Gaming PCs and Monitors Achieve Double Digit Growth in Q2 2019, According to IDC

FRAMINGHAM, Mass., September 30, 2019 – Global shipments of gaming desktops, notebooks, and monitors reached 10.4 million units in the second quarter of 2019 (2Q19), up 16.5% year over year, according to the International Data Corporation (IDC) Worldwide Quarterly Gaming Tracker. A combination of better comparisons against an abysmal 2018, easing CPU shortages, and improved GPU inventory helped the overall market achieve growth.

Gaming notebooks continued to hold the largest share of the gaming device market in 2Q19 and grew 12.7% year over year, boosted by the launch of models that support ray tracing along a wide spectrum of price points. Gaming desktops, which saw a string of tough quarters from 2018 thru the first quarter of 2019, finally recovered with shipments growing 3.3% year over year due to an improved supply of Intel CPUs, an easing of previously excessive GPU inventory, and a revamped pricing structure for ray tracing-capable GPUs. Fears of additional price hikes due to Chinese import tariffs also played a role, boosting overall device shipments in the U.S. Finally, demand for gaming monitors remained strong, posting a record high quarter in volume and continuing to outpace the other two categories in terms of year-over-year growth.

"Even as the second quarter saw a general reprieve for gaming desktops, the decline of gaming desktops in emerging markets, particularly in China, is concerning for vendors and signals the larger trend of moving toward more mobile form factors that can still get the job done," said Jay Chou, research manager for IDC's Personal Computing Device Tracker. "Gaming notebooks increasingly bring that value proposition of portability while also narrowing the performance gap against desktops."

Beyond the current quarter, IDC anticipates the market for gaming desktops, notebooks, and monitors will grow 9.6% for the full year of 2019, reaching 42.8 million units. Compared to the previous forecast, IDC has increased its short-term outlook but lowered the long-term forecast for desktop and notebooks while increasing the outlook for gaming monitors. Continued investment in hardware and an increasingly pervasive and accessible gaming ecosystem are expected to help to sustain steady, if modest gaming device adoption, resulting in an expected 55.2 million units by the end of 2023.

Gaming notebooks are expected to still take the lion's share of volume and revenue with the form factor seeing strong innovations in thinner dimensions and performance. Further entrants in the entry and mid-level notebook space will also bring intense competition. While desktops will remain the most powerful gaming device, cannibalization from its notebook sibling has led IDC to revise its outlook for this category. Continued developments in other arenas such as mobile gaming can also distract spending and prolong life cycles, while emerging usage models like cloud gaming could expand the gamer base while potentially challenging non-premium systems in the mid to long term.

Worldwide Gaming Tracker Forecast by Product Category, Shipments, Market Share, and 2019 - 2023 CAGR (shipments in millions)

Product Category	2019 Shipments*	2019 Market Share*	2023 Shipments*	2023 Market Share*	2019 - 2023 CAGR*
Desktop	15.6	36.4%	16.8	30.4%	1.8%
Monitor	7.8	18.3%	11.6	21.0%	10.3%
Notebook	19.4	45.3%	26.8	48.6%	8.4%
TOTAL	**42.8**	**100.0%**	**55.2**	**100.0%**	**6.5%**

Source: IDC Quarterly Gaming Tracker, September 30, 2019

*** Note:** All figures represent forecast data.

Taxonomy Note: IDC identifies Gaming PCs as desktops or notebooks that have a Premium or Performance grade GPU. This includes the mid-range and high-end offerings from Nvidia and AMD. Professional grade GPUs, such as the Quadro or Radeon Pro, are excluded from IDC's Gaming PC definition. For monitors, IDC identifies Gaming Monitors as those with a refresh rate of 100 Hz or higher.

IDC's Worldwide Quarterly Gaming Tracker provides detailed, timely, and accurate information on the global PC gaming market. This includes data and insight into global trends around desktop (DT) and notebook (NB) gaming systems as well as gaming monitors. The program provides insightful analysis, quarterly market share data, and a five-year forecast that can be broken down by key geographies.

About IDC Trackers

IDC Tracker products provide accurate and timely market size, vendor share, and forecasts for hundreds of technology markets from more than 100 countries around the globe. Using proprietary tools and research processes, IDC's Trackers are updated on a semiannual, quarterly, and monthly basis. Tracker results are delivered to clients in user-friendly excel deliverables and on-line query tools.

For more information about IDC's Worldwide Quarterly Gaming Tracker, please contact Kathy Nagamine at 650-350-6423 or knagamine@idc.com.

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