

BMRB International survey of retail prices, May 1994

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Introduction

Background and objectives

1. As part of the inquiry the MMC commissioned BMRB International to carry out a survey of retail prices of video games in different countries. The countries selected included both countries where comparison with UK prices is often made (eg the USA), and countries which are comparable in terms of market size and systems penetration (eg France, Germany).

2. The principal aim of the survey was to obtain up-to-date information on prices paid by consumers for video games in a range of different countries, both including and excluding local taxes.

3. This introduction concentrates on the survey in Great Britain. Details of surveys conducted in the USA, France and Germany are given later.

4. Retail prices of hardware and software were collected for four leading formats:

- Nintendo hand-held (Game Boy);
- Sega hand-held (Game Gear);
- Nintendo 16-bit (SNES); and
- Sega 16-bit (Mega Drive).

5. For each format the following data were recorded:

- retail price of the machine plus one game; and
- retail price of five named games per format.

6. All the software titles were pre-selected for the interviewer by the MMC, following a pilot exercise in each country.

7. The pilot provided a check on the availability of each item, and highlighted any other problems an interviewer was likely to encounter. As a result of the pilot the Amiga 1200 and associated software were dropped from the survey, having originally been one of five formats specified by the brief.

8. As well as assisting in finalizing the list of hardware and software for which prices were collected, the pilot also helped resolve the issue of 'bundling'. One of the complications of this market is that hardware is often sold 'bundled' with one or more games, and sometimes with accessories as well. Bundles vary across stores, and so a priority list of bundles was printed on the questionnaire for each format. These lists were based on findings from the pilot. If the first bundle was not on sale in a particular store then the interviewer was told to look for the second bundle, and so on. In each case if a given bundle was not available there was the option for the interviewer to record details of a bundle not listed, or for the hardware alone.

9. Prices were collected by having interviewers go into each outlet and record each of the 24 prices by observation.

10. The sample was representative of urban, suburban and regional retail locations. In Great Britain the principal retail types are:

- electrical retail chains: chains specializing in electrical goods, eg Dixons, Currys;
- general multiple retailers: retailers which have several branches and sell a wide range of goods, eg Woolworths, W H Smith;
- toy retailers; and
- specialist retailers of video and computer games.

11. The sample of 250 outlets was drawn from the Yellow Pages Business Database. A representative sample of 72 local expenditure zones (LEZs) was picked and within each an average of three to four outlets was selected. Interviewers were provided with specific outlets and addresses at which to record prices.

12. Interviewers were equipped with letters from the MMC and BMRB explaining the purpose of the survey. These letters stressed the confidentiality of the data collected, and gave a contact name and telephone number if further reassurance was required.

13. In addition the MMC wrote to several major retailers in Great Britain requesting their co-operation. Copies of the retailers' replies were given to interviewers to show to the relevant shop staff if necessary.

14. BMRB's interviewers did not disclose their purpose immediately, but did so if approached by a member of

staff, or if they needed to ask the price of two or more items.

15. As well as recording prices, interviewers noted the availability of each item, to give three measures:

- available from stock;
- available to order; and
- not available.

16. In addition, interviewers recorded (from observation) whether or not any item was in a sale or on special offer. Fieldwork was conducted by BMRB's own fully trained fieldforce between 11 May and 1 June 1994.

17. The BMRB fieldforce carries the Market Research Society identity card and works to Interviewer Quality Control Scheme standards.

Analysis

18. Completed questionnaires were returned to BMRB and a number of manual checks were made. Records were processed using punch cards, and a number of computer edit checks carried out on the consistency and completeness of the data.

19. Corrections were made by research staff with reference to the original questionnaire where necessary.

20. The main findings are summarized in paragraphs 21 and 22. A full overview of the project then follows. Details of sampling points, exchange rates, tax rates, and fieldwork for each of the surveys conducted in the USA, France and Germany are given in paragraphs 98 to 110.

Summary

21. Prices were collected for the following video game hardware and software from a sample of stores in Great Britain, the USA, France and Germany, between 11 May and 2 June 1994:

- Sega Mega Drive II;
- Sega Game Gear;
- Nintendo SNES; and
- Nintendo Game Boy.

Within each format prices were collected for:

(a) a hardware bundle; and

(b) five games.

22. The most pertinent findings are summarized below. In general, references are mainly to prices before tax.

Hardware

- All hardware bundles were widely available in all four countries, although bundle composition varied by country.
- Overall, where bundles were available, they were largely available from stock. The incidence of console-only offerings was generally low, except in Germany where for each format between a quarter and two-fifths of stores only stocked console-only offerings.
- The Mega Drive bundle was most expensive in Great Britain, followed by Germany, France and the USA, which is cheapest by some margin. This hierarchy holds consistently both before and after tax. Before tax the USA is approximately £30 cheaper than Great Britain, and after tax the difference rises to around £45. Although taxes vary by state in the USA, taxation levels are generally much lower (often by 5 per cent or

more) than those applied in the European countries surveyed (see paragraph 100).

Bundle composition varies to quite a large extent between countries. In Great Britain half the Mega Drive prices recorded were with Sonic 3. In the USA the vast majority came with Sonic 2, whilst half the Mega Drive bundles in France and Germany included Aladdin.

- Great Britain was also the most expensive country for Nintendo SNES bundles, averaging about £20 more than the USA before tax, and £33 after tax. The USA is the cheapest of the four countries for the SNES bundle by some margin.

Bundle composition for the SNES was more consistent across countries. In Great Britain, the USA and France the most common bundle included Super Mario Allstars. However, Streetfighter II Turbo was also common in Great Britain, whereas Super Mario World was the second most common in the USA.

- The Sega Game Gear bundle was cheaper in Great Britain than in the USA before tax, and only marginally cheaper in the USA after tax. However, the Game Gear bundle was by far the cheapest in France, both before and after tax, and most expensive in Germany.

Game Gear bundles tended to comprise largely Columns, except in the USA, where the great majority included Sonic 2.

- Great Britain was also the cheapest country for the Nintendo Game Boy before tax, followed by France and the USA, where before tax prices are very similar. After tax the USA is the cheapest, followed by Great Britain and France. Germany is the most expensive country both before and after tax. Bundle composition is dominated by Tetris in all countries.

Software

- All software was widely available, primarily from stock, apart from a few individual titles in particular countries.
- Overall the average price of the five Mega Drive games was almost identical in Great Britain and the USA. Germany and France were on average £6.50 to £7.50 more expensive than either Great Britain or the USA before tax. The impact of tax makes the USA the cheapest country overall by some margin, followed by Great Britain, Germany and France, in that order.
- For Nintendo SNES Software, Great Britain was more clearly cheaper than the USA before tax, averaging £1 less for the five selected games. France and Germany were £1 to £1.50 more expensive than the USA. However, this hierarchy is largely due to Starwing, which was considerably cheaper than other SNES software surveyed. For the other four games Great Britain was generally about the same price as the USA before tax, or slightly more expensive. Great Britain was cheaper than both France and Germany except for Super Mario Allstars which was noticeably more expensive in Great Britain than elsewhere.
- Great Britain has the cheapest before-tax prices overall for the five Sega Game Gear games selected, on average about £1 cheaper than the USA. France and Germany occupy third and fourth places respectively.
- Prices for Nintendo Game Boy games are generally cheaper in the USA, averaging £2 less than in Great Britain. France and Germany follow closely.
- Special offers appeared to be most common in Great Britain, for both hardware and software. A lower level of visible discounting was recorded in the USA, whilst this practice was generally negligible in France and Germany. In particular, significant levels of discounting were noted for Game Gear and SNES bundles in Britain, and to a lesser extent the SNES bundles in the USA. In Britain the SNES Starwing game was also widely sold at 'bargain' prices.

Hardware

23. As detailed in the introduction to this appendix, prices were collected for four formats:

- Sega Mega Drive II;
- Sega Game Gear;
- Nintendo SNES; and
- Nintendo Game Boy.

24. For each format prices were collected for a hardware bundle, comprising the video game console and game(s). The aim was to keep bundle composition as consistent as possible in order to make valid comparisons both across and within countries. However, it was realized from the outset, and confirmed by pilot in each country, that it would probably be impossible to compose a sample where the same bundle type was available in all cases. Therefore a priority list was drawn up for interviewers (on the questionnaire), listing the two or three most common bundle types. If none of these were available (from stock or to order) then prices were collected for any other bundle available, or failing that, the price of the console alone, without any games.

25. The commentary concentrates largely on prices before tax, although prices after tax can be found in the accompanying tables. The issue of availability is taken first.

Availability of hardware bundles

26. As noted in paragraph 15, three measures of availability were collected:

(a) available from stock;

(b) available to order; and

(c) not available.

27. Table 1 lists the overall availability (ie (a) or (b)) of each format bundle in each of the four countries surveyed. The table covers all bundles, including those which comprise the console only (ie no game).

TABLE 1 **Availability of hardware bundles**

Base: All stores

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	252	252	105	102
				<i>per cent</i>
Sega Mega Drive II bundles	79	96	98	90
Sega Game Gear bundles	78	89	92	86
Nintendo SNES bundles	82	96	96	95
Nintendo Game Boy bundles	74	87	92	98

Source: BMRB survey.

28. As would be expected given the focus of the research, all formats were widely available in all countries. Generally, each hardware bundle was available in four-fifths or more of the stores visited. Availability was lowest in Great Britain. This is probably due to the fact that a relatively higher proportion of music stores were sampled in Great Britain, which, although they are well represented in the software market, often do not stock hardware.

29. Overall, where bundles were available, they were largely available from stock and did not require to be ordered.

30. Generally, the incidence of console-only offerings was low, usually below 10 per cent of stores surveyed. However, in Germany, a substantial proportion of the hardware offerings available were console-only:

	%
Mega Drive	27
Game Gear	27
SNES	38
Game Boy	35

31. Overall the Game Boy was most likely to be available on its own. This applied to 19 per cent of the US stores visited, 15 per cent of British stores and 9 per cent of French stores.

Prices of hardware bundles

32. Table 2 shows the average price obtained for each of the hardware bundles. The figures are based on the number of stores where a price was recorded, and exclude hardware offerings which did not include a game (ie console only). The table shows prices before and after tax for each country, in sterling. Local tax levels and exchange rates are noted in paragraphs 99 and 100.

TABLE 2 **Average prices of hardware bundles including games**

Base: All stores where price was obtained

	<i>£ sterling</i>							
	<i>Great Britain</i>		<i>USA</i>		<i>France</i>		<i>Germany</i>	
	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>
Sega Mega Drive II bundles	112.67	132.39	82.92	87.82	94.97	112.64	101.41	116.62
Sega Game Gear bundles	74.78	87.87	82.56	87.40	63.81	75.68	90.51	104.08
Nintendo SNES bundles	104.06	122.27	84.36	89.27	92.78	110.03	96.49	110.97
Nintendo Game Boy bundles	44.44	52.22	46.98	49.72	46.50	55.15	55.55	63.88

Source: BMRB survey.

Sega Mega Drive II bundle prices

33. The Mega Drive bundle is clearly most expensive in Great Britain, both before and after tax. The Mega Drive II bundle averages nearly £113 before tax in Great Britain, and just over £132 taxed. Germany and France follow, in that order, the higher taxation in France bringing Mega Drive bundle prices there almost up to German levels after tax (£112.64 compared with £116.62), despite a more substantial gap before tax is applied (£94.97 compared with £101.41). The USA is clearly the cheapest country for the Mega Drive bundle, averaging £87.82 after tax, and £82.92 before tax (ie the shelf price in the USA).

34. This is a substantial difference in price, which may be partly explained by the differing bundle compositions, although it seems unlikely that this fully accounts for the price differential. In Great Britain the prices of a variety of Mega Drive bundles were collected, of which half were with Sonic 3, a relatively expensive bundle.

TABLE 3 **Mega Drive bundle composition**

Base: All bundles including game

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	179	221	99	62
				<i>per cent</i>
Sonic 3	48	6	9	8
Sonic 2	17	88	20	18
Aladdin	13	-	54	52
NFL Football	-	2	-	-
Streetfighter II	-	-	11	-
Other bundle	21	4	6	23

Source: BMRB survey.

35. In the USA, average prices reflected the prevalence of the Sonic 2 bundle.

36. In France, the average price of a Mega Drive bundle was much affected by Aladdin. The Aladdin bundle was also the most commonly recorded bundle in Germany, followed by the Mega Drive on its own as already noted, although the latter has been excluded from the averages reproduced here.

Sega Game Gear bundle prices

37. Differentials are smaller for the Game Gear. Germany is the most expensive country for Game Gear bundles, averaging £90.51 before tax. The Game Gear bundle is by far the cheapest in France, at £63.81 before tax, followed by Great Britain averaging £74.78. The USA is considerably more expensive, averaging £82.56.

38. There are large differences in bundle composition between Great Britain and the USA.

TABLE 4 **Game Gear bundle composition**

Base: All bundles including a game

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	174	199	94	58
				<i>per cent</i>
Columns	47	2	67	34
Sonic the Hedgehog 1 & 2	22	13	4	16
Sonic the Hedgehog 2	5	83	9	21
Other bundle	26	2	20	29

Source: BMRB survey.

39. The more basic package commonly available in Britain (Columns) may keep prices cheaper than in the USA, where the Sonic 2 bundle is widely available. Unfortunately, there are only four observations of the Columns bundle in the USA, and so it is difficult to come to a firm conclusion. It is possible that the strong presence of the Columns bundle in France is keeping prices relatively low in that country.

Nintendo SNES bundle prices

40. Average prices for the Nintendo SNES show a similar pattern to Mega Drive average prices. Great Britain is most expensive, with an average price of £104.06 before tax. Average prices in France and Germany are noticeably lower than in Great Britain, at £92.78 and £96.49 respectively. The USA is again the cheapest country by some margin. The average pre-tax price of an SNES bundle in the USA is £84.36. Here too bundle composition varies, but SNES bundles tend to be dominated by Super Mario Allstars. Looking only at observations for the Super Mario Allstars bundle, average pre-tax prices showed Great Britain at £107.53 more expensive than France at £95.13, followed by Germany at £85.89, with the USA lowest at £84.64. In commenting on the results of the survey, Nintendo UK said that comparing average prices for SNES bundles in Germany on a like-for-like basis with the other countries was misleading as a significant proportion of hardware sold in Germany was not packaged with game software. Nintendo added that both Super Mario Allstars and Streetfighter II Turbo were high-quality products (the former contains four games on a single cartridge) for which there was high demand, and which retail at higher prices than Super Mario World. Nintendo UK emphasized that there was, therefore, a higher proportion of better-quality games contained in the British SNES packages than in their US counterparts, and that British consumers, in part, received better value for money than Table 7 suggested. Nintendo UK said that it believed a further factor was the inclusion at no extra cost of a 'Scope' accessory in the Super Mario Allstars bundles in Great Britain; this accessory was an electronic gun contained in a pack which contained six additional games designed to interact solely with the Scope.

TABLE 5 **SNES bundle composition**

Base: All bundles including a game

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	192	224	96	58
				<i>per cent</i>
Super Mario Allstars	60	46	63	38
Streetfighter II Turbo	27	1	22	2
Aladdin	3	1	6	12
Super Mario World	-	29	-	-
Zelda	-	7	-	-
Super Mario Kart	-	6	-	-
Other bundle	10	9	9	48

Source: BMRB survey.

Nintendo Game Boy bundle prices

41. Great Britain is the cheapest country for Game Boy bundles, averaging £44.44 before tax. France is around £2 more expensive, closely followed by the USA. Germany stands out by some margin as the most expensive source on average for Game Boy bundles at £55.55.

42. Bundle composition for the Game Boy is almost uniform across the four countries, being dominated by the Tetris package.

TABLE 6 **Game Boy bundle composition**

Base: All bundles including a game

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	144	167	86	64
				<i>per cent</i>
Tetris	86	72	90	77
Super Mario Land	-	14	-	-
Zelda	-	12	-	-
Other bundle	14	2	10	23

Source: BMRB survey.

The average price for the Tetris bundle was £43.80 before tax in Great Britain, followed by France at £47.67, the USA at £50.68, and Germany at £51.29.

Sales and special offers

43. Another consideration is the extent to which bundles were discounted via a sale or special offer. The questionnaire enabled the interviewer to record whether a bundle (or game) was on special offer or in a sale. The outcome for hardware bundles is shown in Table 7. However, it should be noted that this method will only record whether a title has been conspicuously discounted via a sticker or display. Also tabulated is a coefficient of variation for each bundle (calculated by dividing the standard deviation (SD) by the mean and multiplying by 100). This allows comparisons to be made on a common basis of the degree of dispersion of the recorded prices of each bundle, country by country.

44. The practice of discounting seems to be most common in Great Britain for all four bundle types. Discounting is also relatively common in the USA, although less so than in Great Britain. We found little evidence of conspicuous price cutting in either France or Germany, at least for the bundles researched.

45. In both Great Britain and the USA it was the Sonic 2 package which was the most widely discounted of the Mega Drive bundles. The Game Gear was noticeably more widely discounted in Great Britain than elsewhere. Special offers were common for all the Game Gear bundles covered in Great Britain. The same was true for SNES bundles in Great Britain, and also applied (though to a lesser extent) to SNES bundles in the USA. For the Game Boy it appears that bundles other than that comprising Tetris were more likely to be discounted.

46. The practice of discounting may well have some effect on the co-efficient of variation levels observed. However, prices tended to be fairly well distributed even in France and Germany, where prices were not obviously discounted. Thus there are no strong patterns in terms of the coefficient of variation, although both Sega bundles appear to be priced more uniformly in the USA than elsewhere.

Hardware bundle prices by retailer type

47. In Great Britain and the USA enough stores were surveyed to allow some reasonably robust breakdowns of observations by retailer type. Retailers were classified in one of three types of grouping in each country—electrical retail, general/multiple and specialist/music/toys. These store types covered are defined in detail in paragraphs 10, 102 and 108. The first section of Table 5.19 gives the average price for each hardware bundle for each retailer type in Great Britain and the USA.

TABLE 7 Coefficients of variation for hardware bundles including games

Base: All stores where price was obtained

£ sterling, before tax

	<i>Great Britain</i>				<i>USA</i>				<i>France</i>				<i>Germany</i>			
	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>
Sega Mega Drive II bundles	112.67	22.63	20.09	13	82.92	7.19	8.67	11	94.97	16.29	17.15	5	101.41	15.32	15.11	6
Sega Game Gear bundles	74.78	12.42	16.61	34	82.56	7.15	8.66	8	63.81	13.42	21.03	2	90.51	17.33	19.15	2
Nintendo SNES bundles	104.06	13.06	12.55	32	84.36	11.11	13.17	20	92.78	15.69	16.91	2	96.49	24.01	24.88	10
Nintendo Game Boy bundles	44.44	8.51	19.15	17	46.98	8.21	17.48	14	46.50	5.41	11.63	-	55.55	10.36	18.65	3

Source: BMRB survey.

48. In Great Britain the generals/multiples tend to be marginally the more expensive, and electrical retailers the cheapest for these bundles. It is worth reiterating that for the sake of some broad cross-analysis the specialist group is a composite, comprising also music and toy stores. There is little consistency in the pattern of prices by retailer in the USA.

Sega Mega Drive software

49. This section covers the availability, price and coefficients of variation for the five pieces of Mega Drive software selected by the MMC. Four of these cartridges are produced and marketed by Sega itself (Sonic Spinball, Sonic 3, Sonic 2 and Streetfighter II (Championship Edition)). The fifth (FIFA International Soccer) is an Electronic Arts product. The commentary concentrates largely on prices before tax, although prices after tax can be found in the accompanying tables.

Availability

50. One of the criteria on which these pieces of software were selected for inclusion in the survey was that they were widely available in the four countries. Table 8 lists the overall availability of each piece of software.

TABLE 8 Availability of Sega Mega Drive software

Base: All stores

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	252	252	105	102
				<i>per cent</i>
Sonic Spinball	86	88	76	81
Sonic the Hedgehog 3	93	92	71	84
Sonic the Hedgehog 2	73	66	34	81
Streetfighter II (Championship Edition)	84	79	72	77
FIFA International Soccer	88	76	52	51
All above items	83	80	61	75

Source: BMRB survey.

51. Overall the games were widely available. Sonic 2, however, was found in only a third of stores (34 per cent) in France, and only half the shops surveyed in France and Germany stocked FIFA International Soccer. At the other end of the spectrum, a score of over 90 per cent was recorded for Sonic 3 in Great Britain.

52. Looking more closely at the individual pieces of software, Sonic 3 was the most widely available game in all countries except France; availability of this game ranged from 71 per cent in France to 93 per cent in Great Britain. The results probably reflect the fact that at the time of fieldwork this game had recently been released.

53. Conversely Sonic 2 was the least widely available game in all countries but Germany. This is probably explained by retailers not restocking this game which pre-dates Sonic 3 after the release of the latter. However, it should be noted that availability was still relatively high ranging from a third of stores (34 per cent) in France to four-fifths of stores (81 per cent) in Germany.

54. Looking at availability by country, the five selected pieces of software were generally widely available in Great Britain. At the other end of the scale availability was lowest in France for four out of five of these games. The exception is FIFA International Soccer where availability was slightly lower in Germany.

Average prices

55. Table 9 shows the unweighted average price for each of the five pieces of software.

TABLE 9 Average prices of Sega Mega Drive software

Base: All stores where price was obtained

	<i>£ sterling</i>									
	<i>Great Britain</i>			<i>USA</i>		<i>France</i>		<i>Germany</i>		
	<i>Before tax</i>	<i>After tax</i>	<i>RRP</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>After tax</i>
Sonic Spinball	34.88	40.99	49.99	30.22	31.97	42.17	50.01	41.18	47.35	
Sonic the Hedgehog 3	39.58	46.51	59.99	40.70	43.09	52.13	61.83	48.90	56.24	
Sonic the Hedgehog 2	30.94	36.35	39.99	32.96	34.83	30.65	36.35	36.99	42.54	
Streetfighter 2 (Championship Edition)	44.42	52.19	59.99	44.14	46.75	51.51	61.09	49.00	56.36	
FIFA International Soccer	36.52	42.91	44.99	38.65	40.91	43.70	51.84	44.32	50.96	
All above items	37.56	44.13		37.47	39.66	46.07	54.64	44.01	50.62	

Source: BMRB survey.

56. Quite a consistent pattern emerges when looking at the before-tax prices of the five games. Overall the USA is the cheapest place to buy these five games but only by a few pence. An average price of £37.47 compares with £37.56 in Great Britain, £44.01 in Germany and £46.07 in France.

57. At the level of individual games, Great Britain is the cheapest country, before tax, for two games, FIFA International Soccer and Sonic 3, and second cheapest for the other three games in this group, Sonic Spinball, Sonic 2 and Streetfighter II.

58. France tends to be the most expensive country for the five games overall. In three cases its prices are the highest (Sonic Spinball, Sonic 3 and Streetfighter II) and in one case the second most expensive-FIFA International Soccer. However, it is interesting to note that Sonic 2, before tax, was cheaper in France than elsewhere, though it is worth remembering that this game was only available in about a third (34 per cent) of all stores. It is possible that in France the price of this game has been reduced after the release of Sonic 3, ie the recommended price was adjusted rather than the game being placed by retailers in a sale or put on special offer, as only 4 per cent of stores were noted as offering special reductions.

59. Germany is the next most expensive country. FIFA International Soccer and Sonic 2 cost more in Germany than any other; Germany was second most expensive for the other three games. SOE said that the averages for Germany reflected a number of observations in excess of the RRP. These could be due to retailers attempting to sell products far in excess of the recommended prices, or alternatively might reflect errors in data collection.

60. The fact that Great Britain is almost as cheap as the USA before tax may reflect the level of discounting in this country. Virtually all the price observations in Great Britain for Sonic 3 and Sonic Spinball were at levels lower than the RRP, although fewer undercut RRP's on Sonic 2 and FIFA (both reduced by about a third of stores) and Streetfighter II (reduced by half of the stores). Table 10 shows the proportion of games in a sale or on special offer in the countries surveyed together with a coefficient of variation.

61. For all games a higher proportion of overt discounting was present in Great Britain than any other country. The average of 17 per cent of stores offering an obvious discount compares with 8 per cent in the USA, 2 per cent in France and 1 per cent in Germany. The coefficient of variation is also higher in Great Britain than in any other country, indicating a greater range of prices observed. This may partly reflect the apparently wider practice of discounting in Great Britain, though a reasonably wide range of prices (indicated by the coefficient of variation) can also be seen in countries where discounting is less prevalent.

TABLE 10 **Coefficients of variation for Sega Mega Drive software**

Base: All stores where price was obtained

£ sterling, before tax

	Great Britain				USA				France				Germany			
	Mean	SD	Coeff of var	% sale/special offer	Mean	SD	Coeff of var	% sale/special offer	Mean	SD	Coeff of var	% sale/special offer	Mean	SD	Coeff of var	% sale/special offer
Sonic Spinball	34.88	5.38	15.42	22	30.22	3.29	10.89	10	42.17	2.61	6.19	1	41.18	4.25	10.32	1
Sonic the Hedgehog 3	39.58	3.14	7.93	22	40.70	3.83	9.41	7	52.13	4.01	7.69	3	48.90	5.51	11.27	3
Sonic the Hedgehog 2	30.94	5.90	19.07	9	32.96	4.36	13.23	6	30.65	12.57	41.01	4	36.99	4.24	11.46	0
Streetfighter 2 (Championship Edition)	44.42	8.13	18.30	16	44.14	5.15	11.67	5	51.51	4.78	9.28	1	49.00	6.17	12.59	0
FIFA International Soccer	36.52	3.81	10.43	16	38.65	2.76	7.14	12	43.70	3.29	7.53	2	44.32	5.92	13.36	0
All above items	37.56	7.00	18.64	17	37.47	6.49	17.91	8	46.07	8.25	17.91	2	44.01	7.07	16.06	1

Source: BMRB survey.

Average prices by retailer type

62. It is possible to examine the average prices of the five pieces of software in different types of retailers in Great Britain and the USA. Table 11 provides such a breakdown.

TABLE 11 Average prices of Sega Mega Drive software by retailer type

	<i>£ sterling, before tax</i>					
	Great Britain			USA		
	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>
Sonic Spinball	32.42	36.45	36.25	30.10	31.39	29.55
Sonic 3	38.97	40.16	39.62	39.68	42.43	39.87
Sonic 2	32.28	33.59	27.07	32.04	34.52	32.18
Streetfighter II (Championship Edition)	39.65	48.26	46.37	43.94	43.51	44.50
FIFA International Soccer	36.69	37.81	35.32	37.69	38.04	39.15
All above items	36.11	39.58	37.39	36.94	38.12	37.23

Source: BMRB survey.

63. In both countries general/multiple stores tend to be the most expensive places to buy the games. In Great Britain this is true in all cases. In the USA such stores are the most expensive source for Sonic Spinball (£31.39 compared with £30.10 in electrical stores and £29.55 in specialist/music/toy stores), Sonic 3 (£42.43 compared with £39.68 and £39.87) and Sonic 2 (£34.52 compared with £32.04 and £32.18), second most expensive for FIFA International Soccer (£38.04 compared with £37.69 and £39.15) and marginally cheapest for Streetfighter II (£43.51 compared with £43.94 and £44.50).

64. In both countries electrical stores tend to be the cheapest place to buy these five games. In Great Britain electrical stores are cheapest for Sonic Spinball (£32.42 compared with £36.45 in general/multiples and £36.25 in specialist/music/toy stores), Sonic 3 (£38.97 compared with £40.16 and £39.62) and Streetfighter II (£39.68 compared with £48.26 and £46.37). They are second cheapest for Sonic 2 (£32.28 compared with £33.59 and £27.07) and FIFA International Soccer (£36.69 compared with £37.81 and £35.32).

65. In the USA electrical stores are also cheapest for three games: Sonic 3 (£39.68 compared with £42.43 and £39.87), Sonic 2 (£32.04 compared with £34.52 and £33.18) and FIFA International Soccer (£37.69 compared with £38.04 and £39.15). They are second cheapest for Sonic Spinball (£30.10 compared with £31.39 and £29.55) and Streetfighter 2 (£43.94 compared with £43.87 and £44.50).

66. In Great Britain specialist/music/toy stores are close to electrical retailers in offering the lowest prices. It should be remembered, though, that this last retailer type is a composite of three types of stores.

Sega Game Gear software

67. Four of the cartridges covered in this section are produced and marketed by Sega itself (Sonic Chaos, Ecco the Dolphin, Sonic 2 and Jurassic Park), the other (NBA Jam) being an Acclaim product.

Availability

68. Table 12 lists the overall availability (that is from stock and to order) of each piece of software.

TABLE 12 **Availability of Sega Game Gear software**

Base: All stores

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	252	252	105	102
				<i>per cent</i>
Sonic Chaos	83	80	75	73
Ecco the Dolphin	78	71	49	63
Sonic the Hedgehog 2	68	55	40	67
Jurassic Park	65	82	36	65
NBA Jam	79	84	59	58
All above items	75	74	52	65

Source: BMRB survey.

69. Overall the games were widely available, the scores ranging from available in 36 per cent of stores (Jurassic Park in France) to 83 per cent of stores (Sonic Chaos in Great Britain). On the whole where games were available they were mainly available from stock.

70. Looking more closely at the five games we can see that Sonic Chaos was the most widely available game in all countries but the USA. Availability ranged from 73 per cent in Germany to 83 per cent in Great Britain. As with Sonic 3 in the Sega Mega Drive section, this high availability may reflect the fact that the game had recently been released at the time of fieldwork.

71. At the other end of the spectrum the picture is less clear cut. Jurassic Park was the least widely available in Great Britain (65 per cent) and France (36 per cent) but second widest available in the USA (82 per cent) and third in Germany (65 per cent). Sonic 2 was least widely available in the USA (55 per cent), second least widely available in Great Britain (68 per cent) and France (40 per cent).

Average prices

72. Table 13 shows the unweighted average price for each of the five pieces of Sega Game Gear software.

TABLE 13 **Average prices of Sega Game Gear software**

Base: All stores where price was obtained

	<i>£ sterling</i>									
	<i>Great Britain</i>			<i>USA</i>		<i>France</i>		<i>Germany</i>		
	<i>Before tax</i>	<i>After tax</i>	<i>RRP</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	
Sonic Chaos	24.25	28.73	29.99	26.67	28.21	29.01	34.41	31.70	36.46	
Ecco the Dolphin	25.77	30.28*	29.99	25.43	29.61	30.87	36.62	32.83	37.76	
Sonic the Hedgehog 2	22.79	26.78	27.99	26.20	27.62	19.89	23.59	32.48	37.36	
Jurassic Park	25.16	29.57	29.99	27.85	29.45	29.02	34.42	33.26	38.25	
NBA Jam	31.05	36.49	N/A	28.30	29.94	27.83	33.01	37.93	43.61	
All above items	26.00	30.55	-	27.04	28.59	27.91	33.10	33.44	38.45	

Source: BMRB survey.

*Including a small number of observations in excess of RRP.

73. Overall Great Britain is the cheapest place to buy the five Sega Game Gear games-an average price of £26.00 before tax compared with £27.04 in the USA, £27.91 in France and £33.44 in Germany. Average prices in Great Britain were close to RRP prices, where applicable.

74. Examining the data more closely shows that Great Britain is cheapest for Sonic Chaos (£24.25 compared with £26.67 in the USA, £29.01 in France and £31.70 in Germany) and Jurassic Park (£26.16 compared with £27.88, £29.02 and £33.26 respectively). Great Britain is second cheapest for Ecco the Dolphin (£25.77 compared with £25.43, £30.87 and £32.83 respectively) and second most expensive for NBA Jam (£31.05 compared with £28.30, £27.83 and £37.95 respectively).

75. Before tax, Germany is the most expensive country for all five games. France tends to be the second most expensive although there are two exceptions to this-Sonic 2 and NBA Jam where the games are cheapest in France. As with Sega Mega Drive software, SOE commented that the German averages reflected some observations in excess of RRP prices (see paragraph 59).

76. Sega Game Gear software is far more overtly discounted in Great Britain than in any of the other three countries (11 per cent of observations compared with 3 per cent in the USA, and 1 per cent in France and Germany). Overall, as shown in Table 14, the coefficient of variation is also high in Great Britain relative to the USA and Germany-18.42 compared with 14.24 in the USA. The highest coefficient, however, is the French, with a particularly wide dispersion in the prices for Sonic 2 (coefficient of variation of 39.72).

Average prices by retailer type

77. Table 15 provides a breakdown of the average prices of the five Sega Game Gear games by retailer type in Great Britain and the USA.

TABLE 14 **Coefficients of variation for Sega Game Gear software**

Base: All stores where price was obtained

£ sterling, before tax

	<i>Great Britain</i>				<i>USA</i>				<i>France</i>				<i>Germany</i>			
	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/special offer</i>
Sonic Chaos	24.45	2.76	11.29	12	26.67	2.54	9.52	3	29.01	2.85	9.82	0	31.70	2.98	9.40	2
Ecco the Dolphin	25.77	1.90	7.37	4	25.43	2.77	10.89	2	30.87	5.51	17.85	0	32.83	4.20	12.79	2
Sonic the Hedgehog 2	22.79	4.61	20.23	27	26.20	4.62	17.63	3	19.89	7.90	39.72	9	32.48	4.83	14.87	0
Jurassic Park	25.16	3.80	15.10	8	27.85	3.68	13.21	3	29.02	6.08	20.95	0	33.26	5.97	17.95	2
NBA Jam	31.05	5.49	17.68	6	28.30	4.73	16.71	3	27.83	5.92	21.27	0	37.93	6.60	17.40	0
All above items	26.00	4.79	18.42	11	27.04	3.85	14.24	3	27.91	6.30	22.57	1	33.44	5.37	16.06	1

Source: BMRB survey.

TABLE 15 Average prices of Sega Game Gear software by retailer type

Base: All stores where a price was obtained

£ sterling, before tax

	Great Britain			USA		
	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>
Sonic Chaos	24.76	25.27	23.04	24.89	26.87	27.08
Ecco the Dolphin	26.05	25.74	25.47	24.27	25.68	25.53
Sonic 2	23.15	25.70	20.84	23.90	27.76	25.89
Jurassic Park	24.79	26.06	25.04	26.90	27.77	28.19
NBA Jam	31.22	31.18	30.76	28.41	27.89	28.50
All above items	25.87	27.00	25.17	26.09	27.18	27.20

Source: BMRB survey.

78. Overall, Game Gear software is cheapest from the specialist sector in Great Britain, averaging £25.17 before tax compared with £25.87 from electrical retailers and £27.00 from general/multiples. This pattern is largely consistent across individual titles, the specialist sector being cheapest for all bar Jurassic Park, which is a little cheaper from electrical retailers (£24.79 compared with £25.04).

79. In the USA the electrical sector appears to be cheapest for these games. The average price for the five games from electrical retailers in the USA is £26.09. The average for generals/multiples and the specialist sector is almost identical (at £27.18 and £27.20 respectively). In terms of individual titles, on average electrical retailers are cheapest for four of the five games.

Nintendo SNES software

Availability

80. Table 16 shows the availability of the five selected SNES games in each country.

TABLE 16 Availability of Nintendo SNES software

Base: All stores

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	252	252	105	102
	<i>per cent</i>			
Super Mario Allstars	87	85	83	92
Super Mario Kart	78	81	68	88
Zelda 3, A link to the past	74	64	70	78
Streetfighter II Turbo	79	80	86	91
Starwing	79	76	77	87
All above items	80	77	77	87

Source: BMRB survey.

81. Generally, these five games were available in around four-fifths of the stores visited. In all cases the games were available primarily from stock. Zelda 3 tended to score less in terms of availability than the other games. It was only available in two-thirds (64 per cent) of US stores surveyed.

Average prices

82. Table 17 shows the average prices of the five selected SNES games.

TABLE 17 **Average prices of Nintendo SNES software**

Base: All stores where price was obtained

	<i>£ sterling</i>									
	<i>Great Britain</i>			<i>USA</i>		<i>France</i>		<i>Germany</i>		
	<i>Before tax</i>	<i>After tax</i>	<i>RRP</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	
Super Mario Allstars	40.33	47.39	49.99	38.02	40.19	36.98	43.86	34.21	39.34	
Super Mario Kart	33.01	38.79	39.99	33.83	35.77	38.08	45.16	35.83	41.20	
Zelda 3, A link to the past	33.41	39.26	39.99	33.33	35.22	38.35	45.49	35.18	40.45	
Streetfighter II Turbo	44.35	52.11	59.99	43.88	46.40	45.73	54.23	47.63	54.77	
Starwing	28.05	32.96	39.99	34.74	36.74	31.11	36.89	40.56	46.65	
All above items software	36.01	42.31	-	36.99	39.11	38.11	45.20	38.75	44.56	

Source: BMRB survey.

83. Overall Great Britain is the cheapest country for these five games, averaging £36.01 before tax. The USA is the next cheapest, averaging £36.99 before tax. France and Germany occupy third and fourth places at £38.11 and £38.75 respectively. About 30 per cent of British stores sold Super Mario Allstars at below RRP, compared with about 20 per cent for Super Mario Kart and Zelda 3. Streetfighter II Turbo was selling below RRP at half of the stores, as was Starwing, and this is reflected in the average after-tax prices shown in the table.

84. In terms of individual games this pattern is largely maintained, with some divergencies. Before tax Starwing in Great Britain is considerably cheaper than other SNES software, which has a notable effect on the overall price noted above. For the other four games Great Britain is generally about the same price as the USA before tax, or slightly more expensive, though cheaper than both France and Germany. The exception is Super Mario Allstars; this game is noticeably more expensive in Great Britain than in any of the other countries, both before and after tax.

85. Table 18 shows the proportion of games which were visibly discounted, together with coefficients of variation. Overall it is clear that SNES software is more likely to be discounted in Great Britain than elsewhere, affecting 16 per cent of the prices recorded. This leads to a much higher coefficient of variation being observed here. These differences are primarily due to a high level of discounting recorded for Starwing in Great Britain. A third of the Starwing prices were listed as visibly discounted, which explains its unusually low price, and its very high coefficient of variation (38.97). A fifth of Streetfighter II Turbo prices were visibly price-cut in Great Britain, as were 14 per cent of Super Mario Allstars.

TABLE 18 **Coefficients of variation for Nintendo SNES software**

Base: All stores where price was obtained

£ sterling, before tax

	<i>Great Britain</i>				<i>USA</i>				<i>France</i>				<i>Germany</i>			
	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>
Super Mario Allstars	40.33	4.12	10.22	14	38.02	3.72	9.78	4	36.98	3.46	9.36	3	34.21	4.34	12.69	4
Super Mario Kart	33.01	2.92	8.85	7	33.83	2.36	6.98	3	45.16	3.36	7.44	-	35.83	4.97	13.87	1
Zelda 3, A link to the past	33.41	2.78	8.32	5	33.33	3.65	10.95	3	38.35	1.81	4.72	-	35.18	4.46	12.68	1
Streetfighter II Turbo	44.35	8.97	20.23	19	43.88	5.73	13.06	4	45.73	7.78	17.01	5	47.63	7.10	14.91	5
Starwing	28.05	10.93	38.97	34	34.74	6.58	18.94	9	31.11	5.53	17.78	5	40.56	7.17	17.68	8
All above items	36.01	8.92	24.77	16	36.99	6.10	16.49	5	38.11	6.87	18.03	3	38.75	7.64	19.72	4

Source: BMRB survey.

Average prices by retailer type

86. Finally in this section we consider any differences in the prices of SNES software by retailer type in Great Britain and the USA.

TABLE 19 Average prices of Nintendo SNES software by retailer type

Base: All British/USA stores

	<i>£ sterling, before tax</i>					
	Great Britain			USA		
	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>
Super Mario Allstars	42.08	40.86	37.99	36.38	37.21	39.09
Super Mario Kart	33.59	34.13	31.67	31.88	33.77	34.41
Zelda 3 A link to the past	33.28	33.97	33.12	29.22	34.14	34.05
Streetfighter II Turbo	39.74	49.37	45.34	44.04	45.28	43.06
Starwing	24.08	36.45	25.84	35.88	37.69	32.82
All above items	34.58	39.23	35.10	35.77	37.68	36.91

Source: BMRB survey.

87. In Great Britain the specialist sector tends to offer the lowest prices for individual games, being either the cheapest (three games) or second cheapest (two games). However, overall electrical retailers are slightly cheaper. This is largely due to the much lower average price found among electrical retailers for Streetfighter II Turbo, nearly £6 less than specialists. The general/multiple sector is clearly more expensive than either electrical retail or specialists for SNES software in Great Britain.

88. The general/multiple sector in the USA is also the most expensive sector for SNES software, although here the differences are much smaller. Overall the electrical sector appears cheapest on average, followed by specialists and the generals/multiples.

Nintendo Game Boy software

Availability

89. Table 20 shows the availability of the five selected Game Boy games in each country.

TABLE 20 Availability of Nintendo Game Boy software

Base: All stores

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>Germany</i>
Unweighted	252	252	105	102
				<i>per cent</i>
Zelda Link's Awakening	87	73	65	90
Super Mario Land	70	73	65	93
Super Mario Land 2 (6 golden coins)	82	75	66	84
Jurassic Park	72	71	66	66
Kirby's Pinball Land	79	81	66	82
All above items	78	75	65	83

Source: BMRB survey.

90. Generally, the five games were available in about three-quarters of the stores visited. However, this format appears to be less widely available in France, where overall only two-thirds of shops visited stocked the games, or could order them. As with other availability figures tabulated in this report, those shown here are a composite measure of available from stock or to order. However, where available, these games were largely on sale from stock.

Average prices

91. Table 21 shows the average prices of the five selected Game Boy cartridges. Overall, before-tax prices for Game Boy software are cheapest in the USA, averaging £19.01. Great Britain has the next cheapest average price (£21.28), closely followed by France (£22.60) and Germany (£23.81).

TABLE 21 **Average prices of Nintendo Game Boy software**

Base: All stores where price was obtained

	<i>£ sterling</i>										
	<i>Great Britain</i>			<i>USA</i>		<i>France</i>		<i>Germany</i>			
	<i>Before tax</i>	<i>After tax</i>	<i>RRP</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>	<i>Before tax</i>	<i>After tax</i>
Zelda Link's Awakening	20.78	24.41	24.99	20.30	21.47	23.97	28.43	24.53	28.21		
Super Mario Land	19.68	23.13	21.99	14.94	15.80	19.84	23.53	20.40	23.46		
Super Mario Land 2 (6 golden coins)	25.17	29.58	29.99	19.84	20.98	24.09	28.57	24.39	28.05		
Jurassic Park	23.18	27.23	29.99	19.72	20.85	24.86	29.48	30.24	34.78		
Kirby's Pinball Land	17.40	20.45	19.99	20.05	21.22	20.22	23.98	21.67	24.92		
All above items	21.28	25.01		19.01	20.10	22.60	26.80	23.81	27.38		

Source: BMRB survey.

92. This pattern does not alter greatly when individual Game Boy titles are considered. However, Kirby's Pinball Land is cheapest in Great Britain, both before and after tax.

93. The only other divergence from the familiar pattern is the relatively high price of Super Mario Land 2 in Great Britain, both before and after tax. Before tax the average British price of £25.17 makes it unusually more expensive than both in France and Germany (£24.09 and £24.39 respectively). Apart from Jurassic Park, which was sold at below RRP in 90 per cent of British stores, the incidence of sales at below RRP was low for the Game Boy titles, and in the case of Super Mario Land a third of the price observations were at higher levels than RRP.

Average prices by retailer type

94. Table 22 shows the levels of discounting recorded for these titles, and coefficients of variation. Overall the incidence of discounting is relatively low for Game Boy software, never rising above 11 per cent even in Great Britain where it appears to be most prevalent. Nonetheless, the coefficients of variation show that each country has a broad range of prices for this format.

TABLE 22 **Coefficients of variation for Nintendo Game Boy software**

Base: All stores where price was obtained

£ sterling, before tax

	<i>Great Britain</i>				<i>USA</i>				<i>France</i>				<i>Germany</i>			
	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>	<i>Mean</i>	<i>SD</i>	<i>Coeff of var</i>	<i>% sale/ special offer</i>
Zelda Link's Awakening	20.78	2.02	9.72	11	20.30	2.20	10.84	5	23.97	2.32	9.68	-	24.53	3.19	13.00	-
Super Mario Land	19.68	2.46	12.50	2	14.94	2.80	18.74	7	19.84	2.88	14.52	3	20.40	4.50	22.06	2
Super Mario Land 2 (6 golden coins)	25.17	1.44	5.72	5	19.84	2.02	10.18	7	24.09	2.48	10.29	-	24.39	2.35	9.64	4
Jurassic Park	23.18	3.58	15.44	11	19.72	2.97	15.06	4	24.86	5.13	20.64	-	30.24	7.84	25.93	-
Kirby's Pinball Land	17.40	1.60	9.20	10	20.05	2.29	11.42	7	20.22	1.84	9.10	-	21.67	2.86	13.20	4
All above items	21.28	3.56	16.73	8	19.01	3.17	16.68	6	22.60	3.77	16.68	1	23.81	5.35	22.47	2

Source: BMRB survey.

95. This section finally considers any differences in the prices of Game Boy software by retailer type in both Great Britain and the USA (Table 23).

TABLE 23 **Average prices of Nintendo Game Boy software by retailer type**

Base: All British/USA stores

	<i>Great Britain</i>			<i>USA</i>		
	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>	<i>Electrical</i>	<i>General/ multiple</i>	<i>Specialist/ music/ toys</i>
Zelda Link's Awakening	21.41	21.21	19.58	19.48	20.47	20.44
Super Mario Land	19.43	20.59	19.21	14.89	15.23	14.76
Super Mario Land 2 (6 Golden coins)	25.52	25.44	24.54	18.48	19.90	20.25
Jurassic Park	23.76	22.96	22.81	18.60	19.41	20.17
Kirby's Pinball Land	18.34	17.33	16.52	20.02	19.76	20.29
All above items	21.77	21.46	20.60	18.46	19.01	19.16

£ sterling, before tax

Source: BMRB survey.

96. Overall the specialist sector appears to be the cheapest retail sector in Great Britain for Game Boy software. This pattern is largely maintained for individual titles, the specialist sector leading general/multiples followed by electrical retailers. However, most of the price differences are quite small.

97. In the USA the electrical sector appears to be marginally cheaper overall than either generals/multiples or specialists, a pattern largely maintained on individual titles.

Sampling points: Great Britain

98. Sampling points for the survey in Great Britain were as follows:

Crewe	Droitwich	Worcester
Renfrew	Warrington	Chester
Edinburgh	Johnstone	Paisley
Manchester	Dalkeith	East Kilbride
Ashton-Under-Lyne	Bury	Dunfermline
Darlington	Hyde	Oldham
Newcastle	Bishop Auckland	Durham
Grimsby	South Shields	Wallsend
Leeds	Hull	Cleethorpes
Leicester	Wakefield	Dewsbury
Beeston	Coalville	Melton Mowbray
Norwich	Sutton-in-Ashfield	Nottingham
Stevenage	Diss	Wymondham
Southampton	Hemel Hempstead	Harlow
Reading	Eastleigh	Havant
Eastbourne	Newbury	Bracknell
Islington	Hastings	Brighton
Barnet	Holloway	Kingsland Road
Kingston	Enfield Basin	North Finchley
Swindon	Wimbledon	Salisbury
Cardiff	Chippenham	Gloucester
Bristol	Bath	Kings Heath (Birmingham)
Birmingham	Erdington	Colwyn Bay
Llandudno	Rhyl	Stourbridg

Exchange rates and taxes

Exchange rates

99. The exchange rates used were the spot rates published in the *Financial Times* on 11 May 1994; details are as follows:

<i>Country</i>	<i>Exchange rate</i>
USA	1.491 US\$ = £1
France	8.5297 F.Fr. = £1
Germany	2.4907 DM = £1

Tax rates

100. Tax rates during the survey were as follows:

<i>Country</i>	<i>Tax rate %</i>
GB	17.5
USA	Varies by city and state:
	San Francisco, California 8.50
	Los Angeles, California 8.25
	New York, New York 8.25
	Albany, New York 8.00
	Nashville, Tennessee 8.00
	Philadelphia, Pennsylvania 7.00
	Seattle, Washington 6.50
	Chicago, Illinois 6.25
	Salt Lake City, Utah 6.25
	Dallas, Texas 6.00
	Louisville, Kentucky 6.00
	Miami, Florida 6.00
	Washington DC 6.00
	Columbus, Ohio 5.75
	Boston, Massachusetts 5.00
	Charlotte, North Carolina 5.00
	Indianapolis, Indiana 5.00
	Milwaukee, Wisconsin 5.00
	Phoenix, Arizona 5.00
	St Louis, Missouri 4.23
	Atlanta, Georgia 4.00
	Des Moines, Iowa 4.00
	Detroit, Michigan 4.00
	New Orleans, Louisiana 4.00
	Denver, Colorado 3.00
France	18.6
Germany	15.0

Sampling and fieldwork, USA

101. Given the size of the US market a number of major cities were selected in order to obtain a nationally representative picture. For each city urban and suburban areas were covered. The following cities were sampled:

Seattle, Washington
 Washington DC
 San Francisco, California
 Los Angeles, California
 Phoenix, Arizona
 Dallas, Texas
 Des Moines, Iowa
 New Orleans, Louisiana
 Nashville, Tennessee
 Detroit, Michigan
 Miami, Florida
 Philadelphia, Pennsylvania
 Columbus, Ohio

Boston, Massachusetts
 Atlanta, Georgia
 Albany, New York
 New York, New York
 Charlotte, North Carolina
 Denver, Colorado
 Salt Lake City, Utah
 Chicago, Illinois
 Milwaukee, Wisconsin
 St Louis, Missouri
 Indianapolis, Indiana
 Louisville, Kentucky

102. Retailers were selected by local supervisors in each of the 'interviewing' locations. In each market at least ten 'interviews' were completed giving a total of 252. The split by retailer type is shown below.

- Retailers of electrical equipment, eg Babbages	42
- General retailers and multiples	82
- Specialist retailers, music and video retailers and toy retailers	128

103. In the USA the survey was conducted by Goldstein Krall Marketing Resources. The price checks were carried out between 9 and 20 May 1994.

Sampling and fieldwork, France

104. Two or three cities/towns were selected in each Nielsen region and the number of outlets to be sampled in each city/town was determined on a regional basis:

Paris and surrounding area	Rennes and surrounding area
Englos	Nantes and surrounding area
Villeneuve d'Ascq	Meylan
Siers	Fontaine
Lomme	Grenoble
Nancy	Lyon
Laxou	Eschivoules
Essey	St Priest
Vandoeuvre	Marseille and surrounding area
Cormontreuil	Toulon and surrounding area
Tingueux	La Garde
Reims	Ollioulles
Tours	Aubagne
Blois	Bordeaux and surrounding area
Chambrey les Tours	Libourne and surrounding area
St Pierre des Corp	

105. In France the survey was conducted by CSA. A total of 105 price checks was carried out between 11 and 18 May 1994.

Sampling and fieldwork, Germany

106. The following cities/towns were selected as being representative of the five Nielsen areas and covering a variety of community size.

Nielsen I	Kiel Hamburg Bremen Celle
Nielsen II	Dortmund Münster Euskirchen
Nielsen IIIa	Kassel Frankfurt Saarbrücken
Nielsen IIIb	Stuttgart Augsburg Mannheim Waiblingen
Nielsen IV	München Bamberg Nürnberg
Nielsen Va	Berlin

107. Retailers were selected by local supervisors in each location.

108. The sample was structured by the following retailer types:

Department stores	23
Consumer/supermarkets	24
Electrical retailers	35
Toy retailers	13
Computer retailers	7

109. In Germany the survey was conducted by Basis Research. A total of 102 price checks was carried out between 9 and 20 May 1994.

110. No major problems were encountered. In two cases interviewers were asked to leave shops and stopped from completing their price checks.

Market profile

111. An estimate of the market profile in the countries surveyed was produced from a number of sources and is set out below. The result was not, however, felt to be sufficiently robust to weight the price observations for the main price comparisons. Mail order and catalogue stores are excluded.

TABLE 25 Estimated retailer shares, 1993

	<i>Great Britain</i>	<i>USA</i>	<i>France</i>	<i>per cent Germany</i>
Consumer electronics	43	15	11	19
Multiples/mass merchandisers/ department stores	20	49	11	45
Specialist games and computers	17		9	13
Specialist toys	10	{ 25 }	7	23
Cash and carry discounters	-	-	54	-
Music and video	10	-	8	-
Distributors	-	5	-	-
Other	-	6	-	-

Source: MMC estimate/Nintendo/Sega/Euromonitor/Mintel/Software Factbook.