



Euromonitor
International

Video Games in the US

June 2025

Table of Contents

Video Games in the US - Category analysis

KEY DATA FINDINGS

2024 DEVELOPMENTS

Kidult-focused releases, online connectivity, and innovative business models fuelled growth

Chart 1 - Key Trends 2024

INDUSTRY PERFORMANCE

Video games software drives growth, targeting kidults with key releases

Pokémon capitalises on the card collecting trend; Digimon emulates its approach

Chart 2 - Pokémon Reinvents Card Collecting with TCG Pocket Launch in 2024

PlayStation drives cloud gaming via streaming and peripherals

Chart 3 - PlayStation Tests Cloud Streaming on PS Portal to Merge Console and Mobile Gaming

Final Fantasy VII remake highlights the complexities of kidult-driven remakes

Chart 4 - Analyst Insight

WHAT'S NEXT?

Video games software set to drive growth in video games

Focus on core brands expected to shape video games moving forward

E-sports set to be a growth area along with investment and professionalisation

Indie developers gain ground amid triple-A issues and publisher layoffs

COMPETITIVE LANDSCAPE

Microsoft shifts focus to try and boost its share of sales

Niantic sells its game studio to Scopely amid market shifts

Big Mode thrives amidst financial pressures and triple-A failures

CHANNELS

Digital channels dominate video games retail, particularly software, propelled by subscriptions

Hypermarkets remains an important channel for sales of video games hardware

Digital key resale platforms grow alongside digital distribution

COUNTRY REPORTS DISCLAIMER

Toys and Games in the US - Industry Overview

EXECUTIVE SUMMARY

Growth driven by kidults, tech innovations and rising cloud gaming

KEY DATA FINDINGS

Chart 5 - Key Trends 2024

INDUSTRY PERFORMANCE

After decline for toys and games in 2023, video games drives growth in 2024

Success of Final Fantasy VII Rebirth and Lego exemplifies growth of the kidult trend

Chart 6 - Final Fantasy VII Rebirth: Critically Acclaimed 2024 Sequel Expands Iconic RPG Trilogy

PlayStation pushes cloud gaming via PS Portal and subscription services

Chart 7 - Analyst Insight

WHAT'S NEXT?

Video games to lead growth in toys and games

Core brands and media-related releases set to impact the trajectory of toys and games

Community, legacy and innovation set to contribute to growth

COMPETITIVE LANDSCAPE

Fisher-Price is revitalised and Lego maintains growth in a fragmented landscape

Spin Master acquires Melissa & Doug amidst pre-school market challenges

Fisher-Price and Hasbro reinvigorate core brands amid consumer caution

Chart 8 - Fisher-Price Wood Combines Sustainability and Nostalgia with New FSC-Certified Toys

Microsoft's change of strategy in response to falling sales

CHANNELS

E-commerce boom driven by video games software and competitive pricing strategies

Physical retail also remains important, with omnichannel retailing prevalent

Mattel set to open its first theme park, also expanding its retail presence

ECONOMIC CONTEXT

Chart 9 - Real GDP Growth and Inflation 2019-2029

Chart 10 - PEST Analysis in the US 2024

CONSUMER CONTEXT

Chart 11 - Key Insights on Consumers in the US 2024

Chart 12 - Consumer Landscape in the US 2024

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/video-games-in-the-us/report.