AURORA

Market Size

Total Addressable Market (TAM):
Customers/Users: 38.8M
Revenue: £2.3B - £4.7B

Serviceable Addressable Market (SAM):
Customers/Users: 3.9M - 7.8M
Revenue: £232.6M - £930.2M

Executive Summary

The Total Addressable Market (TAM) for an online game stats service in the UK is estimated to be between £2.3 billion and £4.7 billion annually. This is based on 51 million gamers in the UK, with 76% expressing interest in detailed gaming statistics. The Serviceable Addressable Market (SAM), assuming a 10-20% market share capture, is projected to be 3.9 million to 7.8 million customers, generating £232.6 million to £930.2 million in revenue per year.

To capitalize on this sizeable opportunity, the service must be priced competitively at £5 to £10 per month and differentiate itself through data-driven insights, predictive analytics, real-time tracking, and seamless integration with gaming platforms. Effective marketing to convert interested gamers and continuous innovation will be crucial for success.

Key competitors in the UK gaming statistics market include Statista, Uswitch, Newzoo, IBISWorld, and The Data City. These firms offer a range of market research, user data, revenue projections, and industry analysis for the gaming sector. Statista and Uswitch appear to have the most comprehensive UK-specific gaming data, while others like Newzoo and IBISWorld provide broader global insights that cover the UK market.

To stand out, the proposed service should leverage its unique selling points, such as customizable reporting, competitive pricing strategies, and integration with marketing efforts. Continuously monitoring competitor offerings and adapting to market trends like cross-platform gaming, live service monetization, and in-game advertising will also be essential for maintaining a competitive edge.

Key Data Points

- Number of online gamers in UK in 2023: 10.84 million [3][4]
- Number of video gamers in UK in 2023: 38.6 million [32]
- Number of gamers in UK: 51 million with 65% penetration [37]
- Average spending on online games per user in UK in 2023: US$138.90 (£106.98) [2]
- 76% of UK online gamers interested in detailed game statistics [1]
- Average spending on online services per user in UK: $1,144.40 (£881.52) per year [42]

Market Size Calculations

To calculate the TAM (Total Addressable Market):

- Total gamers in the UK = 51,000,000 [37]
- Percentage interested in detailed game statistics = 76% [1]
- Interested gamers = 51,000,000 x 76% = 38,760,000

At a price range of £5 to £10 per month:

- Annual revenue per user = £5 x 12 months to £10 x 12 months = £60 to £120
- TAM = 38,760,000 interested gamers x £60 to £120 per year
- TAM = £2,325,600,000 to £4,651,200,000

To calculate the SAM (Serviceable Addressable Market):

- Assuming 10-20% market share of interested gamers
- SAM customer range = 38,760,000 x 10% to 38,760,000 x 20% = 3,876,000 to 7,752,000 customers

At a price range of £5 to £10 per month:

- Annual revenue per user = £5 x 12 months to £10 x 12 months = £60 to £120
- SAM = 3,876,000 to 7,752,000 customers x £60 to £120 per year
- SAM = £232,560,000 to £930,240,000

Assumptions

Assumptions:

Pricing for online game stats service: £5 - £10 per month

- Reasoning: This price range aligns with pricing for other online gaming services and subscriptions in the market. Setting the price between £5 to £10 per month positions the service competitively while still capturing value from customers who have expressed interest in detailed gaming statistics [1].

Potential market share capture: 10-20% of interested gamers

- Reasoning: As a new entrant in a competitive market for online gaming services, capturing 10-20% of the addressable market of interested gamers is an ambitious but reasonable target. Achieving this level of market share will require strong product differentiation, effective marketing to the target gaming segments, and a compelling value proposition that resonates with customers. Capturing a higher market share would be challenging without significant investment in customer acquisition or a truly disruptive offering that motivates gamers to rapidly switch from existing alternatives [8][12][13][14].

Proxy Data:

1. Average spending on online services per user in UK: $1,144.40 (£881.52) per year [42]
    - Reasoning: While not directly related to gaming, the average spend on online services provides a useful proxy for UK consumers' willingness to pay for subscription-based digital offerings. As the proposed online game stats service is positioned as a subscription service, this data point offers a relevant benchmark for estimating the monetization potential on a per-user basis. It suggests UK customers are comfortable with spending considerable amounts on online services they value, supporting the viability of a premium-priced game stats service for the enthusiast gaming segment.

Methodology

Here is the thought process we followed to calculate the TAM (Total Addressable Market) and SAM (Serviceable Addressable Market) for an online game stats service that shows statistics in UK currency:

To calculate the TAM, we first needed to identify the total potential market of customers who could be interested in this service. Based on the data provided, there are 51 million gamers in the UK [37], and 76% of online gamers are interested in detailed game statistics [1]. This gives us a total of 38.76 million interested gamers (51 million x 76%) who represent the maximum addressable market.

Next, we needed to estimate the potential revenue opportunity from this market by making an assumption about pricing. We assumed a pricing range of £5 to £10 per month for the online game stats service, which aligns with pricing for other online gaming services and subscriptions in the market [Assumption 1]. With this pricing assumption, the annual revenue potential per user would be £60 to £120 (£5 x 12 months to £10 x 12 months).

Multiplying the total interested gamers (38.76 million) by the annual revenue potential per user (£60 to £120), we calculated the TAM to be in the range of £2.325 billion to £4.651 billion per year.

To calculate the SAM, we made an assumption about the potential market share capture for this service. As a new entrant in a competitive market, we assumed a market share capture of 10-20% of the interested gamers [Assumption 2]. This translates to a range of 3.876 million to 7.752 million customers (38.76 million x 10% to 38.76 million x 20%).

Using the same pricing assumption of £5 to £10 per month (£60 to £120 per year), and multiplying by the potential customer range, we calculated the SAM to be in the range of £232.56 million to £930.24 million per year.

In summary:

TAM (Total Addressable Market):

- 38.76 million interested gamers in the UK
- At £60 to £120 annual revenue per user
- TAM range: £2.325 billion to £4.651 billion per year

SAM (Serviceable Addressable Market):

- 3.876 million to 7.752 million potential customers (10-20% market share)
- At £60 to £120 annual revenue per user
- SAM range: £232.56 million to £930.24 million per year

These calculations provide a rough estimate of the market opportunity for an online game stats service in the UK, based on the available data and assumptions made about pricing and market share capture. Further validation and refinement of these assumptions would be necessary as the product offering and go-to-market strategy are developed.

Competitor Research Summary

1. Statista:
   Statista is a leading provider of gaming and esports statistics in the UK. They offer detailed market forecasts and insights for various gaming segments, including mobile games, video games, and esports [65][68]. Their data includes:
- Market size and revenue projections [48][51][52][53][54]
- User numbers and demographics [55][57]
- Revenue per user [59]
- Digital video games revenue by category and segment [64]
- Esports market data, including revenues from sponsorship, advertising, merchandise, streaming, media rights, and publisher fees [63]
2. Uswitch:
   Uswitch provides comprehensive online gaming statistics for the UK market [50][52][56][66]. Their data covers:
- Number of UK adults playing online games [56]
- Gaming habits and trends [56]
- Impact of broadband on gaming [56]
- Console sales, digital game sales, and gaming accessories [66]
- Demographics of UK gamers [66]
3. Newzoo:
   Newzoo offers global gaming market forecasts, which include data relevant to the UK market [67]. Their services provide:
- Revenue projections for console gaming, PC gaming, and the overall gaming market [67]
- Player numbers and payer numbers [67]
4. IBISWorld:
   IBISWorld provides detailed market research reports on the gaming industry in the UK [60][61]. Their reports cover:
- Mobile Game Development in the UK: Market size, annual change, and 5-year outlook [60]
- Video Games in the UK: Industry analysis, trends, and forecasts [61]
- Key drivers, market share concentration, and top companies by revenue [60][61]

5. Gambling Commission:
   The Gambling Commission collects official statistics on gambling behavior in Great Britain through the Gambling Survey for Great Britain (GSGB) [62]. While not specifically focused on gaming stats, their data provides insights into:

- Gambling trends and behavior [62]
- Official statistics related to online gambling activities [62]

Emergen Research:
Emergen Research provides market size and revenue data for the global esports market, which can be applied to the UK market [47]. However, their statistics are presented in USD rather than UK currency.

F6S:
F6S tracks various esports companies and startups in the UK, including those providing statistical services [49]. While they don't directly provide gaming statistics, they offer information on companies in the esports ecosystem.

Xace:
Xace offers detailed statistics on the UK online gambling industry [50], including:

- Gross gambling yield (GGY)
- Market share for various types of online gaming such as casinos, sportsbooks, and bingo

9. The Data City:
   The Data City offers real-time data and insights into the UK gaming industry [58], including:

- Sector growth
- Financials
- Company data
- Free market report for the UK video game industry

These competitors provide a range of services and data related to gaming statistics in the UK, with varying focuses on different aspects of the industry. Statista and Uswitch appear to be the most comprehensive in terms of UK-specific gaming data, while others like Newzoo and IBISWorld offer broader market insights that include UK data.

Summary of Collected Data

Financial Data

Average spending on online games per user in the UK in 2023 is forecasted to be US$138.90 [2].

The number of online gamers in the UK in 2023 is approximately 10.84 million, with a penetration rate of 16.6%. By 2027, this number is expected to increase to 11.56 million [3][4].

The video games market in the UK is projected to grow by 9.57% from 2024 to 2027, resulting in a market volume of US$11.68 billion in 2027 [7].

As of 2022, 80% of surveyed businesses in the United Kingdom used online services, with online bank accounts being the most used online service [25].

The number of individuals using online services software in the UK is forecast to continuously increase between 2024 and 2029, with a total growth of 2.7 million users [26].

The global Software as a Service (SaaS) market size is projected to reach US$818.80 billion by 2029, growing at a rate of 19.28% from 2024 to 2029 [27].

The PC gaming segment is expected to grow by an estimated +3.9% to reach $40.4 billion in 2023 [28].

The number of video gamers in the United Kingdom (UK) as of 2023 is approximately 38.6 million [32].

There were approximately 466 thousand programmers and software development professionals in employment in the United Kingdom in 2021 [33].

The gaming esports market size in the UK is projected to reach approximately £228.7 million (approximately $283.6 million USD) by 2024, with an annual growth rate of 7.10% from 2024 to 2028 [34].

The average daily turnover of the UK OTC forex market is approximately 3.75 trillion USD. The GBP/USD share of total global forex trades is around 9.5% [36].

The number of online gamers in the UK in 2023 is estimated to be around 51 million, with a gaming penetration of approximately 65% [37].

The eSports market revenue in the UK is projected to reach $228.7 million by 2024 [40].

The number of online gamers using online services in the UK is approximately 44.37 million [41].

The average spending on online services per user in the UK is estimated to be around $1,144.40 per year, as of 2024 [42].

Behavioral Data

1. Gaming Demographics:
- The most common age demographic for UK online gamers is 12-15 years old, with over three-quarters (76%) of this age group engaging in online gaming [45].
- The number of video gamers in the United Kingdom (UK) as of 2023 is approximately 38.6 million [32].
- The UK has the highest number of gamers across major gaming markets in Europe, with an estimated 51 million players and a gaming penetration of around 65% [15].
2. Age Distribution of Gamers:
- 16-24 years: 88% of UK adults in this age group have ever played video games, with 83% of males and 85% of females engaging in gaming activities [17].
- 25-34 years: 76% of males and 74% of females in this age group play video games [17].
- 35-44 years: 68% of males and 65% of females engage in gaming [17].
- 45-54 years: 58% of males and 55% of females play video games [17].
- 55-64 years: 46% of males and 43% of females engage in gaming [17].
3. Gender Distribution:
- Male Gamers: 53% of gaming audiences in the UK are male, with 74% of male gamers playing games online [18][19].
- Female Gamers: 47% of gaming audiences are female, with 68% of female gamers playing games online [18][19].
- The share of female adults in the UK who identify as gamers has overtaken the share of male gamers, with a 56% and 55% gaming penetration rate respectively [16].
4. Device Usage:
- Mobile Phones: 34% of UK adults aged 16 and older have played games on their mobile phones as of September to November 2023 [9].
- Consoles: 39% of internet users in the UK play video games on consoles as of Q3 2023 [10].
- Laptops: Laptops are also a popular device for gaming, with a significant share of UK gamers using them [11].
- Mobile phones are the most popular gaming device in the UK, with over half of UK adults aged 16 to 44 years playing games on their mobile phones [16].
5. Gaming Habits:
- UK gamers spend a significant amount of time playing online games, with over a quarter (26%) playing between one and five hours per week [45].
- 68% of gamers in the UK play games online with or against other people [16].
6. Interest in Game Statistics:
- According to a 2023 survey, 76% of UK online gamers were interested in detailed game statistics [1].

7. Spending Behavior:
- The average spending on online games per user in the UK in 2023 is forecasted to be US$138.90 [2].
- British gamers between the ages of 13 and 64 spent an average of just under 35 USD on video game-related purchases during a 30-day period [6].
- 58% of British gamers aged 13 to 64 buy game subscriptions, with PlayStation Plus being the most popular paid game subscription in the UK [6].

8. Market Growth:
- The number of online gamers in the UK in 2023 is approximately 10.84 million, with a penetration rate of 16.6%. By 2027, this number is expected to increase to 11.56 million [3][4].
- The video games market in the UK is projected to grow by 9.57% from 2024 to 2027, resulting in a market volume of US$11.68 billion in 2027 [7].

9. eSports Market:
- The gaming esports market size in the UK is projected to reach approximately £228.7 million (approximately $283.6 million USD) by 2024, with an annual growth rate of 7.10% from 2024 to 2028 [34].
- The number of eSports users in the UK is expected to grow from 2018 to 2028, with a penetration rate of 3.4% in 2024 [39].

10. Payment Preferences:
- The majority of UK respondents (75%) use debit cards for online purchases, making it a crucial payment method for the gaming industry to integrate [44].

11. Willingness to Pay:
- Parents can help their children understand the value of digital items by discussing the cost of in-game purchases and comparing them to real-life items [43].
- The willingness to pay for game stats services among UK online gamers is influenced by social factors, with an individual's social environment having a significant impact on their willingness to pay for subscription fees for online video games [5].

Competitor Data

Market Share in Mobile Analytics Category:

- Hotjar: 50.85% market share
- Adobe Analytics: 22.13% market share
- Mixpanel: 8.19% market share [8]

Unique Selling Points and Differentiators:

- Data-Driven Insights: Providing actionable insights from player behavior data to enhance game design, monetization, and business impact [12]
- Predictive Analytics: Using statistical models to anticipate player actions, influencing in-game purchases, preventing churn, and optimizing lifetime value [12]
- Competitive Advantage: Offering a comprehensive analytics solution that helps businesses differentiate themselves from competitors [13]
- Customer Analytics Strategy: Empowering teams to make data-informed decisions by leveraging user behavior data [12]
- Real-Time Tracking: Enabling real-time tracking of player behavior and game performance [12]
- Customizable Reporting: Providing customizable reports and analytics tools [14]
- Integration with Marketing Strategies: Offering insights that can inform marketing strategies [14]

Pricing Models and Revenue Strategies:

- Value-Based Pricing: Sets prices based on the perceived value of the product or service [23]
- Freemium Model: Offers a basic product or service for free and charges for premium features [23]
- Flat-Rate Subscriptions: Users pay a set cost on a regular basis for unlimited access [23]
- Dynamic Pricing: Analytics-based pricing strategies for sports franchises to identify appropriate pricing for various rights and events [24]

Competitive Pricing Strategies:

- Game Theory Models: Firms in an oligopoly can choose the "best response" to their competitors' prices [20]
- Competitor Analysis: Conducting thorough research on competitors' pricing tactics [21]
- Revenue Growth Management (RGM): Employs various strategies such as the contrast principle, decoy effect, revenue boosting, and market capture to optimize pricing [22]

Leading Mobile Game Publishers in the UK (May 2023):

- TutoTOONS: 74 games
- Kwalee: 63 games
- BoomBit: 56 games [35]

Global Software as a Service (SaaS) Market Size:

- Projected to reach US$818.80 billion by 2029
- Growing at a rate of 19.28% from 2024 to 2029 [27]

Gaming Analytics Market Trends (2023):

- Cross-platform gaming: Considered crucial by almost 80% of global gaming studios [30]
- Increased focus on monetization through live service games [30]
- Growth in PC gaming: Expected to grow by +3.9% to reach $40.4 billion in 2023 [28]
- Mobile gaming market growth: 2.29% YoY increase in advertisers in casual games [31]
- Subscription services growth: Significant subscriber growth for leading gaming subscriptions [30]
- In-game advertising: Becoming more prevalent, with a focus on preferred types of in-game ads [30]
- Market research and analytics expansion: Companies like Newzoo, Mintel, and Statista providing detailed reports [28][29][30]

Demographic Data

1. Number of online gamers in the UK:
- As of 2023, there are approximately 10.84 million online gamers in the UK, with a penetration rate of 16.6% [3][4].
- By 2027, this number is expected to increase to 11.56 million [3][4].
- Another source estimates the number of video gamers in the UK to be approximately 38.6 million as of 2023 [32].
- A different estimate suggests around 51 million gamers in the UK, with a gaming penetration of approximately 65% [37].

2. Age Distribution of UK Gamers:
- 16-24 years: 88% of UK adults in this age group have played video games (83% of males and 85% of females) [17].
- 25-34 years: 76% of males and 74% of females play video games [17].
- 35-44 years: 68% of males and 65% of females engage in gaming [17].
- 45-54 years: 58% of males and 55% of females play video games [17].
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4. Device Usage:
- Mobile Phones: 34% of UK adults aged 16 and older have played games on their mobile phones as of September to November 2023 [9].
- Consoles: 39% of internet users in the UK play video games on consoles as of Q3 2023 [10].
- Laptops: Laptops are also a popular device for gaming, with a significant share of UK gamers using them [11].

5. Gaming Habits:
- Over a quarter (26%) of UK gamers play between one and five hours per week [45].

6. Average Spending:
- The average spending on online games per user in the UK in 2023 is forecasted to be US$138.90 [2].
7. Willingness to Pay:
- 58% of British gamers aged 13 to 64 buy game subscriptions, with PlayStation Plus being the most popular paid game subscription in the UK [6].
- British gamers between the ages of 13 and 64 spent an average of just under 35 USD on video game-related purchases during a 30-day period [6].
8. Interest in Game Statistics:
- According to a 2023 survey, 76% of UK online gamers were interested in detailed game statistics [1].
9. eSports Market:
- The eSports market revenue in the UK is projected to reach $228.7 million by 2024 [40].
- The user penetration rate for eSports in the UK is expected to be 3.4% in 2024 [39].
- The Average Revenue per User (ARPU) for eSports in the UK is forecasted to increase from $14.40 in 2024 to $17.30 in 2028 [38].
10. Online Services Usage:
- The number of online gamers using online services in the UK is approximately 44.37 million [41].
- The average spending on online services per user in the UK is estimated to be around $1,144.40 per year, as of 2024 [42].

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User Inputs

Please enter the name of your business, product, or service

online

Please describe your business, product or service in as much detail as possible. This can include elements such as the main benefits you offer, costs, industry, etc. and helps make the TAM & SAM calculations more accurate.

online games stats should be shown in UK currency.