

## **United States Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The United States Gaming Market size is estimated at USD 57.91 billion in 2024, and is expected to reach USD 90.79 billion by 2029, growing at a CAGR of 9.41% during the forecast period (2024-2029).

The increased adoption of video streaming apps on mobile devices and televisions to watch movies, TV shows, and live events on-demand, has driven the demand for the gaming industry in the country. Moreover, many consumers want to play the latest games without requiring a new PC or a console. This has aided the development of newer formats as well.

#### **Key Highlights**

- According to a study by the ESA, last year, more than 227 million players in the United States region played video games. In total, 80% of the players are over 18 years old. Furthermore, 76% of American kids under 18 years are players. In addition, 74% of American households have at least one video game player. Also, during the pandemic, 71% of parents agree that video games have been a much-needed break for their children. Also, 66% of parents agree that video games made the transition to distance learning more accessible.
- Further, 57% of the players used smartphones, 46% consoles, and 42% personal computers for playing video games. Also, 29% spent 1 to 3 hours per week, 77% spent more than 3 hours a week, and 51% spent more than 7+ hours playing video games in the country last year.
- Some key vendors, like Microsoft, which generates the largest revenue share in the United States, are focusing on leveraging the growing video game consumption in the country by launching new products. In November 2020, Microsoft launched the Xbox Series X and the Xbox Series S with live and virtual global activations. The games developed for the new consoles showcase visuals at 120 FPS. The consoles are equipped with 12 teraflops of processing power with AMD Zen 2 and RDNA 2 architectures.
- In addition, some of the prominent foreign players are expanding their presence in the United States to leverage the growth in

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the gaming market. For instance, the Chinese gaming company, Tencent Holdings, launched a new studio in California last year. The company built the new studio to focus on publishing AAA titles. The company generates half of its gaming revenues from overseas.

-Some of the major US-based video game companies are focusing on mobile gaming to improve their positions in the market. Last February, Electronic Arts Inc. acquired the US-based developer of mobile games, Glu Mobile, for USD 2.1 billion. The acquisition doubled Electronic Arts' mobile business.

-Also, due to the enforced lockdown during the COVID-19 pandemic, people have been staying at home and turning toward gaming platforms to pass their time. These platforms have been attracting more than hundreds and thousands of new visitors in online traffic.

-Video gaming trends experienced a significant surge in players and revenue last year. Organizations such as Microsoft, Nintendo, Twitch, and Activision, have reached new heights in player investment. Further, last year, Microsoft reported that subscribers to Xbox Game Pass, a Netflix-like subscription service, topped 10 million. Among those subscribers, Microsoft reported a 130-percent increase in multiplayer engagement across March and April.

## US Gaming Market Trends

### Mobile Gaming Segment Expected to Dominate the Market

- Mobile gaming is the most favored form of gaming in the United States, overtaking both console and PC gaming. Moreover, the increasing demand for mobile games results from various technological advancements and improvements such as AR, VR, cloud gaming, and 5G. This trend is not unexpected, considering the mobile game industry mainly relies on new technology. Other trends in the market include the rise of the hyper-casual game genre.

- AR is being utilized in mobile gaming owing to its immersive and interactive technology. Moreover, mobile games are the most famous AR category in app stores. Apart from previously released AR mobile games, which are still famous, such as Pokemon Go and Ingress, many new additions to the genre are being made by vendors in the market, such as Minecraft Earth and Harry Potter: Wizards Unite.

- The development of cloud gaming is an emerging technology across the United States gaming industry, which allows the user to stream advanced games across hand-held devices, especially mobiles, with fast network connectivity, thereby eradicating the requirement of regular hardware upgrades or gaming console/PC/laptops.

- The release of high-speed 5G and unlimited data plans is also expected to be a critical factor toward the success of cloud gaming in the country, as most gamers prefer games on their smartphones. The increasing services, development, and investment in 5G infrastructure are essential toward this success. Moreover, mobile games are growing faster than PC online games, primarily due to free-to-play options. The advent of cloud-based mobile gaming is set to drive this growth even further.

- In November 2021, Netflix started rolling out its mobile video games to Android users where the subscribers have the option of playing five different games on the app, including "Stranger Things: 1984," "Stranger Things 3: The Game," "Shooting Hoops," "Card Blast," and "Teeter Up." The company announced that the games would first launch for Android phones and later be available on Apple's iOS.

- Cloud gaming is also expanding across this sector due to the dominance of low and mid-level smartphones globally. For instance, in June 2021, California-based Now.gg, operating under the umbrella of Bluestacks, an Android-PC gaming firm, launched a mobile cloud platform for game developers targeting low-end and mid-level smartphone users to access high-performance games without lag or loss of resolution.

### Growing Cloud Gaming subscriptions

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- The gaming market in the United States saw an unprecedented growth in the recent years due to increased mobile penetrations and availability of new consoles in the market. The United States is one the largest markets for gaming industry and the country has the biggest library of games available to its citizens. Also, the COVID-19 pandemic increased the need for people to engage themselves in immersive experiences while staying at home. In addition, affordable VR equipment and 5G implementation allowed many users in the country to engage in mobile gaming.
- Cloud gaming services are leveraging hyper-scale cloud capabilities, global content delivery networks, and streaming media services to build the next generation of platforms for interactive, immersive, and social entertainment. The proliferation of edge data centers in the country also facilitates the accelerated growth of mobile gaming in the United States.
- The steady incline in 5G mobile networks in the country is expected to drive the surge in the adoption of mobile gaming as performance constraints associated with low wireless bandwidth and high latency will decrease. In August 2020, the White House and Defense Department announced a plan to accelerate 5G adoption by making more spectrum available to the telecoms, earlier used for high-power defense radar. The efforts by the government to speed up the rollout of 5G in the country also helps in reducing the latency lag, thus, providing a smooth gaming experience.
- Moreover, telecoms are working to determine how well their networks support the requirements of shifting potentially billions of gamers onto streaming services. All three major operators in the United States, i.e., AT&T, T-Mobile, Verizon, and T-Mobile, have begun working with cloud gaming companies, such as PlayGiga, Hatch, and Microsoft Xbox Game Pass, to test and develop services, including bundling deals that offer mobile data packages alongside subscriptions.

## US Gaming Industry Overview

The United States Gaming Market is fragmented and has some major players who have adopted various growth strategies, such as mergers and acquisitions, new product launches, expansions, joint ventures, partnerships, and others, to strengthen their position in this market. The major players in the market are Activision Blizzard Inc., Electronic Arts Inc., Take-Two Interactive Software Inc., Zynga Inc., and Microsoft Corporation, among others.

- July 2022: Codemasters and Electronic Arts Inc. launched EA SPORTS F122, the official game of the 2022 FIA Formula One World Championship, for PlayStation5, Xbox Series X|S, PlayStation4, Xbox One, and PC via Origin Steam.
- May 2022: Take-Two Interactive Software announced the completion of its combination with Zynga Inc. Under the merger agreement's terms, Zynga stockholders received USD 3.50 in cash and 0.0406 shares of Take-Two common stock per share of Zynga common stock.

## Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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