

## TOPLINE & METHODOLOGY

### Generation Lab/Ipsos Gaming Survey

Conducted by Ipsos in collaboration with Generation Lab

**A survey of the American general population (ages 18-34) who have played or watched video games for at least 1 hour per week on average**

*Interview dates: August 29, 2023 – September 5, 2023*

*Number of interviews: N=841*

*NOTE: \* = less than 0.5%, - = no respondents*

*NOTE: All results show percentages among all respondents, unless otherwise labeled. Reduced bases are unweighted values.*

#### Annotated Questionnaire:

1. On average, how many hours per week do you play or watch video or mobile games? Please consider all of the platforms or devices that you play or watch video games on, including mobile, tablet, PC/computer, gaming consoles, and all different types of games.

	<b>Total (N=954)</b>	<b>Age 13-17 (N=165)</b>	<b>Age 18-24 (N=406)</b>	<b>Age 25-29 (N=143)</b>	<b>Age 30-34 (N=240)</b>	<b>Male (N=384)</b>	<b>Female (N=570)</b>
= 0	10%	8%	17%	2%	9%	5%	14%
≥ 1	90%	92%	83%	98%	91%	95%	86%

[REMAINING QUESTIONS AMONG THOSE WHO PLAY OR WATCH GAMES 1+ HOURS A WEEK]

2. Which of the following devices do you own or have regular access to in your household? Select all that apply.

	Total (N=841)	Age 13-17 (N=150)	Age 18-24 (N=334)	Age 25-29 (N=138)	Age 30-34 (N=219)	Male (N=362)	Female (N=479)
Smartphone (such as iPhone or Android)	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Windows (e.g. Max, PlayStation, Nintendo Switch), (such as iPad, Samsung Galaxy Tab)	61%	66%	61%	59%	57%	61%	60%
Android smartphone, Nintendo Switch, PlayStation 4 (PS4) or PS5 (PS5) console, tablet)	39%	28%	36%	43%	49%	45%	32%
Apple iPad (e.g. iPad, Samsung Galaxy Tab)	43%	33%	39%	48%	51%	36%	50%
Windows PC/Mac, PlayStation 4 (PS4) or PS5 (PS5) console, tablet)	36%	33%	36%	44%	32%	38%	35%
Android smartphone, Nintendo Switch, PlayStation 4 (PS4) or PS5 (PS5) console, tablet)	32%	31%	35%	36%	36%	36%	33%
Windows PC/Mac, PlayStation 4 (PS4) or PS5 (PS5) console, tablet)	22%	34%	27%	16%	12%	27%	17%
Xbox One / Xbox Series X / Xbox Series S / Xbox One X / Xbox One S / Xbox One SE / Xbox One S All-in-One	29%	27%	27%	31%	32%	33%	24%
PlayStation 4 (PS4) or PS5 (PS5) console, tablet)	28%	19%	18%	32%	33%	30%	16%
Other (e.g. VR headset, Quest 2, PlayStation VR, HTC Vive)	2%	2%	*	3%	3%	3%	1%
Other (e.g. VR headset, Quest 2, PlayStation VR, HTC Vive)	17%	17%	11%	22%	21%	22%	12%
Xbox Series X/S	15%	14%	8%	21%	18%	19%	10%
Valve Steam Deck	5%	5%	3%	10%	4%	8%	2%
None of these	2%	2%	3%	3%	-	2%	2%

3. On which device do you **most prefer** to play video games? Select one answer.

4. Which of the following activities (if any) have you done in the past month? Please select all that apply.

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Watched online videos on platforms like YouTube, Instagram, TikTok, etc.	78%	84%	82%	74%	73%	75%	82%
Played video games on a smartphone/tablet	73%	75%	68%	77%	71%	72%	74%
Watched a streaming service (Netflix, Hulu, Max, etc.)	72%	65%	83%	67%	72%	67%	78%
Posted on any social media site	61%	67%	61%	60%	58%	57%	67%
Played video games on a video game console	54%	45%	50%	59%	63%	61%	46%
Watched content creators live on platforms like YouTube, Twitch, etc.	47%	54%	48%	40%	46%	49%	45%
Played video games on a desktop/laptop PC	46%	54%	42%	45%	45%	54%	38%
Played a tabletop game (board games, card games, etc.)	45%	44%	50%	40%	44%	45%	45%
Watched a movie in a theater	43%	45%	47%	37%	44%	43%	43%
Watched events on live platforms like YouTube, Twitch, etc.	34%	39%	28%	31%	38%	40%	26%
Watched Cable TV	28%	22%	23%	36%	32%	29%	27%
Played video games using a virtual reality (VR) headset	17%	17%	8%	22%	23%	22%	11%
None of the above	1%	*	*	3%	*	1%	*

5. Which of the following statements about the video gaming industry (i.e. companies that design, produce and sell video games and consoles) do you **agree** with? Select all that apply.

"I believe that the video gaming industry..."

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Wants you to have fun	64%	67%	65%	58%	66%	59%	70%
Is diverse	30%	36%	28%	28%	29%	31%	30%
Acts on customer feedback	30%	31%	32%	28%	27%	30%	30%
Is inclusive	26%	28%	24%	31%	20%	32%	19%
Cares about its players	26%	26%	18%	34%	26%	29%	21%
Promotes diversity	25%	26%	16%	35%	23%	28%	21%
Promotes inclusion	25%	26%	20%	29%	23%	26%	23%
Does a good job protecting player data	21%	24%	16%	22%	24%	24%	18%
Is participating in implementing wider policies to improve the gaming community in a positive way	21%	16%	17%	26%	24%	24%	17%
Is a toxic environment to work in	20%	26%	20%	20%	13%	23%	16%
Cares about social issues	18%	18%	7%	29%	19%	25%	10%
Supports those with disabilities	16%	16%	13%	20%	15%	21%	11%
Is an industry that has unequal pay	16%	16%	15%	19%	13%	17%	15%
Gives back to society	16%	19%	11%	20%	14%	20%	11%
Is ethical	14%	13%	12%	16%	15%	18%	9%
Is mindful of my playing time	13%	10%	9%	19%	17%	17%	9%

Is proactive in battling toxicity	9%	9%	6%	12%	9%	11%	6%
Is proactive in battling racism	8%	11%	6%	9%	8%	11%	5%
Is proactive in battling sexual harassment	6%	5%	5%	9%	5%	8%	5%

6. Which of the following statements about video gaming do you **agree** with? Select all that apply.

“Video gaming...”

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Helps me pass the time	65%	76%	67%	58%	59%	66%	64%
Is an escape into a different world	53%	59%	54%	50%	51%	51%	56%
Is a great way to spend free time	53%	55%	50%	52%	56%	55%	51%
Has experiences that feel fun and not like chores	43%	54%	49%	33%	35%	42%	44%
Helps me cope with day-to-day life	40%	43%	33%	48%	35%	42%	37%
Is a positive social activity	36%	48%	27%	34%	37%	42%	29%
Helps me stay connected to my friends/family	33%	37%	32%	37%	29%	37%	30%
Makes me feel part of a community	32%	39%	24%	39%	26%	38%	24%
Helps me make close friends	26%	32%	21%	26%	25%	30%	21%
Can help me develop new skills that I can use in real life	24%	25%	17%	29%	26%	27%	20%
Makes me feel confident	22%	21%	15%	27%	28%	30%	14%
Makes me smarter	21%	22%	10%	28%	28%	28%	13%
Is a career	15%	18%	12%	22%	10%	18%	13%
Is full of risks	14%	19%	14%	10%	11%	15%	12%

7. Which of the following, if any, have you done in the past 6 months? Select all that apply

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Purchased a digital copy of a video game	40%	48%	34%	36%	43%	49%	29%
Played a game through a subscription service (Xbox Game Pass, PlayStation Plus, Nintendo Switch Online, Apple Arcade, etc.)	40%	36%	31%	49%	44%	45%	34%
Played a free-to-play live service game	38%	44%	36%	40%	34%	46%	30%
Purchased microtransactions or made an in game purchase	30%	42%	23%	31%	27%	37%	23%
Purchased a video game expansion/season pass (usually adds onto the base game with new story, locations, etc.)	24%	19%	18%	29%	29%	27%	20%
Purchased a physical copy of a video game	22%	17%	17%	25%	30%	26%	18%
Purchased a battle pass	21%	26%	16%	19%	24%	26%	15%
None of the above	18%	16%	27%	14%	15%	12%	25%
Paid a subscription to play a live service game (games like World of Warcraft, Final Fantasy XIV, etc.)	14%	13%	6%	18%	22%	16%	12%
Other	*	*	1%	-	-	*	*



8. In the past month, which of the following have you experienced when playing video games online with others? Select all that apply.

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Felt included	40%	47%	33%	44%	41%	45%	35%
Felt recognized for my skills	33%	33%	23%	41%	39%	41%	24%
Felt like a hero	28%	21%	15%	40%	38%	37%	17%
Felt popular	24%	19%	14%	35%	28%	30%	16%
Felt angry	17%	26%	19%	11%	11%	21%	12%
None of the above	16%	16%	17%	13%	16%	11%	21%
Felt jealous of other players	15%	19%	14%	17%	9%	18%	12%
Did not play video games online with others in the past month	13%	8%	23%	5%	15%	8%	19%
Felt like I had to pretend to be someone else	10%	11%	9%	14%	7%	13%	8%
Felt unimportant or unwanted	8%	6%	7%	11%	6%	9%	6%
Felt worthless	5%	4%	6%	5%	4%	6%	4%

9. How important is the following to you when playing video games? Please select one.

Very Important/Moderately Important Summary

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Game mechanics/gameplay	91%	93%	86%	94%	93%	91%	92%
Game aesthetics and style (how the game looks)	91%	89%	89%	95%	91%	91%	91%
Progression/reward systems	87%	88%	81%	92%	86%	87%	86%

Challenging levels and features	85%	84%	81%	92%	85%	87%	83%
Story	82%	78%	77%	87%	86%	84%	80%
Connecting with friends	72%	78%	65%	76%	70%	76%	66%
Achievements	72%	65%	67%	74%	81%	69%	74%
Leaderboards/competitive rankings	55%	44%	49%	68%	60%	57%	54%
Meeting new people	48%	45%	32%	61%	55%	53%	42%

10. In the past six months, which of the following have you done while playing video games? Select all that apply

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Used a personalized avatar or character	58%	71%	54%	58%	51%	58%	58%
Chatted with other players within the game	49%	59%	37%	51%	51%	55%	41%
Got angry with another player	26%	35%	25%	25%	19%	33%	17%
None of the above	20%	10%	27%	16%	23%	16%	23%
Missed at least two meals in a row	13%	7%	8%	18%	19%	14%	12%
Missed class or work to play a game	8%	9%	6%	9%	8%	9%	6%

11. Do you feel like you are part of a video gaming community?

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Yes	60%	65%	44%	69%	64%	70%	48%
No	40%	35%	56%	31%	36%	30%	52%

12. How do you interact or stay engaged with your video gaming community? Select all that apply

	<b>Total (N=482)</b>	<b>Age 13-17 (N=94)</b>	<b>Age 18-24 (N=143)</b>	<b>Age 25-29 (N=105)</b>	<b>Age 30-34 (N=140)</b>	<b>Male (N=253)</b>	<b>Female (N=229)</b>
Talking about video games with friends/others	60%	68%	54%	64%	56%	60%	61%
Playing video games with friends/others	59%	56%	64%	62%	54%	59%	59%
Watching/commenting on videos	52%	57%	40%	54%	53%	53%	49%
Going to shared interest communities (Reddit, Discord, Steam Community Platform, etc.)	46%	48%	45%	53%	37%	50%	40%
Following or engaging with video gaming creators	41%	47%	45%	41%	32%	44%	36%
Watching/chatting on livestreams	41%	35%	34%	47%	45%	40%	42%
Engaging with other community members	39%	47%	32%	40%	36%	41%	35%
Joining or playing with a clan or a guild in a specific video game	37%	27%	28%	45%	45%	39%	33%
Participating in video gaming tournaments or events	31%	21%	12%	46%	40%	36%	23%
None of the above	3%	2%	5%	1%	3%	3%	2%

13. How much do you agree or disagree with the following statements:

Strongly Agree/Somewhat Agree Summary

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
Video gaming culture is diverse	64%	68%	60%	58%	70%	67%	60%
Video gaming has had a positive impact on my life	60%	62%	47%	69%	66%	68%	52%
Video gaming culture is inclusive	53%	45%	50%	59%	58%	55%	51%
Video gaming culture is supportive of one another	53%	45%	43%	67%	57%	56%	49%
Video gaming culture is toxic	46%	63%	52%	34%	35%	48%	44%
Video gaming culture is sexist	45%	55%	53%	30%	43%	41%	51%
Video gaming culture is hateful	32%	44%	36%	22%	28%	32%	32%
Video gaming culture is racist	30%	38%	31%	28%	23%	32%	27%
Video gaming culture is unethical	21%	21%	18%	24%	21%	23%	19%

14. Where do you typically watch video gaming content? Select all that apply

	<b>Total (N=841)</b>	<b>Age 13-17 (N=150)</b>	<b>Age 18-24 (N=334)</b>	<b>Age 25-29 (N=138)</b>	<b>Age 30-34 (N=219)</b>	<b>Male (N=362)</b>	<b>Female (N=479)</b>
YouTube/YouTube Gaming	63%	77%	61%	60%	57%	67%	59%
TikTok	37%	42%	41%	36%	31%	31%	45%
Instagram	31%	38%	25%	34%	28%	34%	27%
Twitch	27%	30%	25%	29%	24%	30%	23%
Facebook	21%	8%	9%	37%	31%	23%	19%
Discord	18%	23%	12%	22%	18%	24%	13%

Reddit	16%	15%	10%	22%	20%	22%	10%
X (formerly Twitter)	13%	11%	10%	14%	16%	16%	10%
None of the above	10%	6%	13%	7%	14%	6%	14%
Kick	5%	4%	3%	7%	4%	6%	3%
Other	*	-	1%	-	*	*	*

This Ipsos Generation Lab poll was conducted August 29 - September 5, 2023, using Generation Lab's online youth and teens panel. This poll is based on a sample of 954 general population of people 13-34 years old, including 841 who play games for at least an hour or longer each week.

The margin of error reported for this survey was computed using the classical Simple Random Sampling formula with an adjustment for the estimated design effect. The margin of error assumes that the weighted estimates are approximately unbiased. This assumption of approximate unbiasedness is based on our assertion that any differences between the survey sample and the target population on key survey outcomes are corrected by raking on the demographics listed in the weighting description.

The margin of sampling error for this study is plus or minus 4.4 percentage points at the 95% confidence level, for results based on the entire sample of adults. The margin of sampling error takes into account the design effect, which was 1.36 for all respondents. The margin of sampling error for this study is plus or minus 4.6 percentage points at the 95% confidence level, for results based on the sample of respondents who play at least one hour of games each week.

In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent.

The survey was conducted using Generation Lab's online teen and youth respondent panel. Generation Lab leverages the internet, social media, and search platforms to create a non-probability panel. This panel is built to reflect individuals of all backgrounds ages 13-34 in the United States.

Generation Lab utilize a geographic frame made up of a set of randomized geographic units, selected by applying probability proportional to size (PPS) sampling, to recruit participants.

The data for the total sample were weighted to adjust for gender by age, sex, race, ethnicity, and education. The demographic benchmarks came from the 2021 and 2019 American Community Survey (ACS). The weighting categories were as follows:

- Age Group (13-17, 18-24, 25-29, 30-34)
- Sex (Male, Female)
- Race (White, Black or African American, Asian or Native Hawaiian and Other Pacific Islander, All Remaining Groups)
- Ethnicity (Hispanic or Latino, Not Hispanic or Latino)
- Education (High School Graduate or Below, Some College or Associate's Degree, Bachelor's Degree or Above)