Home Entertainment (Computing & Gaming)

Description: This report analyses the section of the home entertainment market concerned with computing and gaming. This includes entertainment activities undertaken on desktop PCs, laptops and tablets, and video gaming on static and handheld consoles.

The report is focused on consumer behaviour among those engaged in the interaction of the above media, in order to determine any ongoing or emerging consumer patterns. While the size of the market and consumer penetration of home entertainment products and services are discussed within the scope of this report, detailed analysis of the market size of these sectors is discussed in various other titles, including Household Appliances (Brown Goods), Computer Hardware, Computer Software and Video Gaming. Therefore, this report is focused primarily on consumer behaviour in relation to the home entertainment sector.

MARKET SECTORS

Computing

The computing market sector covers various PC devices, including desktop PCs, laptops, notebooks and tablet computers. The market for PCs can be divided between desktop PCs and portable devices. Desktop PCs are generally considered non-portable systems that are confined to a particular area due to their size and need for various external hardware - such as monitors and keyboards - in order to operate. However, it should be noted that recent innovations have seen processing units integrated with monitors on many high-end devices.

Portable PCs incorporate the majority of desktop functionality but have the added benefit of being transportable. While there can be some loss of performance in exchange for portability, the majority of modern models are now indiscernible to their desktop counterparts in terms of performance. Following the demise of the netbook segment - which has all but disappeared as a result of the rise of tablets, with virtually all major manufacturers ceasing production over the last few years - there are two main subsectors of portable PCs:

- laptops - these computers represent the most significant segment of portable PCs. Sizes range from 13- to 17-inch screens and functionality and performance is comparable to that of desktop PCs. Both traditional products and the new ‘ultrabook’ standard are included in this subsector
- tablets - generally sized between 7 and 10 inches, tablet computers continue to be the main driver of growth in the computer hardware market following their launch in 2010. While tablets tend to have more limited functionality compared with desktops and laptops, the high mobility and connectivity of the devices have proved hugely popular.

Gaming

The gaming sector covers video game hardware and software products, as well as any associated accessories. Also included are games downloaded to mobile phones and similar mobile devices, although the devices themselves are excluded. Given the rapid proliferation of smartphones over the past few years, mobile phone games represent an increasingly important sector of the overall gaming industry.

In the hardware subsector, the market is dominated by three main static video game consoles: the Xbox One, produced by Microsoft; Sony’s Playstation 4 (PS4); and Nintendo’s Wii U. There are also various portable gaming devices - known as handheld consoles - including Nintendo’s DS, DS Lite, DSi, DSi XL, 3DS and 3DS XL, and Sony’s PS Portable (PSP) and PS Vita.

Video games software comes in a variety of formats with DVDs, CDs and Blu-ray discs remaining the most popular. However, with growth in Internet uptake and continued improvements in speed, digital has represented an increasingly popular distribution stream, with all static console manufacturers and many distributors operating digital distribution stores. In portable gaming, products for mobiles are delivered entirely via digital streams while on handheld consoles ‘game cards’ are used - such as the proprietary ‘Playstation Vita game card’ and the ‘Nintendo Game Card’ on the PS Vita and DS/3DS, respectively -
Various additional and auxiliary items are available for video gaming hardware, some of the most popular of which include controllers, joypads, joysticks, headsets and microphones. For portable gaming consoles, popular accessories include cases, portable chargers, headphones and memory cards.
16. Competitor Analysis
MARKET LEADERS
Apple Retail UK Ltd
Electronic Arts Ltd
Google UK Ltd
Hewlett-Packard Ltd
Lenovo Technology (UK) Ltd
Microsoft Ltd
Nintendo Co Ltd
Samsung Electronics (UK) Ltd
Sony Computer Entertainment Europe Ltd
Take-Two GB Ltd
Toshiba Information Systems (UK) Ltd
TT Games Publishing Ltd

17. NUMBER OF COMPANIES
By Turnover
By Employment
Regional Variation in the Marketplace

18. MARKETING ACTIVITY
Computing
Video Gaming
Mobile Downloads

19. KEY TRADE ASSOCIATIONS

20. EXHIBITIONS/TRADE SHOWS
Buying Behaviour
COMPUTING
Expenditure
GAMING
Expenditure
Types of Games Purchased

21. CONSUMER DYNAMICS
Overview
Computing and Gaming Attitudes and Habits
Motivations for New Home Entertainment Equipment Purchasing
Important Factors When Buying Home Entertainment Technology
Strengths, Weaknesses, Opportunities & Threats

22. STRENGTHS
WEAKNESSES
OPPORTUNITIES
THREATS
PESTEL

23. POLITICAL
Digital Inclusion Strategy
Superfast Broadband
Tax Break for Video Games Sector

24. ECONOMIC
New Console Sales
Computer Hardware Sales

25. SOCIAL
Low Hardware Uptake Among Older Consumers
Esports

26. TECHNOLOGICAL
Windows 10
Superfast Internet
New Nintendo 3DS and 3DS XL
Console Developments

27. ENVIRONMENTAL
WEEE
LEGISLATIVE
VAT on Digital Services
Further Sources
Associations
Publications
General Sources
Government Publications
Other Sources
Understanding Consumer Survey Data
Number, Profile, Penetration
Social Grade
Standard Region

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