

Gaming Trends: 2020 - US - December, 2019

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Growing audience elevated by heavy users
- Market shifting from product to service
- Opportunity for outside brands to get into gaming



"Global gaming revenue estimated to reach \$152.1 billion by the end of 2019, representing 66% growth from 2015. While only representing a fraction of the market, the US gaming market is growing in tandem with global expectations. In 2019, the US even gained some share on the dominant APAC market."

-John Poelking, Senior Gaming Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

- **Market overview**
Figure 1: Gaming revenue (\$ bn), global vs US, 2015-19 (est)
- **Key takeaways**
- **The hardware**
- **What happened in 2019**
Figure 2: Hardware purchasing, October 2019
- **What's coming in 2020**
Figure 3: Interest and usage of AR and VR gaming, October 2019
- **The software**
- **What happened in 2019**
Figure 4: Software purchasing, October 2019
- **What's coming in 2020**
Figure 5: Attitudes toward cloud/subscription gaming, October 2019
- **The gamers**
- **What happened in 2019**
Figure 6: Perceptions of free games, January 2019 vs October 2019
- **What's coming in 2020**
Figure 7: Popularity of non-gaming brands in gaming, October 2019
- **What it means**

THE HARDWARE – WHAT YOU NEED TO KNOW

- New hardware for the new year
- Global market is booming
- Gaming across devices is on the rise
- Investing in the gaming experiences through purchases
- The potential for alternate realities

WHAT'S COMING IN 2020 – HARDWARE

- **Next generation of consoles in time for the 2020 holidays**
Figure 8: Specifications of next generation consoles, PS5 vs Xbox Project Scarlett
- **Mobile phones will get ready for 5G gaming**
- **New accessories coming to support mobile gaming**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Gaming computer competition is ratcheting up**
- **Haptic feedback will be more intuitive in controls**

THE GLOBAL GAMING MARKET

- **Gaming is a global phenomenon**
Figure 9: Gaming revenue, global vs US, 2015-19
- **US catching up to heavy APAC gaming influence**
Figure 10: Global gaming market share and US gaming revenue, 2018 and 2019
- **Smartphones dominate revenue, but console and PC games growing quickly**
Figure 11: Global gaming revenue, by market segment, 2018 and 2019

GAMING DEVICES

- **Seven in 10 US adults play games**
Figure 12: Video game devices, October 2019
- **Who's playing every week?**
Figure 13: Crossover of gaming device use and frequency, October 2019
- **Active mobile gamers**
Figure 14: Active mobile gamers, by key demographics, October 2019
- **Active computer gamers**
Figure 15: Active computer gamers, by key demographics, October 2019
- **Active console players**
Figure 16: Active console gamers, by key demographics, October 2019

HARDWARE PURCHASING

- **Ponying up for games and devices**
- **Even split between physical and digital games**
- **Gamers still buy dedicated hardware**
Figure 17: Hardware purchasing, October 2019
- **Multicultural audience spending on hardware**
Figure 18: Hardware purchasing, by race and Hispanic origin, October 2019
- **Active console gamers are the most lucrative target market**
Figure 19: Hardware purchasing, by gaming segments, October 2019

INTEREST IN AR AND VR

- **Most gamers expect immersive environment in the future...**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: AR/VR as the future, October 2019

- **...but many gamers still need to be convinced**

Figure 21: Interest and usage of AR and VR gaming, October 2019

- **Middle-aged gamers interested in an immersive gaming experience**

Figure 22: Interest and usage of AR and VR gaming, October 2019

THE SOFTWARE – WHAT YOU NEED TO KNOW

- **Marching into a crowded 2020**
- **2019 standouts include fresh takes on classic games**
- **Hesitation to adopt a new service model**
- **In-game purchases drive software spending**

WHAT'S COMING IN 2020 – SOFTWARE

- **Delayed releases will get their due in spring**
 - **Big players are doubling down on gaming services**
 - **Publishers and developers to bridge the gap between them**
- Figure 23: Meet the Creators — Apple Arcade, March 2019
- **Outside players will build awareness**
 - **Freemium will not be the standard**

STANDOUT GAME MOMENTS IN 2019

- **The event that knocked out Fortnite**
- Figure 24: Twitter and Instagram mentions of Fortnite, by day, September–October 2019
- **Apex Legends hits huge milestone in first month**
 - **Unsuccessful launch prompts redesign**
 - **Untitled Goose Game puzzles the masses**
- Figure 25: Untitled Goose Game – Launch Trailer – Nintendo Switch, September 2019
- **Big publishers leave their mark on mobile**

GAME SERVICES: SUBSCRIPTION, CLOUD AND ONLINE STORES

- **Education important to gain momentum for subscription services**
- Figure 26: Interest and usage of cloud/subscription gaming, October 2019
- **Cross-platform play intrigues, but adoption of subscriptions might take time**
- Figure 27: Attitudes toward cloud/subscription gaming, October 2019
- **PlayStation beating Xbox on service front**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 28: Awareness and interest in console subscription services, October 2019

- **Online stores work for exclusive titles**

Figure 29: Awareness and interest in online game stores, October 2019

- **Apple plays catch up**

Figure 30: Awareness and interest in Apple Arcade, October 2019

- **Awareness will be essential to emerging cloud services**

Figure 31: Awareness and interest in cloud gaming services, October 2019

Figure 32: Google Stadia emails, November 2019

SOFTWARE PURCHASING

- **Spending to boost the gaming experience**
- **Evolving microtransactions**
- **Interacting with players**

Figure 33: Software purchasing, October 2019

- **Hispanics more likely to indicate in-game spending**

Figure 34: Software spending, by Hispanic origin, October 2019

THE GAMER – WHAT YOU NEED TO KNOW

- **The definition of “gamer” is shifting**
- **Bring game conversations further into the mainstream**
- **Larger gaming audience looks to chill rather than thrill**
- **Gamers play often, but not for a long time**
- **Streaming video to impact gameplay**
- **Most gamers prefer casual genres**
- **Gamers open to outside sponsorships**
- **Improving public perceptions**

WHAT'S COMING IN 2020 – GAMERS

- **Other entertainment will integrate with the gaming world**
- **Mainstream media will cover gaming**
- **The community will need to respond to video game addiction**
- **Gaming participants will consider the impact of their actions**
- **Brand marketing will be timed with gaming events**

MOTIVATIONS FOR GAMING

- **Casual fun drives most gamers...**

Figure 35: Reasons to play games, October 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **...but social and competitive gamers are incredibly engaged**

Figure 36: Profile of social gamers and competitors, by key demographics, October 2019

TIME SPENT ON GAMING

- **Nearly half of gamers play daily**
- **Nearly one quarter of gamers looking to play more in 2020**

Figure 37: Frequency of gameplay, October 2019

Figure 38: Expectations for time spent gaming – 2020 vs 2019, October 2019

- **Hours spent gaming vary wildly**
- **Gaming content consumption is limited to active gamers**

Figure 39: Hours spent playing video games, October 2019

Figure 40: Hours spent watching video game content, October 2019

COMPETITION IN THE ENTERTAINMENT WORLD

- **Gaming faces stiff competition from other outlets...**
- **...but is becoming more integral to gamers' lives over time**

Figure 41: Preference of in-home leisure activities, August 2019

Figure 42: Gaming vs other entertainment, 2015-19

PREFERRED GAMING GENRES

- **Casual games garner the largest fan base**
- **Casual genres bolstered heavily by older gamers, women**
- **Competitors, social gamers spread love amidst the action**

Figure 43: Favorite gaming genres ranked, October 2019

Figure 44: Favorite gaming genres ranked – Casual games, by age and gender, October 2019

Figure 45: Favorite gaming genres ranked – Action games, by gamer segment, October 2019

MARKETING IN GAMING

- **Entertainment, food have made early forays into gaming marketing**
- **Case studies: non-gaming brands in gaming**
- **Competitive and social gamers want brand involvement**
- **Opportunities to reach a multicultural gaming audience**

Figure 46: Mtn Dew Amp Game Fuel energy drink range, 2019

Figure 47: Popularity of non-gaming brands in gaming, October 2019

Figure 48: Popularity of non-gaming brands in gaming, by gamer segments, October 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Popularity of non-gaming brands in gaming, by race and Hispanic origin, October 2019

ATTITUDES TOWARD GAMING

- **Room to grow safe spaces for gamers and appeal for non-gamers**

Figure 50: Attitudes toward perceptions of the gaming world, October 2019

- **Gamers engaged in the conversation**
- **Boost appeal of gaming content**
- **The role of eSports**

Figure 51: Attitudes toward gaming culture, October 2019

- **Improve the perception of free games**

Figure 52: Perceptions of free games, January 2019 vs October 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

APPENDIX – THE GAMER

Figure 53: Genres played by gamers, 2015–19

Figure 54: Number of games bought in the past year, 2015–19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.