VIDEO GAMES IN THE 21ST CENTURY:

The 2026 Economic Impact Report

esa entertainment software association

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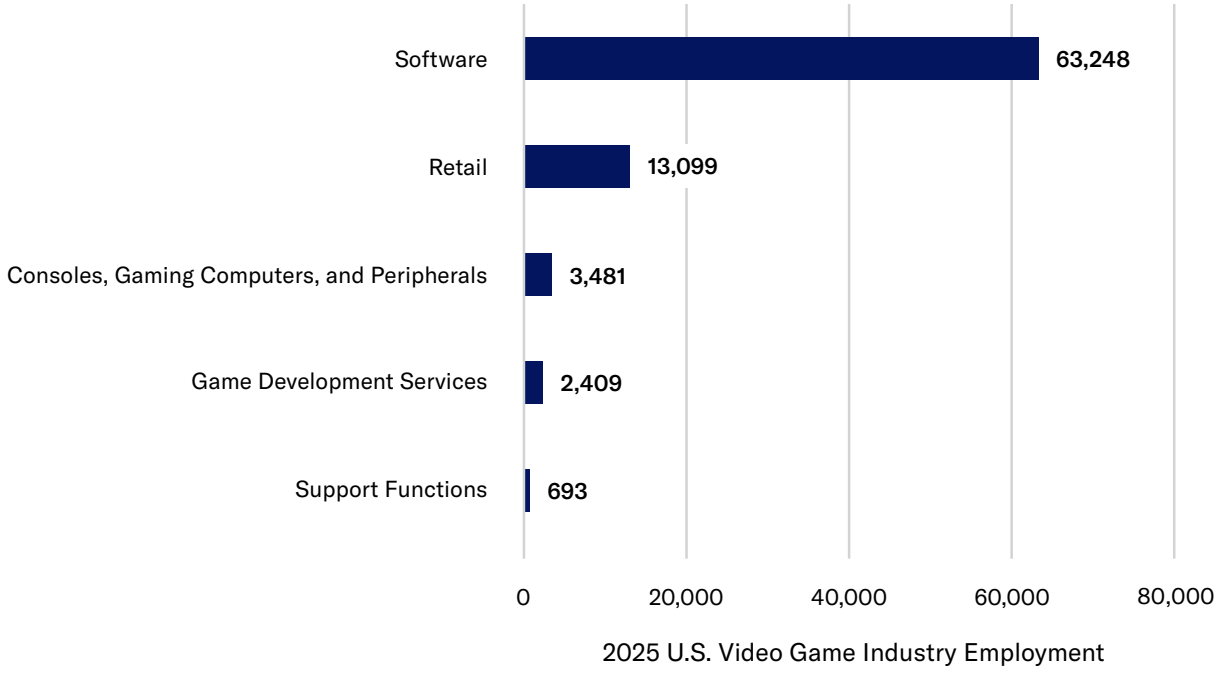
Executive Summary

In 2025, the Entertainment Software Association (ESA) contracted with TEConomy Partners, LLC (TEConomy) to perform a detailed economic impact analysis of the U.S. video game industry. The study presented here is based upon 2025 employment, with most company employment data captured between November and December of 2025.

This current analysis defines **the U.S. video game industry as comprising five sectors totaling 82,930 U.S. employees**, as shown in ES-1. As it has historically, the industry and its employment is driven by the video game software sector, which accounts for more than 63,000 of these employees in 2025.

Figure ES-1. U.S. Video Game Industry Employment by Sector, 2025

Source: TEConomy analysis of 2025 U.S. Video Game Industry Database.

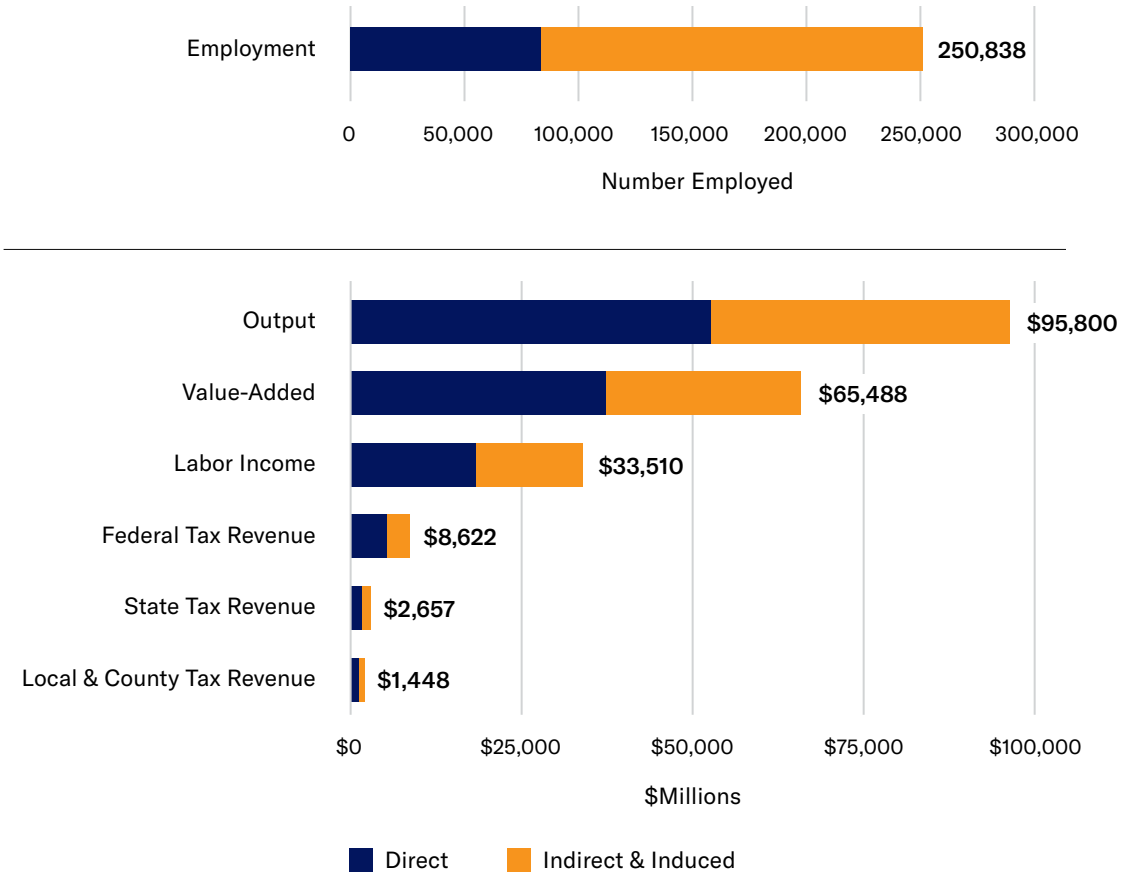


The video game industry, while having a presence in all 50 states, Washington, D.C. and Puerto Rico, is highly concentrated in a handful of states. **California is home to over 36,000 jobs, accounting for 44% of industry employment. Washington, Texas, New York, and Florida round out the top five states, accounting for 74% of the industry's employment.** While some companies have discontinued remote work opportunities, the increased use of the hybrid modality (workers with a specific office location who can also work one or more days a week at home) is an increasingly important option offered by the U.S. video game industry. Additionally, the industry employs workers that work remotely from home or other locations without a defined corporate office site, while an emerging set of companies operate fully remote, with the entire workforce working off site connected with just a basic mailing address. In 2025, these remote and fully remote workers accounted for 14,461 jobs, or 17% of total U.S. video game industry employment.

The U.S. video game industry has an outsized economic impact—in a conservative accounting, the industry created and supported 250,838 jobs across the U.S. economy while generating and supporting $95.8 billion in total economic impacts (Figure ES 2). Within these economic impacts, the U.S. video game industry contributed $65.5 billion to U.S. GDP in 2025.

Figure ES-2. Economic Contributions of the U.S. Video Game Industry to the U.S. Economy, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.



The estimated labor income impacts (total compensation including salaries, wages, and benefits) indicate an average industry compensation of $218,000, ranging from approximately $69,000 in the video game retail sector to over $346,500 in the game development services sector. Removing the retail sector from the industry average leads to a $246,000 average among the four remaining sectors combined.

The substantial employment in the U.S. video game industry, as well as the economic expenditures driven by the industry, are multiplied many times

Video Game Industry Impact Types

Direct Effects – the specific impacts of video game industry companies.

Indirect Effects – the impacts of suppliers to the video game industry.

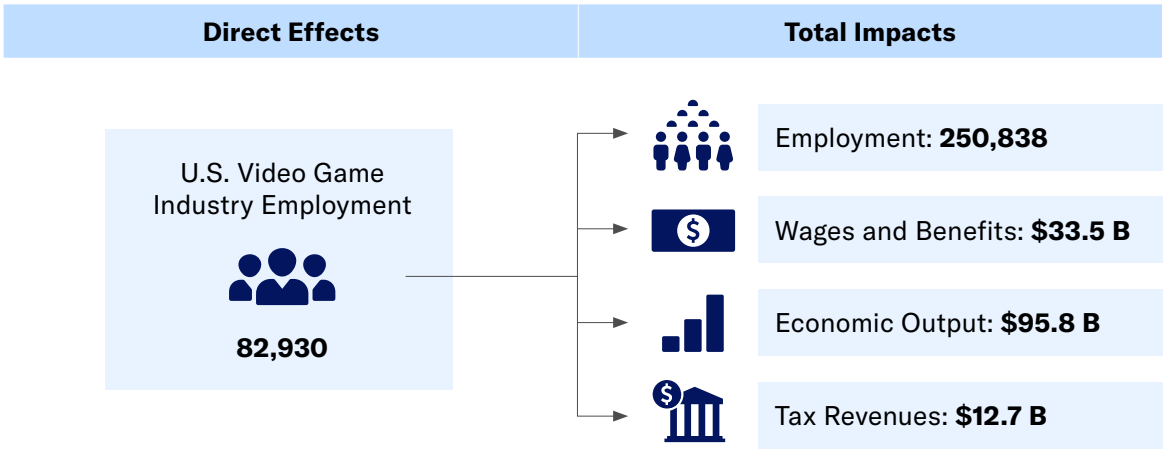
Induced Effects – the additional economic impacts supported by the personal spending of industry and supplier employees.

Total Impact – the sum of the three impact types reflecting the total generated and supported impacts.

over. The expenditures of industry suppliers, along with the spending of personal incomes by workers related to and supporting the industry, perpetuate this ripple effect through the economies of the nation and its individual states (Figure ES-3). **This analysis estimates that, on average, every job within the U.S. video game industry supports 2.02 additional jobs in the national economy.**

Figure ES-3. Economic Impacts of the U.S. Video Game Industry to the U.S. Economy, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.



These industry economic impacts are generated and supported across all 50 states, Washington, D.C., and Puerto Rico. The top six states for both employment impacts and output impacts are shown in Table ES-1.

Table ES-1 Top 6 States in Video Game Industry Employment and Economic Impacts, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

	Employment Impacts			Output Impacts ($ Millions)		
State	Intrastate – Direct Effect	Intrastate – Total Impacts	Interstate – Total Impacts	Intrastate – Direct Effect	Intrastate – Total Impacts	Interstate – Total Impacts
California	36,217	115,847	119,033	$29,830.2	$51,000.2	$52,162.3
Washington	9,795	27,184	28,451	$7,841.7	$12,790.0	$13,388.3
Texas	8,124	20,255	22,108	$3,177.4	$5,864.9	$6,339.3
New York	4,036	9,967	11,473	$2,210.6	$3,791.3	$4,367.9
Florida	3,034	7,724	8,688	$1,156.4	$2,146.6	$2,351.3
North Carolina	2,467	6,344	6,717	$1,106.6	$1,993.8	$2,092.1

Introduction

In 2020, the Entertainment Software Association (ESA) first contracted with TEConomy Partners, LLC (TEConomy) to perform a detailed economic and functional impact analysis of the U.S. video game industry, with the last study released in 2024 (developed using 2023 data).[1] With significant changes in the industry—driven by merger and acquisition (M&A) activities, workforce adjustments such as rightsizing in response to shifting demand, and evolving work models—the U.S. video game industry landscape is undergoing transformation. Some firms are expanding remote or hybrid work options, while others are implementing return-to-office strategies to boost collaboration, and many smaller studios are emerging as fully remote operations. These changes are also reflected in U.S.-based remote employment within non-U.S.-based video game industry firms. The updated study presented here is based upon 2025 employment, with most company employment data captured between November and December of 2025.

This two-year update reflects the changes described above, while also capturing an increasing level of entrepreneurship. Though the underlying methodology for this study remained largely the same, improvements in the approach and the data tools used to construct the database contributed to a substantial increase in database records, from 5,684 sites/locations in 2023 to 8,998 in 2025. Much of this increase reflects either additional coverage of solo or small developers and studios, many with fewer than 10 employees or improved ability to collect data (counts) of remote workers. Methodology is discussed in detail in Appendix B.

It is important to recognize that for this effort measuring economic impact relies on models that estimate the economic activities generated from the employment numbers captured in the industry database. Changes in the employment levels included and captured in the 2025 database will shape the resulting economic impact values. The net result is an analysis that should be of interest to industry members, policymakers, economic development professionals, the media, and other parties who seek to understand and communicate the size, economic importance, and workforce characteristics of this dynamic U.S. industry.[2]

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[1] To explore the functional impacts of the U.S. video game industry, Chapter IV of the 2020 study is still highly relevant in highlighting the innovation advancements, wealth generation and application spillover effects of the U.S. video game industry. See: https://www.theesa.com/wp-content/uploads/2024/02/Video-Games-in-the-21st-Century-2020-Economic-Impact-Report-Final.pdf.

[2] It should be noted that this effort is designed to capture and estimate the economic impacts of the U.S. video game industry – its game designers, console and hardware manufacturers, and organizations that collaborate with and support the industry. It is not designed to measure or include the economic value or impact of in-game purchases and sales.

Defining and Measuring the Size of the U.S. Video Game Industry

At the heart of this analysis is the significant task of estimating the size and scale of the U.S. video game industry, which has a continually evolving structure due to merger and acquisition activities, new studios being opened, and entrepreneurs starting new ventures, often via strong teams from former studios or the emergence of developers to fill a new niche. While major corporations dominate the console and software space, the industry is open to individuals focusing their talents on personal projects, bringing them to market via industry-specific e-commerce platforms or through self-publishing efforts.

Definition of the Video Game Industry

For this study, the **video game industry** is defined to include the following sectors:

- **Video game software firms** including developers, studios, developer/publishers, and publishers that release games for use with console systems, personal computing devices, tablets, and mobile phones, as well as software accessed online;[3] firms developing software platforms that provide a variety of free-to-play/download games or allow multiplayer or team-based activities; the distribution of physical software from developers (e.g., game cartridges or disks) is also included in this sector.

- **Video game consoles, gaming computers, and peripherals firms** including consoles, gaming-specific PCs, core processor technologies, and gaming-specific peripherals such as controllers, headsets, keyboards, and similar devices. Consoles, hardware, and peripheral distribution activities.[4]

- **Video game-related development services** including artistic, graphic, and audio support firms, firms specializing in localization or operating system porting efforts, firms supplying in-game marketing and monetization technologies, and firms associated with developing related interactive media platforms.

- **Video game-specific retail outlets** focused on selling video games, consoles, hardware, and peripherals. Notable physical examples include GameStop, RazerStore, and the Nintendo Stores in New York City (Rockefeller Plaza) and San Francisco (Union Square); e-commerce activities of Steam (Valve Corporation) and similar pay-to-download sites.

- **Video game-specific support functions** including marketing or PR firms focused on the video game industry, specialized education providers related to the development of video games, and trade and business associations.

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[3] Typically, developers are responsible for creating a video game, and publishers are responsible for the marketing, sales, and PR of the game. Developers may be internal to the publishing company or an external/independent company.

[4] It is often difficult to discern specific U.S.-based console/hardware employment from the major combined console and software firms. Corporate databases often classify these establishments under software industry codes since much of their revenue comes from these software sales (e.g., video game or other non-video game software). This classification issue is a limiting factor in measuring console, hardware, and peripherals employment.

Building the Industry Database

Similar to previous TEConomy studies completed for the ESA, **the underlying data for the analysis was developed by compiling a database of companies and locations from multiple data resources**, building upon the previous efforts but once again accessing game industry databases, websites, e-commerce sites, and other publicly accessible industry data resources, as well as proprietary data resources and market research reports.

Drawing from the experience of previous studies and through discussion with ESA staff, some changes and improvements were made to the methodology and approach used to create the 2025 industry database. The principal changes in database methodology include:

- Improvements in the methodology to capture small firms.
- Efforts to improve site specific employment estimates and to more finitely capture the remote workforce for many U.S. video game industry firms.
- Continued improvements in the approach to estimating video game-related employment for diversified companies and electronic component suppliers in the Consoles, Gaming Computers, and Peripherals sector.

Beyond these methodological changes, records were updated to current employment and locational data. Existing database firms were removed if:

- The firm had no visible active or updated presence on websites or social media since the previous data development efforts.
- The firm has since moved their business model to be primarily involved in branding and marketing "gamification" services.

Per this last point, the task of assembling this industry database is complicated by the fact that many companies with a major influence in the video game industry have diversified business models that extend well into non-game industries. Companies such as Microsoft, Sony, and NVIDIA, for example, are central players in the video game industry, yet have extensive business activities unrelated to video games. The development of the Video Game Industry Database accounts for this by conservatively identifying the portion of these diversified businesses that is video game-related. The primary resources used in developing the industry database are listed in Appendix B.

Size of the U.S. Video Game Industry

Table 1 and Figure 1 provide summaries of the sites/locations and employment data captured within the 2025 U.S. video game industry database, showing the overall industry to be **a significant U.S. employer with 82,930 jobs**.[5] The industry database reflects 8,998 sites/locations in 2025 (consisting of both address-specific site records and state-specific location records accounting for a firm's remote workers).

Table 1. Sites/Locations and Employment for the U.S. Video Game Industry and its Principal Sectors, 2025.

Source: TEConomy analysis of 2025 U.S. Video Game Industry Database..

Video Game Industry Sectors and Key Subsectors	Number of Sites/ Locations	Employment	Share of Total U.S. Video Game Industry Employment
Software	**6,143**	**63,248**	**76.3%**
Developer	4,643	34,070	41.1%
Developer/Publisher	712	23,455	28.3%
Publisher	318	2,751	3.3%
Platform	252	1,061	1.3%
Development Tools	197	1,579	1.9%
Other	21	332	0.4%
Consoles, Gaming Computers, and Peripherals	**205**	**3,481**	**4.2%**
Game Development Services	**220**	**2,409**	**2.9%**
Support Functions *(Industry-Specific Associations, Media, Education, and Other Organizations)*	**65**	**693**	**0.8%**
Total Non-Retail Video Game Industry	**6,622**	**69,831**	**84.2%**
Retail *(Video Game-Specific Stores)*[6]	**2,354**	**13,099**	**15.8%**
Total Video Game Industry	**8,976**	**82,930**	**100.0%**

The largest sector of the U.S. video game industry is game-related software, accounting for 63,248 U.S. employees and over 76% of the total industry employment. This includes 34,070 employees working within studios, independent developer teams, or home offices across the country. An additional 23,455 workers are part of developer/publisher operations, including publishers with captive studio operations and significant publishing and marketing functions.

[5] While every effort was made within the resources available for this project to identify establishments and their employment involved in the U.S. video game industry, the data most assuredly has not identified and captured all entities in the industry due to the incomplete nature or vagaries in the source data. In this regard, the economic impacts derived from the data included in the U.S. video game industry database are seen as a conservative picture of the overall U.S. video game industry.

[6] GameStop alone had more than 2,300 individual locations in 2025.

Publishing operations, including Activision Publishing (now a business unit under Microsoft Gaming), Capcom USA, NetEase, and Nexon America among others, account for an additional 2,751 industry jobs. Key tools, such as stand-alone video game engine companies and graphics software companies, make up the Development Tools subsector and account for 1,579 jobs within the U.S. video game industry. Lastly, the 332 employees in the software/other subsector consist of various entities supporting the overall software sector including specific video game physical distribution activities.

ESA Members Highlight

Current ESA members account for more than 32,800 or 40% of the U.S. video game industry's 83,000 employees with the software sector accounting for 99% of ESA member employment.

The consoles, gaming computers, and peripherals sector is conservatively estimated to employ 3,481 U.S. workers, or approximately 4% of the U.S. video game industry workforce. While significant manufacturing of consoles, components, and peripherals occurs overseas, key engineering, design, marketing and distribution capabilities are located in the U.S.[7] Additionally, numerous customized gaming computer companies have developed over the last five to ten years, where a U.S. establishment "builds" the computer from a variety of sourced parts and peripherals.

The game development services sector includes firms that provide creative and development assistance to the industry, often on a contract basis, in the form of graphic or animation artists, audio and sound effects engineers, motion-capture firms, and ancillary software programming services. This sector also includes firms providing localization assistance or operating system porting services on a contract basis. Altogether, these firms provide unique services used in the development of video games and account for 2,409 U.S. workers, or nearly 3% of the industry's current workforce.

The retail category focuses on companies and their establishments in which the sale of video game software and hardware dominates their operational focus.[8] Together these focused retail outlets employ 13,099 workers across the U.S. and account for nearly 16% of the defined U.S. video game industry.

Finally, the support functions sector captures key organizations that promote, educate, and provide other unique services for the video game industry. Together, these firms add an additional 693 jobs to the U.S. video game industry and include such video game-focused organizations such as the Entertainment Software Association, the Academy of Interactive Arts & Sciences, the National Videogame Museum, and DigiPen.[9]

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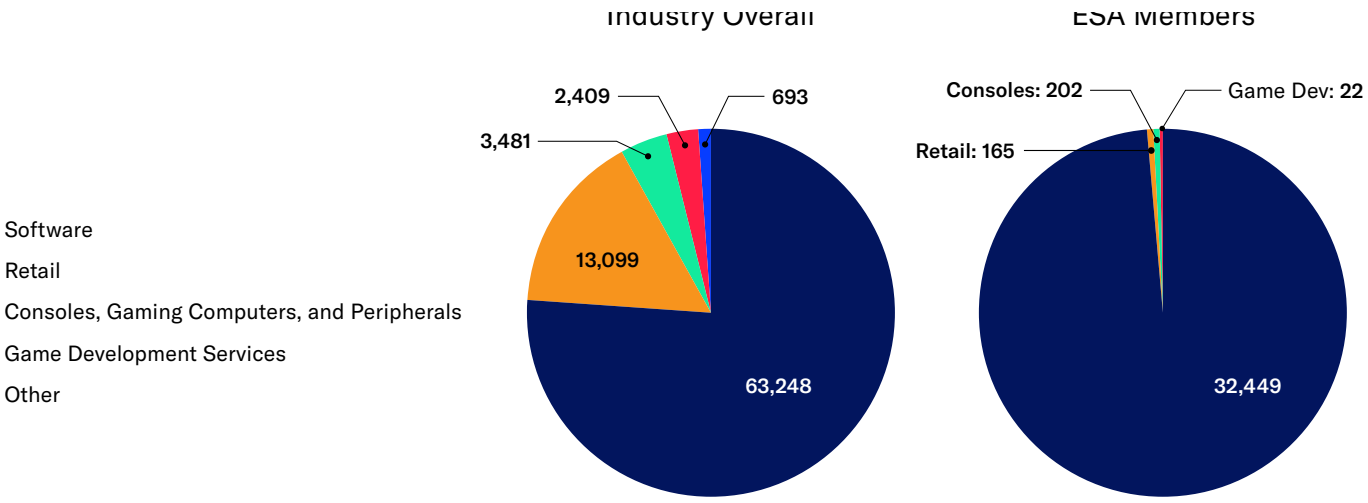
[7] Actual manufacturing employment related to various video game consoles, computers, other hardware, and peripherals, often based in various parts of Southeast Asia, is not included in these employment values. Additionally, methodology changes continue to more conservatively estimate the U.S. video game-focused employment in these firms.

[8] This focus will miss the employment and economic impacts of locally owned video game stores, making the overall impact results more conservative regarding the retail context of the overall U.S. video game industry.

[9] This sector does not, however, attempt to include the many local and regional game developer support groups, as many of these groups are informal and difficult to track and quantify.

Figure 1. Employment Distribution by Sector for the U.S. Video Game Industry Overall and ESA Members

Source: TEConomy analysis of 2025 U.S. Video Game Industry Database.



Notably, even with the improved methodology and increased geographic specificity, the 2025 database shows a decline in total U.S. video game industry employment of more than 21,100 workers compared to the 2023 employment database. While most sectors of the video game industry lost employment, the most significant losses were seen across software (a loss of about 12,000 workers) and retail (a loss of about 7,000 workers).

Specifying the Geographic Location of Video Game Industry Employment

The 2020 analysis performed by TEConomy made principal use of third-party corporate providers for the establishment level employment data for records within the video game industry database. With ESA's interest in establishing more specific locations for this employment, as well as the desire to recognize the "remote worker" element of industry employment in order to better model state-level economic impacts, TEConomy worked with the LinkedIn Talent Insights (LTI) tool, which uses the locational information within each professional user's LinkedIn profile to define an employee's work location more precisely.

When TEConomy could identify a physical address from existing corporate information that was distinctly reflected in an LTI-specified location, that location was used and the LTI employment for that geography applied to that address. If TEConomy could not find a closely corresponding physical address, those workers are treated as part of the substantial cadre of remote workers, and their employment is captured in the state specified in the LTI profile.

For some large city locations, where a city's broader metropolitan area includes counties from multiple states, TEConomy used LTI to establish a physical state-level location for employees instead of applying all the employment into the state where the actual city and company site is located. For example, instead of putting all workers in New York City into New York State to distinctly put workers from a New York City location into New York, New Jersey, and Connecticut based upon their LinkedIn profile. While this approach is not 100% perfect, it does spread some of the impacts related to where workers live–and likely spend most of their wages (induced impacts)–to the specific state identified.

Geographic Distribution of Video Game Industry Employment

A key characteristic of the video game industry is that it is an entrepreneurial industry, open to new business innovations and entrants. Additionally, the industry, especially its developers and studios, maintains a strong "reseeding" component as studio leaders from one studio often leave to start a new studio.

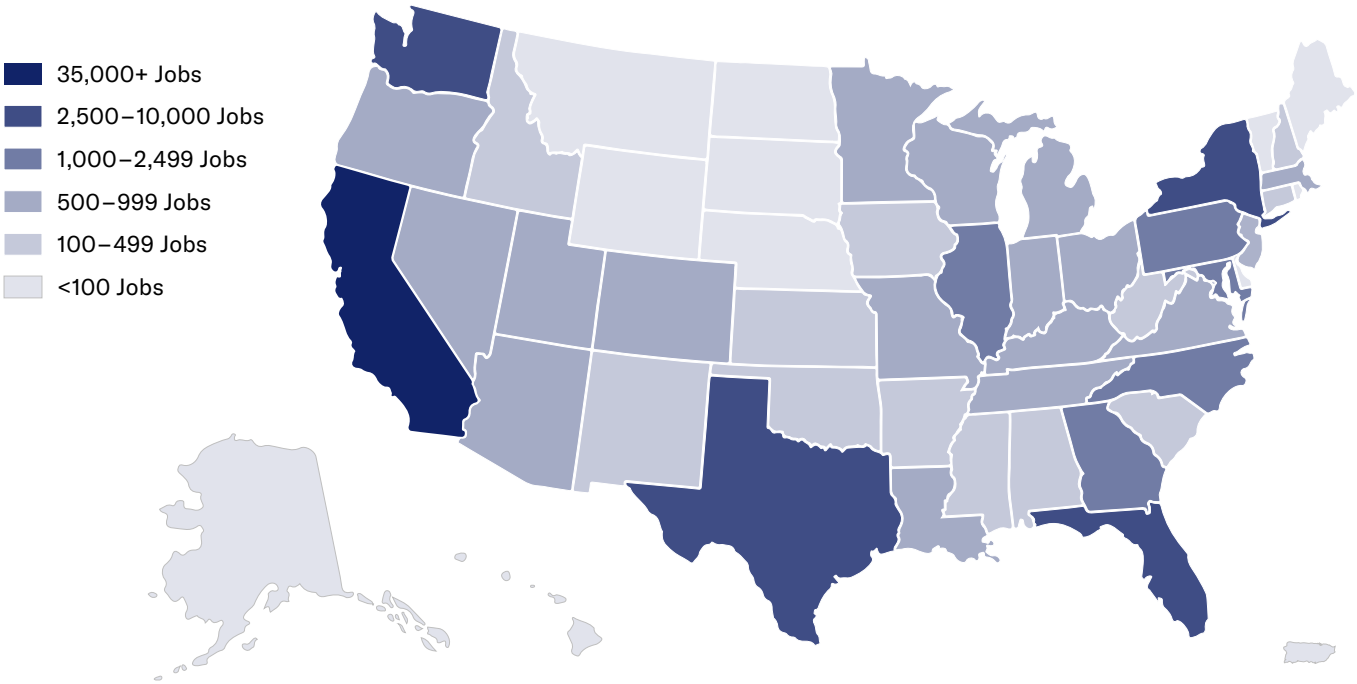
ESA Members Highlight

ESA members account for 40% or more of six states' total video game industry employment. Of these six, the share ranges from 61% in Maryland to 42% in Minnesota. Additional states include North Carolina, Washington, California, and Utah.

This constant evolution of the U.S. video game industry, with its combined site-based and remote workforce, increases the opportunity for wider geographic distribution of industry operations with every state in the U.S. having establishments and employment in the industry (Figure 2).

Figure 2. Geographic Distribution of Video Game Industry 2025 Employment in the United States

Source: TEConomy analysis of 2025 Video Game Industry Database.



ESA Members Highlight

Leading states for ESA member total employment include California, Washington, Texas, New York, North Carolina, and Florida.

As most readers familiar with the U.S. video game industry would expect, California hosts the largest number of video game industry firms and workers, accounting for 36,217 jobs. The next four largest states, Washington, Texas, New York, and Florida, account for about 9,800, 8,100, 4,000, and 3,000 jobs, respectively. Six additional states exceed 1,000 video game industry jobs each—North Carolina, Illinois, Georgia, Massachusetts, Maryland, and Pennsylvania.

The Remote Workforce of the U.S. Video Game Industry

The use of remote workers has significant implications for capturing and measuring the economic impacts of the U.S. video game industry and will continue to change the employment landscape.

The video game industry, like other aspects of the software industry and perhaps other industries with significant distributed marketing and sales infrastructures, utilizes an extended and external workforce approach for both competitive and efficiency reasons. Over the last three to five years, the increasing use of hybrid workers, a partly remote workforce, or even a 100% fully remote or "digital first" workforce, has forever changed the employment landscape, with technical and creative positions allowed, or even fostered, to exist beyond the physical footprint of a studio or facility.

However, even this trend continues to evolve, as many firms in the video game, software, and other industries have sought a return to the office while others have moved to or retained a hybrid model (workers reporting to a specific location, but some amount of time is spent working from home). Undoubtedly, for some, this decision was for improved management of the workforce. But in many creative industries, such as the video game industry, moving towards including at least some level of an "in office" mode is seen as a necessity for artistic and development collaboration.

The development of the industry database captured the most extensive aspect of the truly remote worker geographic distribution. The 2025 database identifies nearly 14,500 workers, or 17% of the industry's total employment, as truly remote workers. This compares to the approximately 18,000 remote workers (also 17%) identified in the 2023 database. These latest numbers do not capture the thousands of industry employees formerly working remotely and now working in a hybrid fashion, spending at least some work time within a company office.

Size Distribution of Video Game Industry Software Sector Sites

The video game software sector companies (i.e., developer/studios, and publishers) have at least one site-based location which is useful in fully understanding the sector and the overall industry.[10]

Employment data for each of the 1,767 specific software sites within the U.S. video game industry database was categorized into one of seven employment size groupings, ranging from "less than 10" to "1,000 or more". This employment totals 49,734 jobs.[11] These employment figures represent the number of workers located at a specific site and do not include estimates for remote workers.

The smallest sites, those with between one and nine employees, dominate the sheer number of video game software sites, accounting for 1,276 of the 1,767 of the identified sites, but less than 3,300 site-based software jobs (Figure 3). This points to the significant solo or small team development efforts occurring across the U.S.

The largest sites, those with 1,000 or more employees, account for 14,292 jobs or 29% of all site-based software jobs, but only eight sites.

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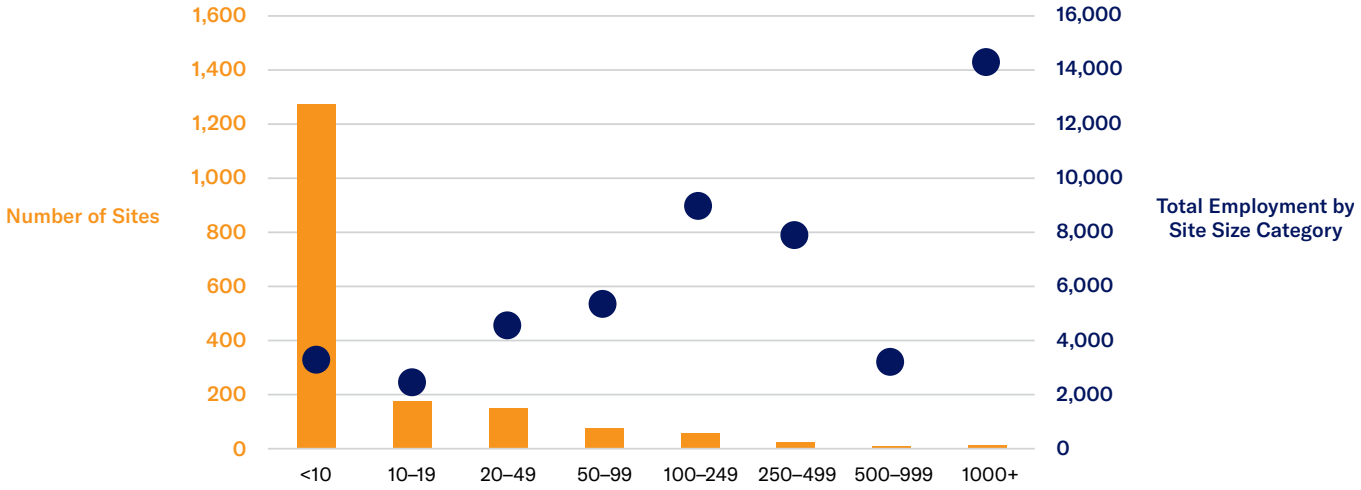
[10] For retail establishments and much of the console, gaming computer, and peripherals sector estimated employment records do not lend themselves to examination by size.

[11] This figure does not include "remote" and "fully remote" employment.

Figure 3. Distribution of Studio, Developer, Developer/Publisher Sites by Employment Size Category

Source: TEConomy analysis of 2025 Video Game Industry Database.



Interestingly, some context of a "sweet spot" in terms of site size is reflected in the data. The second largest employment total is captured by the site size category of 100-249 jobs, made up of 72 sites, totaling 11,364 site-based jobs.

Key Findings

- The U.S. video game industry employs **82,971 workers** in 2025, with the industry generating employment in every state.
- California captures a significant share of industry employment, accounting for **44% of the industry's workforce**. Washington, Texas, New York and Florida round out the top five states, accounting for approximately **74% of the industry's employment**.
- Beyond these five states, every state has at least some developer, developer/publisher, or publisher employment as the software sector dominates the industry, accounting for **76% of total industry employment**.
- However, in 25 states the estimated employment of GameStop locations accounts for **50% or more** of the 2025 U.S. video game industry employment.
- Remote workers (those workers working from home or elsewhere without a defined corporate office) account for nearly **14,500 workers, or 17% of U.S. video game industry's employment**.
- In the U.S. **65%** of the software sector (primarily game developers, developer/publishers, and publisher firm locations) **operate with less than 10 employees**, while **29%** of the total employment (14,292 jobs) in this space **is in eight sites with 1,000 or more employees**.

Economic Impact of the U.S. Video Game Industry

Input-Output analysis (see text box at right) is a well-established methodology for measuring the total economic impacts of an industry. The direct employment levels captured within the 2025 U.S. video game industry database, shown in Table 1, are used to drive and ultimately estimate and quantify the full economic impacts of the U.S. video game industry on both national and individual state economies.

National Economic Impact of the U.S. Video Game Industry

The U.S. video game industry, with 82,930 direct jobs (from Table 1), each allocated to the relevant IMPLAN model industry sector, drives a large-scale economic impact for the United States. Table 3 contains the results of the Input-Output analysis, showing that the industry produced the following estimated impacts for 2025:[12]

- Created and supported **nearly 251,000 total jobs** across the U.S. economy.
- **Generated $95.8 billion in total economic impact.**
- Contributed **$65.5 billion to U.S. GDP.**[13]
- Generated total income (salaries, wages, and benefits) for U.S. employees of $33.5 billion across all sectors of the economy, including $18.1 billion in direct labor income to U.S. video game industry workers (equivalent to an **average total compensation value of $217,982 per industry worker**).
- **Generated $12.7 billion in taxes**, comprising $8.6 billion in taxes generated for the federal government, $2.7 billion generated for state governments, and $1.4 billion generated for local and county governments.

ESA Members Highlight

ESA members, accounting for 40% of U.S. video game industry employment, directly generate over $17.4 billion of U.S. GDP and support an additional $12.3 billion in indirect and induced contributions to U.S. GDP.

Table 3. The Economic Impact of the U.S. Video Game Industry on the U.S. Economy, 2025
Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

		Values in $ Millions					
Impact Type	**Employment**	**Labor Income**	**Value-Added**	**Output**	**Local & County Tax Revenue**	**State Tax Revenue**	**Federal Tax Revenue**
Direct Effects	82,930	$18,078.9	$37,303.7	$52,077.4	$477.8	$1,266.9	$4,817.9
Indirect Effects	62,417	$7,752.3	$13,402.1	$20,629.2	$267.5	$517.3	$1,889.7
Induced Effects	105,490	$7,679.0	$14,782.7	$23,093.4	$702.4	$873.2	$1,914.3
Total Impacts	250,838	$33,510.2	$65,488.5	$95,800.0	$1,447.7	$2,657.4	$8,622.0
Multiplier	*3.02*	*1.85*	*1.76*	*1.84*	–	–	–

[12] Appendix C includes an economic impact table specific to the employment of ESA member firms.

[13] As a primarily a higher wage IT "service" sector, total compensation dominates the calculation of value added. Though overall employment and output declined from 2023 to 2025, compensation experienced a significant increase (estimated average compensation in 2023 was $168,600 compared to $217,982 in 2025). Hence, value added (share of GDP) was only slightly lower with the 2025 data as it was in 2023 ($65.5 billion in 2025 compared to $65.8 billion in 2023).

Overview of Input-Output Analysis

Input-Output (I-O) analysis models the interrelationships and financial transactions between economic sectors. I-O multipliers are based on the flow of commodities between industries, consumers, and institutions in a state or regional economy. This analysis uses U.S. and state-specific I-O models developed by IMPLAN. The IMPLAN model used by TEConomy is the most widely deployed model in the nation and is based on the U.S. Bureau of Economic Analysis (BEA) national accounts data, supplemented with state-level employment data from the U.S. Bureau of Labor Statistics (BLS) and other economic data from the U.S. Bureau of the Census. As used for this effort, the impact models are driven by the U.S. and state-level employment numbers stemming from the video game industry establishment database. The resulting analysis calculates three types of impacts:

- **Direct Effects** – the specific impacts of the direct employment and expenditures of video game industry companies.
- **Indirect Effects** – the impacts of in-state or national suppliers to these companies.
- **Induced Effects** – the additional economic impacts resulting from the spending of industry and supplier employees.
- **Total Impacts** – the sum of the three impact types.

The I-O analysis models multiplier effects (also known as "ripple effects") that originate from video game company employment and estimated expenditures in the U.S. and individual state economies.

The IMPLAN I-O models are used to derive estimates for five impact metrics:

- **Employment** is the total number of jobs created, including the direct industry employment.
- **Labor Income** is the total amount of income, including salaries, wages, and the value of benefits received by employees, owners, and others in the related supply chain. Often called total compensation.
- **Value-Added** represents the difference between output and the cost of intermediate inputs (e.g., purchases from suppliers) and represents the specified industry's contribution to Gross Domestic Product (GDP).
- **Output** (also known as production, sales, or business volume) is the total value of the goods and services produced in the economy due to the video game industry. Total output impacts are traditionally described as the "total economic impacts".
- **Government Revenues** includes estimates of revenues generated for local/county, state, and federal governments through taxes on the economic activity measured.

The IMPLAN system also allows for the design and operation of a Multi-Region Input-Output (MRIO) model. With the development of a U.S. 50 state plus the District of Columbia MRIO model, the estimates of interstate suppliers (e.g., firms in Oregon that supply both Washington and California's video game firms) are also captured, extending above and beyond the impacts a state's firms have distinctly within their state.

The direct employment impact of the 82,930 industry jobs had a strong multiplier effect on additional job creation in the U.S. economy. **The national employment multiplier of 3.02 indicates that for each individual direct job in the U.S. video game industry, an additional 2.02 jobs are supported within the broader U.S. economy**. In terms of economic output, the multiplier of 1.84 indicates that for every $1.00 in direct output generated by the U.S. video game industry, an additional $0.84 is generated across the U.S. economy.

While the average compensation for a U.S. video game industry employee is $218,002, there are substantial variations among the industry sectors (Table 4). Excluding retail employment, the average compensation for the remainder of the U.S. video game industry reaches $245,925.

ESA Members Highlight

The 21 ESA members accounted for and supported nearly $42.5 billion in economic impact in 2025, or 44% of the entire U.S. video game industry's economic impacts.

The game development services sector's workers are estimated to receive $346,542 in annual compensation (including the costs and value of all benefits) – indicative of the unique value these firms bring to the video game industry. The varied support functions sector generates $255,904 in average annual compensation, while the software sector's employees are estimated to receive $246,931 in total compensation. As expected, the retail sector constitutes the lowest average among the five sectors yet still averaging $68,931 in total compensation.

Table 4. Average U.S. Video Game Worker Compensation, by Industry Sector, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

U.S. Video Game Industry Sector	Average Industry Worker Compensation (Including All Benefits)
Software	$246,931
Consoles, Gaming Computers, and Peripherals	$155,930
Game Development Services	$346,542
Retail	$68,931
Support Functions	$255,904
Five Sector (Total) Industry Average	$218,002
Four Sector (Without Retail) Industry Average	$245,965

The economic impacts of the video game industry are felt widely across the U.S. economy. Table 5 shows key, yet diverse, industry supplier segments, each supplying at least $50 million to the U.S. video game industry. These supplier segments benefit from the demand generated by the operations of the U.S. video game industry. In terms of the sales to the U.S. video game industry (indirect output), these 17 segments account for $18.9 billion of the total $20.6 billion in supplier (indirect) output (92%). Similarly, these segments account for more than 56,000 jobs, 91% of indirect supplier employment.

Table 5. Key Industry Supplier Segments to the U.S. Video Game Industry, 2025 ($ in millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Industry Supplier Segment	Indirect U.S. Output ($M)	Indirect U.S. Employment
Total, All Segments	**$20,629.1**	**62,417**
Software and IT Services	$8,442.5	12,748
Financial, Insurance, and Real Estate Services	$1,981.0	5,419
Wholesale Professional Equipment, Machinery, and Supplies	$1,899.0	4,571
Business Support Services	$1,328.0	6,162
Employment Services	$1,181.7	10,531
Broadcasting, Programming, and Telecommunication Carriers	$816.7	943
Business Management and Administration	$764.3	3,960
Electronic Components and Parts Manufacturing	$611.9	935
Professional and Technical Services	$436.8	1,442
Transportation, Delivery, and Warehousing Services	$382.6	3,422
Facility Support Services	$301.9	1,964
Hotels and Restaurants	$211.0	1,682
Utilities	$201.3	144
Industrial, Electronic, and Precision Equipment Repair and Maintenance	$118.5	719
Security Services	$96.9	1,434
Printing	$95.2	439
Computer and Communication Equipment Manufacturing	$65.9	67
Key Supplier Sector Total	**$18,935.1**	**56,583**

Note: Columns do not sum to values in Total, All Segments row.

Not surprisingly, software and other IT services is the largest supplier segment to the U.S. video game industry by a substantial margin, both in terms of output (more than $8.4 billion) and jobs (12,748). In terms of the supplier workforce, employment services (temporary workers) account for the second largest number of supplier workers at 10,531.

State Economic Impact of the Video Game Industry

As Figure 2 shows, the distribution of video game employment is spread across the U.S., but with key states capturing a significant share of the total employment and total economic activity. Each state's employment level, across the five industry sectors, plays a significant role in determining the ultimate economic impact within a state or region.

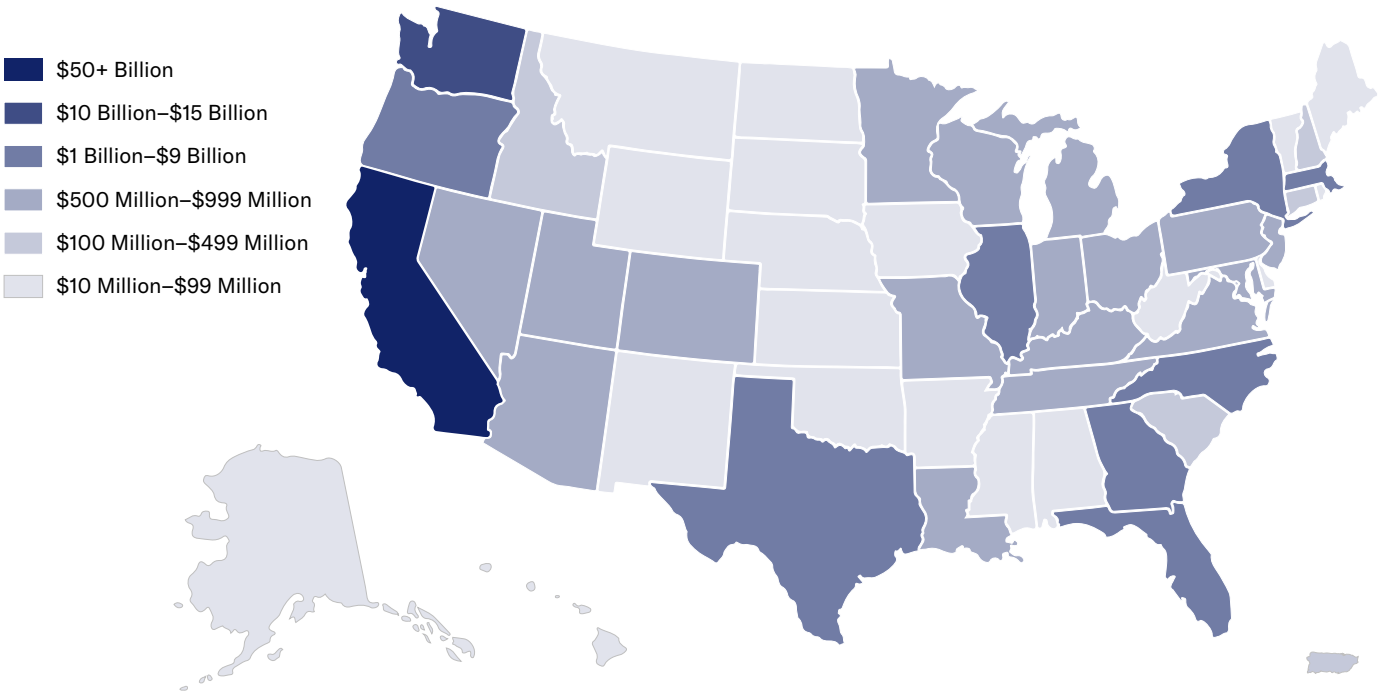
TEConomy estimated both the intrastate and interstate economic impacts in this analysis. This multi-state economic impact analysis generates, at the state level, an estimate of each state's impact stemming

from its direct industry employment, or its **intrastate impacts** (e.g., impacts generated in each state by the firms in that state captured within the U.S. Video Game Industry Database). Additionally, the impact analysis estimates each state's **interstate impacts**, or impacts captured within a state from the sales of its firms (from any sector) to the video game firms in other states.

Figure 4 shows the geographic distribution of these total interstate output impacts, also considered to be the "total economic impacts" across the 50 states, the District of Columbia, and Puerto Rico. Table 6 lists the top 15 states by direct video game industry employment (direct video game state-level employment is also displayed in Figure 2) and provides the intrastate and interstate total employment impacts. Table 7 lists the top 15 states by estimated direct video game industry output and provides the intrastate and interstate total output impacts.

Figure 4. Geographic Distribution of Video Game Industry Interstate Total Economic Impacts in the U.S., 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.



The outsized importance of the U.S. video game industry to California and California to the U.S. video game industry is shown in the U.S. map and in both tables.

Table 6 also shows that with more than 2,000 video game industry workers each, Washington, Texas, New York, Florida, and North Carolina are key states both in terms of direct U.S. video game industry employment as well as drivers of total employment impacts. Combined, the 15 states shown in Table 6 account for 89% of U.S. video game industry employment, 92% of intrastate total employment impacts, and 90% of interstate total employment impacts.

Table 6. Top 15 States Ranked by Direct Video Game Industry Employment, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

	Employment Impacts				
State	**Intrastate – Direct Effects**	**Intrastate – Total Impacts**	**Intrastate *Multiplier***	**Interstate – Total Impacts**	**Interstate *Multiplier***
California	36,217	115,847	*3.20*	119,033	*3.29*
Washington	9,795	27,184	*2.78*	28,451	*2.90*
Texas	8,124	20,255	*2.49*	22,108	*2.72*
New York	4,036	9,967	*2.47*	11,473	*2.84*
Florida	3,034	7,724	*2.55*	8,688	*2.86*
North Carolina	2,467	6,344	*2.57*	6,717	*2.72*
Illinois	1,640	4,133	*2.52*	4,700	*2.87*
Georgia	1,386	3,561	*2.57*	4,091	*2.95*
Massachusetts	1,308	3,402	*2.60*	4,075	*3.12*
Maryland	1,194	2,731	*2.29*	3,014	*2.52*
Pennsylvania	1,181	2,487	*2.11*	3,141	*2.66*
Colorado	934	2,455	*2.63*	2,763	*2.96*
Oregon	918	2,351	*2.56*	3,389	*3.69*
Ohio	778	1,531	*1.97*	1,867	*2.40*
Nevada	693	1,611	*2.33*	2,196	*3.17*

Table 7 shows similar results when examining U.S. video game output (economic) impacts. Beyond the top six leading states, the remaining in the top 15 shift in order, with Ohio included in the direct video game industry employment (Table 6), replaced by New Jersey in the U.S. video game industry economic output (Table 7).

Table 7. Top 15 States Ranked by Total Video Game Industry Economic Output, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry.

	Output Impacts ($ Millions)				
State	**Intrastate – Direct Effects**	**Intrastate – Total Impacts**	**Intrastate *Multiplier***	**Interstate – Total Impacts**	**Interstate *Multiplier***
California	$29,830.2	$51,000.2	1.71	$52,162.3	1.75
Washington	$7,841.7	$12,790.0	1.63	$13,388.3	1.71
Texas	$3,177.4	$5,864.9	1.85	$6,339.3	2.00
New York	$2,210.6	$3,791.3	1.72	$4,367.9	1.98
Florida	$1,156.4	$2,146.6	1.86	$2,351.3	2.03
North Carolina	$1,106.6	$1,993.8	1.80	$2,092.1	1.89
Massachusetts	$750.8	$1,306.4	1.74	$1,547.3	2.06
Illinois	$715.9	$1,281.4	1.79	$1,428.5	2.00
Georgia	$544.4	$1,027.7	1.89	$1,147.6	2.11
Maryland	$491.2	$833.4	1.70	$893.7	1.82
Oregon	$450.7	$779.4	1.73	$1,064.2	2.36
Colorado	$429.0	$797.9	1.86	$883.9	2.06
Pennsylvania	$388.2	$672.3	1.73	$829.0	2.14
Nevada	$269.7	$478.2	1.77	$605.4	2.24
New Jersey	$247.5	$438.5	1.77	$675.8	2.73

Key Findings

- The U.S. video game industry created and supported **251,000 total jobs** across the U.S. economy while generating and supporting nearly **$96 billion** in total economic impacts.
- **Average industry compensation stands at $218,000** but ranges from **$69,000** in the video game retail sector to **$347,000** in the game development services sector.
- A high value-added industry, the U.S. video game industry contributed nearly **$66 billion to U.S. GDP**.
- The industry generates and supports more than **$12.7 billion in tax revenues** flowing to local/county, state, and federal governments.
- **The national employment multiplier is 3.02**, with estimated state-level interstate multipliers ranging from 1.68 to 4.96.
- Economic impacts are generated and supported across **all 50 states**, Washington, D.C. and Puerto Rico, with interstate total impacts ranging from $11.31 million to $52.16 billion.

Conclusion

The substantial employment in the U.S. video game industry, as well as the economic expenditures driven by the industry, are multiplied many times over. The expenditures made by industry suppliers, as well as the spending of personal incomes by workers related to and supporting the industry, perpetuate this ripple effect through the economies of every state and the nation as a whole. Input-Output analysis estimates that **the total economic impact generated by the U.S. video game industry is nearly $96 billion, and the business activity generated by the industry supports more than 250,000 jobs across the U.S. On average, every job within the U.S. video game industry supports 2.02 additional jobs in the national economy.**

Appendix A

State Economic Impacts of the U.S. Video Game Industry

The video game industry has a physical business presence in every state, with industry establishments located in all 50 U.S. states, the District of Columbia, and Puerto Rico. The research results (presented as Tables A-1 through A-7 on the subsequent pages) provide two distinct sets of impact metrics being generated by the video game industry at a state level:

1. The first set of metrics capture the impacts generated within each state by video game industry establishments that are physically located in each state. Thus, the impacts and metrics in Columns 2-6 are the states' "in-state" (intrastate) video game industry impacts, with the sum of states' intrastate metrics included in the last row in these columns.[14]

2. The second set of metrics (Columns 7 and 8) are the total impacts within each state that are generated by the effects of the nationwide video game industry (including the intrastate industry impacts shown in Column 5 and all additional interstate impacts). This is, by definition, a larger number because it includes the impact in each state of the expenditures of both in-state and out-of-state video game-related firms and the expenditures of associated suppliers and other industry sectors. In effect, this second measure represents the "share" of the total U.S. video game industry impacts that are captured in each state.[15]

For example: in the case of Alabama on Table A-1, Column 5 shows the total intrastate impact on employment, and Column 6 is the intrastate multiplier (i.e., Alabama's 229 in-state or intrastate video game industry employment has a total employment impact on Alabama of 330 jobs). The impact of the whole U.S. video game industry in Alabama (including the impacts from the industry in other states spending money within Alabama) provided in Column 7 is 473 jobs.

State impact tables are provided for employment (Table A-1), total employment compensation (Table A-2), value added (Table A-3), economic output (Table A-4), local/county taxes (Table A-5), state taxes (Table A-6) and federal taxes (Table A-7).

[14] It should be noted that the sum of individual state intrastate impacts in the following tables will not equal the total national impacts shown in Table 3, as by default the U.S. model captures all of the interstate impacts as well.

[15] Due to the structure of the IMPLAN models TEConomy is not able to measure the possible interstate impacts flowing between Puerto Rico and the rest of the U.S.. Therefore, Puerto Rico intrastate and interstate impacts are the same and these impacts are added to the U.S. overall impacts for both U.S. intrastate and interstate metrics.

Table A-1. State Employment Impacts of U.S. Video Game Industry, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-6) and Interstate Impact of U.S. Industry Overall (Columns 7-8).

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Alabama	229	39	62	330	1.44	473	*2.06*
Alaska	28	3	6	37	1.33	76	*2.73*
Arizona	557	255	389	1,201	2.16	2,370	*4.25*
Arkansas	126	29	36	191	1.52	283	*2.25*
California	36,217	25,034	54,596	115,847	3.20	119,033	*3.29*
Colorado	934	615	906	2,455	2.63	2,763	*2.96*
Connecticut	226	78	104	408	1.80	616	*2.72*
Delaware	69	11	19	99	1.43	157	*2.27*
District of Columbia	138	60	46	245	1.77	370	*2.68*
Florida	3,034	2,064	2,625	7,724	2.55	8,688	*2.86*
Georgia	1,386	992	1,182	3,561	2.57	4,091	*2.95*
Hawaii	82	21	38	141	1.72	210	*2.56*
Idaho	155	58	74	288	1.86	559	*3.61*
Illinois	1,640	972	1,521	4,133	2.52	4,700	*2.87*
Indiana	385	74	140	599	1.55	865	*2.25*
Iowa	154	31	53	238	1.54	343	*2.23*
Kansas	157	39	54	251	1.60	348	*2.22*
Kentucky	353	75	112	540	1.53	638	*1.81*
Louisiana	544	190	204	938	1.72	1,054	*1.94*
Maine	69	25	35	129	1.87	176	*2.56*
Maryland	1,194	692	844	2,731	2.29	3,014	*2.52*
Massachusetts	1,308	747	1,347	3,402	2.60	4,075	*3.12*
Michigan	599	222	344	1,165	1.95	1,496	*2.50*
Minnesota	587	328	467	1,382	2.35	1,675	*2.85*
Mississippi	141	25	6	172	1.22	237	*1.68*
Missouri	395	188	149	732	1.85	966	*2.44*
Montana	47	13	5	65	1.38	113	*2.41*
Nebraska	64	25	16	104	1.63	188	*2.93*
Nevada	693	477	442	1,611	2.33	2,196	*3.17*
New Hampshire	151	101	48	300	1.99	479	*3.17*
New Jersey	686	331	473	1,489	2.17	2,533	*3.69*
New Mexico	128	21	29	177	1.39	258	*2.01*
New York	4,036	2,370	3,561	9,967	2.47	11,473	*2.84*
North Carolina	2,467	2,259	1,618	6,344	2.57	6,717	*2.72*
North Dakota	52	12	7	70	1.35	108	*2.07*
Ohio	778	326	427	1,531	1.97	1,867	*2.40*
Oklahoma	164	26	45	234	1.43	348	*2.12*
Oregon	918	631	802	2,351	2.56	3,389	*3.69*

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Pennsylvania	1,181	469	838	2,487	2.11	3,141	*2.66*
Rhode Island	69	27	34	130	1.89	208	*3.01*
South Carolina	316	63	112	491	1.55	754	*2.39*
South Dakota	24	2	5	31	1.29	69	*2.88*
Tennessee	457	157	237	850	1.86	1,131	*2.48*
Texas	8,124	5,092	7,039	20,255	2.49	22,108	*2.72*
Utah	522	351	484	1,357	2.60	1,624	*3.11*
Vermont	48	26	25	99	2.06	138	*2.87*
Virginia	684	221	350	1,255	1.83	1,880	*2.75*
Washington	9,795	5,204	12,185	27,184	2.78	28,451	*2.90*
West Virginia	101	5	19	125	1.23	173	*1.71*
Wisconsin	621	328	479	1,428	2.30	1,800	*2.90*
Wyoming	25	3	4	32	1.28	57	*2.30*
Puerto Rico	72	204	82	357	4.96	357	*4.96*
U.S. Totals	**82,930**	**51,607**	**94,725**	**229,262**	**2.76**	**250,838**	***3.02***

Table A-2. State Labor Income (Total Compensation) Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-6) and Interstate Impact of U.S. Industry Overall (Columns 7-8).

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Alabama	$14.55	$2.53	$3.24	$20.32	1.40	$30.17	*2.07*
Alaska	$1.58	$0.21	$0.41	$2.20	1.39	$5.14	*3.26*
Arizona	$58.06	$23.72	$25.01	$106.79	1.84	$196.69	*3.39*
Arkansas	$7.31	$1.79	$1.87	$10.97	1.50	$17.04	*2.33*
California	$10,207.11	$3,557.49	$4,149.81	$17,914.41	1.76	$18,316.74	*1.79*
Colorado	$140.40	$68.21	$61.02	$269.62	1.92	$296.87	*2.11*
Connecticut	$26.31	$8.05	$7.26	$41.63	1.58	$59.98	*2.28*
Delaware	$5.14	$0.77	$1.16	$7.06	1.37	$12.06	*2.35*
District of Columbia	$43.92	$10.82	$4.53	$59.26	1.35	$78.73	*1.79*
Florida	$358.83	$172.06	$157.06	$687.95	1.92	$754.70	*2.10*
Georgia	$162.97	$90.77	$69.27	$323.01	1.98	$360.45	*2.21*
Hawaii	$8.17	$1.77	$2.42	$12.36	1.51	$17.11	*2.09*
Idaho	$13.52	$4.63	$4.31	$22.46	1.66	$40.99	*3.03*
Illinois	$242.39	$102.04	$103.05	$447.49	1.85	$493.78	*2.04*
Indiana	$27.88	$5.89	$8.65	$42.42	1.52	$61.06	*2.19*
Iowa	$11.47	$2.44	$2.83	$16.75	1.46	$23.95	*2.09*
Kansas	$11.27	$3.19	$3.19	$17.65	1.57	$24.83	*2.20*
Kentucky	$23.04	$5.41	$6.52	$34.97	1.52	$41.78	*1.81*

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Louisiana	$37.37	$12.06	$10.52	$59.94	1.60	$67.36	*1.80*
Maine	$5.75	$2.15	$2.16	$10.07	1.75	$13.39	*2.33*
Maryland	$159.70	$70.38	$53.69	$283.77	1.78	$305.08	*1.91*
Massachusetts	$267.19	$102.43	$111.68	$481.30	1.80	$569.10	*2.13*
Michigan	$54.57	$18.62	$20.80	$93.99	1.72	$118.95	*2.18*
Minnesota	$68.58	$32.12	$31.39	$132.09	1.93	$157.65	*2.30*
Mississippi	$6.17	$1.12	$0.32	$7.61	1.23	$10.99	*1.78*
Missouri	$30.62	$11.25	$12.49	$54.36	1.78	$72.69	*2.37*
Montana	$2.52	$0.72	$0.38	$3.62	1.44	$6.57	*2.61*
Nebraska	$4.85	$1.44	$1.37	$7.67	1.58	$13.95	*2.88*
Nevada	$86.66	$29.27	$39.51	$155.44	1.79	$195.50	*2.26*
New Hampshire	$22.11	$7.34	$6.03	$35.48	1.61	$52.20	*2.36*
New Jersey	$90.80	$36.71	$34.92	$162.43	1.79	$248.47	*2.74*
New Mexico	$6.84	$1.36	$1.53	$9.73	1.42	$15.09	*2.21*
New York	$762.74	$314.75	$286.17	$1,363.66	1.79	$1,542.98	*2.02*
North Carolina	$383.09	$139.06	$162.56	$684.72	1.79	$714.12	*1.86*
North Dakota	$2.92	$0.71	$0.47	$4.10	1.40	$6.99	*2.39*
Ohio	$63.02	$25.02	$24.82	$112.86	1.79	$137.13	*2.18*
Oklahoma	$10.05	$1.78	$2.45	$14.29	1.42	$21.94	*2.18*
Oregon	$128.64	$64.91	$52.64	$246.19	1.91	$337.60	*2.62*
Pennsylvania	$133.45	$46.62	$56.30	$236.37	1.77	$289.34	*2.17*
Rhode Island	$6.25	$2.39	$2.19	$10.83	1.73	$16.30	*2.61*
South Carolina	$24.00	$4.78	$5.85	$34.63	1.44	$50.91	*2.12*
South Dakota	$1.34	$0.13	$0.30	$1.77	1.32	$4.68	*3.51*
Tennessee	$44.37	$14.41	$16.13	$74.91	1.69	$97.45	*2.20*
Texas	$1,063.23	$462.28	$438.45	$1,963.96	1.85	$2,114.75	*1.99*
Utah	$76.26	$34.05	$28.27	$138.58	1.82	$158.30	*2.08*
Vermont	$3.84	$2.23	$1.51	$7.59	1.97	$10.52	*2.74*
Virginia	$73.01	$22.95	$21.53	$117.50	1.61	$171.34	*2.35*
Washington	$3,006.78	$788.99	$962.65	$4,758.43	1.58	$4,959.65	*1.65*
West Virginia	$4.99	$0.30	$1.07	$6.36	1.27	$9.50	*1.90*
Wisconsin	$76.26	$31.60	$29.06	$136.93	1.80	$166.32	*2.18*
Wyoming	$1.35	$0.18	$0.19	$1.71	1.27	$3.44	*2.55*
Puerto Rico	$5.70	$9.28	$2.97	$17.95	3.15	$17.95	*3.15*
U.S. Totals	**$18,078.93**	**$6,355.19**	**$7,034.00**	**$31,468.12**	**1.74**	**$33,510.25**	***1.85***

Table A-3. State Value Added Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-6) and Interstate Impact of U.S. Industry Overall (Columns 7-8).

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Alabama	$20.33	$4.23	$6.61	$31.16	1.53	$49.48	*2.43*
Alaska	$2.00	$0.33	$0.76	$3.08	1.54	$10.60	*5.30*
Arizona	$101.50	$38.15	$50.28	$189.93	1.87	$346.99	*3.42*
Arkansas	$10.88	$2.84	$3.77	$17.48	1.61	$28.88	*2.66*
California	$22,412.57	$6,243.25	$7,864.43	$36,520.25	1.63	$37,295.10	*1.66*
Colorado	$272.25	$110.89	$118.68	$501.83	1.84	$548.98	*2.02*
Connecticut	$45.62	$12.97	$13.98	$72.57	1.59	$103.43	*2.27*
Delaware	$6.76	$1.39	$2.43	$10.58	1.57	$23.23	*3.44*
District of Columbia	$80.18	$17.63	$8.02	$105.83	1.32	$134.48	*1.68*
Florida	$649.50	$265.53	$313.06	$1,228.10	1.89	$1,339.37	*2.06*
Georgia	$312.23	$153.81	$139.28	$605.32	1.94	$671.85	*2.15*
Hawaii	$13.72	$2.79	$4.97	$21.49	1.57	$31.31	*2.28*
Idaho	$21.82	$7.62	$8.56	$38.00	1.74	$69.19	*3.17*
Illinois	$453.00	$160.97	$192.46	$806.43	1.78	$885.83	*1.96*
Indiana	$38.57	$8.56	$15.90	$63.03	1.63	$95.78	*2.48*
Iowa	$19.88	$4.25	$5.72	$29.86	1.50	$45.11	*2.27*
Kansas	$16.37	$4.48	$5.96	$26.82	1.64	$38.68	*2.36*
Kentucky	$32.06	$8.16	$12.06	$52.29	1.63	$63.97	*2.00*
Louisiana	$64.38	$18.81	$21.13	$104.32	1.62	$120.21	*1.87*
Maine	$8.00	$3.19	$4.31	$15.50	1.94	$21.68	*2.71*
Maryland	$300.44	$108.76	$105.12	$514.32	1.71	$550.96	*1.83*
Massachusetts	$519.16	$172.45	$196.91	$888.51	1.71	$1,043.60	*2.01*
Michigan	$94.96	$29.13	$38.40	$162.49	1.71	$200.84	*2.12*
Minnesota	$116.85	$48.67	$57.90	$223.41	1.91	$266.17	*2.28*
Mississippi	$7.58	$2.39	$0.51	$10.48	1.38	$17.06	*2.25*
Missouri	$52.25	$21.06	$19.78	$93.09	1.78	$123.71	*2.37*
Montana	$3.27	$1.34	$0.62	$5.23	1.60	$10.57	*3.23*
Nebraska	$7.77	$2.86	$2.43	$13.06	1.68	$27.33	*3.52*
Nevada	$157.31	$61.79	$64.34	$283.43	1.80	$354.35	*2.25*
New Hampshire	$34.23	$13.70	$9.61	$57.53	1.68	$82.87	*2.42*
New Jersey	$160.97	$57.76	$63.74	$282.47	1.75	$428.43	*2.66*
New Mexico	$10.24	$2.25	$3.21	$15.70	1.53	$26.66	*2.60*
New York	$1,499.19	$540.32	$532.22	$2,571.74	1.72	$2,984.68	*1.99*
North Carolina	$732.53	$274.58	$270.80	$1,277.91	1.74	$1,329.56	*1.82*
North Dakota	$4.02	$1.24	$0.77	$6.02	1.50	$11.32	*2.82*
Ohio	$111.94	$41.09	$48.19	$201.23	1.80	$246.03	*2.20*
Oklahoma	$12.95	$2.65	$4.72	$20.32	1.57	$32.91	*2.54*
Oregon	$259.06	$106.41	$94.92	$460.40	1.78	$615.61	*2.38*

State	Intrastate Impacts					Total Interstate Impacts	
	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	*Multiplier*	Total Impacts	*Multiplier*
Pennsylvania	$247.01	$74.39	$99.95	$421.35	1.71	$504.79	*2.04*
Rhode Island	$10.05	$3.73	$4.07	$17.85	1.78	$27.28	*2.71*
South Carolina	$34.17	$7.69	$12.82	$54.69	1.60	$85.34	*2.50*
South Dakota	$1.66	$0.21	$0.56	$2.43	1.46	$8.99	*5.42*
Tennessee	$65.97	$22.79	$29.89	$118.65	1.80	$156.31	*2.37*
Texas	$1,882.49	$739.45	$850.43	$3,472.37	1.84	$3,721.12	*1.98*
Utah	$145.07	$59.40	$60.17	$264.65	1.82	$304.68	*2.10*
Vermont	$6.52	$3.57	$2.87	$12.97	1.99	$17.50	*2.68*
Virginia	$121.67	$35.79	$43.66	$201.13	1.65	$288.54	*2.37*
Washington	$5,921.57	$1,343.76	$1,996.34	$9,261.67	1.56	$9,696.05	*1.64*
West Virginia	$6.21	$0.46	$2.02	$8.69	1.40	$14.77	*2.38*
Wisconsin	$146.56	$53.24	$55.88	$255.68	1.74	$308.56	*2.11*
Wyoming	$1.83	$0.27	$0.42	$2.53	1.38	$6.15	*3.35*
Puerto Rico	$46.56	$18.09	$6.93	$71.58	1.54	$71.58	*1.54*
U.S. Totals	**$37,303.69**	**$10,921.14**	**$13,472.59**	**$61,697.42**	**1.65**	**$65,488.46**	***1.76***

Table A-4. State Output Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-6) and Interstate Impact of U.S. Industry Overall (Columns 7-8).

State	Intrastate Impacts					Total Interstate Impacts	
	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	*Multiplier*	Total Impacts	*Multiplier*
Alabama	$30.37	$7.99	$11.16	$49.52	1.63	$91.79	*3.02*
Alaska	$3.49	$0.65	$1.22	$5.36	1.54	$16.88	*4.83*
Arizona	$162.98	$64.43	$80.85	$308.26	1.89	$591.99	*3.63*
Arkansas	$19.56	$5.39	$6.46	$31.41	1.61	$56.84	*2.91*
California	$29,830.23	$8,967.35	$12,202.65	$51,000.24	1.71	$52,162.31	*1.75*
Colorado	$429.03	$178.76	$190.11	$797.91	1.86	$883.94	*2.06*
Connecticut	$72.04	$20.94	$20.73	$113.72	1.58	$167.13	*2.32*
Delaware	$10.01	$2.27	$3.76	$16.04	1.60	$34.11	*3.41*
District of Columbia	$104.00	$23.96	$11.19	$139.16	1.34	$178.10	*1.71*
Florida	$1,156.37	$468.99	$521.19	$2,146.56	1.86	$2,351.33	*2.03*
Georgia	$544.41	$256.13	$227.20	$1,027.74	1.89	$1,147.56	*2.11*
Hawaii	$21.84	$4.89	$7.81	$34.54	1.58	$50.86	*2.33*
Idaho	$38.37	$14.18	$14.35	$66.90	1.74	$130.83	*3.41*
Illinois	$715.90	$257.96	$307.54	$1,281.39	1.79	$1,428.53	*2.00*
Indiana	$60.06	$15.33	$25.96	$101.35	1.69	$172.54	*2.87*
Iowa	$30.09	$7.39	$9.43	$46.91	1.56	$76.35	*2.54*
Kansas	$27.83	$9.08	$10.26	$47.17	1.70	$70.95	*2.55*

	Intrastate Impacts					Total Interstate Impacts	
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	***Multiplier***	**Total Impacts**	***Multiplier***
Kentucky	$52.04	$15.50	$20.49	$88.03	1.69	$114.30	*2.20*
Louisiana	$123.54	$36.29	$36.11	$195.93	1.59	$231.65	*1.88*
Maine	$14.19	$6.06	$6.93	$27.18	1.92	$39.16	*2.76*
Maryland	$491.20	$177.34	$164.82	$833.36	1.70	$893.69	*1.82*
Massachusetts	$750.83	$257.51	$298.10	$1,306.43	1.74	$1,547.31	*2.06*
Michigan	$153.61	$51.38	$64.63	$269.63	1.76	$362.74	*2.36*
Minnesota	$206.31	$83.04	$93.88	$383.23	1.86	$468.67	*2.27*
Mississippi	$9.09	$4.20	$1.09	$14.38	1.58	$30.34	*3.34*
Missouri	$89.02	$35.29	$35.27	$159.58	1.79	$219.98	*2.47*
Montana	$4.74	$2.29	$1.17	$8.20	1.73	$19.21	*4.05*
Nebraska	$11.51	$4.67	$4.24	$20.43	1.77	$45.98	*3.99*
Nevada	$269.70	$97.63	$110.87	$478.20	1.77	$605.35	*2.24*
New Hampshire	$47.60	$21.09	$14.88	$83.58	1.76	$128.90	*2.71*
New Jersey	$247.46	$92.09	$98.98	$438.52	1.77	$675.76	*2.73*
New Mexico	$17.59	$4.38	$5.33	$27.29	1.55	$50.10	*2.85*
New York	$2,210.61	$797.38	$783.35	$3,791.34	1.72	$4,367.90	*1.98*
North Carolina	$1,106.56	$447.65	$439.62	$1,993.84	1.80	$2,092.07	*1.89*
North Dakota	$6.36	$2.14	$1.47	$9.97	1.57	$20.35	*3.20*
Ohio	$187.32	$71.40	$79.70	$338.42	1.81	$436.23	*2.33*
Oklahoma	$19.81	$5.14	$8.33	$33.28	1.68	$58.88	*2.97*
Oregon	$450.72	$175.96	$152.71	$779.38	1.73	$1,064.18	*2.36*
Pennsylvania	$388.24	$122.46	$161.64	$672.34	1.73	$829.00	*2.14*
Rhode Island	$17.26	$6.63	$6.48	$30.37	1.76	$47.15	*2.73*
South Carolina	$48.34	$13.92	$20.94	$83.20	1.72	$142.02	*2.94*
South Dakota	$2.34	$0.40	$0.94	$3.68	1.57	$15.74	*6.73*
Tennessee	$100.35	$39.49	$48.14	$187.98	1.87	$258.98	*2.58*
Texas	$3,177.44	$1,262.76	$1,424.72	$5,864.92	1.85	$6,339.34	*2.00*
Utah	$226.27	$99.01	$99.41	$424.69	1.88	$498.07	*2.20*
Vermont	$12.69	$6.85	$4.66	$24.20	1.91	$33.90	*2.67*
Virginia	$187.44	$57.42	$68.81	$313.67	1.67	$457.90	*2.44*
Washington	$7,841.72	$1,937.93	$3,010.36	$12,790.01	1.63	$13,388.28	*1.71*
West Virginia	$7.68	$0.88	$3.37	$11.93	1.55	$24.36	*3.17*
Wisconsin	$232.82	$89.92	$91.88	$414.62	1.78	$518.72	*2.23*
Wyoming	$3.10	$0.59	$0.76	$4.44	1.43	$11.31	*3.65*
Puerto Rico	$105.35	$33.65	$11.45	$150.44	1.43	$150.44	*1.43*
U.S. Totals	**$52,077.42**	**$16,366.03**	**$21,027.41**	**$89,470.86**	**1.72**	**$95,800.01**	***1.84***

Table A-5. Local/County Tax Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-5) and Interstate Impact of U.S. Industry Overall (Column 6).

	Intrastate Impacts				Total Interstate Impacts
State	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	Total Impacts
Alabama	$0.93	$0.06	$0.30	$1.30	$1.96
Alaska	$0.06	$0.00	$0.03	$0.09	$0.45
Arizona	$2.21	$0.60	$1.96	$4.76	$9.33
Arkansas	$0.29	$0.04	$0.11	$0.43	$0.70
California	$240.54	$112.70	$391.94	$745.19	$763.73
Colorado	$4.96	$1.94	$7.14	$14.03	$16.28
Connecticut	$1.62	$0.31	$0.81	$2.75	$4.08
Delaware	$0.07	$0.02	$0.05	$0.13	$0.33
District of Columbia	$3.10	$0.75	$0.65	$4.50	$5.98
Florida	$11.31	$6.14	$14.17	$31.62	$35.84
Georgia	$7.26	$3.45	$7.10	$17.81	$20.15
Hawaii	$0.40	$0.04	$0.21	$0.65	$1.21
Idaho	$0.34	$0.07	$0.27	$0.68	$1.53
Illinois	$8.77	$3.49	$10.58	$22.83	$26.04
Indiana	$1.16	$0.15	$0.52	$1.83	$2.70
Iowa	$0.64	$0.09	$0.27	$1.00	$1.48
Kansas	$0.76	$0.07	$0.26	$1.10	$1.48
Kentucky	$1.07	$0.15	$0.42	$1.64	$1.98
Louisiana	$2.75	$0.42	$1.11	$4.29	$4.92
Maine	$0.29	$0.07	$0.21	$0.56	$0.79
Maryland	$6.82	$3.16	$5.25	$15.23	$16.84
Massachusetts	$6.19	$2.72	$7.45	$16.37	$19.86
Michigan	$2.16	$0.43	$1.39	$3.98	$5.14
Minnesota	$1.79	$0.72	$1.99	$4.50	$5.59
Mississippi	$0.52	$0.01	$0.09	$0.62	$0.85
Missouri	$1.49	$0.41	$1.02	$2.92	$4.00
Montana	$0.05	$0.01	$0.04	$0.10	$0.29
Nebraska	$0.35	$0.05	$0.13	$0.53	$0.94
Nevada	$1.58	$0.88	$2.09	$4.56	$6.53
New Hampshire	$0.80	$0.24	$0.67	$1.70	$2.87
New Jersey	$4.30	$1.72	$3.41	$9.43	$16.38
New Mexico	$0.27	$0.04	$0.10	$0.42	$0.83
New York	$55.70	$20.03	$34.93	$110.66	$126.83
North Carolina	$8.80	$4.20	$10.35	$23.35	$24.69
North Dakota	$0.06	$0.01	$0.02	$0.08	$0.18
Ohio	$4.49	$1.03	$2.14	$7.66	$9.23
Oklahoma	$0.50	$0.05	$0.19	$0.75	$1.17
Oregon	$4.81	$2.20	$4.01	$11.02	$16.04

	Intrastate Impacts				Total Interstate Impacts
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	**Total Impacts**
Pennsylvania	$5.73	$1.79	$4.09	$11.61	$14.56
Rhode Island	$0.24	$0.08	$0.19	$0.51	$0.92
South Carolina	$1.59	$0.16	$0.70	$2.45	$3.81
South Dakota	$0.11	$0.00	$0.02	$0.14	$0.30
Tennessee	$1.51	$0.28	$0.96	$2.75	$3.57
Texas	$27.38	$15.09	$36.89	$79.36	$88.87
Utah	$1.83	$0.88	$2.78	$5.50	$6.83
Vermont	$0.09	$0.04	$0.07	$0.19	$0.30
Virginia	$3.84	$0.73	$2.40	$6.97	$10.20
Washington	$43.53	$22.74	$77.88	$144.14	$151.33
West Virginia	$0.42	$0.01	$0.07	$0.50	$0.69
Wisconsin	$2.24	$0.95	$2.29	$5.48	$6.89
Wyoming	$0.09	$0.00	$0.02	$0.11	$0.23
Puerto Rico	$0.00	$0.00	$0.00	$0.00	N/A
U.S. Totals	**$477.83**	**$211.25**	**$641.72**	**$1,330.80**	**$1,447.72**

Table A-6. State Tax Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-5) and Interstate Impact of U.S. Industry Overall (Column 6).

	Intrastate Impacts				Total Interstate Impacts
State	**Direct Effect**	**Indirect Effect**	**Induced Effect**	**Total Impacts**	**Total Impacts**
Alabama	$1.29	$0.14	$0.42	$1.84	$2.83
Alaska	$0.05	$0.00	$0.02	$0.07	$0.36
Arizona	$3.34	$1.00	$2.60	$6.93	$13.34
Arkansas	$0.85	$0.13	$0.31	$1.28	$2.08
California	$911.96	$286.76	$507.33	$1,706.04	$1,743.97
Colorado	$5.84	$2.35	$4.19	$12.38	$13.86
Connecticut	$2.30	$0.56	$0.91	$3.76	$5.47
Delaware	$0.30	$0.07	$0.14	$0.50	$1.13
District of Columbia	$0.00	$0.00	$0.00	$0.00	$0.00
Florida	$12.32	$6.15	$13.57	$32.04	$36.07
Georgia	$8.57	$4.27	$5.63	$18.46	$20.69
Hawaii	$0.94	$0.13	$0.43	$1.51	$2.59
Idaho	$1.08	$0.31	$0.61	$2.01	$4.06
Illinois	$17.09	$6.14	$11.14	$34.37	$38.27
Indiana	$2.20	$0.32	$0.94	$3.47	$5.10
Iowa	$0.85	$0.15	$0.31	$1.31	$1.93
Kansas	$1.06	$0.16	$0.36	$1.58	$2.18
Kentucky	$2.12	$0.34	$0.84	$3.30	$4.00

State	Intrastate Impacts				Total Interstate Impacts
	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	Total Impacts
Louisiana	$3.13	$0.62	$1.17	$4.92	$5.63
Maine	$0.41	$0.12	$0.26	$0.79	$1.10
Maryland	$11.19	$4.49	$6.79	$22.47	$24.56
Massachusetts	$17.96	$6.36	$9.30	$33.63	$39.83
Michigan	$4.02	$0.96	$2.25	$7.23	$9.21
Minnesota	$5.88	$2.40	$4.22	$12.49	$15.14
Mississippi	$0.98	$0.02	$0.19	$1.19	$1.66
Missouri	$1.52	$0.50	$0.82	$2.84	$3.84
Montana	$0.14	$0.02	$0.07	$0.23	$0.51
Nebraska	$0.34	$0.07	$0.13	$0.55	$1.06
Nevada	$3.49	$1.95	$4.65	$10.09	$14.47
New Hampshire	$0.69	$0.20	$0.43	$1.33	$2.01
New Jersey	$6.69	$2.44	$3.55	$12.67	$20.27
New Mexico	$0.74	$0.12	$0.26	$1.12	$2.13
New York	$56.05	$20.15	$24.65	$100.85	$116.28
North Carolina	$18.79	$8.18	$13.59	$40.56	$42.60
North Dakota	$0.18	$0.02	$0.06	$0.26	$0.56
Ohio	$5.01	$1.22	$2.35	$8.59	$10.34
Oklahoma	$0.66	$0.09	$0.23	$0.99	$1.55
Oregon	$8.36	$3.74	$4.04	$16.14	$22.25
Pennsylvania	$8.78	$2.70	$5.30	$16.78	$20.74
Rhode Island	$0.45	$0.16	$0.26	$0.87	$1.45
South Carolina	$1.86	$0.25	$0.76	$2.87	$4.44
South Dakota	$0.12	$0.01	$0.02	$0.15	$0.33
Tennessee	$2.89	$0.61	$1.83	$5.33	$6.94
Texas	$26.70	$14.48	$34.40	$75.58	$84.49
Utah	$3.90	$1.71	$2.93	$8.54	$10.15
Vermont	$0.40	$0.19	$0.27	$0.86	$1.27
Virginia	$4.59	$1.13	$2.19	$7.91	$11.48
Washington	$90.21	$39.83	$121.86	$251.89	$264.13
West Virginia	$0.76	$0.02	$0.14	$0.92	$1.31
Wisconsin	$5.29	$2.05	$3.20	$10.54	$12.95
Wyoming	$0.16	$0.01	$0.03	$0.20	$0.42
Puerto Rico	$2.44	$1.12	$0.86	$4.41	$4.41
U.S. Totals	**$1,266.93**	**$426.92**	**$802.76**	**$2,496.61**	**$2,657.44**

Table A-7. Federal Tax Impacts of U.S. Video Game Industry, 2025 ($ millions)

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Intrastate Impact of In-State Video Game Industry (Columns 2-5) and Interstate Impact of U.S. Industry Overall (Column 6).

	Intrastate Impacts				Total Interstate Impacts
State	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	Total Impacts
Alabama	$3.21	$0.58	$0.79	$4.58	$6.92
Alaska	$0.32	$0.04	$0.09	$0.45	$1.21
Arizona	$14.48	$5.62	$6.33	$26.43	$48.09
Arkansas	$1.66	$0.41	$0.46	$2.53	$4.01
California	$2,785.61	$872.79	$1,027.49	$4,685.90	$4,787.85
Colorado	$36.42	$16.29	$15.19	$67.91	$74.45
Connecticut	$6.96	$2.04	$1.92	$10.91	$15.57
Delaware	$1.05	$0.17	$0.28	$1.50	$2.78
District of Columbia	$8.22	$1.92	$0.82	$10.95	$14.25
Florida	$100.18	$45.08	$43.75	$189.01	$206.74
Georgia	$41.22	$21.43	$17.23	$79.88	$88.79
Hawaii	$1.92	$0.39	$0.59	$2.89	$4.05
Idaho	$3.21	$1.10	$1.07	$5.38	$9.75
Illinois	$61.55	$23.80	$25.34	$110.69	$121.74
Indiana	$6.11	$1.28	$2.03	$9.42	$13.76
Iowa	$2.75	$0.58	$0.69	$4.03	$5.83
Kansas	$2.51	$0.70	$0.75	$3.97	$5.59
Kentucky	$4.83	$1.14	$1.47	$7.45	$8.94
Louisiana	$8.59	$2.57	$2.46	$13.61	$15.39
Maine	$1.29	$0.48	$0.53	$2.30	$3.10
Maryland	$39.78	$16.09	$13.35	$69.21	$74.27
Massachusetts	$69.44	$24.83	$26.92	$121.19	$142.86
Michigan	$13.45	$4.31	$5.03	$22.79	$28.51
Minnesota	$16.68	$7.31	$7.60	$31.59	$37.61
Mississippi	$1.28	$0.07	$0.28	$1.63	$2.46
Missouri	$7.27	$2.82	$2.66	$12.76	$16.95
Montana	$0.59	$0.09	$0.18	$0.86	$1.60
Nebraska	$1.12	$0.33	$0.36	$1.81	$3.45
Nevada	$23.44	$10.06	$7.98	$41.49	$51.81
New Hampshire	$5.33	$1.46	$1.83	$8.61	$12.55
New Jersey	$23.44	$8.97	$8.87	$41.27	$62.65
New Mexico	$1.51	$0.31	$0.37	$2.19	$3.49
New York	$195.47	$75.45	$69.92	$340.84	$388.37
North Carolina	$97.82	$38.76	$34.58	$171.16	$178.22
North Dakota	$0.62	$0.10	$0.16	$0.88	$1.54
Ohio	$15.08	$5.73	$6.00	$26.82	$32.61
Oklahoma	$1.99	$0.37	$0.56	$2.92	$4.53
Oregon	$33.59	$15.34	$12.62	$61.56	$83.30

State	Intrastate Impacts				Total Interstate Impacts
	Direct Effect	Indirect Effect	Induced Effect	Total Impacts	Total Impacts
Pennsylvania	$33.67	$10.89	$13.54	$58.10	$70.35
Rhode Island	$1.56	$0.58	$0.55	$2.68	$4.03
South Carolina	$5.68	$1.16	$1.56	$8.40	$12.52
South Dakota	$0.28	$0.03	$0.07	$0.38	$1.10
Tennessee	$9.98	$3.28	$3.79	$17.06	$22.18
Texas	$260.44	$106.28	$106.53	$473.25	$507.82
Utah	$19.29	$8.16	$7.14	$34.59	$39.46
Vermont	$0.93	$0.52	$0.37	$1.82	$2.49
Virginia	$17.68	$5.33	$5.42	$28.43	$41.06
Washington	$804.09	$195.32	$250.12	$1,249.53	$1,304.27
West Virginia	$1.00	$0.06	$0.25	$1.31	$2.04
Wisconsin	$19.98	$7.73	$7.32	$35.03	$42.37
Wyoming	$0.32	$0.04	$0.05	$0.41	$0.86
Puerto Rico	$3.02	$2.08	$2.08	$2.08	$5.82
U.S. Totals	**$4,817.92**	**$1,552.28**	**$1,747.34**	**$8,112.44**	**$8,621.96**

Appendix B

Development of the 2025 Video Game Industry Database

The development of the Video Game Industry establishment-basis database used for this analysis and report was a two-step process. The first step was to develop a "master list" of video game industry firms active in 2025. The second step was to connect, assign, and/or develop employment and location information for these firms. A review and discussion of each of these steps is provided below. Once the industry database was complete, TEConomy used industry classification and other firm-level information to assign each record to both a video game industry role (e.g., developer, publisher, etc.) and to the appropriate sector for IMPLAN modeling.

The initial task of this economic impact effort was to develop an industry database that includes video game industry firms active in 2025. Data regarding the existence and employment of these firms was primarily obtained during the September to December 2025 period.[16] Considerable effort was made to determine a true "active in 2025" status of firms within the database by examining company websites and social media accounts for recent (ideally 2025 or at least 2024) activity. The second critical activity was to determine a U.S. location or locations for each firm. The development of this list attempted to include any U.S.-based operations, even if the firm's headquarter operations were located outside of the U.S.

Sources of Video Game Firms

The development of this master list is graphically depicted in Figure 5. The following industry-specific sources were used, in whole or in part, to provide input for the 2025 list of active video game industry firms.

To build the 2025 database, the baseline list of firms started with the prior 2023 TEConomy video game industry database. The following sources were used to identify a list of potentially new or recently active firms.

First, developer and publisher data from Steam were collected by accessing game data via the SteamSpy API. For developers identified through Steam, an additional check was performed to select only "paid for" games. Though there are a number of very successful "free-to-play" games distributed through Steam, these games do not generate economic activity measurable through the methodology used in this effort (though they may ultimately generate economic activity through in-game purchases and advertising sales).

Additional lists of potential U.S. video game industry firms were added from GameDevMap and GiantBomb using a web scraping tool, and lists of companies with recent releases were collected from Indie DB and Riot Pixel.[17]

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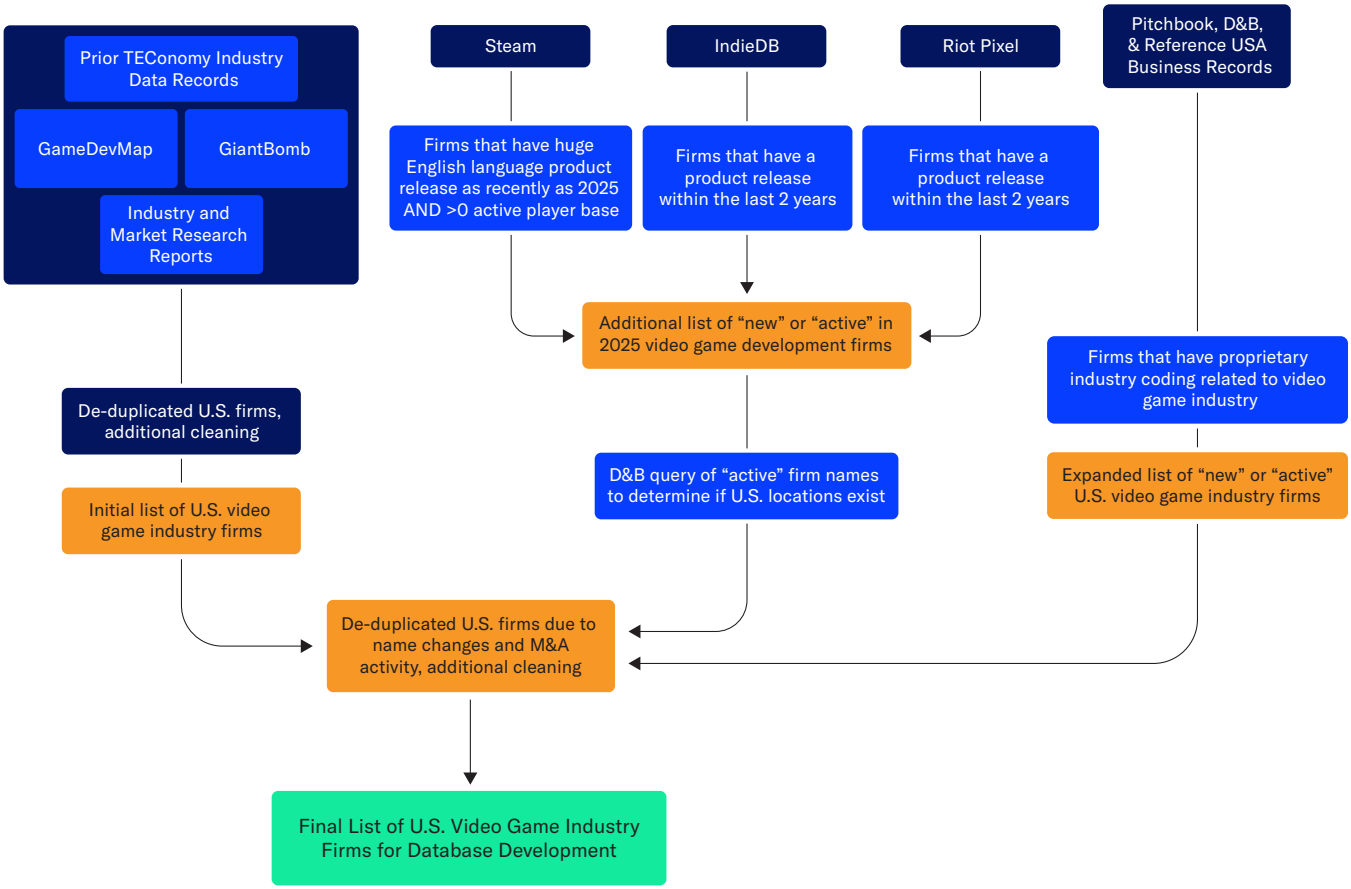
[16] It is possible that some included firms may have gone out of business prior to 2025 that have games still available through one of the "publishers" used for source data. Every possible attempt to check and correct for this using web-based research was made.

[17] The GiantBomb and Riot Pixels databases were accessed in September and October of 2025. Since then, GiantBomb has removed the relevant company database page after making widespread content changes, and Riot Pixels is currently displaying unsolicited spam material when accessed without an ad blocker.

The inclusion of video game industry firms from these sources often yielded firm names but typically limited, if any, locational information, and no employment information. For firm records with some available locational information, these data were typically limited to a single geographic scope, with no indication of whether the firm had multiple sites in the U.S.

Figure 5. Approach to Developing and Updating the 2025 U.S. Video Game Industry Database

Source: TEConomy Partners.



Beyond these industry-specific sources, TEConomy used a proprietary data source, the PitchBook Venture Capital Database, for additional assistance in developing the video game industry database. Pitchbook was queried using built-in industry verticals (e.g., gaming) and keywords (e.g., "video game") to find an additional list of emerging companies involved in the video game industry. As Pitchbook's coverage of the video game space has increased and improved over time, it has become a reliable source for finding significant emerging firms that are receiving angel funding and venture capital investments, including many firms launched by former AAA game developers. Care was required in including firms from Pitchbook, as definitional vagaries at times caused query results to include firms related to gambling, health tech, and generic "gamification" firms.

Finally, two additional proprietary data sources were used for examining existing firms and determining their status, location, and potential employment: Dun & Bradstreet (D&B) and Reference USA (a product of DataAxle).

Developing the Data Records

At this stage, potential additional firms were compared to the existing 2023 database to remove duplicates (where the video game firm already exists in the 2023 database), leaving the deduplicated combined set as the starting master list for the 2025 database.

- **Matching to the master list**
  - Many records had to be matched in a manual lookup process due to slight variations in names, etc.
  - For video game firms from the curated list that had a strongly correlated matching data record (or records in the case of multi-establishment firms), those records were brought into the initial database.
  - Though matching records worked in part, some stray matches due to algorithm limitations and lack of corresponding information did occur. These had to be identified and removed.

The master list created in this first step became the starting point for developing the ultimate industry database for this effort in step two. From this list, employment and locational-specific information was added in a number of ways. These include:

- **Developing data records for existing, but non-matched firms**
  - Due to the update cycles and other issues inherent in the two proprietary company information providers, there were a significant number of existing video game firms (e.g., firms with active websites and new games in 2024 or 2025) for which no record could be found within the D&B or Reference USA data.
  - For these firms, TEConomy worked to find specific locations using web searches and company and employee information from websites and various social media pages e.g., LinkedIn, X (Twitter), Facebook..

- **Developing records for multi-location video game firms**
  - Many of the larger developers and developer/publisher firms have multiple specific locations, often due to the location of key developer studios. For these firms, website information (as well as annual reports of public firms) was used to identify the active (as of late 2025) locations, capturing city and state for these specific sites.
  - If a key location record was not included with these proprietary datasets, TEConomy estimated the employment at these locations using company and employee information from annual reports, websites, company LinkedIn pages and the LinkedIn Talent Insights (LTI) tool that allows for querying among a set of employee LinkedIn pages all stating their employment with the same current employer.
  - At this point, efforts were made to find and identify changes required in the database to account for the results of M&A activities and the closing of studios and other locations.

- **Developing records for video game firms' remote workers**
  - The U.S. video game industry not only employs workers who are logistically "housed" within specific location sites but also provides numerous remote work opportunities.
  - When querying industry firms using the LTI tool, significant employment can be found at the state level that does not correspond to any of a firm's existing address-specific sites.
  - For states, with and without address-specific locations, the LTI-specified employment was first examined at the metropolitan level to associate individuals living near address-specific locations with those sites. For employment that reflected truly remote workers, sample LinkedIn profiles of these workers were examined to determine if these remote workers were actual company employees.
  - If these locations (at the state level) met inclusion criteria, a record of this employment for the company in question was added to the U.S. Video Game Industry Database located at the state provided in the LTI data.

- **Developing video game industry employment estimates for multi-industry firms**
  - Certain firms, primarily within the consoles, gaming computers, and peripherals sector, are significant players in the video game industry but also have substantial (if not the majority of their) operations and revenue tied to non-video game-related markets. For the 2025 database, the names of current video game-related technologies offered by these firms were found via web searches. Then, for each company, an LTI search query was developed looking for individuals working with those specific technologies. TEConomy developed this approach to avoid using overly generic keyword searches that may have included individuals who were involved in the video game industry in former versus current jobs.

- **Developing records for industry-specific retail establishments**
  - For certain video game-specific retail establishments (e.g., RazerStore), TEConomy included 100% of the reported employment from LTI or their websites as video game-related, even though some items they sell may be ancillary to the principal video game market. These retail firms were primarily limited to operations of publicly traded or otherwise large corporations.
  - For GameStop stores, TEConomy used the count of stores by state and overall store employment provided in the most recent GameStop 10-K report. With this information, TEConomy found the employment of an "average GameStop location." Using this value, TEConomy multiplied it by the reported number of stores in each of the 50 states (GameStop had no stores in Washington, D.C. or Puerto Rico in 2025). This approach may be conservative for some of the larger stores, but store specific details found in Dun & Bradstreet were determined to be too unreliable to use.
  - In this regard, TEConomy and ESA acknowledge that many smaller video game-related retail entities exist, and that video game-related merchandise is also sold by major retail players (e.g., Best Buy, Walmart, Target, etc.). To the extent that these additional retail sources of video games are not included within the analysis, this will inherently make the presented economic impact results more conservative.

Appendix C

Estimated Economic Impacts of ESA Member Companies

The data in these tables are based upon identification, within the 2025 U.S. Video Game Industry Database, of ESA members and their studios and other operations and workers located in the United States.

Table C-1. The Economic Impact of the U.S. Employment of ESA Members, 2025

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

		Values in $ Millions					
Impact Type	**Employment**	**Labor Income**	**Value-Added**	**Output**	**Local & County Tax Revenue**	**State Tax Revenue**	**Federal Tax Revenue**
Direct Effects	32,838	$8,277.88	$17,434.32	$23,724.56	$181.67	$551.86	$2,167.18
Indirect Effects	26,053	$3,288.83	$5,814.35	$8,701.14	$108.79	$218.84	$797.85
Induced Effects	46,851	$3,349.04	$6,459.92	$10,066.27	$304.70	$385.86	$835.00
Total Impacts	105,742	$14,915.74	$29,708.59	$42,491.98	$595.16	$1,156.56	$3,800.03
Multiplier	*3.22*	*1.80*	*1.70*	*1.79*			

Table C-2. ESA Member Impacts Share of Total Industry Impacts, 2025.

Source: TEConomy IMPLAN analysis of 2025 U.S. Video Game Industry Database.

Impact Type	**Employment**	**Labor Income**	**Value-Added**	**Output**	**Local & County Tax Revenue**	**State Tax Revenue**	**Federal Tax Revenue**
Direct Effects	40%	46%	47%	46%	38%	44%	45%
Indirect Effects	42%	42%	43%	42%	41%	42%	42%
Induced Effects	44%	44%	44%	44%	43%	44%	44%
Total Impacts	42%	45%	45%	44%	41%	44%	44%

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