

This report looks at the following areas:

- Next generation consoles will ride a wave of hype in 2020
- Action genres, developers differentiate console gameplay
- Brand loyalty and hardware matter

A volatile market will see huge interest from a dedicated console gaming audience looking for an upgraded (but still familiar) gaming experience from the brands and games that they are loyal to. New games and upgraded formats should propel interest in console gaming into the next generation of devices.



"2020 is a transition year between console generations, capped off by the releases of the PS5 and Xbox Series X at the end of the year."

John Poelking, Senior
 Gaming Analyst

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

Report Price: £3695 | \$4995 | €4400

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

- What you need to know about console gaming in 2020
- Console market overview

Figure 1: Total US unit sales of video game consoles, 2014-20

 Three key players: PlayStation, Xbox and Nintendo Figure 2: Type of console used, November 2019

- Top takeaways
- Key trends
- Next generation consoles will ride a wave of hype in 2020
 Figure 3: Interest in purchasing next generation of consoles,
 all vs console players, November 2019
- Action genres, developers differentiate console gameplay
 Figure 4: Developers played, all vs console gamers,
 November 2019
- Brand loyalty and hardware matter
 Figure 5: Brand loyalty and the importance of hardware, all gamers vs console gamers, November 2019
- What it means

THE MARKET - WHAT YOU NEED TO KNOW

- · Console market gears up for next generation
- Three main console brands had different results in the latest generation
- The gaming audience is dedicated and diverse
- Console cycles supported by home entertainment investments
- · Gaming is increasingly important for gamers

MARKET SIZE

 Console market reflects peaks and valleys due to generational release cycle

Figure 6: Total US unit sales of video game consoles, 2014-20

MARKET BREAKDOWN

PlayStation

Figure 7: Total US unit sales of PlayStation consoles, 2014-19

Xbox

Figure 8: Total US unit sales of Xbox consoles, 2014-19

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.

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

Report Price: £3695 | \$4995 | €4400

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



Nintendo

Figure 9: Total US unit sales of Nintendo consoles, 2014-19

THE US GAMER: WHO THEY ARE AND HOW THEY PLAY

Who are gamers?

Figure 10: Profile of US gamers, by key demographics, November 2019

Mobile attracts the most attention

Figure 11: Gaming devices, November 2019

· Gamers game all the time

Figure 12: Frequency of gaming and weekly hours, November 2019

Casual gaming is common

Figure 13: Reasons to play video games, November 2019

Puzzle and board games have the biggest audience

Figure 14: Favorite gaming genres ranked, October 2019

MARKET FACTORS

- · Console release cycles drive direction of hardware sales
- · Affordable HD TVs are in most homes

Figure 15: Types of TVs owned, August 2019

Most homes invest in high speed internet

Figure 16: Home internet source, July 2019

MARKET PERSPECTIVE

Gaming is more competitive with other entertainment

Figure 17: Gaming vs other entertainment, 2015-19

Half of parents play video games with their kids

Figure 18: Time spent on gaming with kids, August 2019

KEY PLAYERS – WHAT YOU NEED TO KNOW

- · Different brands for different console gamers
- · Services are a key area of focus
- Some old and new gaming models struggle as audiences disappear
- Preparing for the future of console gaming

PLAYSTATION, XBOX AND NINTENDO

- PlayStation (Sony)
- Current console: PS4
- · The gamer

Figure 19: Profile of PlayStation players, by key demographics, November 2019

• What happened in 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.

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

Report Price: £3695 | \$4995 | €4400

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



What's coming in 2020

Figure 20: Estimated specifications of PS5

- Xbox (Microsoft)
- Current console: Xbox One
- The gamer

Figure 21: Profile of Xbox players, by key demographics, November 2019

- What happened in 2019
- What's coming in 2020

Figure 22: Estimated specifications of Xbox Series X

- Nintendo
- Current console: Nintendo Switch
- · The gamer

Figure 23: Profile of Nintendo players, by key demographics, November 2019

- What happened in 2019
- What's coming in 2020

WHAT'S WORKING

- Switch, PS4 hit milestones in 2019
- Building up subscription offerings

Figure 24: Awareness and interest in console subscription services, October 2019

- Remote play challenges the cloud
- Boosting the streaming platform

WHAT'S STRUGGLING

· Handheld devices give way to hybrids

Figure 25: @alienware "Concept UFO" Instagram post, January 2020

- Rental market takes a hit
- Selling a digital-exclusive model
- Few standout games in 2019

WHAT TO WATCH

- Making greener consoles
- Broadening the idea of "exclusive"
- Heading to the cloud

Figure 26: Awareness and interest in cloud gaming services, October 2019

Bumping up VR content

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.

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

Report Price: £3695 | \$4995 | €4400

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



THE CONSUMER - WHAT YOU NEED TO KNOW

- Dedicated hardcore gamers overrepresented in console gaming
- Games for two groups of consoles
- · Console gamers are looking to buy
- · Console gamers look to other gamers for hardware advice
- The next generation will be driven by a desire to upgrade
- · Gaming accessories need to perform
- · Positive perceptions and heavy play go hand in hand
- Familiarity creates hype for upcoming games
- Console gamers play differently
- New (but familiar) experiences are important to console gamers

CONSOLE GAMER OVERVIEW

 Active console gamers represent typical gaming demographics

Figure 27: Profile of active console gamers, by key demographics, November 2019

- PlayStation has slight edge on competition
 Figure 28: Type of console used, November 2019
- Many console players are brand and device loyal
 Figure 29: Number of consoles and brands used, November 2019

GAMING GENRES AND DEVICES

- PlayStation and Xbox
- Nintendo

Figure 30: Correspondence analysis – Symmetrical map – Perceptions of gaming devices, November 2019

HARDWARE PURCHASE INTENT

- Interest in current generation of consoles remains
 Figure 31: Gaming console purchase intent, all vs console players, November 2019
- Xbox, pro console players look to invest in consoles
 Figure 32: Gaming console purchase intent, by type of console played, November 2019
- Other gaming devices don't attract as much interest
 Figure 33: Other gaming device purchase intent, all vs
 console players, November 2019
- Console gamers will bulk up their home systems
 Figure 34: TV and speaker purchase intent, all vs console players, November 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.

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

Report Price: £3695 | \$4995 | €4400

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



GAMING HARDWARE PURCHASE INFLUENCERS

Reviews, gaming influencers go a long way with console gamers

Figure 35: Gaming hardware purchase influencers, by gamers vs console players, November 2019

Pro console players need hardware tested by gamers
 Figure 36: Gaming hardware purchase influencers, by gamers
 and pro console players, November 2019

• Gamers will influence the sale of next generation consoles
Figure 37: Gaming hardware purchase influencers, by interest
in next generation consoles, November 2019

NEXT GENERATION CONSOLES

Half of console players plan to buy new consoles
 Figure 38: Interest in purchasing next generation of consoles,
 all vs console players, November 2019

PlayStation, Xbox gamers ready to upgrade
 Figure 39: Interest in purchasing next generation of consoles,
 by type of console played, November 2019

- Power will be a key selling point for new consoles
- Memory, brand important for potential buyers
- **Key opportunity: exclusive games for console players**Figure 40: Reasons to purchase a next generation console, all vs console gamers, November 2019
- Nintendo players want games, Xbox just want something different

Figure 41: Reasons to purchase a next generation console, by brand of console played, November 2019

New consoles won't change minds of non-gamers
 Figure 42: Reasons not to purchase a next generation console, November 2019

GAMING ACCESSORIES

- Better controls necessary for a good console experience
 Figure 43: Interest and ownership in controls, November 2019
- Brighten the home with other gaming accessories
 Figure 44: Interest and ownership in miscellaneous accessories, November 2019

PERCEPTIONS OF GAME DEVELOPERS

- Reputation matters to console gamers
 Figure 45: Attitudes toward brand reputations, November 2019
- Developers fight for attention in crowded landscape

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.

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

Report Price: £3695 | \$4995 | €4400

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



Figure 46: Perceptions and use of game developers, November 2019

Console preferences highlight partner opportunities
 Figure 47: Developers played, all vs console gamers,
 November 2019

PlayStation and Xbox players attract similar interests
 Figure 48: Developers played, by type of console played,
 November 2019

REASONS TO TRY A NEW GAME

Franchises, gamer recommendations go a long way for console players

Figure 49: Reasons to try a new game, all vs console gamers, November 2019

Console brands need to differentiate game advertising
 Figure 50: Reasons to try a new game, by type of console played, November 2019

CONSOLE GAMING BEHAVIORS AND PREFERENCES

Console gamers spend more across multiple titles
 Figure 51: Playing different games at a time, all gamers vs console gamers, November 2019

Good hardware and brand loyalty matter
 Figure 52: Brand loyalty and the importance of hardware, all gamers vs console gamers, November 2019

PlayStation, Xbox gamers look under the hood
 Figure 53: The importance of hardware, by type of console played. November 2019

ATTITUDES TOWARD GAMING AND CONSOLES

Cross-platform gameplay boosts appeal for cloud gaming
 Figure 54: Attitudes toward cloud gaming, November 2019

Social console gaming builds community
 Figure 55: Attitudes toward social gaming, November 2019

Console gamers say new is better
 Figure 56: Attitudes toward new devices, November 2019

Different brands seek new ways to enter the future
 Figure 57: Attitudes toward new gaming experiences, by type of console played, November 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Consumer survey data

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.

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

Report Price: £3695 | \$4995 | €4400

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



- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE MARKET

Figure 58: Total US unit sales of video game consoles, by console, 2014-19

APPENDIX - CORRESPONDENCE ANALYSIS

Methodology

Figure 59: Correspondence Analysis – Principal map – Perceptions of gaming devices, November 2019
Figure 60: Perceptions of gaming devices, November 2019

APPENDIX - THE CONSUMER

Figure 61: When players buy games, by console brand, April 2018-June 2019

Figure 62: Types of games played most, by console brand,

April 2018-June 2019

Figure 63: Number of games bought in the last year, by console brand, April 2018–June 2019

Figure 64: eSports viewing, by console brand, April 2018-June 2019

Figure 65: Renting games, by console brand, April 2018-June 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.

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.