GAMERS IN THE UK

Digital play, digital lifestyles.

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Introduction

The Magnavox Odyssey may sound like a strange science-fiction series, but in 1972 this unassuming brown and white box was to give birth to a whole new home entertainment form: videogames. One of the Odyssey’s first games, Ping Pong inspired Atari to release Pong, the first videogaming hit, in the arcades that same year. Now over 30 years later, videogames have grown into a multi-billion dollar industry, grabbing the hearts, minds and pockets of many audiences the world over.

Most of us are aware of the big-name videogame franchises that dominate the charts, such as Grand Theft Auto and The Sims. But even the word “game” has different connotations nowadays for the ever-growing pool of consumers. It can mean anything from simple games played on mobile phones like Snake, PC- and web-based games such as Solitaire and Bejeweled, up to massively multiplayer online titles like World of Warcraft and Star Wars Galaxies which enrapture millions of subscribers every month.

With consumption growing at a steady rate, today’s digital games are being recognised as a powerful and unique entertainment force. But just how important have games become to the players themselves? What value do they place on them in their lives compared to other entertainment forms? What is popular, and why?

In Summer 2005 the BBC’s Audience Research department undertook a research study on behalf of the New Media and Technology division amongst people between the ages of 6-65 (grouped into six sections: 6-10, 11-15, 16-24, 25-35, 36-50 and 51-65 years old) 1. As well as surveying just under three and a half thousand people across the UK, we also commissioned qualitative research from fourteen mini-groups 2 of gamers from the first four age groups (in Leeds and London). The results give us a light-touch window into the gaming life of UK residents today 3.

In the context of a multi-platform Digital Britain, we wanted to know what the British public thinks of games and the gaming experiences across the various different platforms capable of delivering digital entertainment, and how they fit the gaming experiences in with their other media activities. Specifically, we wanted to know:

• How many people are playing games in the UK?
• How, where, when and why they play games?
• When is the family television used as a monitor for a console?
• The context in which gaming plays a role in people’s lives?
• Do people play games in isolation, or in a social situation?
• How does the public’s relationship with radio, television and mobile devices affect the games they play?
• What value do people place on the time spent playing?

1 Research agency commissioned for quantitative research: TNS
2 Mini-groups consisted of 3 respondents in each group, split evenly between the two locations.
3 Research agency commissioned for qualitative research: Firefish Ltd

Research Introduction

In Summer 2005 TNS took a sample of UK residents 4, aged between 6 and 65 years old, coming from a spread of demographic and ethnic backgrounds. The aim was to find out the size of the gaming market in the UK, and to profile “gamers”.

Who are the “gamers”?
We defined a “gamer” as someone who had played a game on a mobile, handheld, console, PC, Internet or interactive TV at least once in the last 6 months: a broad definition designed to capture any “light” gamers as well as medium or heavier gamers.

4 Total sample size was 3442 6-65 year olds in the UK.
Combining these responses with how often people play gives us a good picture of general gaming consumption. Unlike many research projects, we also counted active play of games pre-installed on a PC: we consider these people to be gamers even if they have yet to purchase a commercial game or venture onto the web to play.

How often they play?
We were interested in how often the gamers played and how long they played for in an average session, and how play sessions compare with other media. Furthermore, we wanted to establish whether length of play depended on the content and platform. We asked our gamers how often they played, split into the following divisions:

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every day</td>
<td>2-3 times a month</td>
</tr>
<tr>
<td>5-6 times a week</td>
<td>1-2 times a month</td>
</tr>
<tr>
<td>3-4 times a week</td>
<td>Every couple of months</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>less often</td>
</tr>
</tbody>
</table>

While the above definition of a “gamer” was designed to be broad enough to capture light levels of play, most gamers play at least several times a week, up to daily in some age groups: 92% of 11-15 year olds play at least three times a week.

What they play on?
We wanted to know what the preferred platforms were for each age group. This includes consoles, Internet and PCs, but also more casual games platforms such as handheld devices (Game Boy Advance/SP, Nintendo DS, etc), mobiles/PDAs and interactive television.

Why they play?
Whether our gamers were playing for a few hours of an evening in order to relax, or just for 10 minutes whilst waiting for the bus, we wanted to know what motivates them to play. Why choose interactive entertainment over other forms of entertainment or distraction?

Where they play?
We wanted to gain an insight into where the gamers played their games. They were given the following choices:

<table>
<thead>
<tr>
<th>Location</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home – In the living room</td>
<td>Whilst travelling</td>
</tr>
<tr>
<td>Home – In the study room</td>
<td>At an Internet café</td>
</tr>
<tr>
<td>Home – In the bedroom</td>
<td>At school/college/university</td>
</tr>
<tr>
<td>While travelling</td>
<td>At a library</td>
</tr>
<tr>
<td>At a friends/relatives home</td>
<td>At work</td>
</tr>
</tbody>
</table>

Only playing, or doing something else too?
We wanted to know whether other media featured during the gaming experience; is the television or radio on in the background? What about personal music? Are they multi-tasking, or singularly focused on the game at hand?

The value they place on gaming
In a world where numerous forms of entertainment compete for attention on a daily basis, we wanted to know how much importance UK gamers place on their gaming time and experiences. We asked them to tell us where gaming as an activity ranked within their lives, to get a sense of the value they place on playing games:
For the age groups from 11 to 65 we also added **Reading newspapers**.

### Their attitudes towards gaming
As well as assessing the value put on gaming, we also gave the groups nine different statements to reflect their varying levels of agreement to each by a 5 point scale: we wanted to see how or if they saw themselves as gamers, their most frequent gaming habits and their attitudes towards current gaming genres.

- I get more enjoyment out of videogames than any other forms of entertainment.
- I spend more time playing videogames than watching TV.
- I spend more time than I should playing videogames.
- I prefer playing games as a social activity, rather than playing on my own.
- Games are part of my identity.
- I’ve made some good friends through games that are online.
- I think that games could be used for education as well as entertainment.
- There are too many racing, shooting and fighting games.
- I am not really interested in videogames although I do play sometimes.
The penetration of gaming is very high between the ages of 6 and 24, and although it drops off after that, still over half of 36-50 year olds in the UK are gamers.

“This research returned the result that 59% of 6 to 65 year olds in the UK are gamers. In total there are 26.5 million gamers in the UK. The average age of a UK gamer is 28 years old, and the gender split is almost even, averaging out at 45% female and 55% male.”

How often are they playing?
“Heavy” (At least once a week and up to daily: the younger the gamer, the more likely they are to play daily)
48% of UK 6-65 year olds (21.6m) – 27% male (12m), 21% female (9.6m)

“Medium” (1-3 times a month)
7% of UK 6-65 year olds (3m) – 3% male (1.4m), 4% female (1.6m)

“Light” (Less than once a month)
4% of UK 6-65 year olds (1.9m) – 2% male (0.7m), 3% female (1.2m)

What sort of experience?
All of our age groups stated they had other media on in the background while gaming, either the television (presumably while PC, mobile or handheld gaming), the radio or personal music, with no group dropping below 70% in this category.

5 A "gamer" is defined here as someone who has played a game on a console, a PC, the internet, a mobile, a handheld devices or via Interactive TV, at least once in the last 6 months.

6 Percentages are the result of rounding after weighting for population: the gender breakdown is marginally different due to this process.
**The Players**

**Age Group – 6 to 10 Gamers**

The youngest age group that we surveyed are extremely dedicated to their gaming. 100% of 6-10 year olds in the UK are gamers, 95% playing several times a week and 61% playing every day. Gender has no significant impact on whether someone is a gamer in this age group, with 52% male to 48% female.

These young gamers play across all four platforms, but the PC is the most popular, very closely followed by consoles. Handhelds penetration is high, and they are also the group with the highest penetration of interactive TV at 66%; it’s unsurprising that the majority of console and PC gaming takes place in the living room. 67% also play on the more popular handhelds, often in their bedrooms – the Game Boy, Nintendo DS and Sony PSP are often the modern day equivalent of reading under the covers with a torch.

**Callum’s Profile**

“With gaming you’re involved and in control. With other things you just have to sit back and watch. I’ve been gaming for most of my life.”

Callum, 10, London:

<table>
<thead>
<tr>
<th>How long gaming:</th>
<th>6 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favourite platform:</td>
<td>PC and PS2</td>
</tr>
<tr>
<td>Secondary platform:</td>
<td>Gameboy</td>
</tr>
<tr>
<td>Time spent gaming:</td>
<td>About 17 hours a week</td>
</tr>
<tr>
<td>Favourite game:</td>
<td>Pokémon – “I like it because you get to go along with the story and you are really involved”</td>
</tr>
</tbody>
</table>

Action-Adventure is their favourite gaming genre, perhaps as they seem to respond to established brands that they can identify with, such as *Shrek* and *Finding Nemo*. It’s likely that parents are getting involved with the type of games this age group play, as Educational games are second on the “most played” genre list, with Puzzle/Board/Quiz games coming in third.

Perhaps the popularity of educational games with this group is one of the reasons why 76% of them agreed that games could be used for education as well as entertainment. They also turned out to be the most sociable players of all the age groups interviewed, with 54% agreeing that they preferred playing games with friends as a social activity rather than on their own.
Age Group 11 - 15 Gamers

This group had many similarities to their younger counterparts, with 97% being gamers and again with a fairly even gender split of 53% males and 47% females. This group tends to opt for consoles first (particularly the PlayStation 2), PCs second, and mobile gaming third. Interactive TV’s popularity also peaks in this hungry bunch, with 10% playing daily here too.

Increased levels of homework and competition from other forms of entertainment only seem to slightly dent this group’s available play time: 97% play at least once a week and 55% still find time to play every day.

Perhaps a teenager’s desire for privacy is behind the fact that 79% of this group has moved their console playing to the bedroom, where they play an average of 1.9 hours in a session. Despite this, the PC still has its home in the living room and what probably lures a large number of these gamers back to this platform to play is the fact that Simulation games are their favourite and most played genre – *The Sims* is a long-established PC franchise, only recently moving to consoles. Action-Adventure is close behind though, with Sports games in third place.

Although this group closely mirrored the 6-10 year olds in many ways, they are more attached to gaming, with 45% agreeing that they get greater enjoyment out of videogames than any other entertainment form. As with the 6-10s, gaming also hit the top spot in the entertainment value hierarchy, even though the majority of the interviewees here watch TV more regularly (and for longer) than they play games.

Although this group is very fond of gaming and place a lot of importance on it, there is also an awareness of the concept of playing too much and 46% agree that they think they play games more than they should.

“**Our female diary-keeping respondents indicated a more even preference spread across consoles, PC and mobile platforms, whereas the male diary-keepers showed a stronger tendency towards console play.**”

Megan’s Profile

<table>
<thead>
<tr>
<th>How long gaming:</th>
<th>A few years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favourite platform:</td>
<td>Mobile</td>
</tr>
<tr>
<td>Secondary platform:</td>
<td>Internet Browser</td>
</tr>
<tr>
<td>Time spent gaming:</td>
<td>3 or 4 hours a week</td>
</tr>
<tr>
<td>Favourite game:</td>
<td>Anything on <a href="http://www.bubblegumgang.com">www.bubblegumgang.com</a> “It’s got Tetris, Pac-Man etc.”</td>
</tr>
</tbody>
</table>

“My phone is one of my favourite things. I’d never get bored because the games are all good. It keeps me entertained because I can speak to any of my mates at any time. Gaming is often quite important to me because it gives me something to do when I’m bored. It’s usually quite demanding and it makes you concentrate. It’s quite rewarding when you achieve high scores or complete a level.”

Megan, 13, Leeds
At 82%, gamers still form a clear majority of 16-24 year olds. 81% are “heavy” gamers playing at least once a week, which may explain why the majority placed videogaming second in their preferred entertainment list (watching TV now coming in first). There are also more “medium” gamers (14%) playing only a few times a month, than the two previous groups. This age group is also the one with the lowest proportion of female gamers at 44% – is this an indication that the choice of games targeted at this group is less appealing to females?

Again the PlayStation 2 and the PC come out on top, although they were much nearer in preference level (at 71% for PlayStation 2s and 67% for PCs) than either of the previous two groups. But despite the PC coming in second to the PlayStation 2, the PC still elicits more gaming time from the 16-24 year olds than the PlayStation 2: 2.2 hours compared to 2.1 hours per session.

“**I think gaming is very important to me as it takes up a large amount of my time. It always offers me enjoyment, especially when I’m playing with a group of my friends. It never gets boring...it can get very addictive so I have to limit myself to how much I play. After watching TV I always get bored...but that never happens with gaming.”**

Sarah, 16, London

Racing games turned out to be the most popular genre (beating Simulations by just 1%), although when they were asked to choose their one favourite genre, Simulations edged into top spot. The answers of this group characterises more of an obvious move away from the gaming patterns of the 6-10 and 11-15 year old groups and also demonstrated the PC moving up to meet, although not overtaking, consoles in popularity.
Like the 6-10s and the 11-15s, the results for the 25-35 year olds were quite similar to the 16-24s, both in term of the gender split, the number of heavy and medium gamers and the frequency of play. But this time the PC has just pulled into the lead over the PlayStation 2 in order of platform preference and now commands 64% compared to the PlayStation 2’s 60%.

Since this group is more likely to be living in their own accommodation, either owned or rented, it’s no surprise that the preferred room for playing games in – across all platforms – is the living room, either using the family television or the family PC.

“The could be an indication that the puzzle-orientated games that this group enjoy aren’t being produced enough by the videogames industry – or more likely, that the puzzle/quiz experience isn’t immersive enough to compete with more traditional media such as television drama.”

The gamers in this group seem to be looking for something a bit more cerebral in what they play – or, more “pick up, put down”. The most played genre for the 25-35s is Puzzles/Board/Quiz games, and 24% also highlighted this genre as their favourite genre. Action-Adventure was also a well played genre and Classic (retro) gaming came in third – perhaps from those gamers looking to recapture a bit of their gaming youth or those looking for a less complicated gaming experience.

This group ranks videogaming fairly low on their entertainment preference list when compared to the previous groups. Gaming came in at 5th place with TV, Internet, books and speaking with friends on the phone above it.

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“Gaming is very important as it’s a chance to relax and switch off for a bit. It’s completely flexible as it can be done for as long or as little as required, and it’s not weather dependent. And it can be either social or anti-social. But anti-social in a nice way!”
Matt, 32, Leeds
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Age Group 36 - 50 Gamers

Although the split between male and female gamers seemed to be widening slightly in the previous group, this age group shows the gender split edging towards being more even again, with 55% male and 45% female coverage. That’s just 1% difference from the 16-24 year olds. There was also more of a spread between the heavy, medium and light gamers, with 72% for heavy, 16% for medium and 12% for light.

“There are 40% of this group also agreed that there were too many racing, shooting and fighting games on the market at the moment; although 12% ranked First-Person Shooters as their favourite genre.”

There is also a high proportion of this group (40%) that game on just one platform only, likely to be a PC or a PlayStation 2. This group is where the PC surges ahead in platform popularity, beating back the PlayStation 2 by a strong margin – 76% to 50%. So, with that in mind, it makes sense that Puzzle/Board/Quiz games are the most played genre for this age group and also ranked as their favourite genre. Perhaps surprisingly, Role-Playing Games (RPGs) ranked as the third favourite for the 36-50 years olds with 9% giving it the thumbs-up as their favourite genre. This is the first time that role-playing games have entered the top three “favourite” slots.

It’s interesting to see that this group gave the highest support for the statement: “I think games could be used for education as well as for entertainment.” One reason for this may be that they are more likely to be the parents of young gamers and are therefore more aware of the educational children’s titles currently available. 40% of this group also agreed that there were too many racing, shooting and fighting games on the market at the moment; although 12% ranked First-Person Shooters as their favourite genre.

Age Group 51 - 65 Gamers

Both heavy gamers and light gamers are significant here, with 69% and 18% respectively. However, one of the most surprising statistics is the fact that the gender split is almost even, at 52% male and 48% female, exactly the same as the 6-10 age group.

Like the 36-50s, this group is also primarily made up of single-platform gamers, with 84% preferring it to be a PC with the PlayStation 2 limping behind at 26%. There is a fairly even split between the living room and the study when it came to playing on the PC, with 41% opting for the living room and 44% preferring the privacy of the study.

The PC-centric nature of these gamers is reflected in their genre choices which have certain similarities to the 36-50s. Puzzle/Board/Quiz games also came out on top for both the “most played” and the “favourite” genre. Again role-playing games were listed as a favourite, coming in joint second place with sports. Strategy games also got a look-in for the first time and came in third place in the most-played genre list with 28%. As you might expect from these preferences, this was also the group with the highest number of gamers who thought there were too many racing, shooting and fighting games on the market.
**51-65 gamers**

48% 

52% 

AB 36% 

C1 28% 

C2 19% 

DE 17%

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**Frequency of platforms**

- **Games Console**
  - 5% (Every day)
  - 11% (3-6 times a week)
  - 30% (1-2 times a week)
  - 23% (1-3 times a month)
  - 31% (Less often/DK)

- **PC**
  - 31%
  - 25%
  - 14%
  - 19%
  - 12%

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**Average session**

- Any device: 1.6hrs
- Average session: 1.7hrs

**Location of gaming - Any (see next page for breakdown)**

- **Home**
  - Study 49%
  - Bedroom 28%
  - Living Room 63%
- **While travelling**
  - 14%
- **Friends/relatives**
  - 12%
- **Work**
  - 11%

**Device preference**

- PC 84%
- PS2 26%
- Any iTV 13%
- PS1 12%
- Mobile Phone 10%
- Gameboy (inc Advanced) 8%
- X-Box 7%
- PDA/Palmtop 6%
- Nintendo Gamecube 5%

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69% play at least once a week = 1.2 million

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Number of Platforms used

- 1 platform only 61%
- 2 platforms 22%
- 3 platforms 15%
- All 4 platforms 2%
Values

When it comes to its value as entertainment, it’s the two youngest groups that place the most importance on gaming. Both cited gaming as the entertainment activity they valued most and also the one they get the greatest enjoyment from. As we go up through the life stages, other entertainment media – particularly television – tends to overshadow gaming until gaming is relegated to a low seventh place for the 50-65 year olds.

Key insights

There are several noticeable trends that emerged from this research:

The Gender Split
Contrary to popular belief, the gender split between gamers is fairly even across all age groups. Although female gamers never overtake their male counterpart, the figures are particularly even in the youngest and oldest gaming groups. Between the ages of 16-35 the ratio of males to females is slightly higher, but the stereotype of a large gender gap in gamers - in any age group - is untrue.

Females and males do however display some different preferences in gaming categories. Simulations and MMOGs perform equally well with males and females, while RPGs and Strategy fare only marginally better with males. Females then show strong approval for Music/Dance, Puzzles/Board/Quiz, and Classic games. Males show strong approval for Action-Adventure, Racing, Sports, and First Person Shooters. Simulations and MMOGs seem to be key to attracting audiences of both genders equally: Sports and Shooting category games generally hold the lowest appeal for females, although it should be noted that this doesn’t mean they have no appeal: 12% of females play First Person Shooters.

The PC
Despite occasionally-reported claims that the commercial PC games market is in decline, the PC as the preferred platform of choice was particularly high amongst both the youngest and the oldest gamers. This was also reflected in their genre preferences, with Puzzle/Board/Quiz games being particularly strong for both groups. It is also worth noting that most Puzzle/Board/Quiz games are web-based, and free to play. Educational games were also popular with the 6-10 year olds, again stressing the importance of the PC as a gaming platform; games for learning, or interactive education, have yet to take off on the console platform.

Number of Platforms
Whilst the two youngest groups spread their gaming time over
between being one-platform gamers (with a potential preference towards the PlayStation 2) or three-platform gamers. For the two oldest age groups there was a higher majority of one-platformer gamers, this time with the potential preference being towards the PC. Interactive TV only appears to be popular with the younger age groups and quickly tails off after the age of 15.

**Where they play**
The living room is the main room for playing games in for the 6-10s and the 11-15s, with handhelds also being played in the bedroom. However, as the desire for privacy grows in the teenage years, the consoles in particular, move into the bedroom. Once we get to the 25-35 year olds who often have their own property, we see both consoles and PCs moving back into the living room.

Consoles remain in the living room for the 36-50 year olds although the PC tends to be placed either in the living room or the study. This is also mirrored by the 50-65 year olds. Clearly the majority of the last two age groups don’t see the bedroom as an appropriate place for gaming.

**Conclusion**

**Understanding UK Gamers**
• 59% of 6-65 year olds in the UK are gamers: this is equivalent to 26.5 million people
• 48% of the UK aged 6-65 plays games at least once a week (21.6 million people)
• 100% of 6-10s consider themselves to be gamers
• A quarter of UK game players are aged 36-50
• 18% (or 1.7 million gamers) are aged between 51-65
• The average age of UK gamer is approximately 28
• 45% of all gamers are female
• 52% are ABC1 social grade, 48% are C2De social grade

**Platform Popularity in the UK**
• 21.4 million console users
  *favoured platform for 35s and under*
• 19.9 million play games on PCs
  *strongest platform for over 35s*
• 14.8 million handheld/mobile users
  *beats consoles for 11 to 15s*
• 8.1 million iTV game players
  *6 to 10s highest penetration, 11-15s highest usage, lowest frequency of use as a platform overall*

“Female gamers display a stronger attraction to certain genres and are searching for their gaming choices across a wider number of platforms, which may indicate a lack of appealing material on the popular consoles.”

Note: Gambling and similar games are not included in this study.
This research indicates that gaming is an immensely popular activity for a large portion of the UK. It indicates that gaming is also no longer just an entertainment indulgence for those with a Y chromosome; in fact, the gender split has been shown to be nearing equal throughout.

Gaming is not only extremely popular for the under-16s, it’s highly valued as well. The fact that they rank it as their number one entertainment form is a huge indication of how pervasive and embedded gaming has become – at least for certain life stages.

It can’t be just a coincidence that the oldest age group, who favour the PC but value gaming the least out of all the groups, also believe that the market is over-saturated with fighting, shooting and racing games. Is it any wonder that they turn towards puzzle games, classics, strategy and role-playing for their gaming entertainment? Rather surprisingly, the 6-10 year olds also shared the same view of market saturation as the older gamers, as well as believing in the potential for using games as education as well as entertainment. Not knowing a world without PlayStations, Game Boys, mobile phones and ubiquitous Internet access seems to have created a generation of very savvy young gamers who, although they are happy with what’s on offer, still believe that there’s a lot more the industry can do.

It’s clear that the last three decades have seen videogaming move forwards at a truly ferocious pace, creating gamers of all ages along the way. But one particularly pertinent fact highlighted by this research is that 41% of the UK population does not play games at all. They’re not just the older generation either: 18% of the key 16-24 age group never plays. Overall, “non-gamers” is a huge market that the videogames industry will want to reach, not to mention the combined 11% of medium and light gamers overall who perhaps feel that the industry hasn’t provided enough titles to really hook them in.

As our youngest gamers grow up, so their needs and desires will evolve. If the industry is to successfully move with them then it’s going to need to keep pace. The fact that older gamers feel that the market is over-saturated with certain genres, and at the same time don’t place as much value on gaming, would suggest that the industry is currently not diverse enough.

Perhaps one of the most important questions that all the entertainment industries need to ask themselves is “What will these people, who have grown up with games as part of their everyday lives, demand from gaming – and other entertainment – in the future?”

If majority rule dictates, than at 59% we are indeed a nation of gamers. But the games industry can’t rest on its laurels while there is 41% who don’t know, or don’t care, about these interactive and unique entertainment experiences. We’ve seen what videogaming has become in just three decades; we expect the next decade to be a pivotal one for the youngest entertainment industry as games settle down, broaden their appeal and raise the bar once again in quality and experience.

A note from the editors:

We hope this look at gaming in the UK is of use to you in your media planning or thinking. We would like to thank TNS and Firefish Ltd for their work in the Quantitative and Qualitative research respectively, and Rhianna Pratchett for writing this paper.