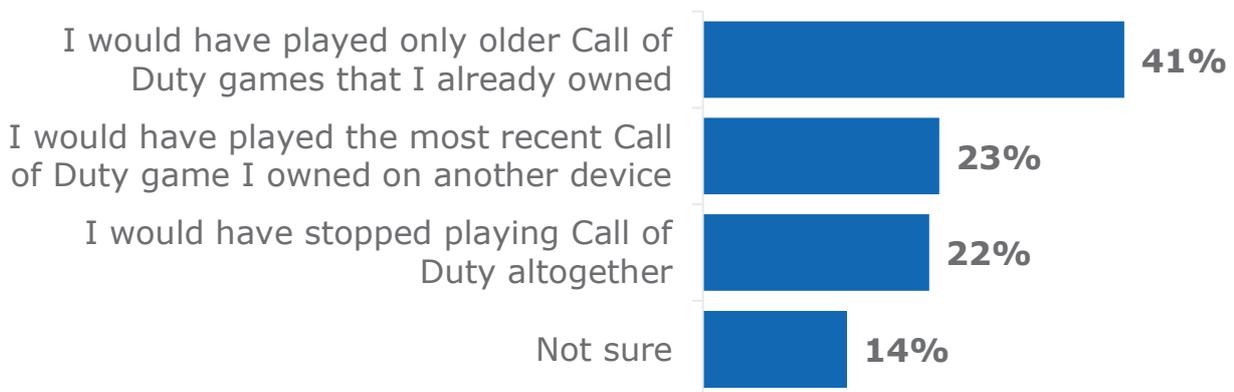


Source: Q11. Which other gaming device would you have bought? **Base:** those who would have bought another gaming device instead of, or as well as, a PlayStation (n=429).

Likely effect on Call of Duty gaming: most recent Call of Duty game not available on PlayStation

Respondents were then asked how this scenario would have affected their Call of Duty gaming. The most likely outcome for gamers would have been to have played only the older Call of Duty games they already owned (41%). Just under a quarter (23%) would have played the most recent Call of Duty game they owned on another device, and just over one in five (22%) would have stopped playing Call of Duty altogether.

Figure 14: How would this have affected your Call of Duty gaming?



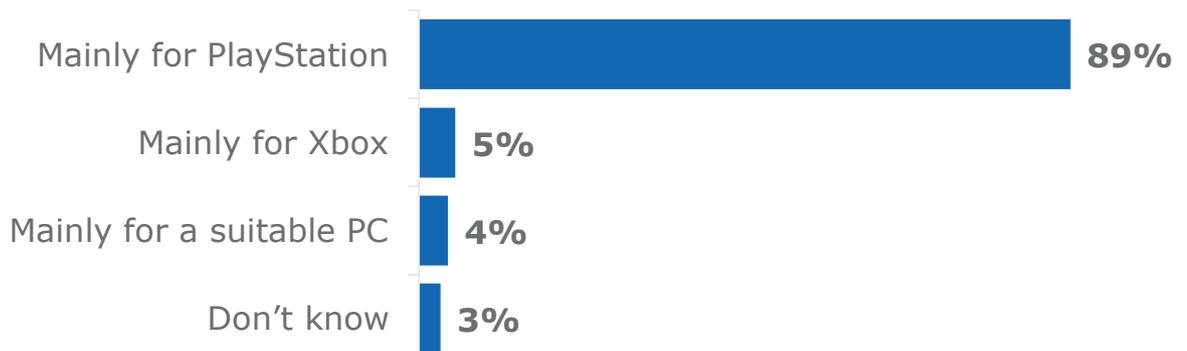
Source: Q12. And how (if at all) would this have affected your Call of Duty gaming?

Base: all excluding those who don't know what they would have done if the most recent Call of Duty game they owned at that time had not been available on PlayStation but had been available on Xbox and PC (n=1,263).

Likely impact on non-Call of Duty gaming: most recent Call of Duty game not available on PlayStation

Those who said in this scenario that they would have bought an Xbox or PC, as well as a PlayStation, were then asked about other game purchases. Of these respondents, 89% said that if the most recent Call of Duty game were not available on PlayStation, they would still have bought other games mainly for the PlayStation.

Figure 15: Would you have bought subsequent non-Call of Duty games...



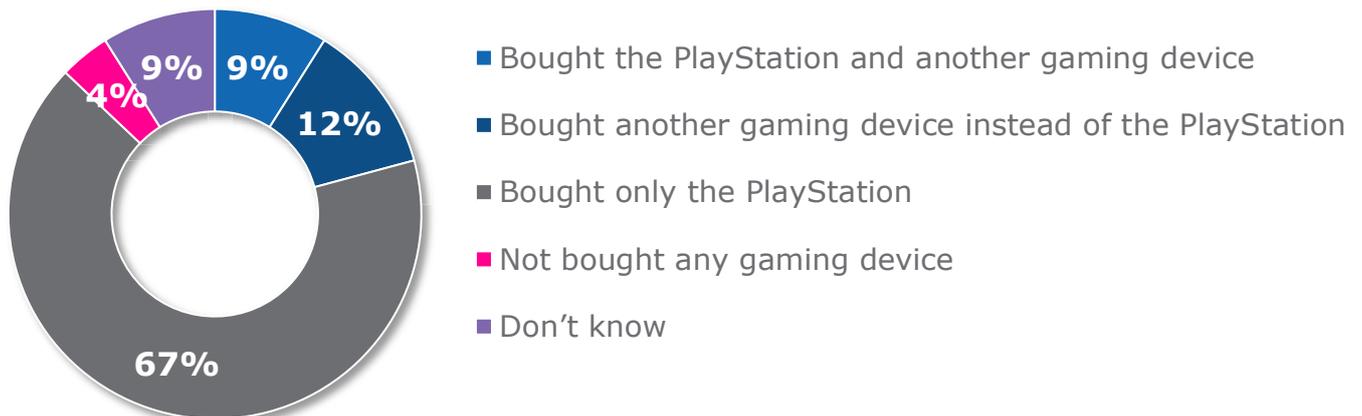
Source: Q12A. Thinking about any other (non-Call of Duty) games that you subsequently bought for PlayStation, would you still have bought these mainly for PlayStation or would you have bought them mainly for <Xbox/PC>? **Base:** those who would have bought an Xbox or PC as well as a PlayStation excl. those who don't know which device they would have bought (n=197).

Likely actions: most recent Call of Duty game is still available on PlayStation but with less content

Gamers were also asked what they would have done at the time of their last PlayStation purchase if the most recent Call of Duty game they owned at the time had still been available on PlayStation, but with less content (not able to access certain content such as specific levels, maps or gameplay modes).

In this scenario, around two thirds of gamers said that they would have bought only the PlayStation (67%). Just over one in ten would have bought another gaming device instead of the PlayStation (12%), and just under one in ten would have bought the PlayStation and another gaming device (9%).

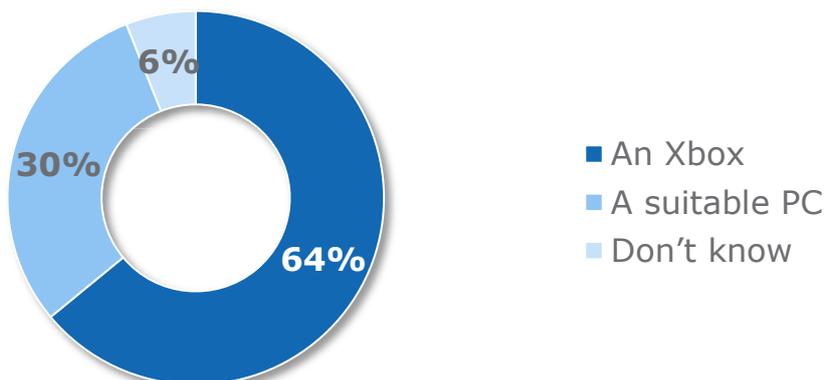
Figure 16: Actions they would have taken



Source: Q12b. Imagine now that the most recent Call of Duty game you owned at that time had still been available on PlayStation, but that you would not have been able to access certain types of content for it... (including specific levels, maps, or gameplay modes) on PlayStation. This content would still have been available to access on Xbox and PC as they are today. Do you think you would now have...? **Base:** all respondents (n=1,397). N.B. Assumes those who would have bought only PlayStation if the most recent Call of Duty game they owned at the time had not been available on PlayStation (Q10) would have done the same if the most recent Call of Duty game they owned at the time was still available but with less content.

Figure 17: Other gaming device they would have bought

Those who would have purchased another gaming device (21%) were then asked which gaming device they would have bought, with the Xbox being the most likely choice.



Source: Q12c. Which other gaming device would you have bought? **Base:** those who would have bought another gaming device instead of, or as well as a PlayStation if the most recent Call of Duty game they owned at the time was still available on PlayStation but with less content (n=288).

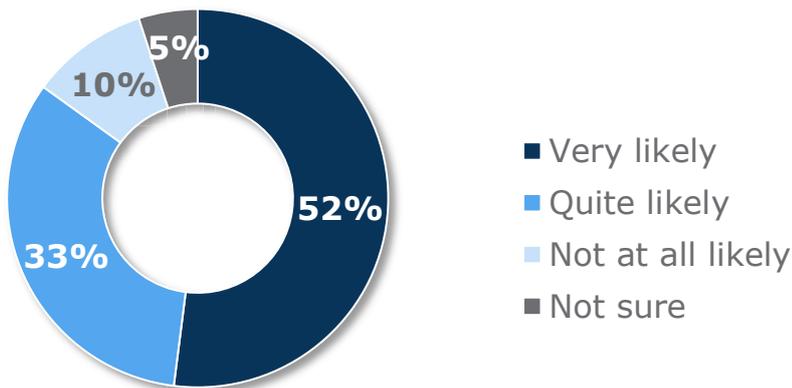
Looking forward

Respondents were then asked about buying any Call of Duty games that may be released in the near future (2023 and beyond).

Buying future Call of Duty game releases

When asked about the likelihood of buying future Call of Duty game releases, just over half of gamers said they would be 'very likely' and a third said they would be 'quite likely'. Overall, 85% would be likely to buy future Call of Duty game releases.

Figure 18: Likelihood of buying future Call of Duty game releases

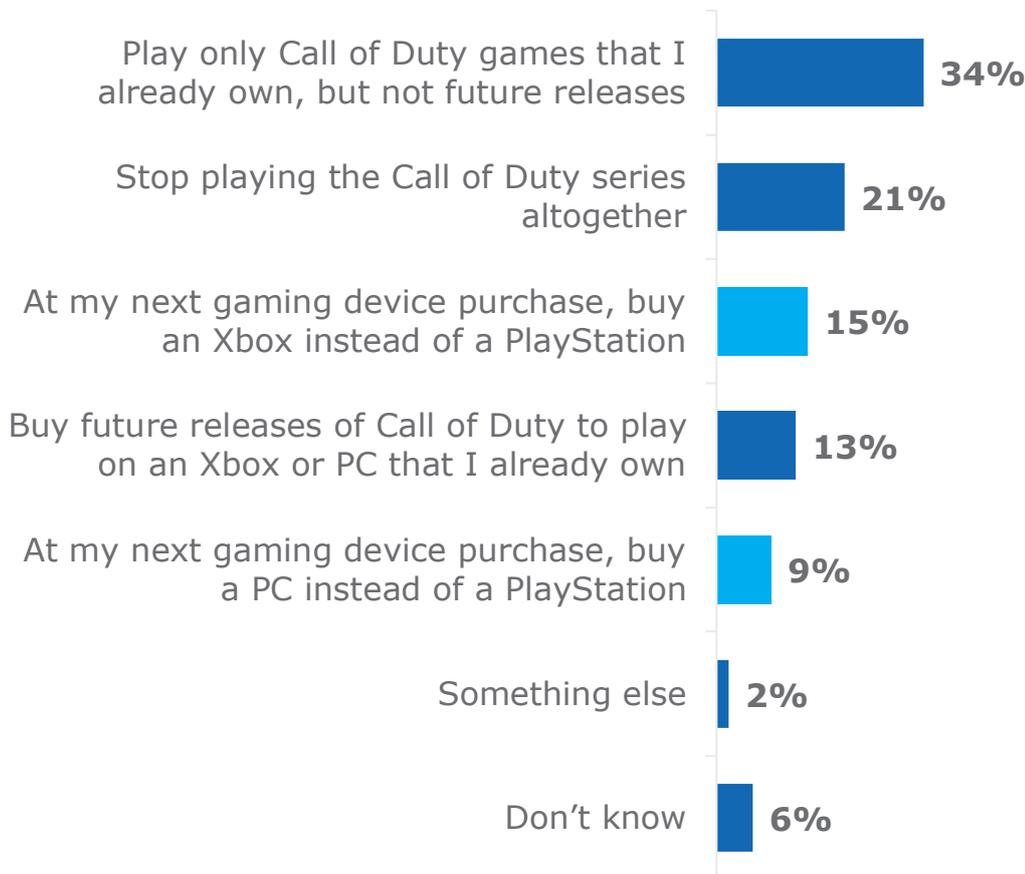


Source: Q20. How likely do you think you are to buy such future Call of Duty game releases?
Base: all respondents (n=1,397).

The most likely course of action if future Call of Duty game releases were not available on PlayStation

Respondents were asked what they would be likely to do if they were to find that future Call of Duty game releases were not available on PlayStation. In this scenario, the most common course of action would be to 'play only Call of Duty games I already own, but not future releases' (34%). Just over one in five say they would stop playing the Call of Duty series altogether (21%), and just under a quarter (24%) would buy another device (either an Xbox or PC) at their next gaming device purchase.

Figure 19: Likeliest course of action

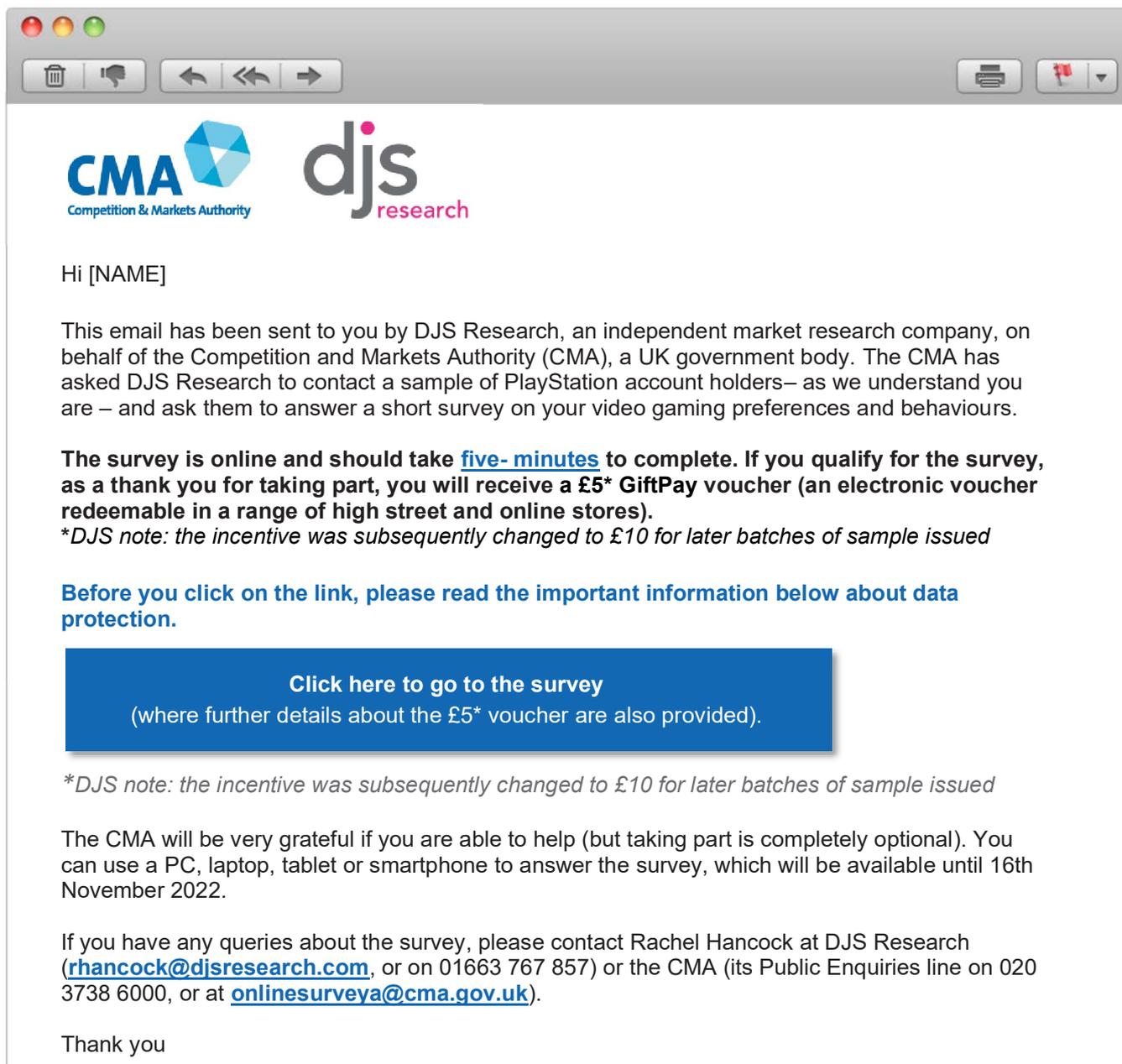


Source: Q21. If you were to find that future Call of Duty game releases were not available on PlayStation, but still available on Xbox and PC, what would you be most likely to do?

Base: all excluding those who are not at all likely to buy future Call of Duty game releases (n=1,259).

4 Appendix

Email Invite



Hi [NAME]

This email has been sent to you by DJS Research, an independent market research company, on behalf of the Competition and Markets Authority (CMA), a UK government body. The CMA has asked DJS Research to contact a sample of PlayStation account holders— as we understand you are – and ask them to answer a short survey on your video gaming preferences and behaviours.

The survey is online and should take [five- minutes](#) to complete. If you qualify for the survey, as a thank you for taking part, you will receive a £5* GiftPay voucher (an electronic voucher redeemable in a range of high street and online stores).

**DJS note: the incentive was subsequently changed to £10 for later batches of sample issued*

Before you click on the link, please read the important information below about data protection.

Click here to go to the survey
(where further details about the £5* voucher are also provided).

**DJS note: the incentive was subsequently changed to £10 for later batches of sample issued*

The CMA will be very grateful if you are able to help (but taking part is completely optional). You can use a PC, laptop, tablet or smartphone to answer the survey, which will be available until 16th November 2022.

If you have any queries about the survey, please contact Rachel Hancock at DJS Research (rhancock@djsresearch.com, or on 01663 767 857) or the CMA (its Public Enquiries line on 020 3738 6000, or at onlinesurveya@cma.gov.uk).

Thank you

More about the CMA, your personal data and data protection

The Competition and Markets Authority (CMA), the UK's competition regulator, is responsible for ensuring that consumers, like you, get a good deal when buying goods and services and that businesses operate within the law. As part of this work, it often asks existing customers of specific companies to participate in important consumer research. You can find out more about the CMA's work [here](#) or, if you prefer, by going to GOV.UK and typing 'CMA' into the search bar.

The CMA has asked DJS Research to survey UK PlayStation account holders to assist with its work. To enable DJS Research to conduct the survey, Sony has provided the CMA with the personal information of a randomly selected sample of around 50,000 of its PlayStation customers, including you. The CMA and DJS Research, as the CMA's agent, are processing your personal data; our doing so is compliant with data protection law as set out in the UK GDPR and in the Data Protection Act 2018. We explain more about this below.

In legal terms, the purpose of the processing is in accordance with the CMA's powers under Parts 1 and 3 of the Enterprise Act 2002 (EA02). The CMA's legal ground for processing your personal data is Article 6.1.(e) of the UK GDPR and section 8(c) of the Data Protection Act 2018, namely that it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority. Although the survey itself is voluntary, because the CMA has statutory powers to process your personal data, this means the CMA does not need your consent to process your personal data under data protection law.

The CMA has used its legal powers under section 109 of the Enterprise Act 2002 to require Sony to share certain items of personal data relating to a sample of around 50,000 of its UK PlayStation customers, including you, for the purposes of conducting a survey and for subsequent statistical analysis. The personal information provided is the minimum required for the CMA's legal purposes, comprising: account number, year account created, name, e-mail address and date of birth, along with information on the ownership of PlayStation consoles, any subscription to PlayStation Plus, gameplay and gaming spend with Sony.

If you follow the survey link, we will also be processing your IP address as it will be collected automatically when you enter the survey. If you do not want the CMA and DJS Research to process your IP address you should not follow the link to the survey. If you do complete the survey, your answers will be combined with answers from everyone else who completes the survey to provide statistical results. It will not be possible to identify you in any results that are published or passed to third parties. While the CMA's inquiry is ongoing, the CMA and DJS Research will continue to process your personal information securely at all times. Your personal information will be securely deleted on conclusion of the case.

You can read more about how the CMA, as a controller, processes personal data (including the contact details for the CMA's Data Protection Officer, information about your rights in relation to your personal data, and details of how to exercise those rights, including how to complain to the Information Commissioner's Officer) in the CMA's Privacy Notice. You can find a link to this document (titled 'Personal information charter') [here](#) (or, if you prefer, you can go to the CMA's homepage via GOV.UK and follow the links to the 'About us' page).

How to contact us

The data controller for your personal information is the CMA. You can contact us at general.enquiries@cma.gov.uk or our DPO at dpo@cma.gov.uk.

DJS Research (the processor for your personal information) abides by the Market Research Society Code of Conduct, which means that all of your personal data will be kept secure and, should you participate in the research, they will share your survey responses only with the CMA. You can find further details on DJS Research's privacy policy at <https://www.djsresearch.co.uk/about/terms>.

If you have any queries about the survey, or anything else you've read here, you can contact Rachel Hancock at DJS Research (rhancock@djsresearch.com, or on 01663 767857). If you would like to confirm DJS Research's credentials, please call the Market Research Society's verification service for free on 0800 975 9596. Alternatively, you can get in touch with the CMA (its Public Enquiries line on 020 3738 6000).

Thank you very much for your help.

[Click here to go to the survey](#)
(where further details about the £5* voucher are also provided).

**DJS note: the incentive was subsequently changed to £10 for later batches of sample issued*

If you would prefer not to receive any further contact from DJS Research regarding this survey, please click [here](#).

Questionnaire

Client name:	CMA
Project name:	PlayStation gamer research
Job number:	8782
Methodology:	Online
Version	5 – POST PILOT REVIEW VERSION

Introduction

DJS Research, an independent market research company, is conducting this survey on behalf of the Competition and Markets Authority (CMA), a government body, and asking you to answer a short survey about your PlayStation video gaming preferences and behaviours.

It should only take around 5 minutes to complete online and, if you qualify for the survey, as a thank you for taking part, you will receive a £5* GiftPay voucher (an electronic voucher redeemable in a range of high street and online stores).

**DJS note: the incentive was subsequently changed to £10 for later batches of sample issued*

THIS PARAGRAPH NEEDS TO BE HIDDEN BEHIND A POP-UP

Taking part in the survey is completely voluntary and if you have any queries about it you can get in touch with Rachel Hancock at DJS Research (rhancock@djsresearch.com, or on 01663 767857). If you would like to confirm DJS Research's credentials, please call the Market Research Society's verification service for free on 0800 975 9596. Alternatively, you can get in touch with the CMA (its Public Enquiries line on 020 3738 6000).

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Before completing this survey, please read the important information about data protection in our e-mail to you(i).

(i) Copy highlighted box from email invite as a pop up.

* Please select one of the answers below:

- I understand that the CMA and DJS Research are processing my personal data. I wish to answer the CMA's survey **[CONTINUE]**
- I understand that the CMA and DJS Research are processing my personal data. I do not wish to answer the CMA's survey **[CLOSE]**

Screening questions

S01.

Base: All respondents

Do you have an account to play games on a Sony PlayStation?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		SCREEN OUT
85	Don't know		SCREEN OUT

S02.

Base: All respondents

How old are you?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than 18 years		SCREEN OUT
2	18-24 years		
3	25-34 years		
4	35-44 years		
5	45-54 years		
6	55-64 years		
7	65 years or older		

S03.

Base: All respondents

Which of the following game series do you have on PlayStation?

Please select all that apply.

MULTI RESPONSE, RANDOMISE. DP NOTE: MUST SELECT CODE 1 TO CONTINUE THROUGH SURVEY, OTHERWISE ASK S04 THEN SCREEN OUT

Code	Answer list	Scripting notes	Routing
1	Call of Duty		INFO1
2	FIFA		ASK S04 THEN SCREEN OUT
3	Grand Theft Auto		ASK S04 THEN SCREEN OUT
4	Assassin's Creed		ASK S04 THEN SCREEN OUT
5	Fortnite		ASK S04 THEN SCREEN OUT
87	None of the above	EXCLUSIVE, FIXED	ASK S04 THEN SCREEN OUT

S04.

Base: those who do not play Call of Duty themselves (excl. S03/1)

As far as you know, has anyone else in your household played a game from the Call of Duty series on your PlayStation account since the start of this year? *Please select all that apply.* **MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Yes, my partner or spouse		SCREEN OUT
2	Yes, one or more of my children		SCREEN OUT
3	Yes, another member of my household		SCREEN OUT
4	No, no one else	EXCLUSIVE, FIXED	SCREEN OUT
85	Don't know	EXCLUSIVE, FIXED	SCREEN OUT

SCREEN OUT TEXT: Thank you for your interest in this survey, unfortunately on this occasion you do not qualify for the research.

Main questionnaire

INFO1.

Base: all respondents

We'd like to ask you a few questions about your use of gaming consoles and the games that you play.

Q01a.

Base: all respondents

Which of the following PlayStation devices do you use? *Please select all that apply.*

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	Sony PlayStation 5		
2	Sony PlayStation 4 (including Pro and Slim)		
3	Sony PlayStation 3 or older		
85	Don't know	EXCLUSIVE, FIXED	SCREEN OUT

Q01b.

Base: all respondents

Do you own any other gaming devices?

Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	Microsoft Xbox Series (including X or S)		
2	Microsoft Xbox One (including X or S)		
3	Microsoft Xbox 360 or older		
4	Nintendo Switch (including Lite or OLED)		
5	Steam Deck		
6	A personal computer (PC) suitable for gaming		

80	Other (please specify)	TEXT RESPONSE, FIXED	
87	None of the above	EXCLUSIVE, FIXED	

Q02.

Base: those who have more than one console (more than one code selected across Q01a-b)

Which, if any, of these devices would you characterise as your main gaming device?
Please select one option.

SINGLE RESPONSE, RANDOMISE KEEPING BRANDS TOGETHER (CODES 1-3, 4-6 IN ORDER). DP NOTE: AUTOFILL FOR THOSE SELECTING ONE CODE AT Q01.

Code	Rows	Scripting notes	Routing
1	Sony PlayStation 5	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
2	Sony PlayStation 4 (including Pro and Slim)	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
3	Sony PlayStation 3 or older	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
4	Microsoft Xbox Series (including X or S)	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
5	Microsoft Xbox One (including X or S)	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
6	Microsoft Xbox 360 or older	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
7	Nintendo Switch (including Lite or OLED)	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
8	Steam Deck	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
9	A personal computer (PC) suitable for gaming	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
80	<PULL THROUGH FROM Q02/80>	ONLY SHOW CODES SELECTED AT Q01A OR Q01B	
85	Not sure	FIXED	

Q03.

Base: those who have more than one console (more than one code selected across Q01a and Q01b) excl. those who don't know which is their main device (excl. Q02/85)

Do you use your **<PULL THROUGH ANSWER FROM Q02>** for gaming ...?

SINGLE RESPONSE, ORDERED

DP NOTE: PULL THROUGH SHOULD EXCLUDE PART IN BRACKETS. "SONY PLAYSTATION 4" RATHER THAN "SONY PLAYSTATION 4 (INCLUDING PRO OR SLIM)". FOR Q02/8 JUST USE "PC".

Code	Answer list	Scripting notes	Routing
1	Almost all of the time		
2	Most of the time		
3	Somewhat more than any of my other devices		
4	About the same as one of my other devices		

85	Don't know		
----	------------	--	--

Q04.

Base: all respondents

How important were the following factors in your choice of purchasing a PlayStation (rather than a different gaming console or device) for video gaming?

Please select one option per row.

SINGLE GRID, RANDOMISE ROWS

DP NOTE: CAN WE HAVE DK AND NA AT THE RIGHT HAND SIDE WITH A SLIGHT GAP BETWEEN CODES 1-3.

Code	Answer list	Scripting notes	Routing
1	Availability of one or more particular games on PlayStation		
2	Wanting to play with friends and/or family members who also owned a PlayStation	KEEP ABOVE CODE 3	
3	Wanting to play with other gamers who owned a PlayStation	KEEP BELOW CODE 2	
4	PlayStation was better value for money than other consoles		
5	PlayStation was superior to other consoles in technical specification, performance, visual appeal or features		
6	Being sure it could run the older games in my PlayStation library		

Code	Answer list (columns)	Scripting notes	Routing
1	Very important		
2	Quite important		
3	Not at all important		
87	Not applicable		
85	Don't know		

Q05.

Base: those who say availability of a particular game is very important or quite important (Q04/1:1-2)

The availability of which particular game(s) influenced you towards buying a PlayStation?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Assassin's Creed		
2	Call of Duty		
3	Fortnite		
4	Grand Theft Auto		
5	Star Wars		

6	Ghost of Tsushima		
7	Uncharted		
8	Last of Us		
9	God of War		
10	Marvel Spiderman		
80	Other	FIXED	

Q05a.

Base: those selecting other at Q05 (Q05/80)

Which other game(s), if any influenced you towards buying a PlayStation?

OPEN RESPONSE

DP NOTE: TEXT BOXES TO APPEAR ONE BY ONE, UP TO A MAX OF 5.

Code	Answer list	Scripting notes	Routing
85	Don't know	EXCLUSIVE	

Q06.

Base: all respondents

Which of the following games do you have **<IF Q01B/1-3,6: and on which devices>?**

<PS ONLY: Please select one option per row/THOSE WITH XBOX OR PC: Please select all that apply>.

MULTI GRID, ORDERED

Code	Rows	Scripting notes	Routing
1	Call of Duty: Modern Warfare II (including the beta version, released earlier this month (October 2022))		
2	Call of Duty: Vanguard (2021)		
3	Call of Duty: Black Ops Cold War (2020)		
4	Call of Duty: Warzone (2020, free version)		
5	Call of Duty: Modern Warfare (2019)		
6	Call of Duty: Black Ops 4 (2018)		
7	Call of Duty: WWII (2017)		
8	Call of Duty: Infinite Warfare (2016)		
9	One or more older titles from the Call of Duty series		

Code	Columns (answer list)	Scripting notes	Routing
1	On PlayStation		
2	On Xbox	ONLY SHOW IF Q01B/1-3 SELECTED	
3	On a PC suitable for gaming	ONLY SHOW IF Q01B/6 SELECTED	
87	I don't think I have this game	SHOW ERROR MESSAGE IF SELECTED FOR ALL ROWS	

**Q06A.
ERROR MESSAGE**

Base: those who select code 87 for all rows at Q06

Based on your selections, it appears that you do not have any Call of Duty games on any devices, is this correct?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes	SCREEN OUT	
2	No	GO BACK TO Q06 (POP UP MESSAGE: Please revisit your answers)	

Q07.

Base: all respondents

In general, how often do you play games from the Call of Duty series in a typical week?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than once per week		
2	At least once per week		
3	Several times per week		
4	More than five times per week		
5	Every day		
85	Not sure		

Q08.

Base: all respondents

In what year did you buy your most recent PlayStation?

If you are not sure, please give your best estimate.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	2022		
2	2021		
3	2020		
4	2019		
5	2018		
6	2017 or earlier		

Q09.

Base: all respondents

Which console do you think you are likely to buy next, assuming that the following consoles are available or become available during the time periods indicated?

Please select one option.

SINGLE RESPONSE, RANDOMISE

DP NOTE: KEEP CODES 1-4 TOGETHER IN A BLOCK AND CODES 5-8 IN A BLOCK AND CODES 9 AND 10 IN A BLOCK, RANDOMISE BLOCKS

Code	Answer list	Scripting notes	Routing
1	PlayStation 5		
2	PlayStation 5 next upgraded version console (2023/24)		
3	Next generation of PlayStation (2026/27)		
4	PlayStation (not sure which version)		
5	Xbox Series X S		
6	Xbox Series X S next upgraded version console (2023/24)		
7	Next generation of Xbox (2026/27)		
8	Xbox (not sure which version)		
9	Nintendo Switch (including Lite and OLED)		
10	Next generation of Nintendo Switch		
11	Steam Deck		
12	Logitech G		
80	Other (please specify)	TEXT RESPONSE, FIXED	
87	I don't expect to buy another console	FIXED	

INFO2.

Base: all respondents

DP NOTE: SHOW ON SAME PAGE ABOVE Q10.

Please now think back to when you bought your most recent PlayStation in **<PULL THROUGH ANSWER FROM Q08>**.

Q10.

Base: all respondents

If the most recent Call of Duty game you owned at that time had not been available on PlayStation, but had been available on Xbox and PC as they are today, do you think you would have...

Please select one option.

SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought <u>only</u> the PlayStation		
2	Bought the PlayStation <u>and</u> another gaming device		
3	Bought another gaming device <u>instead of</u> the PlayStation		
4	Not bought any gaming device		
85	Don't know	FIXED	INFO2A

Q11.

Base: those who would have bought another gaming device instead of, or as well as a PlayStation (Q10/2,3)

Which other gaming device would you have bought?

Please select one option only.

SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	An Xbox		
2	A suitable PC		
85	Don't know	FIXED	

Q12.

Base: all except those who don't know what they would do (excl. Q10/85)

And how (if at all) would this have affected your Call of Duty gaming?

Please select one option only.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I would have stopped playing Call of Duty altogether		
2	I would have played only older Call of Duty games that I already owned <i>All older versions of Call of Duty (previous to the most recent game you owned) would still be playable on PlayStation</i>		
3	I would have played the most recent Call of Duty game I owned on another device <i>The most recent Call of Duty game you owned would not be available on PlayStation</i>	ONLY SHOW IF Q01B/1-80 OR Q10/2-3	
85	Not sure		

Q12A.

Base: those who would buy an Xbox or PC as well as a PlayStation (Q10/2) excl. those who don't know which other gaming device they would buy (Q11/85)

Thinking about any other (non-Call of Duty) games that you subsequently bought for PlayStation, would you still have bought these mainly for PlayStation or would you have bought them mainly for **<pull through answer from Q11:Xbox/PC>?**

Please select one option only.

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Mainly for PlayStation		
2	Mainly for Xbox	SHOW ONLY IF Q11/1	
3	Mainly for a suitable PC	SHOW ONLY IF Q11/2	
4	I have not bought any non-Call of Duty games for PlayStation	FIXED	
85	Don't know	FIXED	

INFO2A.

Base: all who would not have bought only a PlayStation following full foreclosure (excl Q10 / 1)

DP NOTE: SHOW ON SAME PAGE ABOVE Q12B.

Please now think back once more to when you bought your most recent PlayStation in **<PULL THROUGH ANSWER FROM Q08>.**

Q12B.

Base: all except those who would have only bought only a PlayStation following full foreclosure (excl. Q10/1)

Imagine now that the most recent Call of Duty game you owned at that time had still been available on PlayStation, but that you would not have been able to access certain types of content for it (including specific levels, maps or gameplay modes) on PlayStation. This content would still have been available to access on Xbox and PC as they are today. Do you think you would now have...

Please select one option.

SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought <u>only</u> the PlayStation		
2	Bought the PlayStation <u>and</u> another gaming device		
3	Bought another gaming device <u>instead of</u> the PlayStation		
4	Not bought any gaming device		
85	Don't know	FIXED	INFO.5

Q12C.

Base: those who would buy another gaming device instead of, or as well as a PlayStation (Q12B/2,3)

Which other gaming device would you have bought?

Please select one option only.

SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	An Xbox		
2	A suitable PC		
85	Don't know	FIXED	

Q12D.

Base: all except those who don't know what they would do (excl. Q12B/85)

And how (if at all) would this have affected your Call of Duty gaming? *Please select one option only.* **SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	I would have stopped playing Call of Duty altogether		
2	I would have played only older Call of Duty games that I already owned. <i>All older versions of Call of Duty (previous to the most recent game you owned) would still be playable on PlayStation</i>		
3	I would have played the most recent Call of Duty game I owned on another device. <i>The most recent Call of Duty game you owned would not be available on PlayStation</i>	ONLY SHOW IF Q01B/1-80 OR Q12B/2-3	
85	Not sure		

INFO.5.**Base: all respondents**

Thank you. Now two short questions about buying any Call of Duty games that may be released in the near future (2023 and beyond).

Q20.**Base: all respondents**

How likely do you think you are to buy such future Call of Duty game releases?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Very likely		
2	Quite likely		
3	Not at all likely		INFO.6
85	Not sure		

Q21.**Base: all excluding those not at all likely to buy future CoD releases (excl. Q20/3)**

If you were to find that future Call of Duty game releases were not available on PlayStation, but still available on Xbox and PC, what would you be most likely to do?

Please select one option.

SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Stop playing the Call of Duty series altogether		
2	Play only Call of Duty games that I already own, but not future releases		
3	Buy future releases of Call of Duty to play on an Xbox or PC that I already own	SHOW ONLY IF Q01B/1-3,6	
4	At my next gaming device purchase, buy an Xbox instead of a PlayStation	KEEP WITH CODE 5	
5	At my next gaming device purchase, buy a PC instead of a PlayStation	KEEP WITH CODE 4	
80	Something else (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	FIXED	

INFO.6**Base: All respondents**

Please be reassured that the last few questions in this survey were hypothetical: written merely to be thought-provoking. These questions are not being asked because there are any current plans for the availability, features, or pricing of Call of Duty titles to change.

Demographics

D01.

Base: all respondents

How many other adults do you live with?

NUMERIC RESPONSE, MIN 1-MAX 50

Code	Answer list	Scripting notes	Routing
87	None - I live alone		

D02.

Base: those who do not live alone (excl. D01/87)

Are there any other adults who play video games in your household besides you?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

Recontact

C01.

Base: all respondents

The CMA may wish to contact you to ask further questions about your responses to this survey. If you're happy for them to do so, please provide a contact telephone number.

NAME:

TELEPHONE:

Code	Answer list	Scripting notes	Routing
87	I do not wish to be recontacted	EXCLUSIVE	

INCENTIVE

[PLEASE POPULATE EMAIL NAME AND ADDRESS FROM SAMPLE]

Name: **OPEN**

Email address: **OPEN**

Base: all who qualify for the research (S03/1)

Could you please confirm these details are correct so that we can send you a £5* GiftPay voucher.

**DJS note: the incentive was subsequently changed to £10 for later batches of sample issued*

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		IN2

Base: all saying no (IN1/2)

IN2

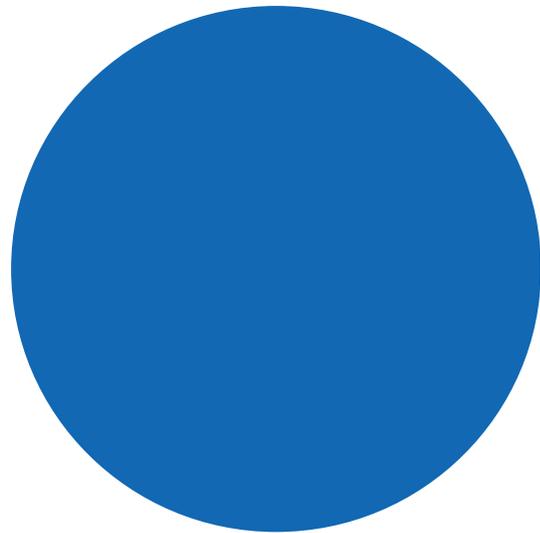
Could you please re-enter the correct details below.

Name: **OPEN**

Email address: **OPEN**

That is the end of the survey. Thank you very much for your time.

For more information



James Hinde, Research Director

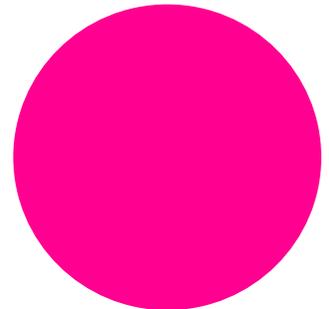
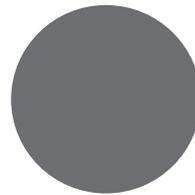
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