



CHANGE THE GAME



DRIVING INCLUSIVITY AND BELONGING IN GAMING

Change the Game is an initiative from Google Play to support women in the gaming industry and improve representation in the mobile gaming world.

May 2019

WHY CHANGE THE GAME

Google is committed to significantly improving the lives of as many people as possible and building a world where progress, equitable outcomes and inclusion can become a reality.

To drive this commitment, **Google launched Change the Game in 2017 on a mission to make mobile gaming truly for everyone by celebrating and empowering women as players and creators.** Google believes that gaming has the potential to inspire creativity, build connections between people, and serve as a gateway to new worlds and passions.

With over 2.3 billion game-players worldwide in 2018 (source: Newzoo 2018), more people are gaming, watching e-Sports and attending large-scale gaming events than ever. Gaming culture is no longer niche, and today, it sits at the heart of global popular culture. This number shows that several people – and among them many women – are bringing gaming and gaming culture into their everyday lives. Still, many women playing feel that games are lagging behind other areas of entertainment and a lot can be done to achieve greater inclusivity in gaming.

So, how can the gaming industry make games and gaming culture more relevant to more players?

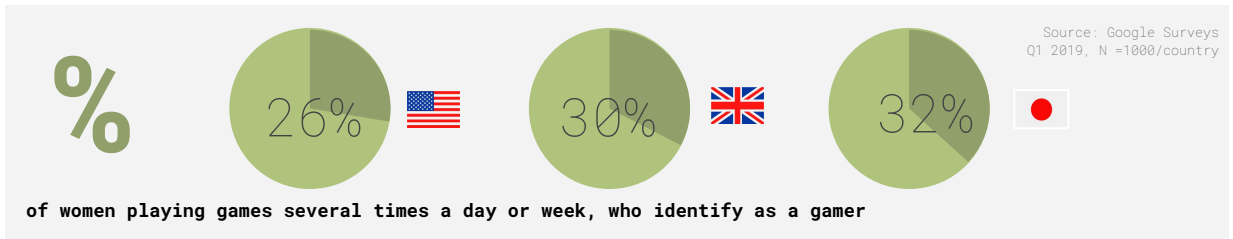
To answer this question, Change the Game, in partnership with The Future Laboratory, conducted three months of in-depth research to understand women who play games. We talked with a variety of 18-35 year old women, who spend several hours per day or week gaming and enjoy different titles, genres and devices.



After spending time immersed in the world of female players, the research revealed numerous insights on how & what they like to play, how they engage with the gaming community and a result, principles on how to drive greater inclusivity in gaming.

UNDERSTANDING FEMALE PLAYERS

Traditionally the attention of the industry has been focused on a smaller population of professional gamers, streamers and seasoned console purists who live and breathe established titles. However, our in-depth research shows that there is a significant population of women playing who spend several hours per day or week gaming and enjoy a variety of genres & platforms, but **who do not necessarily identify as 'gamers'**:



Many of the female players we talked to felt misunderstood not only by other players, but also by the industry itself - that their style of gaming is overlooked and often viewed as 'less serious'. **Many of these women feel that their voices aren't being fully heard by the industry today:**



I think a lot of the gaming world tends to see women gamers as a lesser species, like we are trying too hard to achieve equality in everything. **Companies tend to see female gamers as an afterthought - like we are still a minority in the industry, when in fact we make up almost half the demographic these days.**

Lauren, 26, UK plays The Room (Mobile) and Red Dead Redemption 2 (PS4)



I think it's important to take the feelings and opinions of women into consideration when making a game to make the gaming world more welcoming to women. **I think there are many kinds of games to choose from, however there is still this stereotype that only men play games, which makes it hard to talk about this hobby with other people as a woman.** I think there is a need to create more games that both men and women can enjoy.

Yukari, 21, Japan plays Pokemon Go (Mobile) and Monster Hunter (PS4)

This frequently translates into lower engagement and inclination to spend. In mobile gaming, female buyers currently account for only 39% of total buyers and tend to spend less than male buyers (ARPPU is 65% lower), despite making nearly half of the players. **Just by closing those gaps and driving more meaningful engagement, the mobile gaming category spend could grow further by 44%.**

(Source: Google Play Internal Data & Estimations)

Regardless of why they play, how they play or which titles they devote themselves to, gaming is becoming an important part of many women's daily schedule, life and even identity. This presents a major opportunity for the gaming industry to better connect with this group - to understand their needs and to design with them in mind - and as a result drive stronger engagement.

To help make this happen, **Change the Game is bringing you three opportunities that reveal the unmet gaming needs of women who play, and principles on how to address them.**

OPPORTUNITY 01:

They are multimodal players.

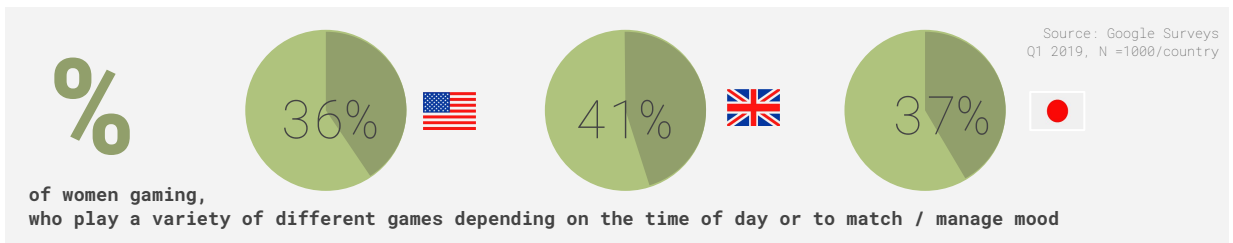
Help them play their way.

How they feel

Many of the women playing feel that the gaming industry is mainly focused on classic PC/console titles that are played in 'sessions' in a fixed space and time at home. While many of them enjoy that style of play, many others prefer **a more flexible approach to gaming - they prefer to game their way, across various game genres and devices at their own pace**, to suit a variety of 'moments' throughout their day.

How they play

(1) Women who play want the flexibility to explore titles and play at their own pace, in a way that fits with their mood, schedule and lifestyle. As a result, they are drawn to a variety of titles and different devices, that fulfil this multimodal style of play.



With console games I really like the distance between you and the screen but **I don't like how you're restricted to play in one place**, and how it takes time to start up the game. I prefer [mobile] games like Tsum Tsum because **I can play them when I want to relieve stress**. These games are really healing, and give you some time to breathe in between your daily commitments.

Niko, 28, Japan plays Tsum Tsum (Mobile) and Monster Strike (Wii)

(2) Women who play are seeking different types of play – even within the same game or franchise – to match their daily rhythm. At some 'moments' they want to focus on winning a battle or progressing a level, at other 'moments' they would rather creatively customize, tweak or tend to their in-game worlds. Finally, there are many 'moments' when they prefer just to 'tap' casual games to relax or kill time.



I've been playing Animation Throwdown for a few months, and the game has so many different layers. **It's so engrossing and has all different ways to play depending on what I have time for**. Sometimes I can just swipe through and collect cards and build my world in the game. When I have more time for focus I can compete in challenges and quests, and the game has endless possibilities and more surprises every time I play.

Fiona, 22, UK plays Animation Throwdown (Mobile) and Far Cry 4 (PS4)

OPPORTUNITY 01:

They are multimodal players. Help them play their way.

How they play

(3) Each female player has a multitude of motivations to play throughout the day and has a set of games reflecting those needs. They create their own 'games catalogues', categorizing them into groups depending on what they want to achieve: 'tap-tap' games for short bursts of downtime, 'brain teasers' to stimulate the mind or games best enjoyed with friends. These categories reflect not only the types of games they enjoy, but they also mirror how they search for and discover new titles.



On my phone all my games are put in folders. I've got all my **'tap tap' games** in one place so they're easy to start up when I'm waiting or killing time. I've got another folder of all my **visually appealing games** like Monument Valley where they're a bit more involved and put you in a certain mood. I've got as well some **games where my friends are all connected** on Facebook so we can see which of us has beat a new level.

Kiara, 24, US plays Eggs Inc. (Mobile) and Don't Starve Together (PC)

Top Motivations for Playing Games

Source: Google Surveys
Q1 2019, N =1000/country



1. Relaxing and unwinding	57%	55%	43%
2. Relieving boredom	54%	48%	49%
3. Making progress in the game	28%	29%	28%
4. Testing skills / knowledge	20%	18%	14%
5. Connecting with others	16%	15%	22%

How to better connect with them

Recommendations:

Appeal to their multi-modal style of play and desire for flexibility, both within games and across titles, enabling them to play 'their way':

- Celebrate all gaming styles & motivations and showcase how your title can address them across your content & channels.
- Create games that allow players to engage in different styles to play within the same title - ensuring they can match the players' goals and needs for that 'moment'.
- Design games with the end in mind - think how your title can fuel different 'moments' of gaming needs through the day and how the player wants to feel.

OPPORTUNITY 02:

They want meaningful storytelling.

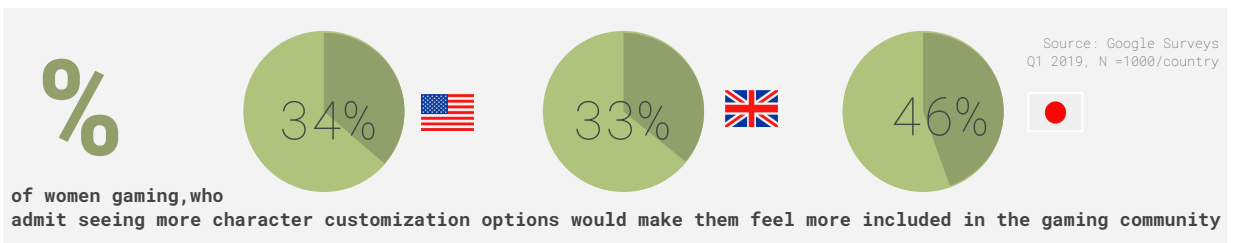
Give them content that better reflects the world.

How they feel

Every day, women are seeing a new wave of films, shows and advertising that feature **diverse, authentic characters and more nuanced storylines that have evolved to better reflect people like them**. Female players' expectations for inclusivity are increasing, and yet many of them feel that gaming and gaming related advertising & events have not moved on from using traditional storylines or characters based on outdated gender and ethnic stereotypes.

What they want from games

(1) Women who play expect – at a minimum – more options for in-game character customization which reflect greater diversity. This includes options for different skin tones, face shapes, hair textures or body types, whilst importantly avoiding tokenism. While Western players look to see more realistic “like me” features, Japanese players like to indulge in creating fantasy and improbable avatars.



I tend to **make characters to look just like me**, but they never have my face shape as an option. Developers could make characters more real by just giving more shade ranges, but usually games get it wrong. The black skin tones aren't well done at all and just make the character look ashy. Nowadays these options shouldn't be hard work...just add a shade slider!

Abigail, 21, UK plays *Fallout Shelter (Mobile)* and *Pokémon Let's Go Pikachu (Switch)*

(2) Games with traditionally masculine themes and characters tend to monopolize the spotlight, leaving the female player tired of predictable tropes and characters. Women who play are looking for authentic narratives and well-rounded characters that show emotions and flaws they can relate to. This allows them to dive into - and feel a deeper connection with - certain stories.



There's **something empowering and honestly just self satisfying about being able to look at the screen and see yourself reflected somewhere within the game/character**. Whenever that is possible for me, I always end up feeling a deeper connection with the game.

Aliyah, 22, US plays *Clash Royale (Mobile)* and *Tomb Raider (XBOX)*

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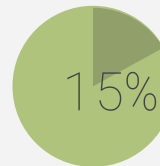
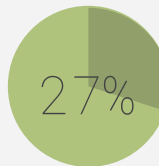
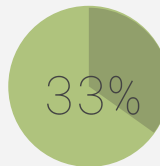
What they want from games

(3) As women engage more with gaming, their expectations for inclusiveness are increasing. Currently, they don't see many e-Sports players, streamers and commentators who reflect them. They want to see the spotlight aimed at a more diverse set of faces - and voices - across the gaming community.



It's important to see people who look like you doing the things you love to do. It makes me feel more confident to be into gaming, and it feels like it's more OK for me to be a part of it. I'm mixed-race, so I don't see a lot of streamers that look like me. In five years, I think you should see all types of streamers - young, old, female, male, different ethnicities - with just as well-made content and just as many views.

Kiara, 24, US plays Eggs Inc. (Mobile) and Don't Starve Together (PC)



Source: Google Surveys
Q1 2019, N =1000/country



of women gaming, who believe seeing more diverse gaming personalities would make them feel more included in the gaming community

How to better connect with them

Recommendations:

Give them content that better reflects the world by creating authentic narratives, well-rounded, relatable characters, and options for customization that mirror reality. Give them gaming peers to aspire to and encourage a new-guard of female gamers.

- When enabling character customization, don't assume a choice of gender is enough and ensure you provide a variety of options for physical traits (like skin tones, face shapes, hair textures or body types) and aesthetic appearance (clothes or accessories).
- When creating narratives and characters, avoid settling for 'well known' plots and character types. Explore ways to bring and showcase different viewpoints and character flaws that are true-to-life.
- Introduce the next generation of diverse gaming role models, influencers and streamers that players can identify with and relate to, enabling them to fully embrace and celebrate their hobby.

OPPORTUNITY 03:

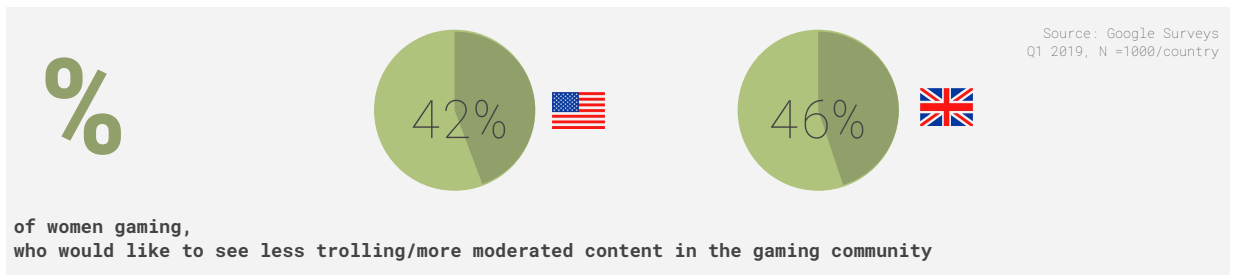
The rules and customs of the gaming community don't appeal to them. Help them engage with the community on their terms.

How they feel

Many of the women playing find the formalities - rules, language and customs - of the gaming community both obsolete and off-putting as they tend to celebrate only one, more traditional style of gaming. Female players feel out-of-place when interacting in this community, and are wary about contributing their opinions in public. **They prefer to stay out of the spotlight, instead seeking out content that helps them learn and progress.**

How they engage with the gaming community

(1) Often, women playing form their own micro-communities with friends on messaging apps around shared interests – including gaming – rather than communicating on public forums. These closed groups offer a constant 'hum' of content that acts as the glue for friendship, and give the members their own sense of belonging in the gaming world.



I'm the admin for two different WhatsApp groups of my friends - one group is just girls, the other is mixed. **We use WhatsApp and Telegram to recommend new games and share scoreboards as well as talk about personal stuff.** We organise a board game night once a week, and we get together to play new games as a group.

Sarah, 34, UK plays The Cave (Mobile) and Legend of Zelda (Wii)

(2) Women who play are open to exploring different genres, but can be put off by the steep learning curve that distracts them from enjoying game-play. Many genres that are 'newer to them' have an already established style of play, culture and shared language that can alienate new players. They feel at a disadvantage in these games, and want a safe 'training ground' that allows them the time and resources to expand their gaming repertoire and skills.



Gamers are experts on certain games and **it's hard to know where to start when you're not.** I've tried some types of games that everyone is into - and every time I joined I get killed within 10 seconds. **It's not like women are unwelcome - it's just that certain games are more aimed at men.**

Alison, 22, US plays Words with Friends (Mobile) and Snipperclips (Switch)

OPPORTUNITY 03:

The rules and customs of the gaming community don't appeal to them. Help them engage with the community on their terms.

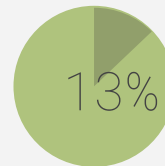
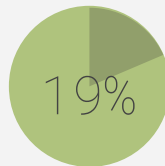
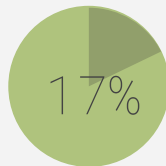
How they engage with the gaming community

(3) While the online gaming community can feel elitist or alienating, real world meetups can unlock a sense of belonging for many of the players. Game nights, local events and large-scale conventions reveal a more diverse, positive and welcoming face of the gaming community. Here, women who play can bond with other players, leaving with the feeling that 'everyone games'.



When I went to EGX I met so many people... We exchanged Instagram and Facebook accounts to chat later. There were all different types of people and everyone was happy to talk about games. **There are lots of trolls online, but no one is a troll in real life. I just wish the online gaming world felt more like the really diverse and friendly group I see in the real world.**

Abigail, 21, UK plays *Fallout Shelter* (mobile) and *Pokémon Let's Go Pikachu* (Switch)



Source: Google Surveys
Q1 2019, N =1000/country



of women playing games several times a day or week, who feel they belong in the gaming community

How to better connect with them

Recommendations:

Help them build micro-communities on messaging apps and in the real world, expand their gaming repertoire and provide safe spaces where they can perfect their skills and connect with like minded individuals.

- Enable players to share their achievements and connect with friends during gameplay in a natural way. Create content that informs & helps them progress, but also entertains, engages them in your game's universe and is fun to share.
- When onboarding users, think not only about the seasoned players familiar with the genre gameplay, but also the newcomers. Create content that helps beginners immerse themselves into the game's mechanics and language, and secure a safe 'training ground' where users of different experience can feel comfortable.
- Bring your title to events, meetups and conventions, finding fun and meaningful ways for players of all levels to connect and enjoy their passions together. Go beyond just large online communities and look to local gamer groups as well.

DRIVING INCLUSIVITY AND BELONGING WITH ALL PLAYERS

Understanding the variety of women playing games is just the start of a journey towards inclusivity, and the possibilities this group holds for the future of gaming culture are highly encouraging. An increasingly diverse and dedicated global community is bringing gaming into their lives, and by driving inclusive change from the ground-up, developers can make a genuine impact on gaming culture.

Many of the players expect gaming to catch up with the global conversation around inclusivity, and will no longer accept tokenism. **They do not want 'special games for women', they want a gaming community for all.** They are looking to the industry to support diverse personalities and provide them with a rich and varied world of gaming content that communicates modern, authentic & real characters and stories they can engage with – and share - for years to come.



I don't think current gaming properly represents the real world at all. The real world is diverse, and in-game worlds should be too. There is a serious lack of women, people of colour, and LGBTQ characters. Honestly, I think every minority group is still under-represented in video games"

Neveah, 20, UK plays *Lost Island: Blast Adventure (Mobile)* and *Overwatch (PC)*

As the gaming industry looks to further sources of growth, understanding the expectations of women playing - and addressing the strategic opportunities they present - is crucial. Applying the following principles can allow companies to drive inclusivity and belonging in gaming:

1

Designing for diverse gaming motivations

Appeal to their multi-modal style of play and desire for flexibility, both within the game and across titles, enabling them to play 'their way'.

2

Supporting diverse gaming content and personalities

Give them content that better reflects their world by creating authentic narratives, well-rounded, relatable characters, and options for customization that mirror reality. Support diverse role models within gaming that they can relate to, enabling them to fully embrace and celebrate their hobby.

3

Cultivating diverse and tolerant gaming communities

Help them build micro-communities on messaging apps and in the real world, expand their gaming repertoire and provide safe spaces where they can perfect their skills and connect with like-minded individuals.

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Committing to and growing diverse development teams

To achieve all of the above points, ensure that the right talent is present at the table: with a wide spectrum of backgrounds, experience and points of view. The more your team represents the players you're trying to connect with, the better they can voice and express their needs.

Google believes that the time for inclusivity is now, and wants to partner on this challenging but exciting journey towards a more inclusive and open gaming culture. Building a sense of belonging for all will take time, iteration and creativity. Developers and the gaming industry stand the best chance of having a critical impact, **helping to create a gaming world that is truly for all.**



To learn more about Change The Game initiatives visit
play.google.com/about/changethegame

Want to share your thoughts? Reach us at
[ctg-research \[at\] google.com](mailto:ctg-research@google.com)