



Savanta:

Game on:

a study of UK gaming
attitudes and behaviours

How smartphones, esports and VR are changing the way we play

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Introduction

Much has changed in the gaming industry since the days of Pong and Pacman or even Mario and Sonic; now everyone with a smartphone has access to a world of games in their pocket. More than two thirds (67%) of people in the UK have played a game on a smartphone over the past year.

The ways in which people buy video games have also evolved with more than a third (36%) of gamers saying they have purchased a gaming subscription and 30% using a game key or token within the last three months.

Gaming is no longer a niche pastime. Overall, the majority (86%) of the UK population have played a game of some kind over the past year, and although 17% of Brits agree with the statement that “most gamers are kids or teenagers” the data demonstrates that this is categorically untrue.

This report on the gaming industry sets out to debunk some myths as well as looking at the personas of different gamers, their gaming habits and their views on emerging trends such as esports and the future of virtual reality. It also touches on issues such as gaming addiction and bullying within the online gaming community.



About the survey

- We interviewed 2,045 UK adults aged 16 – 69, a nationally representative sample of the UK population (which included both gamers and non-gamers)
- Interviews were completed online
- All interviews were completed during September 2019



Industry overview: who are gamers?





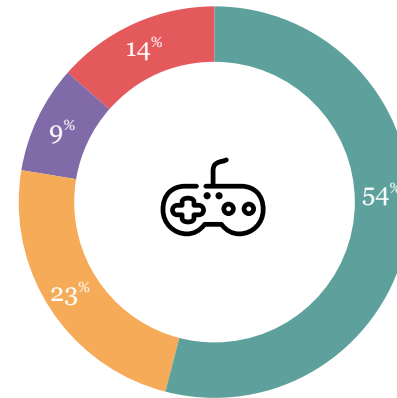
Many misconceptions prevail about gaming and who plays.

But gamers are not necessarily who we might first assume...

Myth		Reality
Gaming is a minority interest pastime.	>	86% of people aged 16-69 have played computer / mobile games in the last year. 54% play on "most days".
Gaming is a male dominated pastime.	>	50% of people who play games on most days are women.
Players are mostly millennials.	>	46% of people who play games on most days are aged over 40.

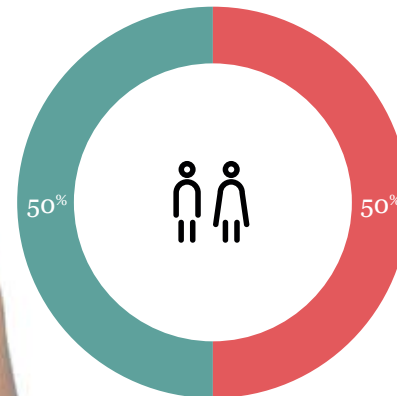
Men and women are equally as likely to play video games.

More than half (54%) of all UK adults play most days and this group is split equally between males and females, putting paid to stereotypes of teenage boys playing on consoles in their bedrooms.



Frequency of play among the UK population

- Play most days
- Play weekly
- Play infrequently
- Never



Gender of players who play on most days

- Male
- Female



Profile of a regular male gamer



Age

Under 45



Platform

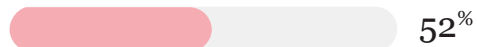
Smartphone



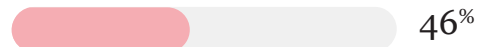
Games console



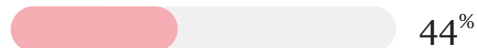
Laptop



Tablet

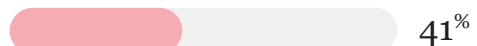


Desktop



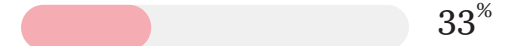
Spending

Over £100 per year

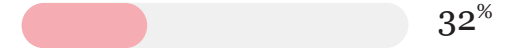


Favorites

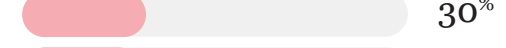
Role-playing action games



First person shooters



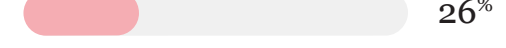
Sports games



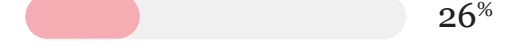
Role-playing sci-fi/fantasy games



Racing games

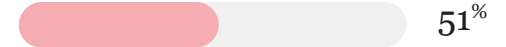


Puzzle/tile matching



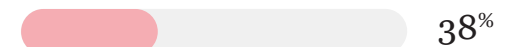
Social media

Game regularly on social media sites

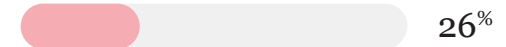


Why do men play daily?

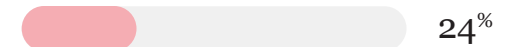
Entertainment



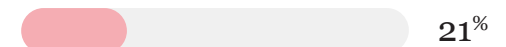
Relaxation



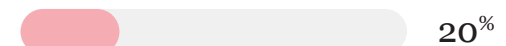
Great storylines

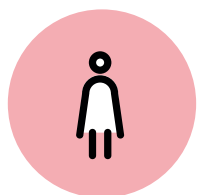


Escapism



Thrills





Profile of a regular female gamer



Age

Under 45

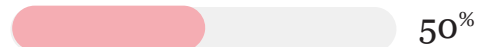


Platform

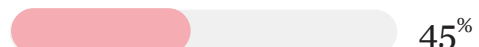
Smartphone



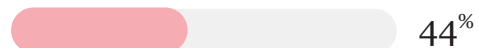
Tablet



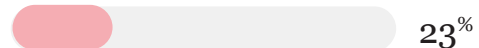
Game console



Laptop

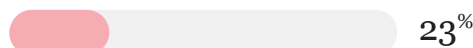


Dedicated mobile gaming device



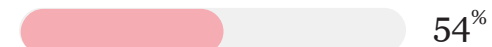
Spending

Over £100 per year

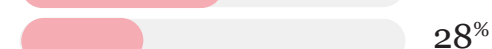


Favorites

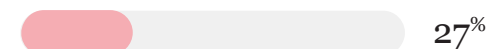
Puzzle/tile matching



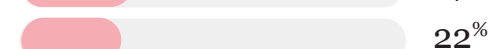
Traditional games (e.g. solitaire)



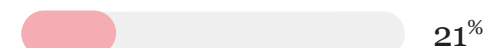
Social simulation games



Sandbox/worldbuilding games



Arcade classics

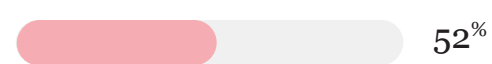


Role-playing action games



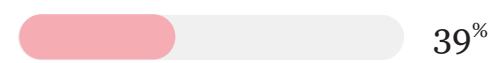
Social media

Game regularly on social media sites

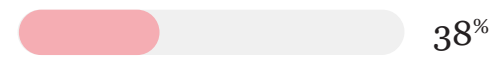


Why do women play daily?

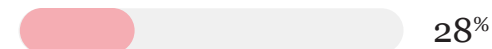
Relaxation



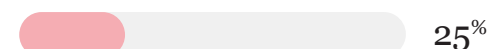
Entertainment



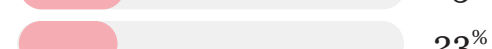
Intellectual puzzles/makes me think



To pass the time



Competition/challenge



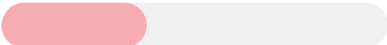
Who counts as a “gamer”?

One key difference between the genders is that men are more likely to consider gaming to be a hobby than women. This could be due to perceptions that only certain types of video games “count” as gaming.

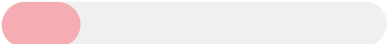
More than two in five (43%) men who play games identify as a gaming hobbyist compared with just a quarter (24%) of women who play.



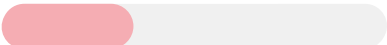
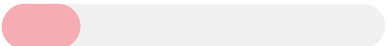
What are your hobbies/ interests? % who selected gaming

Overall  33%

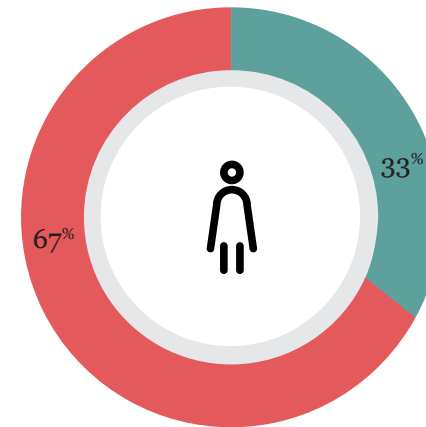
Gender

Male		43%
Female		24%

Age

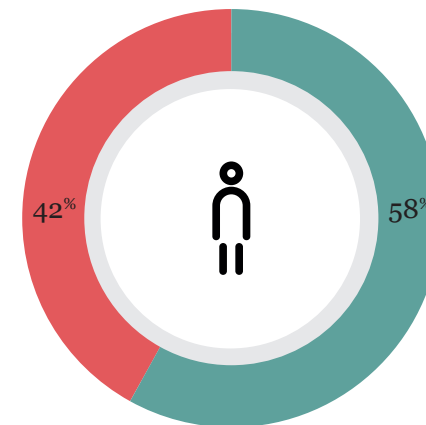
16 - 29		48%
30 - 44		35%
45+		25%

Even among women who say they play most days, only a third (33%) would identify as a “gaming hobbyist” compared with 58% of men who play the same amount.



Regular female players

 Identify as hobbyist  Do not



Regular male players

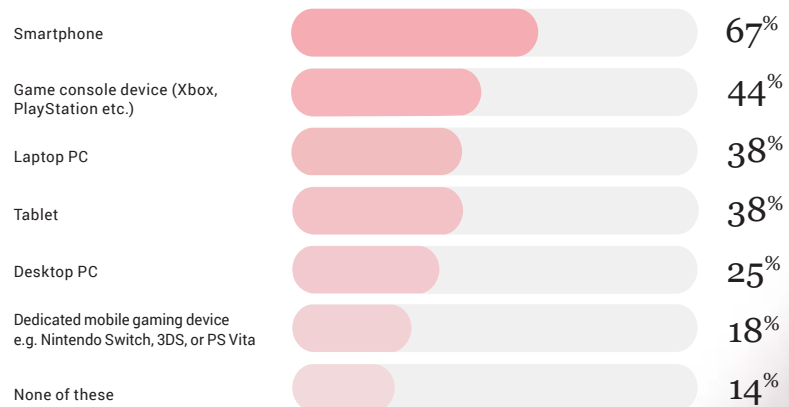
 Identify as hobbyist  Do not

But when we asked people about their gaming activity in a different way: *During the past year, have you played any games on the following devices?* 86% of people said they had - meaning the vast majority of UK adults could be considered gamers. However they don't necessarily think of themselves in this way and don't consider it to be a hobby of theirs.

Smartphones are by far the most commonly used device for gaming, with 67% of people saying they have played a game on their mobile. It seems that the perception of "gaming" is strongly linked to the idea of playing on consoles and computers. Only 11% of those people who play exclusively on smartphones or tablets actually think of themselves as gamers (compared to nearly half of those people who play on consoles or PCs).



During the past year, have you played any games on any of the following devices?



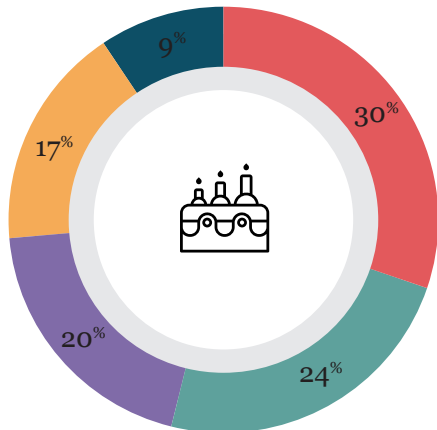
In terms of age, people who play most days tend to be younger - but many are aged over 40. The profile of people who play games shows that the image of a gamer as a single young man is simply wrong:



Almost two thirds are married or in a civil partnership



Gamers are more likely to have children than non-gamers

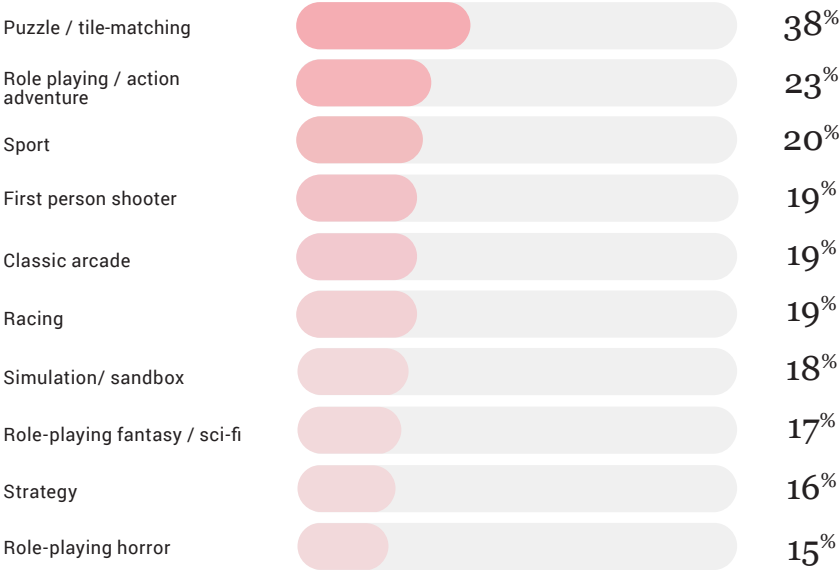


Age of players who play most days

- Under 30
- 30-39
- 40-49
- 50-59
- 60+



The most popular types of games % played in the last year



The four gamer personas



Older age groups (45+) are a lot more likely to use a desktop PC to 'game on' than younger generations. Conversely, younger generations are much more likely to use gaming machines and are more likely to purchase and use the latest technology, e.g. Xbox One (38% of 16—29 yr. olds vs. 19% of 45+ yr. olds) suggesting that they are more likely to keep up-to-date with the the latest trends.

Looking beyond basic demographics and excluding the 14% of the population who say they never play games of any kind, we have identified four types of gamers by their habits and behaviours.

The personas



Casual gamers:

20% of people who play. They are mostly female, play less regularly, and don't identify as a gamer.



Mobile specialists:

17%, mostly older, female and play most days (almost exclusively on mobile devices).



Mainstream gamers:

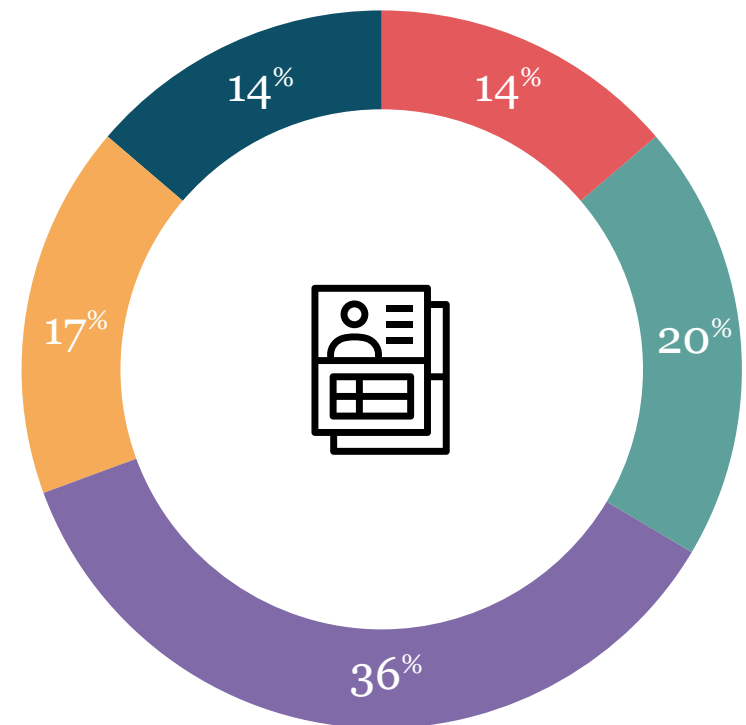
36%, mostly male, play on a mix of platforms, although smartphones are most popular.



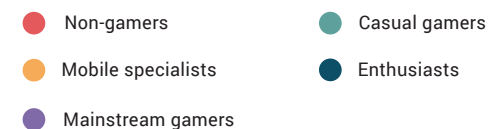
Enthusiasts:

14%, mostly young, male and play most days (on consoles). Their views and opinions have significant influence on the gaming world.

These groups differ by the information sources they use to find out about new games, the media they consume and how much they spend on gaming.



Gaming personas as % of the population

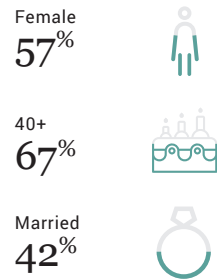




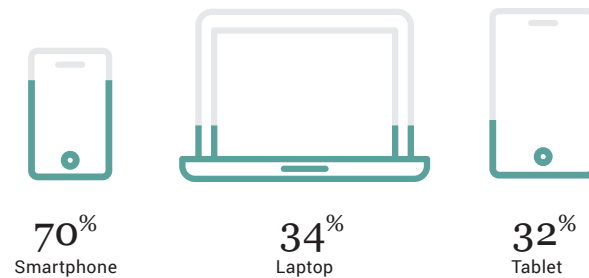
Profile of the casual gamer

20% of the UK population

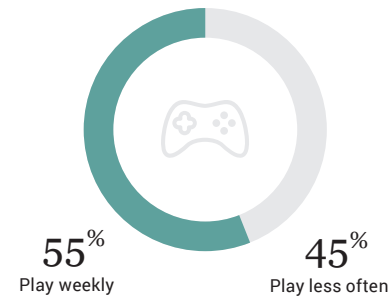
Demographics



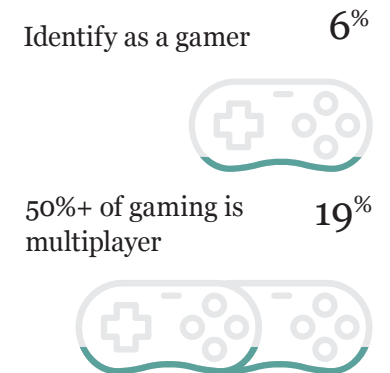
Gaming platforms



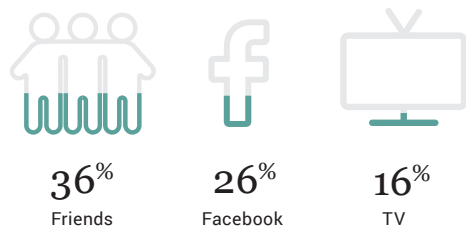
Play frequency



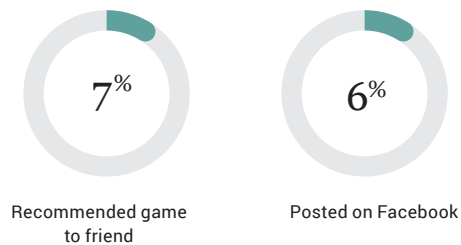
Identify as a gamer



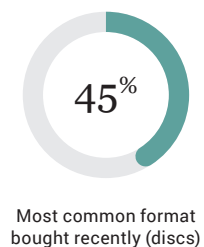
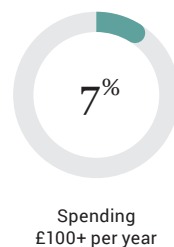
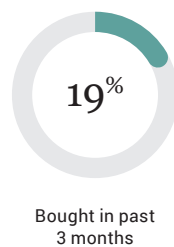
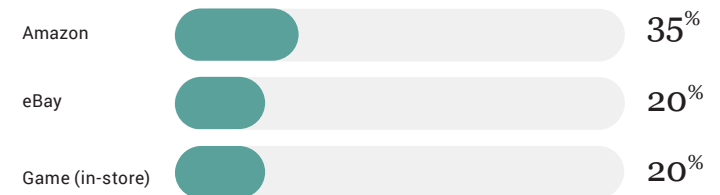
Key information sources



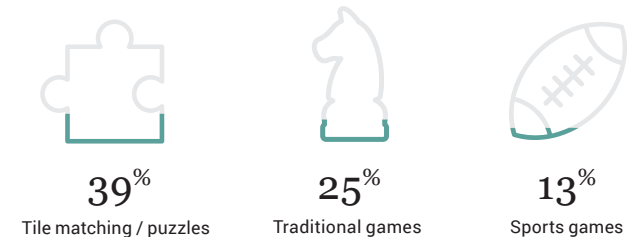
Influencer behaviour (past 3 months)



Where do they buy from? (last 3 months)



Favourite genres





Profile of the mainstream gamer

36% of the UK population

Demographics

Male
57%



Under 40
52%



Married
34%



Gaming platforms



75%
Smartphone

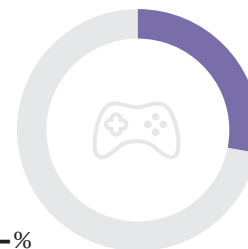


65%
Console



54%
Laptop

Play frequency



65%
Play most days

35%
Play a few
days a week

Identify as a gamer 55%



50%+ of gaming is
multiplayer 35%



Key information sources



35%
Friends



34%
Facebook



24%
TV

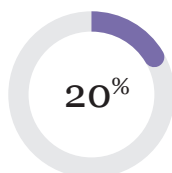


33%
YouTube

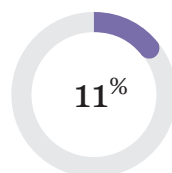


19%
Online store

Influencer behaviour (past 3 months)

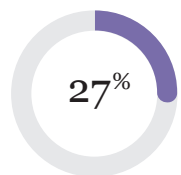
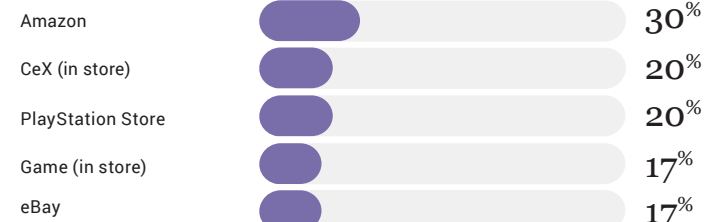


20%
Recommended game
to friend

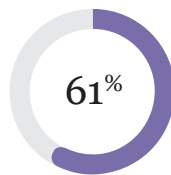


11%
Posted on Facebook

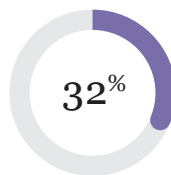
Where do they buy from? (last 3 months)



27%
Buy new games within 1st
2 weeks of release

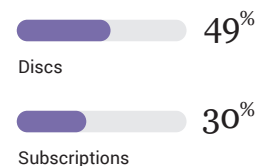


61%
Bought in past
3 months

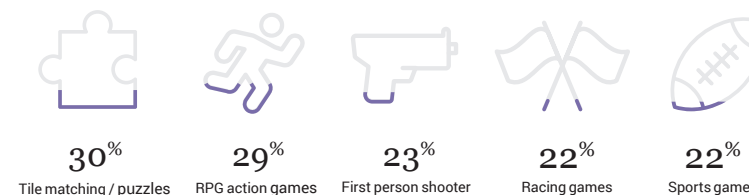


32%
Spending
£100+ per year

Most common format bought recently



Favourite genres





Profile of the mobile specialist

17% of the UK population

Demographics

Female
71%



30-59
67%



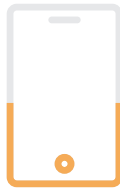
Married
40%



Gaming platforms



89%
Smartphone

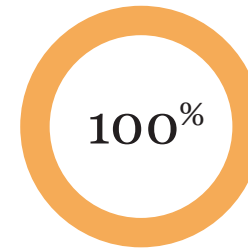


48%
Tablet



19%
Console

Play frequency



Play most days on mobile devices BUT
only rarely on PC/console

Identify as a gamer 21%



50%+ of gaming is
multiplayer 14%



Key information sources



37%
Facebook



32%
Friends



19%
App stores

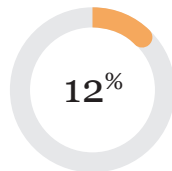


15%
YouTube

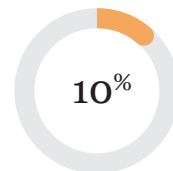


10%
Online store

Influencer behaviour (past 3 months)

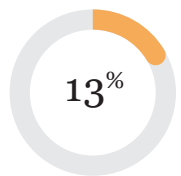
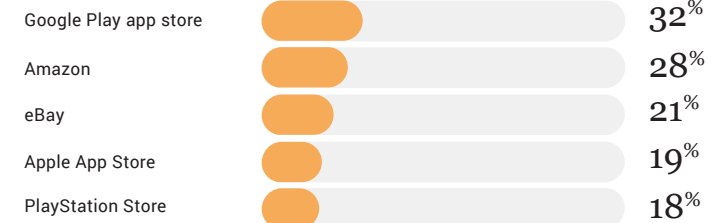


Recommended game
to friend

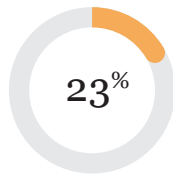


Posted on Facebook

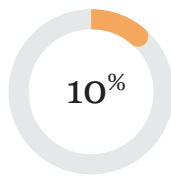
Where do they buy from? (last 3 months)



Buy new games within 1st
2 weeks of release

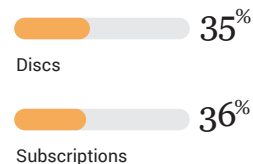


Bought in past
3 months



Spending
£100+ per year

Most common format bought recently



Favourite genres



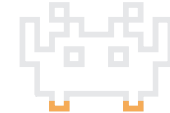
57%
Tile matching / puzzles



28%
Traditional games



17%
Social simulation



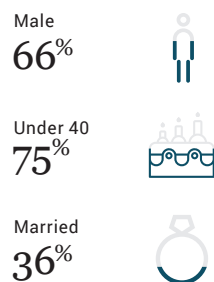
14%
Arcade classics



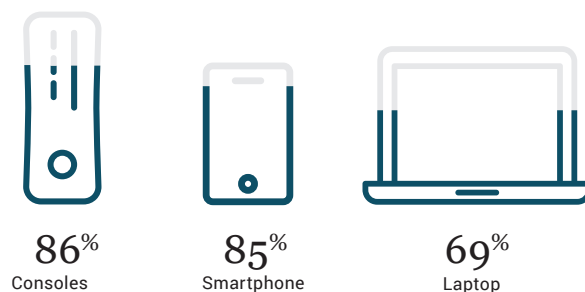
Profile of the gaming enthusiast

14% of the UK population

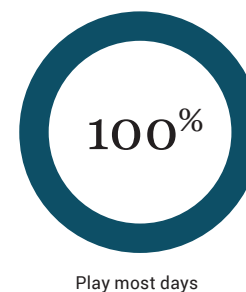
Demographics



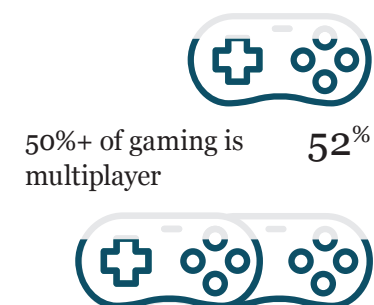
Gaming platforms



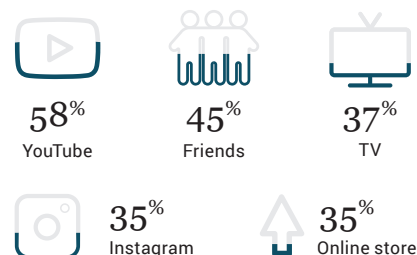
Play frequency



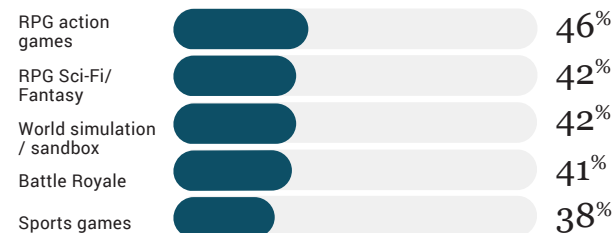
Identify as a gamer 63%



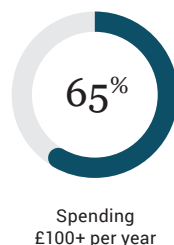
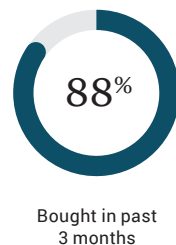
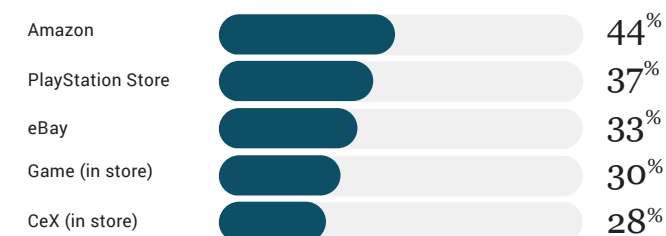
Key information sources



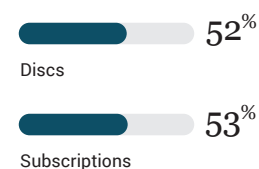
Favourite genres



Where do they buy from? (last 3 months)



Most common format bought recently



Influencer behaviour (past 3 months)



Gaming purchasing behaviour and spend



Where are gamers spending their money?

Most gamers do not spend very much on their hobby, with almost a third (31%) saying they spent nothing on games over the past year and 9% saying they spent less than £10.

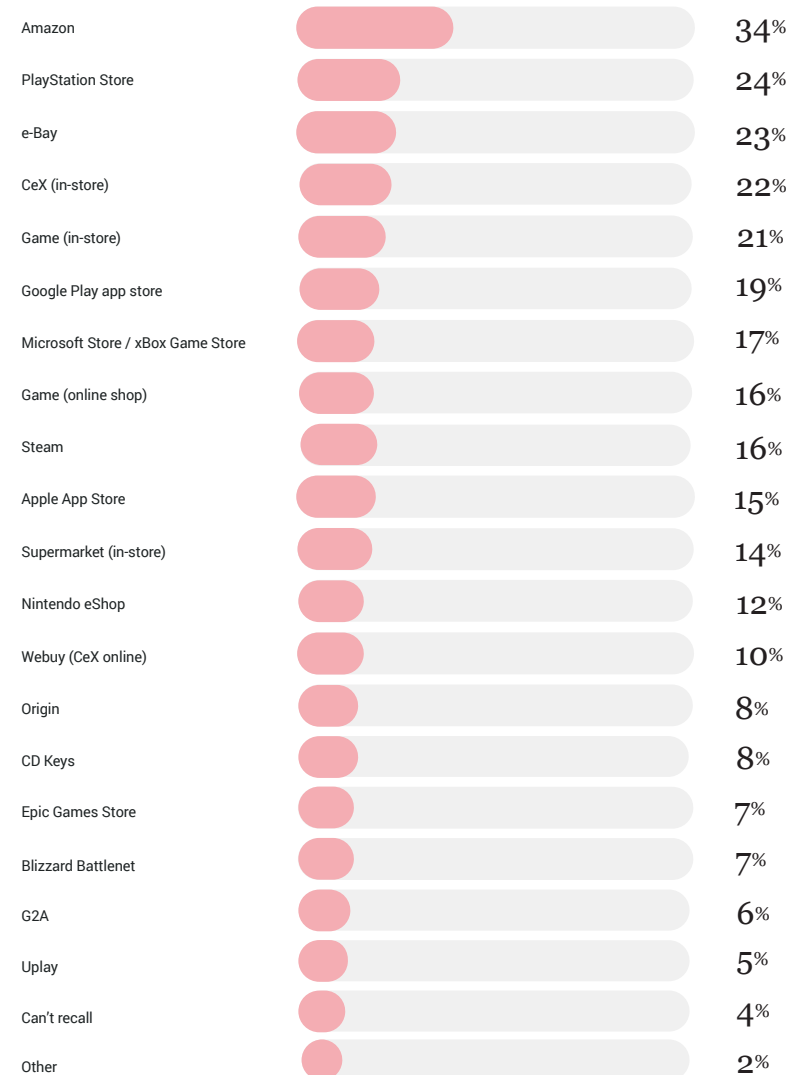
Young people are much more likely to be bigger spenders with 39% spending more than £100 per year.

In terms of the most popular outlets to buy games, Amazon comes out on top overall.

However, the high street is not entirely dead as far as gamers are concerned with around one in five (22%) purchasing from CeX (in-store) and 21% visiting Game.



Where have you purchased games/subscriptions/tokens during the past three months



Purchasing influencers

But what is it that makes people decide to purchase from a certain store or outlet? As with many other industries word of mouth is vital. Most people are influenced by friends' knowledge and also look to social media for gaming news, releases and trends. Gameplay on YouTube is clearly an important influence and it is here that gaming enthusiasts play a key role in influencing the market; they may only account for 14% of gamers but they represent 57% of the people broadcasting gaming content on YouTube.

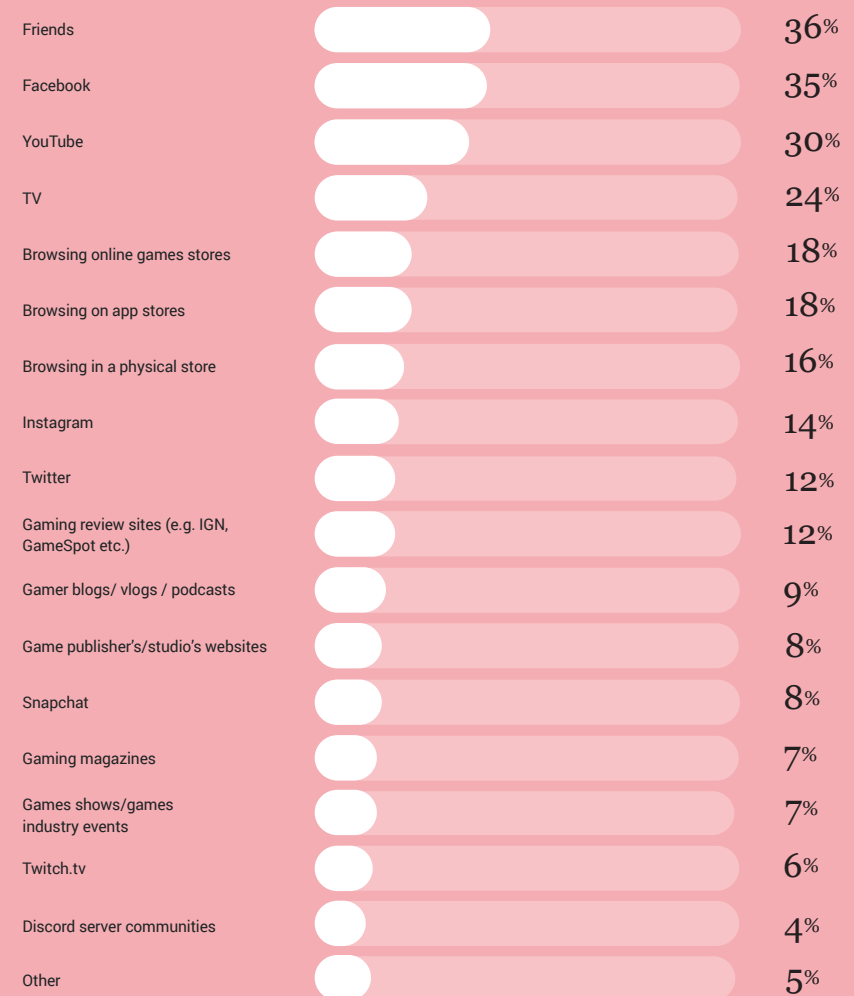
A quarter (23%) of gamers say they have bought a new game within the past month and a further 25% have bought one within the last three months. A third (35%) have not bought a game in the last year.

Free to download games are more popular, with 61% saying they have downloaded one of these games within the last three months.

One in ten gamers (9%) pre-order a game they like the sound of before it comes out and a further 15% buy it as soon as it's released. Around a third (32%) say it depends on the game and are more relaxed about when they get their hands on a new release.



How do you usually find out about new games and emerging trends in gaming?

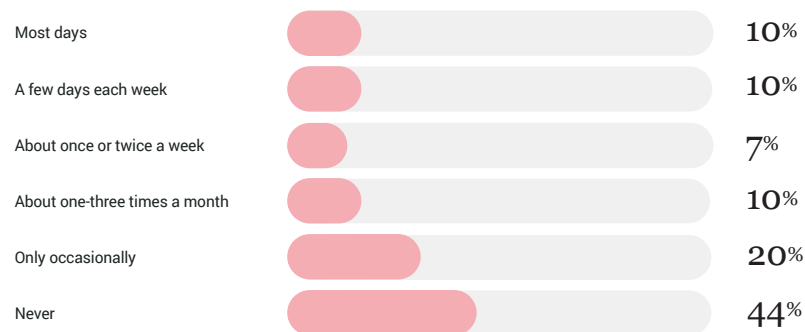


In-game spending

The majority of gamers say they spend on micro-transactions or in-game content with one in ten saying they engage in micro-transactions on most days.



How often do you spend on micro-transactions?



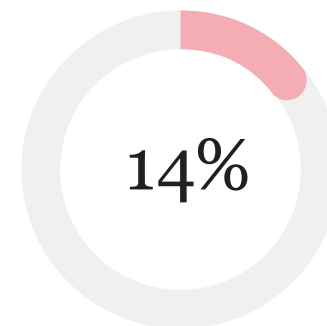
However, despite perceptions that in-game transactions are a stealthy way to increase the cost of a game, only 5% of gamers say they are concerned about how much they spend on these gaming extras.

Advertising in games

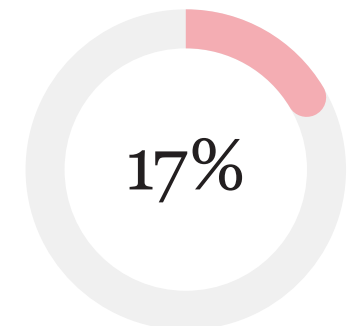
In terms of paying to get rid of ads in games, the majority say it's not worth paying for (54%) and so will sit through this content.

Almost one in five (17%) say they have paid to skip advertising. However, 14% of gamers refuse to play games with ads altogether. This group tend to be older more casual gamers. The majority (66%) of "mobile specialists" (who are most likely to come across the ads) say that they don't believe it's worth paying to skip them and so appear to be somewhat of a captive audience for advertisers.

In terms of the games themselves, 30% of people believe they are too expensive these days. Gaming enthusiasts are most likely to say this (41%).



Refuse to play games with ads



Have paid to skip ads

Addiction and bullying: the dark side of gaming



Addicted to games?

In May 2019, the World Health Organisation officially recognised “gaming addiction” as an illness. “Gaming disorder” will enter the International Classification of Diseases and Related Health Problems in 2022. Many within the gaming industry, however, don’t believe that there is sufficient evidence for its inclusion.

Our research shows that 13% of gamers sometimes find gaming stressful and frustrating, with one in ten (11%) saying they’ve been told that they play too much. Eight per cent say gaming sometimes puts them in a bad mood.

Slightly more women report to having been told they play too much than men. This may not be because they play more (they are no more likely to be playing every day than men) but perhaps because women either feel they have more social obligations or perhaps because they are less comfortable with identifying as a gamer.

Slightly more women (30%) also report having played a game for longer than they intended compared with 26% of male gamers. Again, perhaps because women generally are less inclined to feel they should be spending their “free time” in this way.

When and where are gamers playing?

In terms of where they play, only 12% confess to playing games at work while a fair number admit they play games while on the toilet (16%). The majority of gamers play at home in their living room (63%) or bedroom (38%).

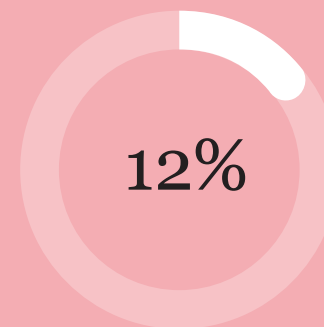
The most popular time for gaming is between 8 – 11pm on weekdays (48%). The less sociable hours of 1am and 6am were only selected by 5% of gamers during the week – rising to 8% at weekends.

Men are more likely to play in the very early hours of the morning than women (10% vs 6 % for weekends and 6% vs

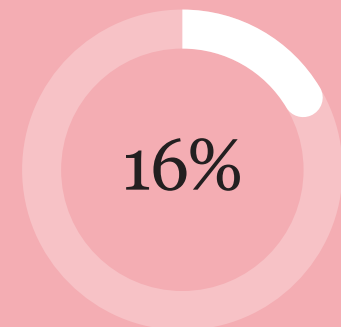
4% during the week) with 15% of male gamers saying they have lost out on sleep due to playing games compared with 13% of women.

However, in general, men are much more social gamers, with a higher percentage saying they play games to be sociable. They are also more likely to play multiplayer games.

Women are more drawn to solitary smartphone games – 48% always play alone - tallying with the idea that they mainly play games for casual relaxation rather than entertainment.



Play at work



Play on the toilet

The gamer community and bullying

While we have established that the term gamer (if by “gamer” we mean anyone who plays video games) applies to almost the whole country, not all gamers join in when it comes to online gaming. However, among a smaller group of enthusiasts a thriving online community has grown.

Around one in ten (11%) men who game have experienced negative bullying behaviour on gaming sites. This rises to more than one in five (22%) in the gaming enthusiast category.

One in ten (10%) people think that the gaming community has a problem with sexism, perhaps due to fewer women in the online community and also the portrayal of female characters within games themselves. A quarter of “gaming enthusiasts” agree that sexism is a problem. Almost one in five (18%) also believe that racism is a problem and 21% think homophobia is an issue.





Do video games encourage real-life violence?

Video games have been criticised by the media for violent content for decades, with connections drawn between this type of game-play and violent crime.

More recently Donald Trump has inflamed this narrative by associating shootings in the US with “gruesome and grisly video games” which lead to the “glorification of violence in our society”.

In the main, the UK public don’t agree that there is a correlation.

Only 14% agree that “violent video games incite knife/ gun crime”. This view is more commonly held by those aged 45 and above (17%).

However, of all groups surveyed “gaming enthusiasts” - i.e. the group mainly made up of young men who

play games most days– are most likely to think that there is a link between gaming and violence. One in five (21%) agree that games can potentially contribute to violent crime.

Enthusiasts who played Battle Royale games were more likely to believe games incite violence (24%) than those who do not (18%). However, aside from this, there is little evidence to show that people who play games that you would expect to have more violent content (such as first person shooters, fighting games or RPG horror) are any more likely than average to believe games incite violence.

Who watches
esports?



The rise of esports

Over the last few years, esports has become a global billion-dollar phenomenon with events such as the Fortnite World Cup making mainstream headlines and the International Olympic Committee considering whether to make it an official Olympic event.

But is esports a niche interest or could it grow even further?

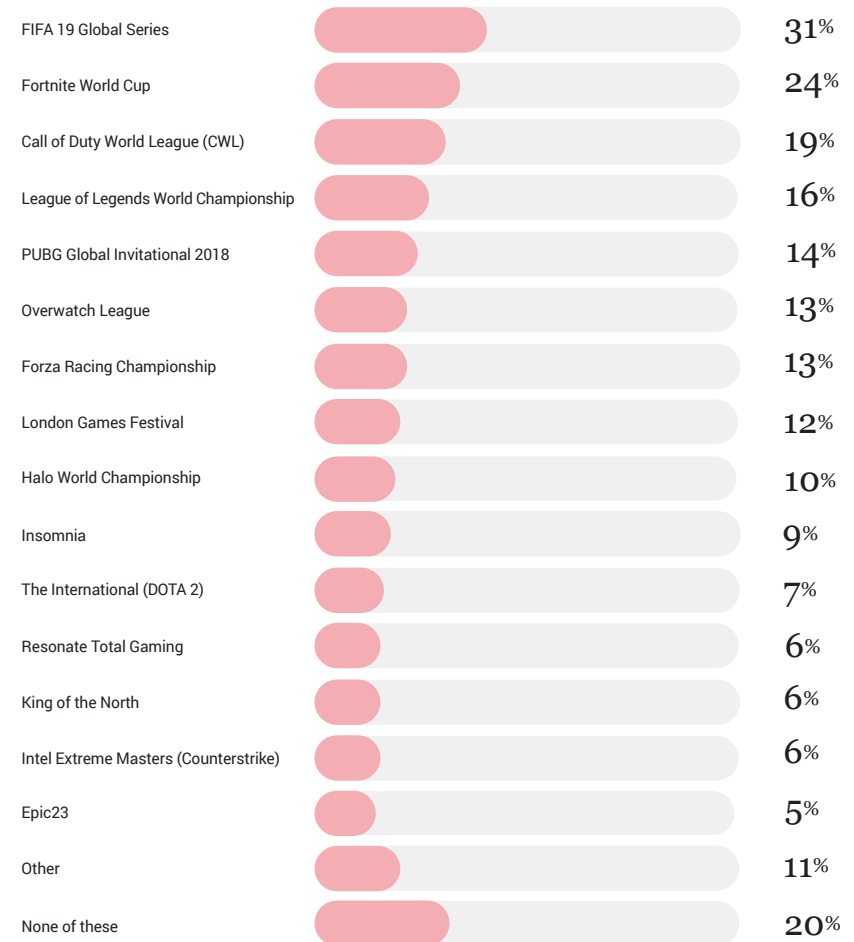
The most popular esports games tend to be multiplayer sports, or first-person shooter games – which are mainly favoured by younger men, mostly in the “gaming enthusiast” demographic. Overall, ten per cent of the population have watched esports. This rises to 14%

of men compared with 7% of women. In fact, more than a third of women (35%) say they’ve never even heard of the pastime versus 18% of men.

FIFA 19 is by far the most popular event among UK audiences with Fortnite emerging with the second largest volume of UK viewers.



Which esports events have you watched over the past year?
% esports watchers



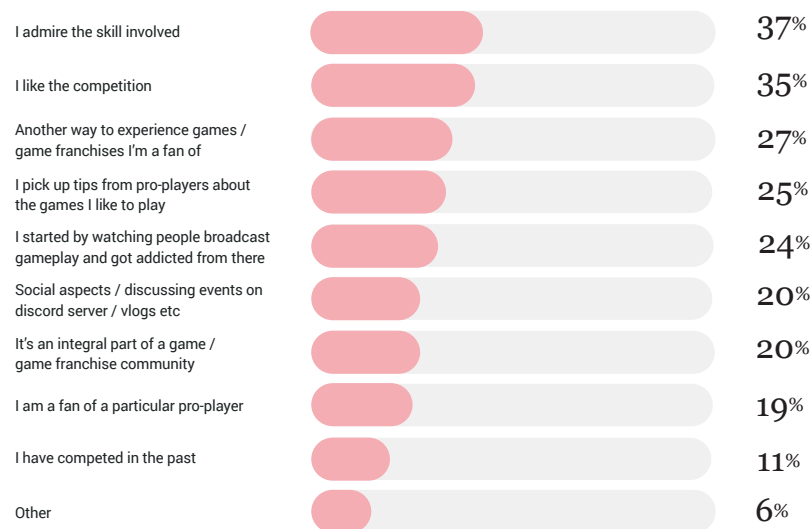
Why watch esports?

Fans of esports say they admire the skill on display and like the competitive element of the games.

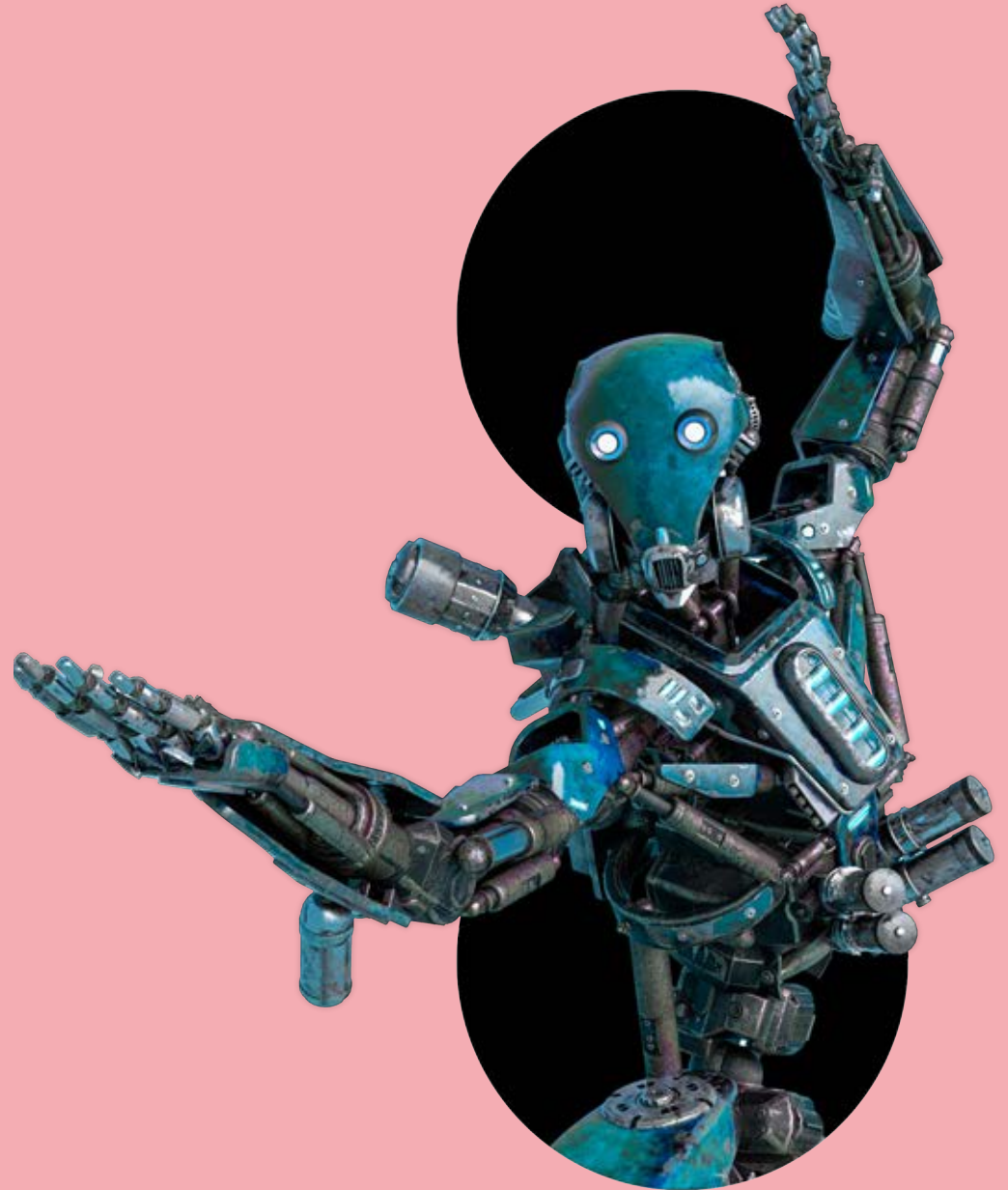
One in ten esports viewers say they have competed themselves in the past. What's more, 37% of people think that esports is just as skillful as physical sport. This rises to 46% among men.



What is it about esports that appeals to you?



VR:
what does the
future hold?



Will VR take off?

While virtual reality (VR) has been around in some form for decades, speculation about its potential uses has soared over the last decade. However, despite being touted as “the next big thing”, VR hasn’t yet gone mainstream.

In October 2019, both the BBC and Google announced that they were disbanding the teams set up to make virtual reality content. Subsequent comments called the technology “niche” and predicted it would be many years before the technology fully took off.

But what do consumers think? Is there a market for VR in the average household?

At present, just 3% of the population (including non-gamers) say they regularly use virtual reality technology either at home or at work. A further 8% say they are very familiar with virtual reality. Younger male gamers are most likely to have high awareness of VR.

However, around a quarter of the population (26%) say they know little or nothing about it.

On top of this lack of knowledge and awareness, cost is a barrier to

accessing VR technology. What’s more, just over one in five (22%) people say they’re not really sure what it would be used for.

Among those who are aware of VR technology, it seems that entertainment is perceived as its main potential function.

Around a quarter (26%) see gaming as its main application, followed by film or TV streaming (26%) and “interacting with virtual reality environments for pure entertainment”(23%).

More practical uses were generally acknowledged by fewer people e.g. shopping centre experiences (20%) work-related simulation (20%) or VR work conference call meetings (18%).

Games manufacturers should note, however, that 16% of the nation do believe that VR games are the future...

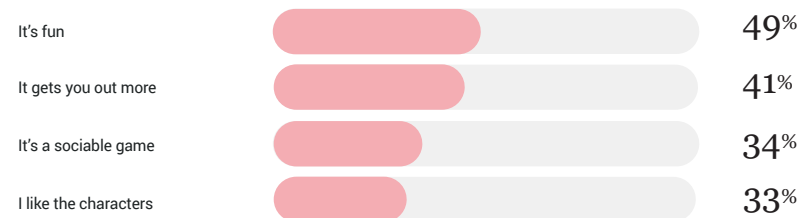
Who is still playing Pokémon Go?

While VR is yet to fully catch on, augmented reality (AR) - where the user is not fully immersed in an alternate reality but rather the virtual world is overlaid on a real environment - has seen more traction.

There is no better illustration than the global popularity of Pokémon Go in the summer of 2016 which even grabbed the attention of people who hadn't been a fan of the original franchise.

By contrast with computer games more generally, Pokémon Go has been credited with helping people lose weight, get fit and meet people.

Fans like it because:



However Google Trends data shows that Pokémon Go's popularity dropped off massively; so more than three years later who is still playing the AR game?

One in ten people are still playing Pokémon Go, with 45% of people saying that they've never played and 19% saying they used to play but don't anymore.

Those still playing are more likely to be men aged between 16-29. Approaching one third (29%) of those in the gaming enthusiasts group still play regularly.

With the growing popularity of other AR games such as Harry Potter: Wizards Unite and a wider societal focus on health and getting fit, AR could be the perfect combination of gaming and exercise.



Conclusion

When it comes to gaming, consumer behaviour varies massively.

However, it is clear that gaming has made the transition from a niche pastime to a mainstream activity that engages the majority of the UK population. People are increasingly as likely to play games as they are to watch TV.

Gaming devices of all kinds are popular with different groups – whether it's desktop, mobile or consoles – and even methods of buying games which may seem “old-fashioned” such as visiting a high street shop are still popular.

In terms of future trends, augmented reality is on an upward trajectory, but virtual reality is still struggling to find its place and it's unclear if it will truly break through commercially.

While video games have had their share of bad publicity over the years – innovations such as augmented reality

and esports show that the pastime can be both sociable and encourage activity if presented in an engaging way which captures the public's imagination.

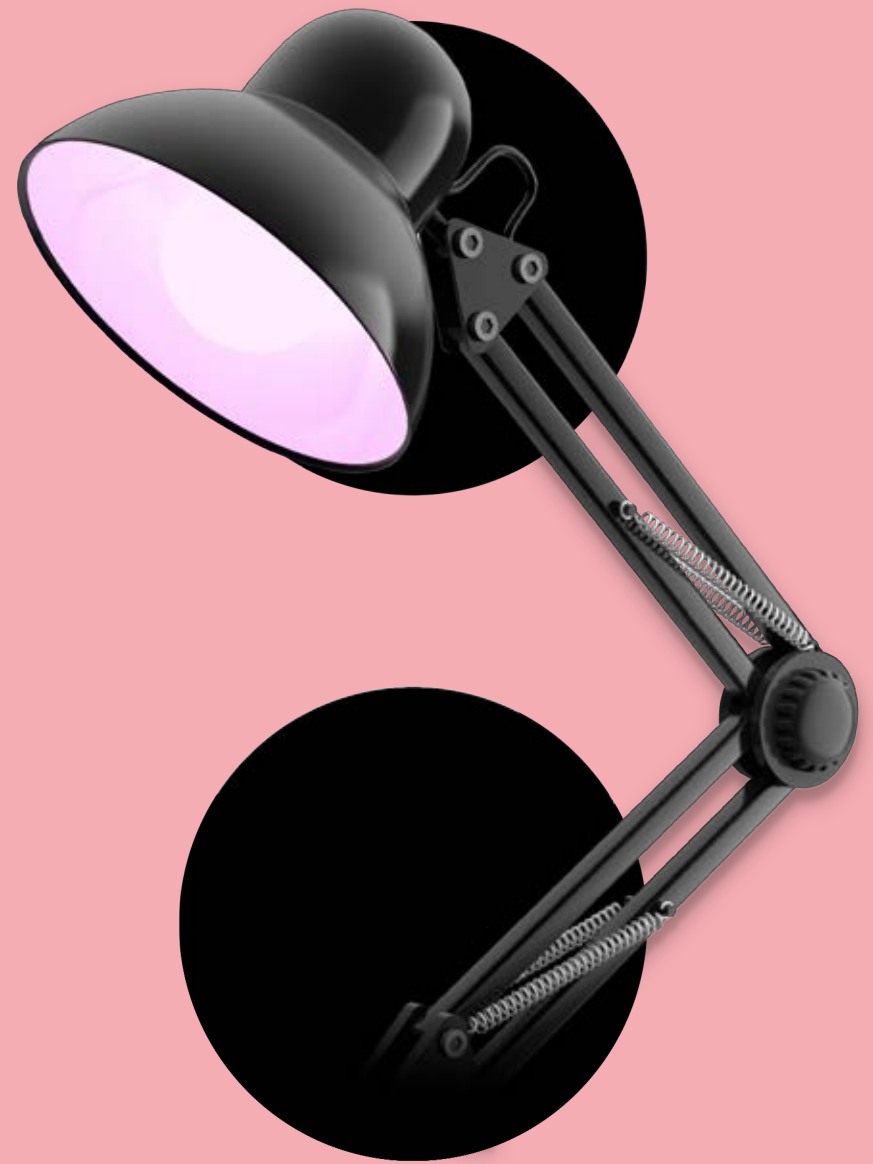
On the more negative side, many gamers report having witnessed online bullying and discrimination which has negative consequences, not just for the gamers themselves but also advertisers.

Mobile apps, especially free ones, are popular and most players would rather just watch the advertising than pay a small fee to skip them. Players, in general, also don't seem to mind paying small amounts of money for micro-transactions within the game.

If you'd like to find out more about the data we hold or look at any of these groups in more detail, contact us on better.decisions@savanta.com



How Savanta
can help you



Our core areas of service delivery

Coverage and capabilities



Target market understanding

- Category due diligence
- Consumer trends
- Market segmentation



Customer experience enrichment

- Customer satisfaction surveys
- Brand communities
- Touchpoint CX tracking



Brand management & growth

- Health audit
- Perceptions tracking
- Strategy research



Proposition development

- Ideation & concept screening
- Pricing strategy research
- In-the-wild product testing



Behavioural shopper analysis

- Path-to-purchase mapping
- Shopper observations
- Retail safaris



Marcomms optimisation

- Communications development
- Advertising testing & tracking
- Experiential activity assessment



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