

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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



"While girls are significantly more likely to enjoy games typically found on mobile devices, boys tend to be engaged in aspects of gaming that require more of an investment. Perceptions of gaming popularity and socialization tend to decrease with age, and younger teen boys appear to be the most dedicated to gaming."

- **John Poelking, Leisure Analyst**

This report looks at the following areas:

- **New generation of consoles lack spark**
- **Saving may be a priority for teens**
- **Interest cools with age**

Video games include any game played digitally, including mobile, computer, console, and online games. This Report focuses on consumer attitudes of teen and tween gamers.

For the purposes of this Report, Mintel has used the following definitions:

- **Tweens:**
children aged 10-11
- **Teens:**
children aged 12-17
- **Younger teens:**
children aged 12-14
- **Older teens:**
children aged 15-17.

Readers of this Report may also be interested in Mintel's *Gaming Consoles – US, September 2016* and *Attitudes Toward Gaming – US, June 2016*.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

The issues

New generation of consoles lack spark

Figure 1: Video game consoles owned or played, October 2015-November 2016

Saving may be a priority for teens

Figure 2: Male younger teens' spend on video games and electronics, January 2007-November 2016

Interest cools with age

Figure 3: Teen and tween gaming attitudes – Select items, by age and gender, February 2017

The opportunities

Screen-centric lifestyles breed avid gamers

Figure 4: Must-have video game features for teens and tweens, February 2017

The gender divide

Figure 5: Teen and tween video game genres played, by gender, February 2017

The meteoric rise of eSports

Blurring the lines between mobile and console gaming

Figure 6: Teen and tween devices used to play video games – Nets, February 2017

Capitalizing on demonstrations

Figure 7: Teen and tween promotional considerations, February 2017

What it means

The Market – What You Need to Know

Gaming console sales cyclical

Teen gaming expectations shifting

Paying for games

The Gaming Consoles Market

Console sales down but not out

Figure 8: Total US unit sales of gaming consoles, 2011-16

Previous generation consoles have higher ownership

Figure 9: Video game consoles owned or played by teens, October 2015-November 2016

Market Perspective

Screen-centric activities common

Mobile app usage more common among teen girls

Immediate content seen as a basic right for the iGeneration

Smartphone, laptop, tablet ownership up

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Market Factors

Male population higher in younger age groups

Figure 10: Number and ratio of males to females, by age, 2017

Figure 11: Teen enjoyment of video games, by gender, October 2015-November 2016

Some teens working

Figure 12: Teen income, October 2015-November 2016

Savings-conscious teens may not spend as much

Figure 13: Male teen spend on video games and electronics, January 2007-November 2016

Investments in mobile network infrastructure

Key Players – What You Need to Know

Gaming developers target teens and tweens

Teens want their voices heard

Struggling to maintain engagement

The new way to game

Spotlight on Gaming Developers

Rovio Entertainment Ltd.

Rockstar Games, Inc.

Nintendo Co., Ltd.

Valve Corporation

Blizzard Entertainment, Inc.

What's Working?

Beta testing allows teens to give opinions

Teens want content now

Mobile gaming popular

Corporate partnerships boost technical innovation

Creating friendships online

What's Struggling?

Negative, aggressive pockets of competitive gamers

Keeping content relevant

New consoles struggle for price-conscious populace

What's Next?

eSports: the future of video game consumption

Rapidly-growing fanbase

Top gamers entering stardom

Scholarships for eSports

The Amazon effect

Blending mobile and console with Nintendo Switch

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 14: First Look at Nintendo Switch video, October 2016

- Virtual reality living up to the hype
- Subscription gaming services
- Gaming in the cloud

The Consumer – What You Need to Know

- Mobile and dedicated gaming fairly even
- Stark gender divides in preferred video game genres
- Solo play a major draw
- Willing to invest in new products
- Word of mouth is a powerful tool
- Taking solace in gaming
- Fun trumps performance

Devices Used to Play Video Games

Mobile and dedicated console gaming fairly even

Figure 15: Teen and tween devices used to play video games, February 2017

Most teens and tweens game on multiple devices

Figure 16: Teen and tween devices used to play video games – Number of devices, February 2017

Not entirely a boys club

Figure 17: Teen and tween devices used to play video games – Nets, by gender, February 2017

Older teens less likely to game

Figure 18: Teen and tween devices used to play video games – Nets, by age, February 2017

Urban teens and tweens game more

Figure 19: Teen and tween devices used to play video games, by area, February 2017

Gaming consoles popular among Hispanics

Figure 20: Teen and tween devices used to play video games, by Hispanic origin, February 2017

Types of Video Games Played

Diversity of genres illustrates complex gaming landscape

Teens and tweens gravitate toward action

Mobile puzzle games enjoyed by many

The power of Minecraft

Figure 21: Teen and tween video game genres played, February 2017

Stark gender divide in gaming preferences

Figure 22: Teen and tween video game genres played, by gender, February 2017

Age restrictions change gaming preferences

Figure 23: Teen and tween video game genres played – Select items, by gender and age, February 2017

Avid gamers more interested in any genre

Figure 24: Teen and tween video game genres played, by number of devices played, February 2017

Video Game Features

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Asserting independence through gameplay

Figure 25: Must-have video game features for teens and tweens, February 2017

Teen and tween boy gamers seeking challenging, engaging gameplay

Figure 26: Must-have video game features for teens and tweens – Select items, by gender and age, February 2017

Hispanic teens expect more from gaming

Figure 27: Must-have video game features for teens and tweens – Select items, by Hispanic origin, February 2017

Video Game Purchases

New, not cheap

Figure 28: Teen and tween video game purchases, February 2017

Older teen boys less likely to invest in gaming

Figure 29: Boys' video game purchases – Select items, by age, February 2017

Avid gamers more likely to enhance gaming

Figure 30: Teen and tween video game purchases – Select items, by number of devices played, February 2017

Later purchases more likely for new games

Figure 31: When teens purchase new games, by all vs boys by age, October 2015-November 2016

Teen and Tween Promotional Considerations

Family and friends play influential roles

Figure 32: Teen and tween promotional considerations, February 2017

Tween boys want to know what they're getting into

Figure 33: Teen and tween boys promotional considerations, by age, February 2017

Teen and Tween Gaming Behaviors

Gaming mostly solitary

Figure 34: Teen and tween gaming behaviors, February 2017

Girls tend to mobile game

Figure 35: Teen and tween gaming behaviors – Select items, by gender, February 2017

Social gaming diminishes with age

Figure 36: Teen and tween social gaming behaviors, by age, February 2017

Teen and Tween Attitudes toward Gaming

Enjoyment over skill

Figure 37: Teen and tween gaming attitudes, February 2017

Younger teens and tween boys most engaged with gaming innovations

Figure 38: Teen and tween gaming attitudes – Select items, by age and gender, February 2017

Video games more important than TV to young men

Figure 39: Male attitudes toward video games, October 2015-November 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Teen and Tween Gaming - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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 40: Young male teen spend on video games and technology, January 2007-November 2016

Figure 41: Teen debit and credit card ownership, and type of bank account, October 2015-November 2016

Appendix – Key Players

Figure 42: Teens' interest in video game rentals, January 2007-November 2016

Appendix – The Consumer

Figure 43: What teens aged 12-17 spend their money on – Trended, October 2007-November 2016

Figure 44: What teen boys aged 12-14 spend their money on – Trended, October 2007-November 2016

Figure 45: What teens aged 12-17 spend their money on, by gender and age, October 2015-November 2016

Figure 46: When teen gamers usually buy new games, by gender and age, October 2015-November 2016

Figure 47: Teens' aged 12-17 attitudes toward money – Trended, October 2007-November 2016

Figure 48: Teens' aged 12-17 attitudes toward money, by gender and age, October 2015-November 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com