



PC Gaming: Desktops and Laptops - US - January 2020

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:

- Powerful machines needed for a great gaming experience
- PC gamers improve performance with accessories
- Reputation matters to PC gamers
- PC gamers invest in a larger library of games

The market for PCs is in decline as unit sales fell from 2014-19. However, PCs remain relevant in gaming and 31% of all adults play on a computer; among gamers, the share increases to 44%.

There is significant crossover between gaming on a PC and other platforms, making it a very fluid market covering a wide variety of interests. Most PC gamers use a Windows computer, with HP and Dell leading the market on the manufacturer side. The PC gaming audience overall is split pretty evenly between desktops and laptops. However, older gamers favor desktops and younger gamers play on laptops. As laptop computing power improves, desktops will need to double down on component sales and at-home value to stay relevant (see Gaming PCs: Types, Operating Systems and Brands).



"From older casual gamers playing simple card games on their home computers to younger gamers investing in dedicated gaming hardware, the PC gaming audience encompasses a vast array of interests."

- 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

- **PC gaming overview**
Figure 1: PC gamer overview, November 2019
- **Top takeaways**
- **Key trends**
- **Powerful machines needed for a great gaming experience**
Figure 2: PC hardware priorities, November 2019
- **PC gamers improve performance with accessories**
Figure 3: Gaming accessories ownership and interest, November 2019
- **Reputation matters to PC gamers**
Figure 4: Perceptions of and experience playing games from different developers, November 2019
- **PC gamers invest in a larger library of games**
Figure 5: Playing different games at a time, all gamers vs computer gamers, November 2019
- **What it means**

THE MARKET – WHAT YOU NEED TO KNOW

- **PCs falling on hard times...**
- **...but the US gaming audience is growing**
- **Growth in other sectors hurts PC gaming**

THE PC MARKET

- **Declining computer sales can hurt PC gaming**
Figure 6: Total US retail unit sales and forecast of PCs (desktop and laptop computers), 2014–24
- **PC game sales fall sharply amidst free-to-play revolution**
Figure 7: Total US retail unit sales and forecast of PCs (desktop and laptop computers), 2014–24
- **PC game sales fall sharply amidst free-to-play revolution**
Figure 8: Total US computer video game sales, 2014–18

THE US GAMER: WHO THEY ARE AND HOW THEY PLAY

- **Who are gamers? Not just young men**
Figure 9: Profile of US gamer, by key demographics, November 2019
- **Nearly half play on smartphones; about one third on PCs**
Figure 10: Gaming devices, 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.

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.

- Three quarters of gamers play at least a few times a week**

Figure 11: Frequency of gaming and weekly hours, November 2019

- Most gamers play casually**

Figure 12: Reasons to play video games, November 2019

- Puzzle and card games get the biggest audience**

Figure 13: Favorite gaming genres ranked, October 2019

MARKET FACTORS

- 5G and the proliferation of mobile devices**

Figure 14: Mobile device ownership, May 2018 and August 2019

- Trade war may have an impact on gaming hardware**

KEY PLAYERS – WHAT YOU NEED TO KNOW

- PC manufacturers fighting for the average computer gamer**
- Working toward more versatile online gameplay**
- Brands fight back against market regression**
- Technology attempts to catch up to consumer expectations**

GAMING PCS: TYPES, OPERATING SYSTEMS AND BRANDS

- Laptop and desktop gamers make up nearly even share of the market**

Figure 15: Type of computer for playing video games, November 2019

- Three quarters of PC gamers use a Windows OS**

Figure 16: Operating systems used for gaming, November 2019

- Crowded hardware market led by HP and Dell**

Figure 17: Gaming computer manufacturers, November 2019

WHAT'S WORKING

- Online stores gaining steam**

Figure 18: Awareness and interest in online game stores, October 2019

- Versatility for the casual and competitive gamers**

- Improving the free-to-play experience**

WHAT'S STRUGGLING

- Decline in household desktop ownership**

Figure 19: Household ownership of desktop and laptop computers, 2015-19

- Getting games ready for PCs**

- Curbing harassment in the online community**

Figure 20: Harassment in gaming, 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.



WHAT TO WATCH

- The impact of cloud gaming on computers**
Figure 21: Awareness and interest in cloud gaming services, October 2019
- Bumping up the resolution on monitors**
- Improved haptic feedback to immerse PC gamers**
- Incorporating the viewing experience into gameplay**
- Combining the console and PC experience**

THE CONSUMER – WHAT YOU NEED TO KNOW

- Look under the hood for the best hardware**
- Investment in gaming PCs will come from the people already using them**
- Take heed of hardware advice**
- Accessories enhance gameplay**
- Find the gaming genres associated with PC gaming**
- Familiarity makes new games more appealing**
- A developer's reputation matters**
- PC gamers want more diversity and better hardware**
- The best gameplay experience can be anywhere**

PC HARDWARE PRIORITIES

- Power over pizzazz**
Figure 22: PC hardware priorities, November 2019
- Young PC gamers want the works**
Figure 23: PC hardware priorities, by age, November 2019
- Desktop gamers expect more from machines**
Figure 24: Computer hardware priorities, by type of computer, November 2019
- Feature priorities differ by brand ownership**
Figure 25: PC hardware priorities, by computer manufacturer, November 2019

GAMING PC PURCHASE INTENT

- PC gamers have plans to buy**
Figure 26: Gaming PC purchase intent, November 2019
- Desktop gamers more likely to invest in laptops, but not vice versa**
Figure 27: Gaming PC purchase intent, by type of computer, November 2019

GAMING HARDWARE PURCHASE INFLUENCERS

- PC gamers check more sources**
Figure 28: Reasons to buy gaming hardware, 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.

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.

- **Desktop gamers look to reviews, while laptops look to influencers**

Figure 29: Reasons to buy gaming hardware, by type of computer, November 2019

GAMING ACCESSORIES

- **PC gamers need custom control**

Figure 30: Gaming accessories ownership and interest – Controls, November 2019

- **Bringing comfort and style**

Figure 31: Gaming accessories ownership and interest – Peripherals, November 2019

- **Adding on to the gaming experience**

Figure 32: Gaming accessories ownership and interest – External storage and screens, November 2019

- **Competitive gamers maintain control by updating accessories**

Figure 33: Gaming control replacements, by gamer segments, November 2019

GAMING GENRES AND DEVICES

- **Gamers associate laptops and desktops with similar genres**

Figure 34: Correspondence analysis – Symmetrical map – Perceptions of gaming devices, November 2019

REASONS TO PLAY A NEW GAME

- **PC gamers look for outside opinions on games**

Figure 35: Reasons to play a new game, November 2019

- **Competitors and social gamers want different types of messages**

Figure 36: Reasons to play a new game, by gamer segments, November 2019

PERCEPTIONS OF GAME DEVELOPERS

- **A game's reputation matters**

Figure 37: Attitudes toward game reputations, November 2019

- **Familiarity breeds appreciation**

- **Everybody loves Nintendo**

- **Relevance leads to success for other big developers**

- **Spotlight: independent developers**

Figure 38: Perceptions of and experience playing games from different developers, November 2019

- **PC gamers play games from a variety of developers**

MINTEL

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 39: Number of developers played, November 2019

- Biggest gaps in play highlight PC advantages**

Figure 40: Experience playing games from different developers, all gamers vs PC gamers, November 2019

PC GAMING BEHAVIORS AND PREFERENCES

- PC gamers more likely to play a larger library of games**

Figure 41: Playing different games at a time and free vs paid, all gamers vs computer gamers, November 2019

- Younger generations of PC gamers looking to subscriptions**

Figure 42: Paying per game and subscriptions, by generation, November 2019

- Gaming device loyalty up for grabs, PC gamers want the best hardware**

Figure 43: Hardware importance and gaming device loyalty, all gamers vs computer gamers, November 2019

ATTITUDES TOWARD GAMING

- PC gamers are open to cloud gaming**

Figure 44: Attitudes toward cloud and mobile gaming, November 2019

- Enhancing the gaming experience through new devices**

Figure 45: Attitudes toward gaming accessories and devices, November 2019

- Isolation can be part of the gaming experience**

Figure 46: Attitudes toward gaming community and isolation, November 2019

- Apple gamers welcome the future**

Figure 47: Attitudes toward devices and cloud gaming, by gaming computer manufacturer, November 2019

- Desktop gamers need the best**

Figure 48: Attitudes toward devices, by type of computer, November 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

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

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.



APPENDIX – THE CONSUMER

Figure 49: Perceptions of and experience playing games from different developers – Table, November 2019

APPENDIX – CORRESPONDENCE ANALYSIS

• Methodology

Figure 50: Correspondence analysis – Principal map – Perceptions of gaming devices, November 2019

Figure 51: Perceptions of gaming devices, November 2019

Figure 52: Correspondence analysis – Symmetrical map – Perceptions of gaming devices among PC gamers, November 2019

Figure 53: Correspondence analysis – Principal map – Perceptions of gaming devices among PC gamers, November 2019

Figure 54: Perceptions of gaming devices among PC gamers, 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.

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.