

2024

Essential Facts

About the U.S. Video Game Industry

30

Advancing the Power
of Play Since 1994





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Foreword

Video games are one of America's most beloved forms of entertainment – **190.6 million Americans play video games weekly**. Those of us who remember first generation consoles like Atari, or who grew up playing Oregon Trail on their first home PC, have now been dedicated players for nearly 50 years. As video games have evolved, our love and appreciation for them has grown along with them.

Yesterday's old school gamers are now parents and grandparents of the next generation of players – but just because they've come of age doesn't mean they've stopped playing. In fact, it's quite the opposite. **Twenty years ago, the average video game player was 29 years old. Today, the average player is 36** and has been playing for almost 17 years. And these lifelong players are playing video games with their children more than ever – 83% play video games with their kids, sharing with them a sense of adventure, challenge and joy.

Not only has the common archetype of who we think of as a “gamer” expanded, but the ways in which we play have shifted dramatically. The introduction of the modern smartphone ushered in mobile games. Gone are the days of carrying a separate device to play a video game on-the-go. With games now at our fingertips, the barrier to entry to play a video game doesn't exist, as reflected in the fact that the number of people who play games on their phone has grown 136% over the past 12 years. **Seventy-eight percent of players now play on a mobile device. Today, everyone can be a gamer.**

Another groundbreaking technological invention from the recent past – the Internet – enabled video game companies to transform the player experience with online cooperative gameplay, opening avenues for community building unlike anything before it. The result? **In 1999, only 18% of players reported playing “on-line”. Today, nearly 90% enjoy some form of online gameplay.** The ability to play games online has brought the video game community closer than ever. 72% of players believe that video games create a sense of community – a community that is united around shared love of play and enables people to find new friends or even their life partner.

The U.S video game industry is at an exciting crossroad. Generation Alpha is poised to become the biggest generation of players we've seen yet. As they come of age and become the next generation of video game developers, engineers, artists and storytellers, the extraordinary potential of video games to delight, inspire, teach and bring us together will undoubtedly continue to transform our lives.

Stanley Pierre-Louis
President & Chief Executive Officer
Entertainment Software Association

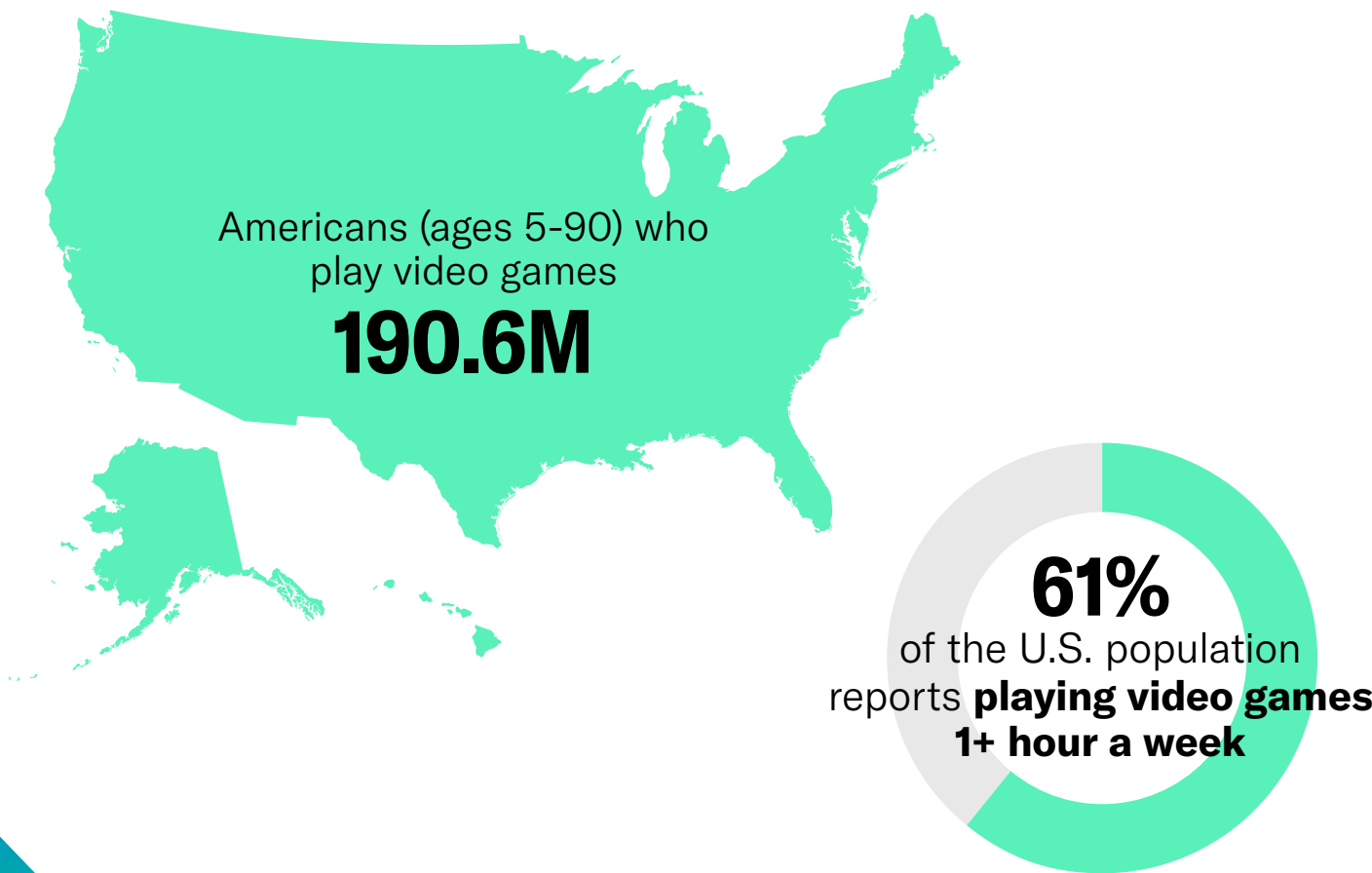


Yesterday's old school gamers are now parents and grandparents of the next generation of players – but just because they've come of age doesn't mean they've stopped playing. In fact, it's quite the opposite.

Who Plays Games

Games are for everyone.

Video games are one of America’s most dynamic and beloved pastimes. It’s no surprise that so many people choose to play.

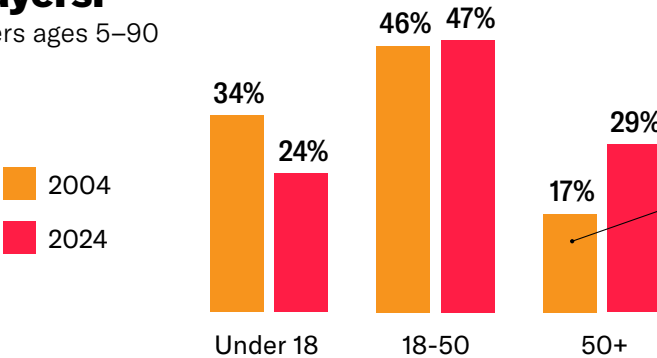


People of all ages play.

Adults and kids enjoy playing video games, and continue to play as they grow.

Ages Of Players:

Among Total Players ages 5–90



In 2004, only **17%** of players were aged 50+

In 1999, this number was even lower at **9%**



29

Average player age in 2004



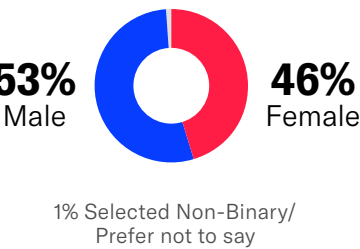
36

Average player age in 2024

Games are inclusive and foster a sense of belonging.

Players come from all walks of life, with engagement across age, gender and racial/ethnic groups.

Players Are:



11%
Identify as LGBT

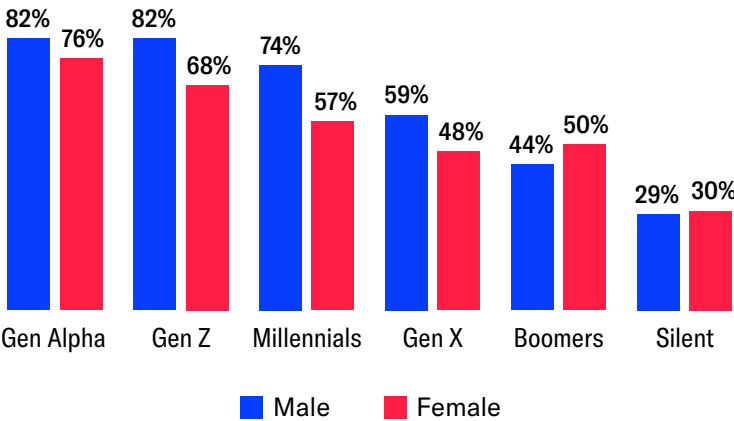
LGBT Self Identification Of Players:

Ages 18+

	Gen Z	Millennials	Gen X	Boomers/ Silent
Yes	17%	12%	9%	6%
No	77%	83%	89%	93%
Did not wish to answer	6%	4%	2%	1%

Gender By Generation:

% Play Video Games 1+ Hour Per Week

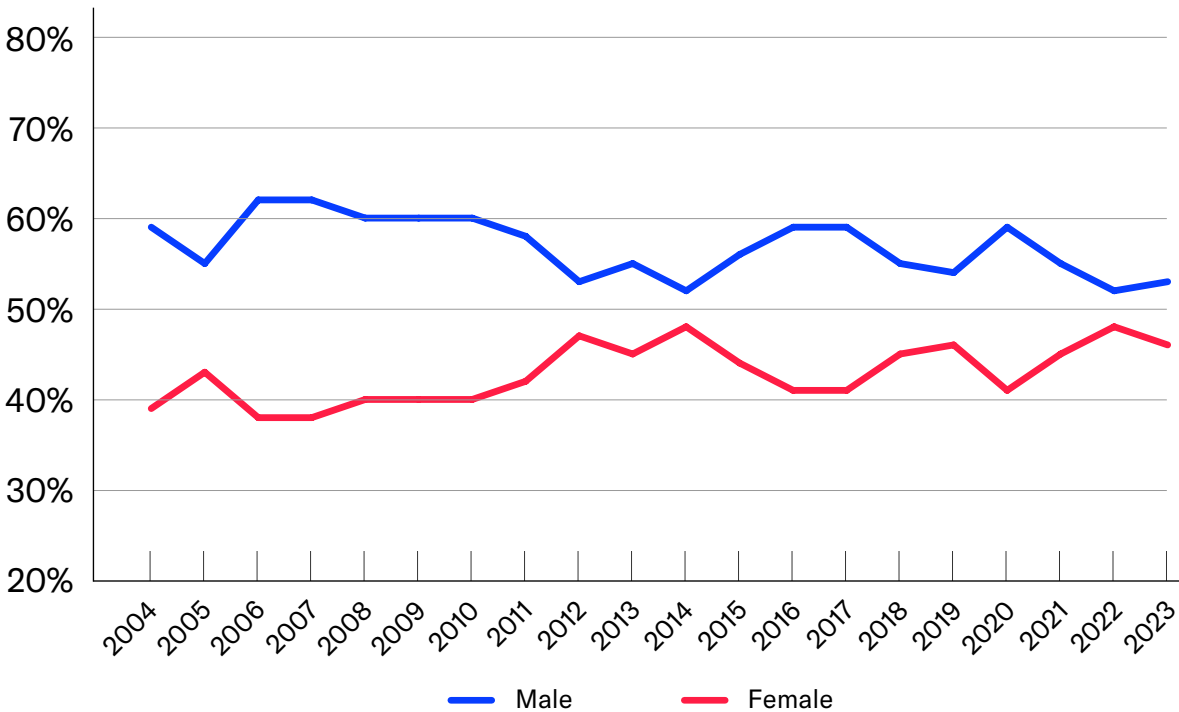


Ethnicity Of Adult Players:

White / Caucasian	75%
Hispanic	19%
Black / African American	12%
Native American / Alaskan	3%
Asian / Pacific Islander	4%

Question allows for more than one selection

Male/Female Players Over Time:



“

Video games are valuable to me since they provide a social and mental connection for me and are a stress reliever.

– Female, 37

Player Perceptions & Attitudes

The benefits of video games.

Games are meaningful entertainment experiences, offering opportunities for insight and enrichment.

U.S. Adults Agree That Games:

% Agree - Among Total Adults 18+

	Total	Among Players, 18+			
		Gen Z	Millennials	Gen X	Boomers/ Silent
Bring people joy through play	79%	90%	90%	88%	88%
Provide mental stimulation	77%	84%	84%	86%	92%
Provide stress relief	76%	85%	86%	88%	87%
Provide accessible experiences for people w/ different abilities	74%	86%	85%	84%	80%
Help improve cognitive skills	73%	82%	84%	84%	85%
Bring different types of people together	70%	84%	85%	81%	70%

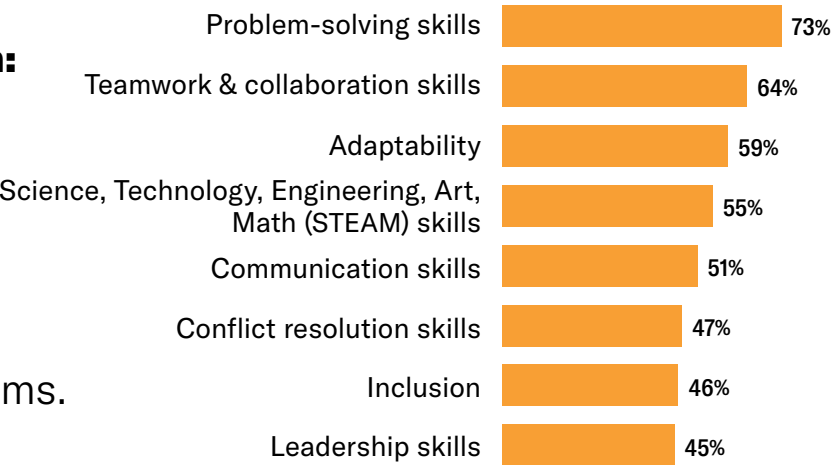
U.S. Adults Agree That Video Games Can Teach:

% Agree - Among Total Adults 18+

“

Games improve my critical thinking skills by giving me a chance to solve complex problems.

– Female, 37



People play for many reasons—including connection.

Players seek out gameplay to forge bonds and deepen ties with friends and family.

Why Do People Play?



68%

To pass the time or relax



67%

To have fun

Motivations For Gaming:

Ranked by Total Players 18+

	% of All Adults	Gen Z	Millennials	Gen X	Boomers/ Silent	Males	Females
Pass the time or relax	68%	58%	60%	71%	83%	65%	72%
To have fun	67%	70%	72%	66%	59%	69%	64%
Use my brain/keep my mind sharp	37%	24%	24%	37%	61%	32%	42%
Immersion and escape	30%	24%	34%	37%	22%	31%	29%
Stay connected with family & friends	16%	24%	22%	11%	6%	18%	13%
Competition: playing <u>against</u> others	16%	27%	20%	12%	5%	20%	11%
A feeling of accomplishment	14%	18%	16%	10%	11%	15%	12%
Community: playing <u>with</u> others	9%	19%	12%	7%	2%	11%	7%

Positive Sentiment Toward Video Games:

% Agree - Among Players 18+

	Gen Z	Millennials	Gen X	Boomers/ Silent
Playing video games is a great way to socialize and maintain relationships	71%	66%	46%	21%
I'm more interested in video games today than I was a year ago	56%	51%	35%	21%
I would rather play video games than watch a movie	63%	55%	33%	14%



Fond memories of gameplay inspire players today.

For those who grew up playing video games, nostalgia and a sense of discovery play an important role in motivating gameplay.

“

Gaming brings a sense of enjoyment to my life and helps me pass time in a way I enjoy.

– Male, 28

“

I grew up playing board games, so as I became an adult and got a cell phone, I was able to play digital versions of my favorites. I get a strong sense of nostalgia from playing them.

– Female, 35

Player Behaviors & Preferences

A game for everyone.

From action and sports games to role-playing games, there is a video game for everyone.

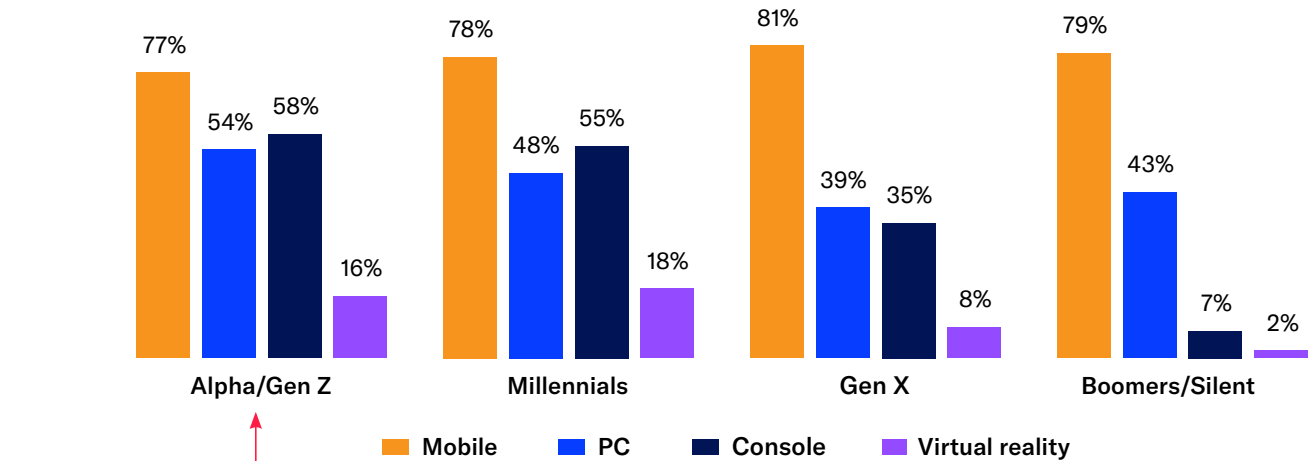
Generations And What They Play:

Top Three Categories Ranked by Total Players 8+

Gen Alpha		Gen Z	
Arcade	64%	Arcade	56%
Action	60%	Action	55%
Puzzle	56%	Shooter	54%
Millennials		Gen X	
Puzzle	61%	Puzzle	66%
Action	54%	Skill/Chance	39%
Arcade	52%	Arcade	37%
Boomers/Silent			
Puzzle	72%		
Skill/Chance	53%		
Arcade	20%		

Gaming Platforms Played By Generation:

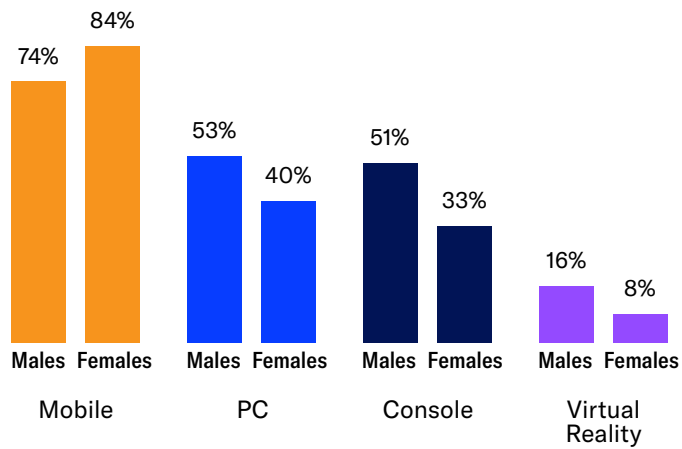
Among Total Players 8+



Gen Alpha and Gen Z are the biggest users of **PC (54%)** and **Console (58%)** for game play

Gaming Platforms Played By Gender:

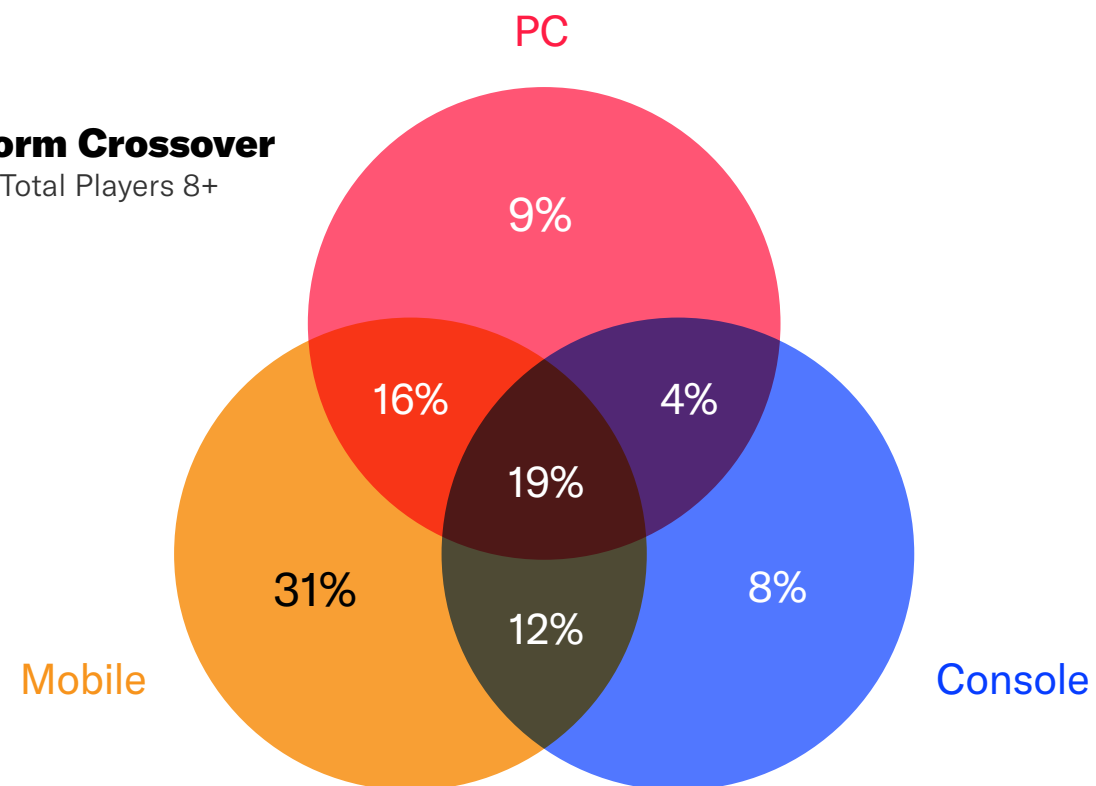
Among Total Players 8+



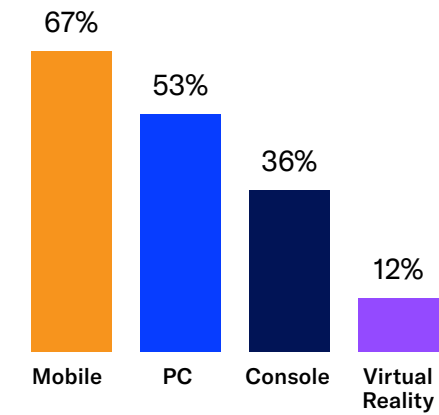


78%
of **U.S. Households** have played at **least one gaming device** in the past 12 months

Platform Crossover Among Total Players 8+



Platforms Played Among U.S. Households:



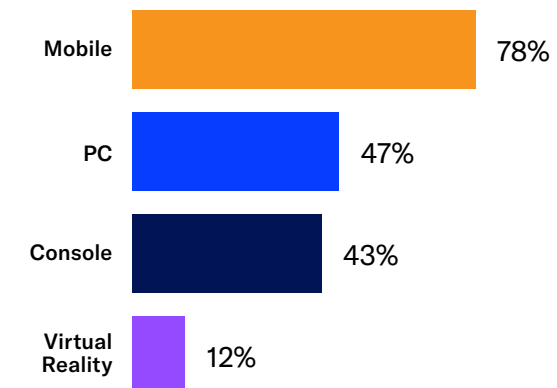
“

I would say that video games that are more relaxing and immersive [and] give me a lot of value, in that I can escape whatever is going on in my life.

– Female, 24

Gaming Devices Played Among Individual Players:

Among Total Players 8+



78% of players reported playing on mobile vs **33%** in 2012



Gaming resets my mind,
helps me feel better and
is something I enjoy.

– Female, 37

Games Foster Community

Games bring people together.

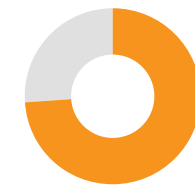
Video games encourage human connection and foster positivity and openness between players.

Among Total Players 8+



88%
have played
games online

In 1999, only
18%
of players reported
playing “on-line”



74%
of players play with
others, either online
or in person



55%
of players play
with others
weekly

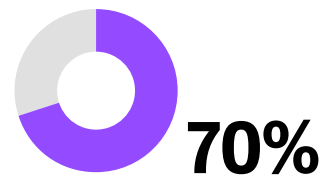


Games allow me to connect with
my wife...they really let us just be
ourselves in the midst of our lives
getting crazy and the stress of
adulthood and all that.

– Male, 37

From families to friends, games unite.

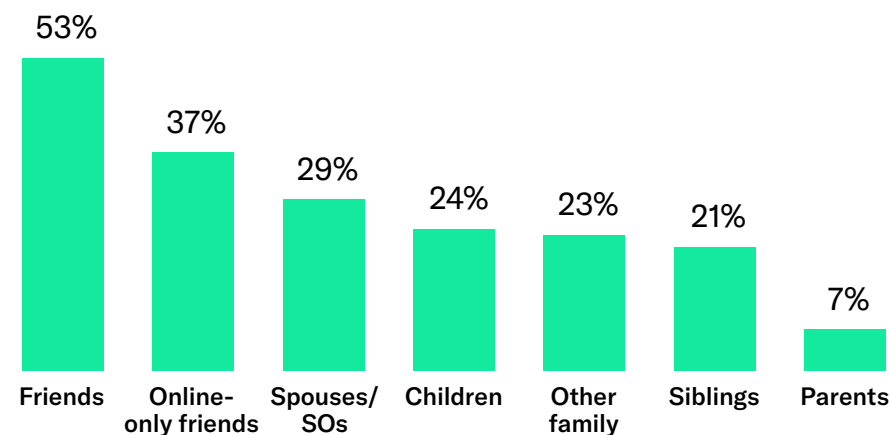
More and more people are playing games together, encouraging family closeness and improving communication.



of adult players who play online have used communication tools like in-game text and voice chat to talk to other players.

Who Players Are Playing With:

Among Players 18+ Who Play With Others



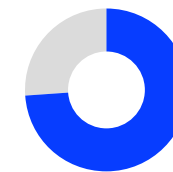
82%
of Alpha and Gen Z say that
video game communities are welcoming

Games encourage lasting connections.

Playing video games with friends, family and loved ones fosters enduring relationships.

When It Comes To Staying Connected, Players:

% Agree - Among Adult Players 18+



Agree that playing games can introduce people to new friends



Agree that playing games has helped them make lasting memories



Say they have met people through video games they otherwise would not have met



Agree they have met a good friend, spouse, or significant other through video games

“

My son and I play games where we can be creative together, which is really nice because we can build together or separately work on a project or communicate.

– Female, 44

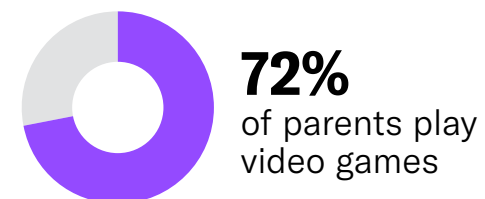
I play with [my son] because it is an avenue to connect with him on a deeper level with something he enjoys. It is way more effective than asking, 'How was your day?'

– Male, 44

Parents, Kids & Video Games

Games help forge family bonds.

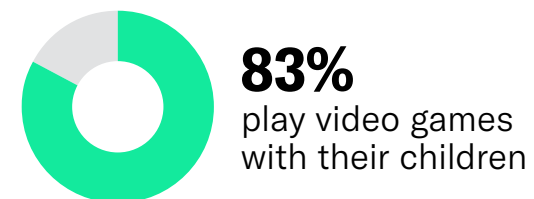
Families who play video games together help strengthen ties between parents and children.



72%

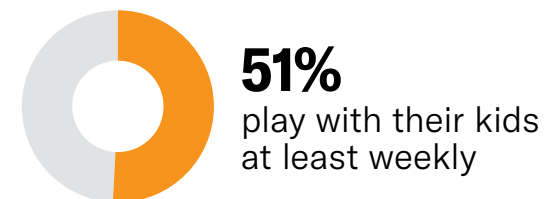
of parents play video games

Of Parents Who Play:



83%

play video games with their children



51%

play with their kids at least weekly

Parents love games for their kids because:

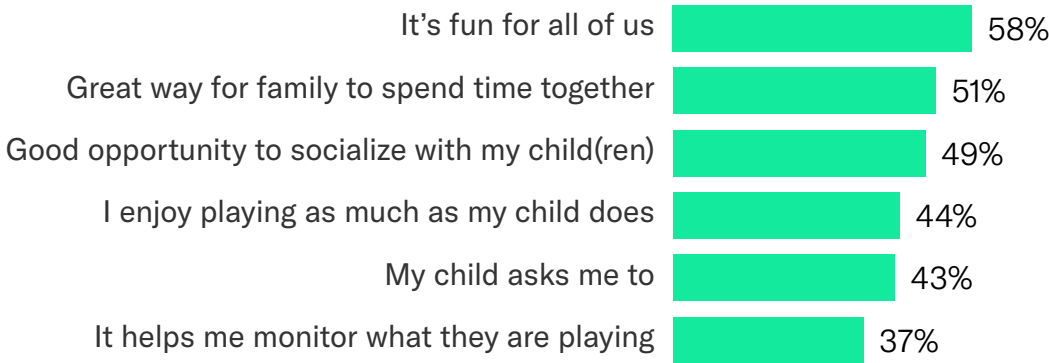
- 1 Their kids enjoy them.
- 2 Video games are a form of entertainment.
- 3 Parents like playing with their kids.

Parents are in the driver’s seat.

Age and content ratings help parents make informed decisions about which games are appropriate for their family.

Reasons Why Parents Play Video Games With Children:

Among 83% who play with their children



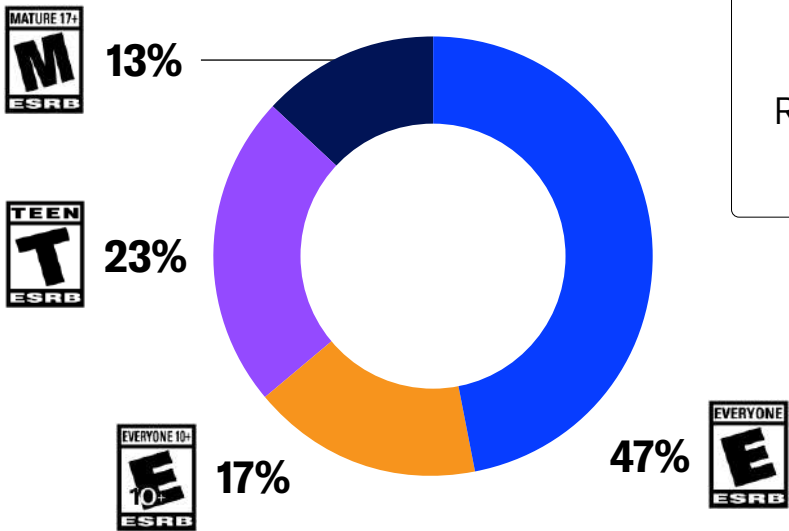
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Games level the playing field and open communication with your children. You’re learning to develop your relationship in different ways. They get to see another part of you, and you can see another part of them and not have it be an unfamiliar territory.

– Female, 44

ESRB Ratings Assigned in 2023

Note: Includes ratings assigned for boxed (physical) video games and downloadable titles playable on consoles



4,088
Ratings assigned
in 2023

Of 4,088 ratings assigned in 2023, **87% were rated E, E 10+ or T**

Among Parents Whose Children Play Games:



84% are aware of ESRB ratings



73% regularly use ESRB ratings

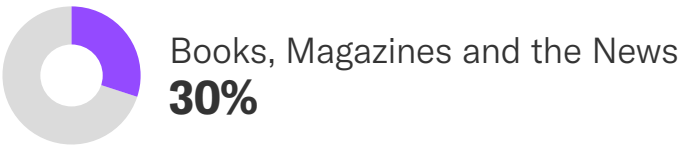
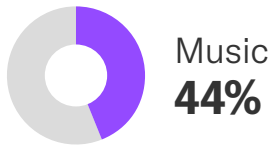
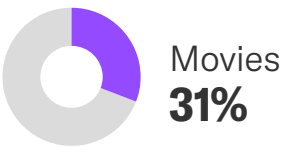
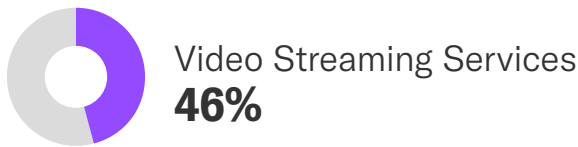
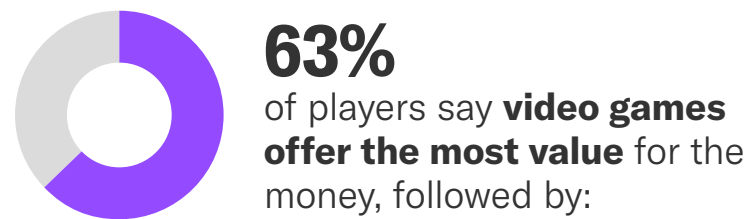
Note: Ratings numbers provided by the Entertainment Software Rating Board (ESRB).

Purchasing & Spending Trends

The business of games.

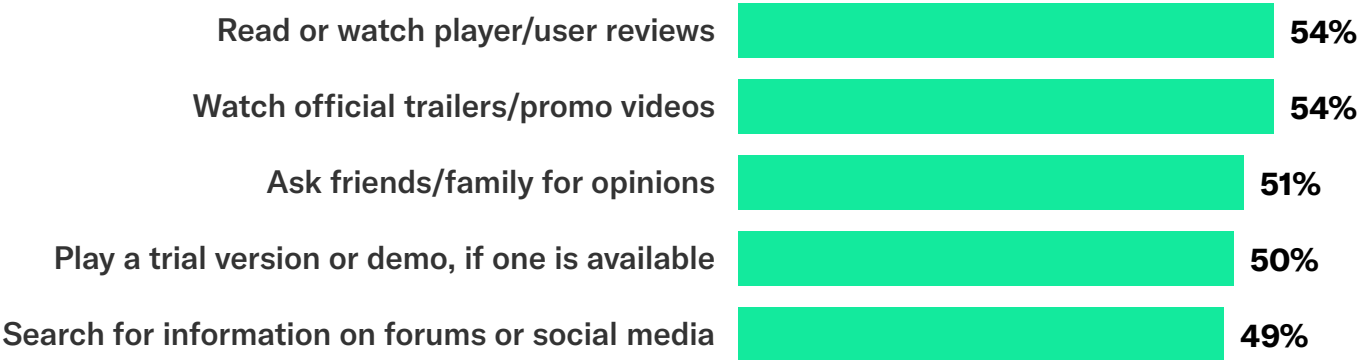
The video game industry plays an important role in entertainment choices—with games offering plenty of bang for their buck.

Top Three, Among Players 18+



Top Sources Of Info When Considering Purchasing A New Game:

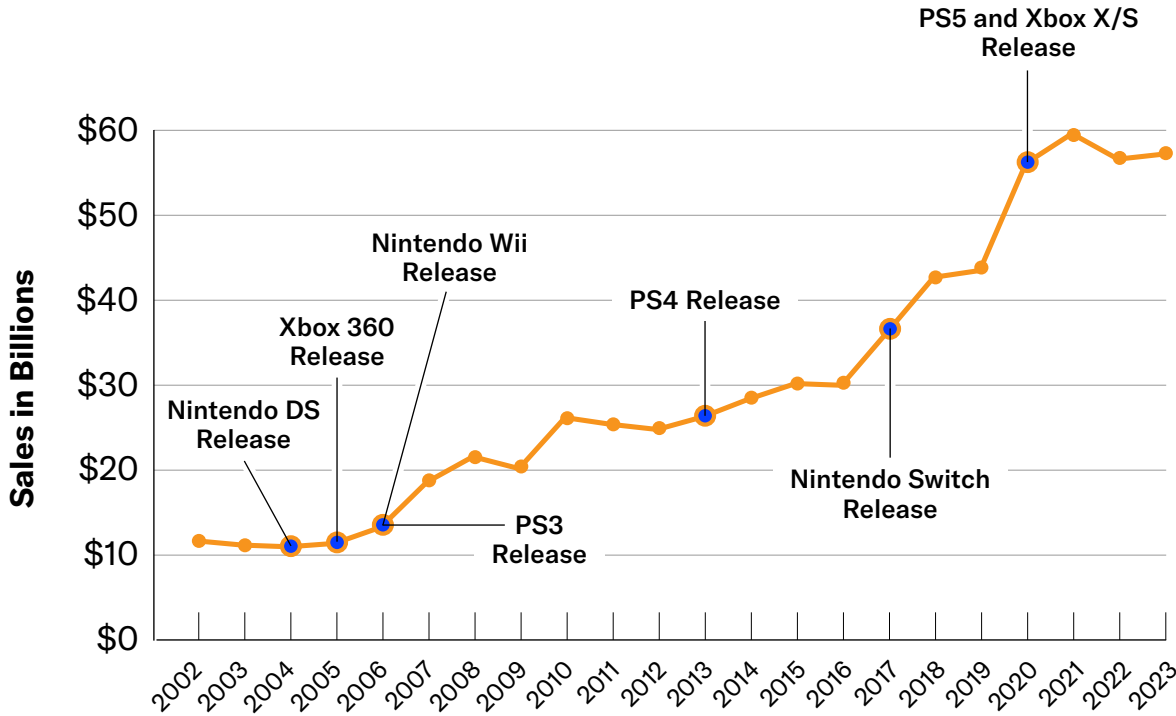
% Agree - Among Players 18+



Top 4 Types of In-Game Content Purchased:

- 1 In-Game Currency
- 2 Expansion Packs
- 3 Skins and Customization Items
- 4 Season Pass/Battle Pass

U.S. Video Game Industry Sales 2002–2023:



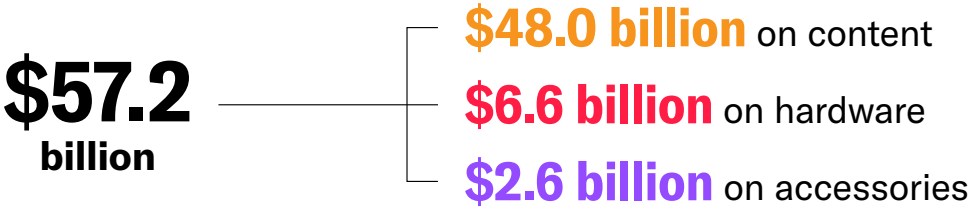
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– Stanley Pierre-Louis, ESA President and CEO

Total Consumer Spending On Video Games In 2023:

Source: Circana



Top Video Games In The United States In 2023:

	Top Grossing: Console & PC Full Game	Top Grossing: Mobile*
1	Hogwarts Legacy	MONOPOLY GO!
2	Call of Duty: Modern Warfare 3	Candy Crush Saga
3	Madden NFL 24	Roblox
4	Marvel’s Spider-Man 2	Royal Match
5	The Legend of Zelda: Tears of the Kingdom**	Coin Master
6	Diablo IV	Pokémon GO
7	Call of Duty: Modern Warfare 2	Gardenscapes
8	Mortal Kombat 1	Jackpot Party – Casino Slots
9	Star Wars: Jedi: Survivor	Township
10	EA Sports FC 24	Evony

* Mobile spending provided by Sensor Tower, Inc.
**Digital Sales not included
Note: Inclusion of digital sales in the best-selling title charts is done at the discretion of the participating publisher.

Economic Impact

The U.S. video game industry generated and supported **more than \$101 billion in total economic impacts.**

It contributed nearly **\$66 billion to U.S. GDP** in 2023.

Source: *Video Games in the 21st Century: The 2024 Economic Impact Report* (ESA)

ESA Members

AMAZON	NEXON AMERICA
BANDAI NAMCO ENTERTAINMENT	NINTENDO OF AMERICA
CAPCOM U.S.A.	RIOT GAMES
DISNEY	SONY INTERACTIVE ENTERTAINMENT
ELECTRONIC ARTS	SQUARE ENIX
EPIC GAMES	TAKE-TWO INTERACTIVE SOFTWARE
KONAMI OF AMERICA	TENCENT AMERICA
KRAFTON	UBISOFT
MICROSOFT CORPORATION	WARNER BROS. GAMES
NETFLIX	WIZARDS OF THE COAST

Methodology

YouGov conducted a 20-minute online survey in the U.S. from October 23-31 among 5,000 total respondents recruited from their proprietary online panel.

- n=4,000 Players (including n=748 Kids/Teens and n=3,252 Adults) who spend at least 1 hour/week playing video games on a smartphone, tablet, PC, console, or VR headset
- n=1,000 Non-Players (Adults) who either don't play video games, or spend less than 1 hour/week playing

Data is weighted to be representative of the overall U.S. population in terms of age, gender, ethnicity, education, census region, and the distribution of players vs. non-players, as defined above. 18+ respondents were asked about all members of their household in order to size players as young as 5 years old. Players aged 8-17 were asked to complete the survey under the supervision of a parent.

YouGov also conducted a 5-day digital ethnography that captured real-time qualitative insights from 20 gamers aged 22-53. Open ends, polls, video responses, short interviews and other questions formats were used to understand their experiences while playing, as well as their thoughts on the industry, specific genres, and more.

ESA & Our Partners

Entertainment Software Association
[TheESA.com](#)

Founded in 1994, the Entertainment Software Association (ESA) has served as the voice and advocate for the U.S. video game industry for more than 30 years. Its members are the innovators, creators, publishers and business leaders that are reimagining entertainment and transforming how we interact, learn, connect and play. The ESA works to expand and protect the dynamic marketplace for video games through innovative and engaging initiatives that showcase the positive impact of video games on people, culture and the economy to secure a vibrant future for the industry for decades to come. For more information, visit the ESA's website.

Entertainment Software Rating Board
[ESRB.org](#)

The Entertainment Software Rating Board (ESRB) is the non-profit, self-regulatory body for the video game industry that assigns age and content ratings to video games and mobile apps to help parents decide which are appropriate for their family. ESRB also ensures companies responsibly market their products, as well as protect their users' privacy.

Circana
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Circana is the leading advisor on the complexity of consumer behavior. Through unparalleled technology, advanced analytics, cross industry data and deep expertise, Circana provides clarity that helps almost 7,000 of the world's leading brands and retailers take action and unlock business growth. Circana understands more about the complete consumer, the complete store and the complete wallet, so their clients can go beyond the data to apply insights, ignite innovation, meet consumer demand and outpace the competition. Practice areas include consumer packaged goods, apparel, appliances, automotive, beauty, books, B2B technology, consumer technology, e-commerce, fashion accessories, food consumption, foodservice, footwear, home, home improvement, juvenile products, media entertainment, mobile, office supplies, retail, sports, toys and video games.

YouGov
[Today.yougov.com](#)

YouGov is an international online research data and analytics technology group. Our mission is to offer unparalleled insight into what the world thinks. Our innovative solutions help the world's most recognized brands, media owners and agencies to plan, activate and track their marketing activities better. With operations in the UK, the Americas, Europe, the Middle East, India and Asia Pacific, we have one of the world's largest research networks. At the core of our platform is an ever-growing source of connected consumer data that has developed daily over our 20 years of operation. We call it living data. All of our products and services draw upon this detailed understanding of our 24+ million registered panel members to deliver accurate, actionable consumer insights. As innovators and pioneers of online market research, we have a strong reputation as a trusted source of accurate data and insights. Testament to this, YouGov data is regularly referenced by the global press, and we are the most quoted market research source in the world.

Sensor Tower
[Sensortower.com](#)

Sensor Tower is the leading provider of market intelligence & digital advertising for the mobile & digital economy. Founded in 2013 and based in San Francisco, Calif., Sensor Tower provides enterprise-level data on mobile apps and publishers through our Store Intelligence, Ad Intelligence, Usage Intelligence, and App Intelligence platforms, which offer download, revenue, creatives, advertising insights and engagement metrics at unparalleled accuracy for the world's largest digital economies. For more information, visit [sensortower.com](#).



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Advancing the Power
of Play Since 1994



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601 Massachusetts Avenue NW | Suite 300 | Washington, DC 20001

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