Gaming Trends: 2022 - US - 2022

Report Price: £3695 | $4995 | €4400

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This report looks at the following areas:

- **Gaming industry marketing during the winter holiday shopping period of 2021**
- **Acquisitions, issues and trends throughout 2021, along with predictions for 2022**
- **What player characteristics influence device preferences and time commitments**
- **Consumer interest in gaming hardware upgrades and other gaming-related purchases, including food and beverage preferences**
- **Attitudes toward the gaming community, monetization and viewership**

The gaming industry continued to expand in 2021, even exceeding the explosive growth from 2020. However, supply chain issues continue to impact the gaming industry, and rising inflation in the US could impact consumers' interest and ability to make expensive entertainment purchases. To combat this, major console manufacturers are already extending console lifespans; they are also shifting more focus toward cloud gaming to offset consumers' hesitancy to purchase physical goods in stores. Meanwhile, gaming subscription services are evolving to provide consumers a greater value than individual purchases. Through these efforts, game sales and in-game transactions should continue to see growth in 2022.

Of course, the new year brings exciting new games, but with COVID-19 continuing to push many industry events to digital spaces, it will be interesting to see how the industry reacts. E3 has long been a staple gaming event in the US but continues to show signs of decline. New gaming films in 2022 will bring more gamers to the theaters and streaming services will introduce non-gamers to some of the gaming industry's hottest franchises. From classics such as Dragon's Lair and Super Mario to new gaming IPs like Cuphead and The Last of US, the gaming industry is set for a packed cinematic year.

"The gaming industry continues to grow even as COVID-19 variants shut down major industry events and hardware shortages limit stock in stores. Gamers themselves remain interested as both players and as viewers, motivated by their desire to see gaming crossover with other forms of entertainment."

– Brian Benway, Gaming and Entertainment Analyst

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The metaverse and NFTs became buzzwords in the last months of 2021. While they've both certainly excited many business executives and individuals already enthusiastic about crypto, the response from the gaming media and gamers has been largely negative. New tech shouldn't be dismissed outright, but the discussion needs to move beyond speculative concepts and investment opportunities into something that offers practical value to consumers.

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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- **US follows similar growth trajectory but stronger hardware sales**

ADVERTISING TRENDS

- **Social media, YouTube particularly, dominated 2021 gaming advertising**
  Figure 9: Video game industry monthly advertising spend, by channel, 2021
  Figure 10: Video game industry top sites for advertising by percentage of spend, 2021
- **Publishers went big on game ads, while consoles showcased services**
  Figure 11: Top video game industry companies by advertising spend, 2021
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KEY DEVELOPMENTS IN 2021

- **Big financial moves – IPOs and acquisitions**
- **Legal issues – Apple vs Epic, Riot Games, Ubisoft, Activison Blizzard**
- **Award winning games of 2021**
  Figure 13: Condensed list of The Game Awards 2021 winners

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- **Sour grapes over a gaming success story or whistle-blower?**
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- **Blockchain, Crypto and gaming NFTs**
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- **Impact of COVID-19 on gaming**

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- **Exclusive games, the sellers of systems**
- **Xbox will look to capitalize on its recent acquisitions**
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- **PlayStation feels like it hasn't fully moved past the PS4 with new sequels**
  Figure 17: God Of War: Ragnarok from Santa Monica Studio, 2021
- **Nintendo's tent poles Pokémon and Zelda are evergreen**

Figure 18: Pokémon Legends Arceus from Game Freak and The Pokémon Company, 2022

- **Subscription services will become a battleground**
- **VR will continue to grow and metaverse will continue to puzzle**

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Connecting with consumers and brands in a world without E3**
- **2022 will be a huge year for video game movies**
- **Netflix expands gaming-related shows, other services should take note**
- **What Mintel's 2022 Consumer Trends mean for video games**
- **Ethics Check**

Figure 19: Attitudes toward gaming company behavior, by consumer gaming segment, 2021

Figure 20: Attitudes toward bias in gaming, by multicultural young adults aged 18-34, 2021

Figure 21: Video game ad prevention measures, by generations, 2021

THE VIDEO GAME CONSUMER: FAST FACTS

- **55% of adult gamers play on a smartphone**
- **27% of gamers play to socialize with friends, the top gaming motivator**
- **46% of adult gamers play on a daily basis**
- **54% of Socializers scored new hardware, leading hardware purchasers**
- **49% of console gamers wanted to purchase a hardware upgrade in 2021**
- **33% of gamers tried out a new gaming genre in 2021**
- **30% of gamers want to see their favorite games on snack food bags**
- **53% of gamers agree, games are an important way to connect with others**
- **75% of gamers still prefer to play a game, rather than watch someone else**

GAMING DEVICES AND PLAYING FREQUENCY

- **Mobile drives growth in gaming audience in 2021**

Figure 22: Video game devices played, 2019-21

- **Device preferences likely influenced by recent console releases for frequent gamers**

Figure 23: Weekly ("active") gamers, by device used, 2019-21

About Mintel

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