

Console Gaming: Spotlight on the Next Generation - US - April 2021

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:

- How the COVID-19 pandemic has changed console gaming behaviors and attitudes
- What will change about gameplay and video game expectations with the arrival of next generation consoles
- How Nintendo, PlayStation and Xbox reach different corners of the console gaming market
- What will happen to older consoles and the resale market as new consoles hit shelves

Console gaming has taken on a particular importance for both new as well as established players since the start of the COVID-19 pandemic. The Nintendo Switch has diversified the console gaming audience with relaxing family-friendly gameplay, while the arrivals of the PS5 and Xbox Series X/S satisfy more dedicated, action-oriented gamers' needs. Console players are some of the most dedicated players, making it essential for gaming and non-gaming brands to understand their needs and wants to reach them.



"2020 was a banner year for console gaming. Nintendo Switches flew out of stores as console players sought a relaxing escape from the pandemic, while the launches of the PS5 and Xbox Series X/S ignited interest among established players. Console brands will build on this momentum in 2021 by showing off new games and investing in service offerings." – **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

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Definition
- Market context
- Economic and other assumptions
- COVID-19: US context

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US unit sales of video game consoles, 2013-21 (est)
- **Impact of COVID-19 on console gaming**
Figure 2: Short-, medium- and long-term impact of COVID-19 on console gaming, April 2021
- **Opportunities and challenges**
- **Console players want new consoles as quickly as they can**
Figure 3: Next generation console ownership and purchase intent, February 2021
- **Older consoles still have value during generational transition**
Figure 4: Video game console ownership, February 2021
- **Brand loyalty is strong but getting tested**
Figure 5: Number of consoles and brands used, 2020-21
- **Leading console brands will define market positions to satisfy audience**
Figure 6: Correspondence analysis – Symmetrical map – Perceptions of console brands, February 2021
- **COVID-19 strengthened community and social gaming among console players**
Figure 7: Attitudes toward community and connected gameplay, December 2019 and February 2021

THE MARKET – KEY TAKEAWAYS

- 2020 sales boom set to reverberate into 2021
- Nintendo in a strong position to hold off new arrivals
- PlayStation and Xbox enter the next generation with confidence
- Most adults incorporate video games into their lives
- Stumbling blocks in 2020 will likely be overcome throughout 2021

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

MARKET SIZE

- **Fluctuating sales saw big boost in 2020**

Figure 8: Total US unit sales of video game consoles, 2013–21 (est)

Figure 9: Total US unit sales and year-over-year change of video game consoles, 2013–21 (est)

- **Impact of COVID-19 on console gaming**
- **Immediate impacts (2020)**
- **Short term (2021)**
- **Recovery (2022–25)**
- **Learnings from the Great Recession**
- **Strong console performance of previous generations points to success even in a downturn**

Figure 10: Global unit sales of Nintendo Wii, PS3 and Xbox 360, 2006–08

SEGMENT PERFORMANCE

- **Nintendo pulls ahead of the competition with Switch**

Figure 11: US video game console market share, 2013–20

Figure 12: US video game console market share, 2013–20

- **New console releases lead to major gains for leading brands**

Figure 13: US console unit sales, by brand, 2013–20

- **Nintendo**

Figure 14: Nintendo US unit sales, by console, 2013–20

- **PlayStation**

Figure 15: PlayStation US unit sales, by console, 2013–20

- **Xbox**

Figure 16: Xbox US unit sales, by console, 2013–20

TARGET AUDIENCE – THE US GAMER

- **Who are gamers?**

Figure 17: Profile of US gamers, by key demographics, February 2021

- **Mobile attracts the largest audience**

Figure 18: Gaming devices used, February 2021

- **Gaming is a daily habit**

Figure 19: Frequency of gaming and weekly hours, February 2021

- **Casual gaming is common**

Figure 20: Reasons to play video games, February 2021

- **Puzzle and board games have the largest audience**

Figure 21: Preferred gaming genres – Any rank, all gamers vs console gamers, October 2020

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

MARKET FACTORS

- **Economic recovery will encourage consumer spending**
Figure 22: GDP change from previous period and personal consumption expenditures, Q1 2018–Q4 2020
- **Employment may affect big ticket tech purchases**
Figure 23: Unemployment and underemployment, January 2020–January 2021
- **Promising holiday sales signal strong launch for new consoles...**
Figure 24: New console unit sales, November 2020–December 2020
- **...but supply issues could keep sales lagging behind last generation**
Figure 25: PlayStation and Xbox console sales, 2013 vs 2020
- **COVID-19 encourages gaming investments, online gaming**
Figure 26: Online gaming activities done since COVID-19, August 2020

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Nintendo: reaching families and promoting versatility**
- **PlayStation: elite and immersive**
- **Xbox: power and services**
- **Brands can provide value by emphasizing new experiences and community**

COMPETITIVE STRATEGIES – NINTENDO

- **Nintendo player overview**
Figure 27: Nintendo consumer profile, by key demographics, February 2021
- **Current console: Nintendo Switch**
Figure 28: Nintendo Switch US unit sales, 2017–20
- **Marketing strategies: “My way to play”**
Figure 29: Nintendo “My way to play” banner ad, July 2020
Figure 30: Nintendo Switch My Way – Super Mario Odyssey commercial, June 2020
- **What happened in 2020**
- **Animal Crossing became the game of the pandemic**
Figure 31: Animal Crossing: New Horizons Facebook ad, May 2020
- **New emphasis on cooperative, online gameplay**
Figure 32: Nintendo Switch – Play Together commercial, May 2020
- **Switch shortages shift focus to Switch Lite**
Figure 33: Nintendo Switch Lite banner ad, July 2020

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

- What to watch in 2021 and beyond

COMPETITIVE STRATEGIES – PLAYSTATION

- **PlayStation player overview**
Figure 34: PlayStation consumer profile, by key demographics, February 2021
- **Current console: PS5**
- **Marketing strategies: "Play has no limits"**
Figure 35: PS5 banner ad, November 2020
- **The games**
Figure 36: PS5 Launch – New Worlds to Explore – Play Has No Limits commercial, November 2020
- **The technology**
Figure 37: PS5 haptic feedback Instagram ad, September 2020
- **What happened in 2020**
- **Building hype throughout the year**
Figure 38: PS5 Facebook ad, October 2020
- **Trying to get as many consoles out as possible**
Figure 39: PlayStation PS5 launch tweet, November 2020
- **What to watch in 2021 and beyond**

COMPETITIVE STRATEGIES – XBOX

- **Xbox player overview**
Figure 40: Xbox consumer profile, by key demographics, February 2021
- **Current console: Xbox Series X/S**
Figure 41: Xbox Series X/S announcement tweet, September 2020
- **Marketing strategies: "Power your dreams"**
- **Emphasizing technical superiority**
Figure 42: Xbox Series X|S Launch trailer – Us Dreamers – Power Your Dreams commercial, October 2020
- **Everything tied in to service offerings**
Figure 43: Xbox All Access banner ad, September 2020
- **What happened in 2020**
- **Entering the cloud with Xbox Game Pass Ultimate**
Figure 44: Xbox Game Pass Ultimate Instagram ad, December 2020
- **Learning and responding to PlayStation missteps**
- **What to watch in 2021 and beyond**

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

MARKET OPPORTUNITIES

- **Utilize gaming services to extend the console gaming experience**
Figure 45: Gaming services use and interest, by active gamer segments, December 2020
- **Balance paid and free games for value-seeking players**
Figure 46: Attitudes and behaviors related to the cost of games, November 2020
- **Enhance console gameplay with new accessories**
Figure 47: OtterBox accessories Instagram post, January 2021
- **Create opportunities for the console community to come together**
Figure 48: Attitudes toward gaming and connection, all gamers vs console gamers, October 2020

THE CONSUMER – KEY TAKEAWAYS

- **Typical hardcore gaming demographics represented in console gaming**
- **Console brands will utilize unique perceptions to strengthen audience and solidify brand image**
- **Nearly two thirds of console gamers are ready for new hardware**
- **Players want to see the improvements for new consoles**
- **Difficult console buying experiences won't deter committed players**
- **Familiar experiences on older consoles remain valuable**
- **2020 re-invigorated interest in consoles and community**

CONSOLE GAMER OVERVIEW

- **Active console gamers represent engaged gamer groups**
Figure 49: Active console gamer profile, by key demographics, February 2021
- **New consoles have ground to make up, but PlayStation has a good start**
Figure 50: Video game console ownership, February 2021
- **Brand loyalty is strong now, but could weaken**
Figure 51: Number of consoles and brands used, December 2019 and February 2021

PERCEPTIONS OF CONSOLE BRANDS

- **PlayStation**
- **Xbox**
- **Nintendo**

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 52: Correspondence analysis – Symmetrical map –
Perceptions of console brands, February 2021

PURCHASING NEXT GENERATION CONSOLES

- **PS5 set to have a big year if supply keeps up with demand**
- **PS5**
- **Xbox Series X/S**

Figure 53: Next generation console purchase intent, February 2021

- **Xbox efforts could bring PlayStation users over**

Figure 54: Learning about consoles and switching brands, by console brands owned, February 2021

Figure 55: Xbox switching consoles tweet reply, September 2020

REASONS TO UPGRADE TO NEW CONSOLES

- **High expectations for quality of next gen games**
Figure 56: Attitudes toward the benefits of next generation consoles, February 2021
- **Next generation needs to live up to the hype**
Figure 57: Attitudes toward next generation hype, February 2021
- **Graphics, gameplay will define a new generation of games**

Figure 58: Most important reasons to upgrade to new consoles, February 2021

- **Long-time players stick by brands they trust**
Figure 59: Most important reasons to upgrade to new consoles – Brand, by key demographics, February 2021

CHALLENGES TO BUYING NEXT GENERATION CONSOLES

- **Communication is key to easing stress of buying new consoles**
Figure 60: Attitudes toward the challenges of buying new consoles, February 2021
- **Purchase difficulties may not discourage potential console owners**
Figure 61: Experience purchasing new consoles, February 2021
- **Some cautious console buyers need to see other people's praise**

Figure 62: Cautiousness about new consoles, February 2021

REPLACING CONSOLES

- **Old consoles hold value even when upgrades happen**

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

Console Gaming: Spotlight on the Next Generation - US - April 2021

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 63: Playing on old consoles vs upgrading to new ones, February 2021

- **Players would rather game until their console breaks than sell early**

Figure 64: Playing until a console breaks vs selling a used console, February 2021

ATTITUDES TOWARD CONSOLE GAMING

- **A console rivalry exists, but PlayStation fans are a little more loyal**

Figure 65: Loyalty and rivalry among console brands, by console brand owned, February 2021

- **Community and social gameplay get stronger from 2020**

Figure 66: Attitudes toward community and connected gameplay, December 2019 and February 2021

- **The arrival of new consoles makes console gaming more important for Xbox, PlayStation players**

Figure 67: The importance of console gaming, by console brand owned, February 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Consumer survey data
- Marketing creative
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

Figure 68: US console unit sales, by console, January 2020–February 2021

Figure 69: US Nintendo console unit sales, 2013–20

Figure 70: US PlayStation console unit sales, 2013–20

Figure 71: US Xbox console unit sales, 2013–20

APPENDIX – CORRESPONDENCE ANALYSIS

- **Methodology**

Figure 72: Perceptions of console brands, February 2021

Figure 73: Correspondence analysis – Principal map – Perceptions of console brands, February 2021

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)**.