



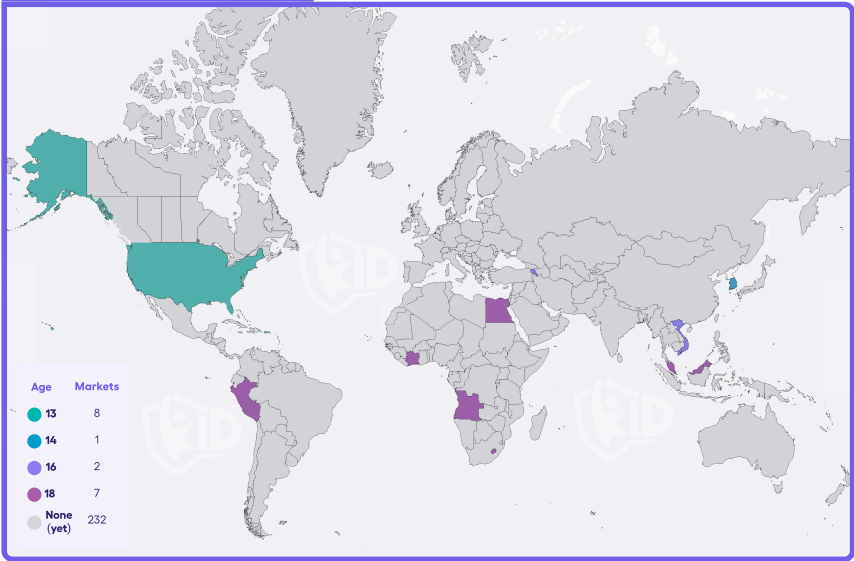
STATE OF THE AGE

2025 Market Report



The world is changing...

What is a “Child?”

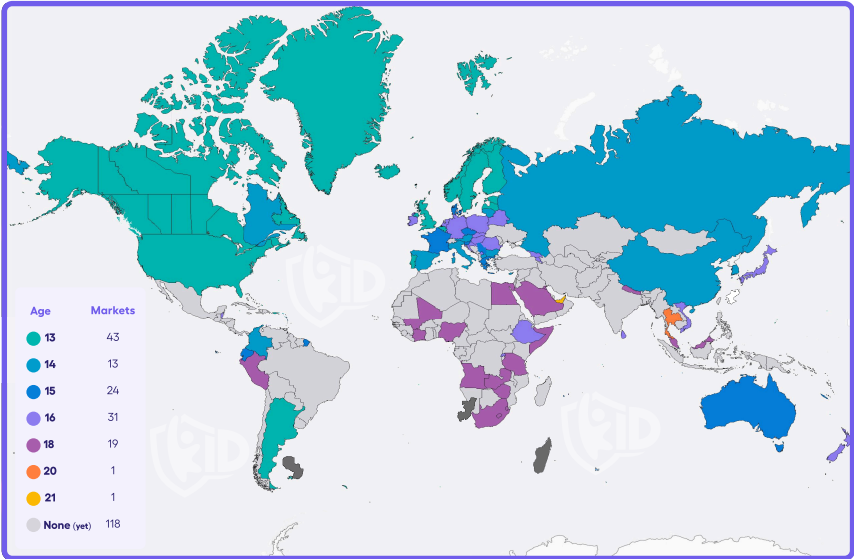


2016

In the context of our report, “digital youth” is an umbrella term we apply to encompass both the age groups that are typically defined as “children” as well as those categorized as “teens.”

If there's one thing that sees broad agreement, it's that digital youth ought to have enjoyable and safe experiences when they play online. Although there is a broad consensus that protecting digital youth is important, *how* countries seek to protect this cohort is much less consistent.

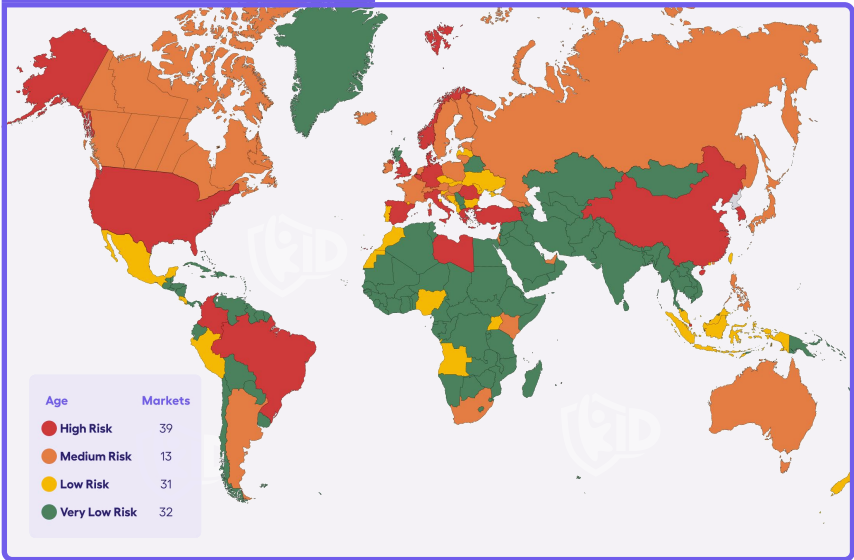
There isn't even a consensus on how to define a "child"!



Today

Our inaugural report in 2024 noted a growing wave of regulatory changes aimed at protecting digital youth. In the past year, this wave has continued to grow at both the national and provincial/state level. Over **37 jurisdictions passed new laws** and regulations in 2024 relating to the protection of digital youth online, and the **United States alone now has over 60 state laws**, bills, or other requirements that affect digital youth. k-ID is releasing a specific US State Law Tracker in 2025 to keep pace with these developments.

Enforcement Heatmap



Meanwhile, existing laws and regulations designed to protect digital youth are being **enforced even more aggressively**. 2024 and 2025 saw a number of high-profile enforcements against tech companies of all sizes regarding online safety and privacy, as well as private class actions brought by consumers. Penalties include fines, data deletion requirements, and injunctions restricting these businesses' ability to do business with digital youth.

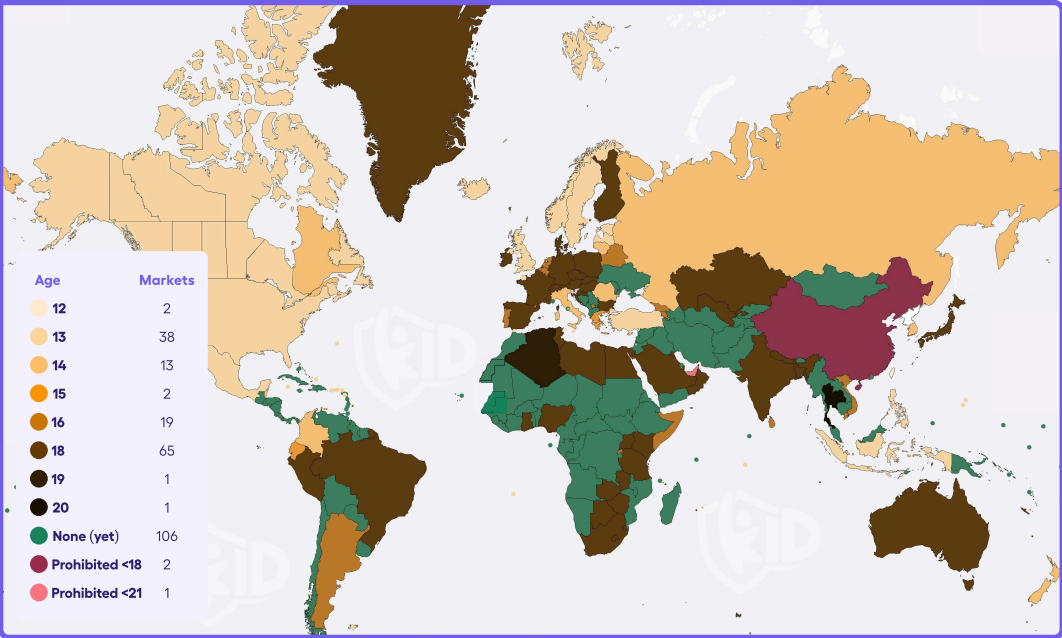
So what does the law say today about protecting kids?

As a starting point, the location and age of digital youth determine the legal protections required for compliant online experiences. One of the most common requirements is to have a parent or guardian give consent before a digital youth can participate in specific online activities. Other jurisdictions may require certain features to be automatically turned off on first launch, but with the option to turn the feature back on at the digital youth’s discretion. Yet others may lay down blanket requirements that features must be turned off entirely for all digital youth, regardless of whether the parent has provided their consent (see, for example, Australia’s total ban on social media for any user under 16).

Today,
there is
more
than ever
to keep
track of.

Beyond what the law says expressly, there are also implicit requirements that arise from other authorities, such as regulatory guidance, enforcement, cultural norms, or industry best practices. These express and implicit rules form the basis of what publishers, parents, and digital youth have come to expect from the industry. Below are two maps that illustrate this regulatory complexity.

Threshold Ages for Chat Features

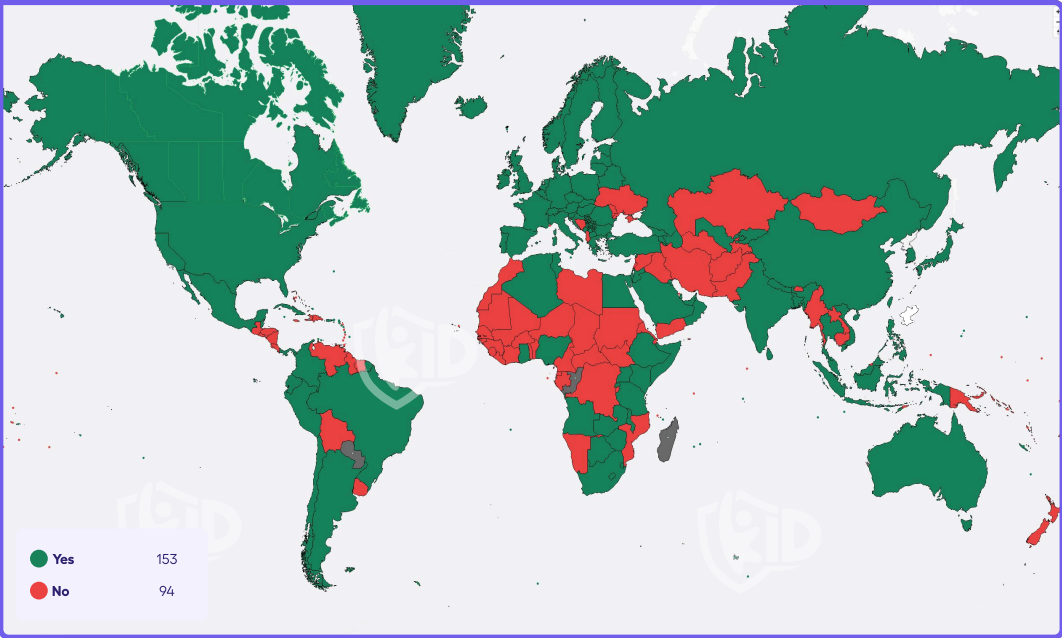


This map outlines the Threshold Ages for the “Text Chat (Public)” feature. Public Text Chat allows players to communicate with individuals outside their network of accepted contacts, enabling interactions with a broader audience.

What is a Threshold Age?

If a player is younger than the specified Threshold Age, the feature must be disabled, and only their parent or legal guardian can enable it. Players older than the Threshold Age can manage access themselves, although there may be additional regulations that require the setting to be disabled by default.

Parental Consent Requirements for General Data Processing



In this basic map, our primary focus has been determining whether parental consent is necessary, according to data privacy and online safety regulations. In jurisdictions where parental consent is required, our Global Compliance Database provides a comprehensive overview of the approved and recommended methods for obtaining that consent, as well as which methods are considered high-risk.

The details are hard (and getting harder)!

Below are some additional illustrations of regulatory complexity that is new to 2024 or coming in 2025.

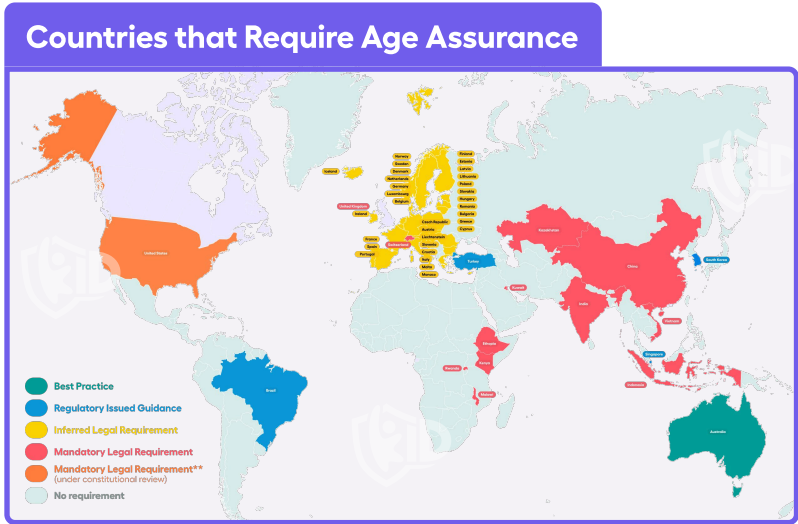
- Age Threshold
- Parental Consent
- Special Privacy Policy for Kids/Teens
- Penalties & Enforcement
- Changes to EULA & Privacy Policy
- Game Notice(s)
- Monetization Model(s)
- Trust & Safety
- Settings
- Record Keeping & Audit
- Data Subject Rights
- Gaming Restrictions
- Processing Requirements for Kids/Teens Personal Data
- Most Common Compliance Errors
- Upcoming Changes
- Quick Reference FAQ
- Discover more at [k-ID.com](#)

United States				
Settings	Threshold Age (Federal)	Default Off If Under+ (Federal)	Additional State Law requirements	Necessity
Precise Location Sharing	13 Pending requirement: 17 (see KOSPA)	18	Default off for all users in Texas, Oregon, Montana, Delaware, Nebraska, New Hampshire, New Jersey	Known Enforcement
Targeted Advertising	13 Pending requirement: 17 (see KOSPA)	13	Banned for users under the following ages: Florida: 18, Virginia: 13 Default off for users under the following ages: California: 16, Connecticut: 18, Montana: 16, Oregon: 15, Maryland: 18, Delaware: 18, New Hampshire: 16, New Jersey: 17	Known Enforcement

The legal landscape in the US is **intricate and continuously changing**, particularly with respect to regulatory enforcement. There is growing concern among federal and state legislators about the potential harm to digital youth from online experiences, which has led to ongoing discussions and forthcoming legislation on the subject. In recent years, **several constitutional challenges** have been raised against state laws that add extra requirements or restrictions concerning children's privacy, with the outcomes of these legal battles still awaiting resolution.

India			
Special Privacy Policy for Kids/Teens	Response	Reference	Necessity
What must the privacy policy for kids/teens include?	Must use easy to understand, clear language, and include the following details: (a) the fact that the information is being collected; (b) the purpose for which the information is being collected; (c) the intended recipients of the information; and (d) the name and address of — (i) the agency that is collecting the information; and (ii) the agency that will retain the information.	Rule 5(3) Reasonable security practices and procedures and sensitive personal data or information (SPDI Rules) Upcoming: Chapter IX, Section 6(1), DPDP Act, 2023	Mandatory Legal Requirement

Our **Global Compliance Database (GCD)** tracks the latest updates affecting gaming companies in India's active online safety landscape. For example, the GCD tracks the progress of **India's Digital Personal Data Protection (DPDP) Act** and its implementing regulations. The Indian Ministry of Electronics and Information Technology invited feedback/comments from the public on the draft regulations ending in March 2025. k-ID participated in this consultation and MeITY is reviewing the submissions. They are expected to provide an update on the draft regulations in the coming months.



A key trend in 2024 saw regulators around the world focus on the means by which age signals are obtained. Because it is so common for digital youth to lie about their age when presented with traditional age screening mechanisms, many regulators have started to mandate **age assurance** to improve the quality of age signals. However, these requirements are not without controversy, as some age assurance technologies have raised privacy, security, and other practical concerns.

This map shows the countries where some form of age assurance has been mandated. Our GCD goes into further detail about which types of age assurance are permitted and under what circumstances.

*The above survey excerpts have been edited for brevity.
+ A user under the "Default Off If Under" age may control access to the feature themselves, provided that they are over the relevant Threshold Age, but the the feature must be off by default.

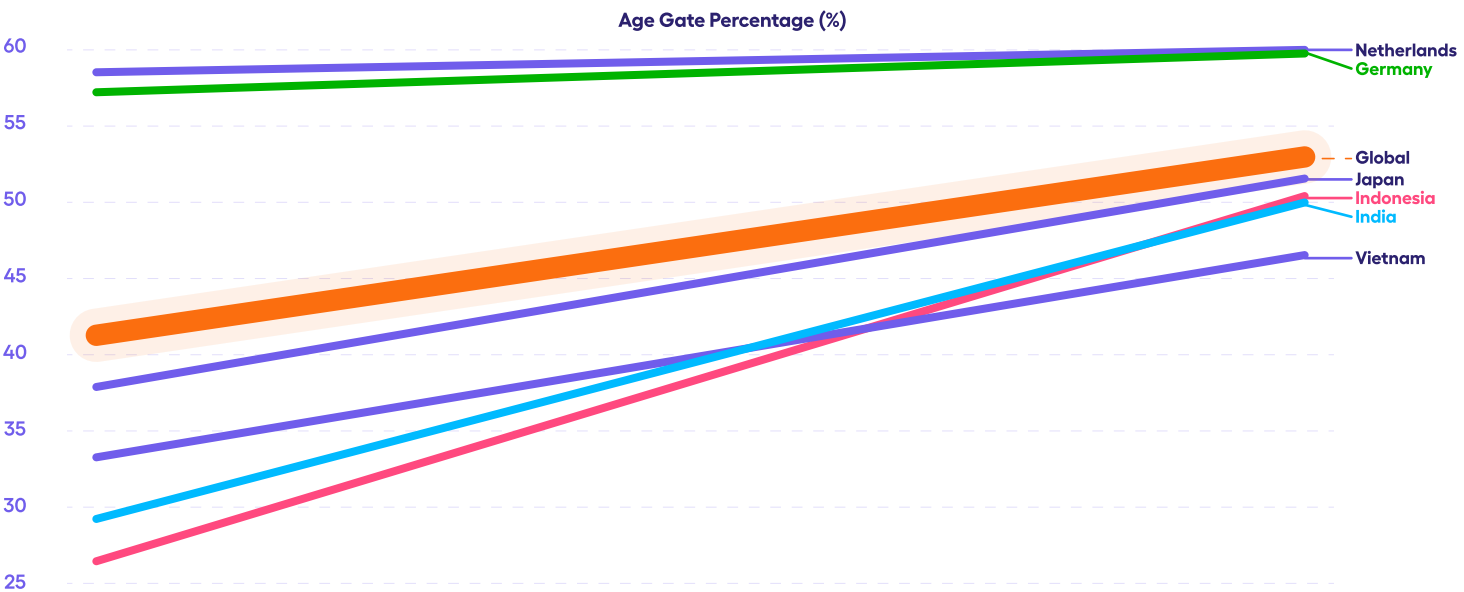
What is the industry doing today?

It is a huge challenge to keep up with the various requirements being implemented around the world, let alone build systems that accommodate them. Many online service providers devote substantial time and resources to identifying market trends that inform the creation of their solutions.

To assist our clients, k-ID's **Global Compliance Database** analyzes market behavior and offers benchmarking tools. These resources enable companies to prioritize their compliance initiatives more efficiently. A sample of our research is included below, including a key finding in the first chart: **The number of games implementing an age gate has increased by ~25% over the course of 2024.** We believe this is a strong signal that the industry is reacting to the increased regulatory complexity and legal risk associated with digital youth.

40 Popular Games

Age Gate Percentage: Q1 vs Q4 2024



The above graph is an illustrative sample of games surveyed across the Google Play Store, Apple App Store and Epic Games Store from January to December 2024, showing the overall global and country-level trends for select markets.

% of multiplayer games that have public chat turned on by default**

From Q3 to Q4, we noticed a significant drop in games that had these features on by default, which is likely due to increased regulatory risk.

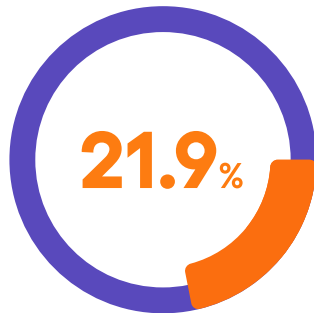


**"Public chat" refers to a feature that enables players to communicate with individuals beyond their network of added/accepted contacts on the relevant gaming platform, i.e., to the world at large/with an indefinite number of individuals.

40 Popular Games

% of games that allow you to retry/change your age after a first failure*

Many laws, such as COPPA in the US, would consider such an age-gate design legally ineffective.



28.8% of games allow parents to set **Screen Time limits**



42.4% of games allow parents to set **In-App Purchasing Limit**



85.6% of games allow parents to set **Text Chat limits**

Top 3 most popular settings for games with parental control centers*

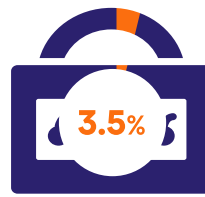
Of the games that do offer parent controls, the controls above are the most popular, suggesting that safety concerns are the most pressing issue for parents, followed by overspending and addiction.

Types of loot boxes present in games today*



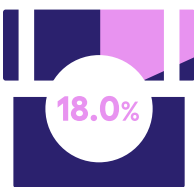
Randomized Rewards

Loot boxes are randomly granted; not purchasable with real money



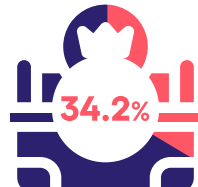
Simulated Gambling

Chips, dice, slots, or other gambling imagery (risky for example in Germany and Australia)



Paid Closed Loop, No Gameplay Impact

Loot boxes are purchasable with real money, but cash-out** is not facilitated; rewards are cosmetic only and don't affect gameplay



Paid Closed Loop, Impacts Gameplay

Loot boxes are purchasable with real money, but cash-out is not facilitated**; rewards impact gameplay (e.g., extra lives)

*Based on a sample of 40 popular games reviewed across the Google Play Store, Apple App Store, and Epic Games Store in December 2024.

**If a game allows for a player to redeem their in-game items for something of real-world value outside the game, this is likely to implicate gambling laws around the world, and is higher risk.

Why is this so hard?

Today, a platform will need to develop a variety of brand-new features to effectively cater to digital youth and their parents. But even obtaining a reliable age signal is hard, as it requires new age gating and screening mechanisms.

Even the most well-resourced platforms find it incredibly challenging to address these disparate and sometimes conflicting requirements. Although some distribution platforms have attempted to address these problems by collecting and transmitting age signals to their developers, these signals are often imprecise or may conflict with signals from other distribution platforms (for cross-platform experiences). All of this makes compliance complicated.



Verifiable Parental Consent

Implement low-friction, effective Verifiable Parental Consent (VPC) based on age and location



Age Assurance & Age Verification

Confirm age with privacy-preserving age assurance



Compliance Kits

Use kits to provide compliant and age-appropriate access to regulated features



Parent Tools

Allow parents and guardians to manage features, spend, and time in one central place



Customer Support Platform

Provide an appeal process for suspended suspicious accounts in games and apps with age limits

Good news: We're here to help

Yes, protecting digital youth in a way that addresses an entire world's worth of requirements is exceptionally challenging. But it's not impossible.

At k-ID, our entire focus is on tackling this challenge head-on. We have built a platform to deliver instantly and seamlessly on the promise of age-appropriate design. We track all regulatory developments through our **Global Compliance Database**, which powers our easy-to-implement **Global Compliance Engine** and feature flags. k-ID customers' applications are featured on the k-ID **Family Portal**, a hub for parents to conveniently manage all their k-ID-powered experiences. Finally, we can help obtain more reliable age signals through our collaborations with trusted **age assurance** partners.

Compliance. Simplified.

**Age-Appropriate.
By Design.**



Age-Appropriate Design (for everyone)

At k-ID, we are on a mission to empower digital youth online. We do this by simplifying compliance, putting the right tools in the hands of parents and guardians, and enabling digital youth to access the online experiences that they want.

We believe we are at an inflection point in online safety for digital youth. Never has there been as much political and social will to make online spaces safer for future generations.

We cannot accomplish this mission alone. We are excited to partner with like-minded creators, innovators, thought leaders, advocates and parents on this journey. If you would like to be a part of this movement, please contact us at contact@k-id.com.



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