Gaming Report 2011

Description: The research for this report illustrates how it is impossible to think about the gaming community as a single market. Major differences exist by gender, age and socio-economic status as to how and when games are played, the expenditure lavished on them and the attitudes of gamers towards particular games.

Nevertheless, research for this report does indicate a number of key groups that are currently highly attractive for those operating in the gaming market, as well as a number of emerging groups who offer the potential to become significant consumers in their own right.

This report examines the dynamics behind recent and future development in each of the three sectors that make up the hardware market, with a review of trends in value and volume sales where possible. It looks in detail at both the general and specific drivers behind gaming in the UK, both now and in the future.

You will get online access to the interactive report, alongside a pdf attachment and the demographic breakdown of the results will be available in an Excel format datasheet.

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- Table of Figures

Introduction & Scope
- Background
- Definitions and methodology
- Abbreviations and acronyms

Report Summary
- Introduction
- Drivers and restraints
- The market for gaming hardware
- The consumer
- The future

General Drivers of Change
- Slowdown impacts severely on UK consumer expenditure
- Household finance show signs of improvement
- More households, more market opportunities
- An ageing population presents opportunities and challenges

Competing Needs
- Household goods suffering from other spending priorities
- Inflation pushes up other areas of consumer expenditure
- Consumers increasingly want to spend money on themselves

Gaming Consoles

Summary
- What consumers think
- Market assessment
- Future direction

General Drivers
- Performance of the UK economy
- Slump in consumer expenditure
- Confidence of consumers towards purchasing
- Changes in the structure of households
- Changes to population and society

Specific Drivers and Innovations
- Launch of new consoles
- Falling average prices since 2007
- Console versatility
- Online gaming
- The impact of Wii

Market Size
- Hardware sales follow pattern of adoption, then decay
- Market peaked in 2008, collapsed in 2009
- Launch of new handheld units in 2011 to stimulate demand

Segmentation
- Static consoles re-exert their influence
- Handheld suffers from absence of NPD

Ownership
- Nintendo dominates static and handheld sectors
- Nintendo's Wii leads static console market
- Nintendo's consoles have feminine appeal

Consumer Attitudes Towards Purchases
- Range of software available ranks most important
- Versatility of consoles appeals to a third
- Accessories not viewed as a priority
- Young men want versatility

Brand Awareness
- Market share
- Where purchased
- Major retailers hold only a small share of hardware sales
- Specialist stores appeal to younger adults

PCs

Summary
- Market assessment
- Future directions

General drivers
- Performance of the UK economy
- Slump in consumer expenditure
- Confidence of consumers towards purchasing
- Changes in the structure of households
- Changes to population and society

Specific drivers and innovations
- PC increasingly viewed as a necessity
- Price deflation makes owning a PC more affordable
- Competition from other platforms
- Online PC gaming on the rise

Market size
- PC sales remain bullish in face of the recent recession
- Signs of improvement expected during 2010

Portable Devices

Summary
- Market assessment
- Future direction
General Drivers
- Performance of the UK economy
- Slump in consumer expenditure
- Confidence of consumers towards purchasing
- Changes in the structure of households
- Changes to population and society

Specific Drivers and Innovations
- Mobile gaming versus social networking
- Gaming not viewed as important when purchasing a smartphone
- Smartphones are more than just gaming devices
- Young adults show most interest in gaming capabilities
- Mobile social network gaming has a strong niche following
- Men show strong interest in social network gaming
- Growing advertiser interest
- Dedicated mobile devices for gamers are about to hit the market

Market size
- Mobile revenues show solid expansion

Gaming Ownership

Hardware preferences
- Consoles are used by around a quarter of adults to play games
- Ownership of household entertainment products varies considerably
- Males and less well-off more likely to own games consoles
- Young adults record strongest preference for gaming hardware
- Consoles by far the most popular way of playing games
- Consoles dominate current game-play activity
- A modern day battle of the sexes
- Youth segment of the market proving especially popular
- London shows distinct differences to elsewhere in the UK
- PC has a strong role for those starting out playing games
- Several are evident when it comes to first choice of games hardware
- Generational differences evident for those aged 40 or over

Game Play

Time spent playing games
- Daily time spent playing games varies considerably
- No clear pattern to game play exists
- C2DEs and men invest considerable time in gaming
- Young adults aged 16-24 also appear addicted to daily game play
- High intensity gamers account for nearly four out of ten adults
- Nearly one in five spend less than ten minutes a day on a particular game
- Young adults are likely to spend most time on a particular game
- Back from work – let’s play!
- Evening is most popular time for playing games
- Older adults more likely to play in morning and afternoon
- Men get their fix over lunch

Where games are played
- Most games are played at home
- Work appeal
- Young adults game differently

Social aspects of gaming
- Gamers are most likely to be playing on their own
- Around 40% of women prefer solitary game play
- Virtual gaming has yet to topple physical gaming with friends
- Consoles do most to bring gamers together
- Women are most likely to game online
Men and C2DEs are attracted to multiplayer online games
- Consoles prove a winner in larger households

Attitudes Towards Gaming

When did you start playing games?
- Gamers are in it for the long term
- Half of those have been playing games all their life
- Women are the new gamers
- Older adults are also entering the market

Importance and role of gaming to individuals
- Most gamers don't consider the pastime serious
- Two-thirds have low key stance towards gaming
- Young men see games as having a major place in their life
- Older males and younger females hold negative views towards gaming
- Views towards playing games are largely positive
- Harmless fun is the overriding view of many adults towards gaming
- Men less critical about gaming
- Young adults see gaming as offering escapism

Broader attitudes to gaming
- Majority of players don't view themselves as gamers
- Gaming has an informal role for many
- Young adults are most likely to be committed gamers
- Gamers have contrasting views on what they want
- Social standing influences style of games played
- Women like the mental challenge of games
- Games can be enjoyed by anyone
- Men view gaming as their domain
- Age promotes tolerance

The Consumer – Purchasing

Expenditure
- Expenditure on games varies considerably
- C2DEs likely to spend more
- Men are more likely to be heavy purchasers
- Between £10 and £30 is the typical price for a console game
- Views differ by gender on what they should pay
- Mobile gamers expect to pay little or nothing
- Free games are viewed as important by many groups

Direction of purchasing
- Most purchasers buy games for themselves
- Men are more likely to purchase and receive games

The Consumer – Promotion

Channels used for promotion
- Online is most popular way of finding out about new games
- Young men turn to their friends to find out about games

Apps stores the most successful form of promotion for mobile gamers
- Men show greater interest in different promotional channels

Views towards advertisements for games
- Power of games advertising appears less than successful
- Women are hard to please

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