

# Gaming in the Interactive World - UK - August 2009

Report Price: £1500 / \$3000 / €2250

## What is this report about?

Online gaming is very much a child of the broadband revolution. Faster 'always on' connections have made it possible for gamers to interact with each other with split-second timing. It has also increased the variety of online games available to the general public today from simple, browser-based games to complicated alternative worlds such as Massive Multiplayer Online Games (MMOGs) like World of Warcraft (WoW).

## Key issues covered in the analysis

- According to Mintel's research at least 65% of respondents surveyed had played games online. The trend is driven by greater access to broadband and hardware, including PCs, internet-enabled portable and static games consoles as well as mobile 'smart' phones.
- For console gaming online, subscription-based services like Xbox LIVE dominate the market. Despite the cost, 31% of respondents admitted they had played online this way. This comes despite the widely held view that services like these should be free (according to 56% of respondents).
- Playing online via PC games is the least popular way of gaming via the internet, at 21% of respondents surveyed (compared to 40% that play free browser based games). This is as much down to the higher level of technical knowledge and investment of time required.
- The recession could be helping the sector: one in ten gamers admit to playing online because they don't have the money to go out and enjoy other leisure activities. Free gaming sites are not the sole beneficiaries, the majority being fully paid-up members of console or pc-game based services.
- Many online games providers are working hard to add value, in particular Microsoft's Xbox LIVE. With moves to integrate Sky on-demand, Twitter, Facebook and Last.fm it is the most likely to retain and attract new subscribers in the downturn.
- The industry must overcome many challenges. Unsurprisingly, older people are least likely to consider playing or paying for online gaming. Social networking is key: its increasing popularity with older web users has the potential for it to act as a gateway to a whole new generation of players.



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## Scope of the report

The report definition includes online gaming via PC-based games (ie paid-for games which provide online play in addition to a main offline game). The definition also includes PC-based games, which are purely focused on online play such as MMOG World of Warcraft.