Overcoming the Diversity Gap in Mobile Gaming:

Why Representation and Inclusion Matters to the Future of the Industry

Gaming has rapidly become the world's most dominant form of entertainment—in 2020, revenues for the sector were predicted at $159.3 billion globally, surpassing that of TV ($105 billion), movies ($48 billion) and music ($17 billion).[1] Alongside this growth, today's gamer population is increasingly more diverse, encompassing a spectrum of ethnicities, ages, genders, sexual orientations, and abilities.

But even as the gaming population diversifies, games don't always reflect that kaleidoscope of experiences. At times, underrepresented gamers lack authentic representation on screen. Stereotypes alienate gamers and can encourage bullying. These experiences make gamers more likely to feel excluded and, in turn, less likely to engage.

To make people feel included and comfortable—and position itself for long-term success—the gaming industry must meaningfully address representation and inclusion across several areas, including the games themselves, the industry composition and how games are marketed. We've uncovered three areas of opportunity that the mobile gaming industry should consider to help overcome its diversity gap.

US

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Inclusive environments help drive player engagement

"People who play games want to see characters that look like them, sound like them, are shaped like them and dress like them. Many people don't find elements that represent them in games and get put into a stereotype, a body or a voice that is not authentic to how they see themselves. This is really a push for game developers, and the first thing we can do is to ensure they understand the audiences and further the conversation about representation."

— Claire Weston,
DIRECTOR, PARTNERSHIPS MARKETING AT META

Percentage of US mobile gamers that say if the game featured more characters that represent them or people like them, they would feel more connected, more immersed or play the game more[1]
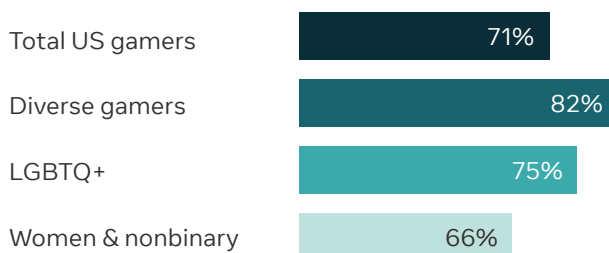
Total US gamers	71%
Diverse gamers	82%
LGBTQ+	75%
Women & nonbinary	66%

Percentage of US mobile gamers that say if the game featured more characters that represent them or people like them, they would be more likely to download, buy or make purchases in the game[1]

Total US gamers	68%
Diverse gamers	76%
LGBTQ+	72%
Women & nonbinary	62%
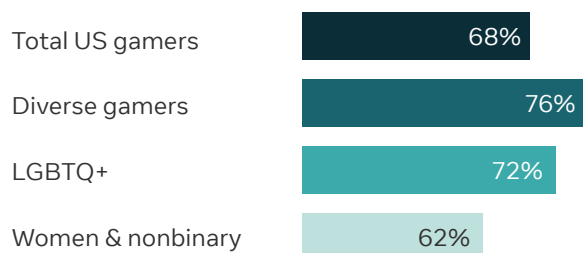
What does this mean for the future of mobile gaming?

Embracing diversity is good for business. More diverse gaming environments not only make gamers feel more included and represented, but they also make games more appealing and engaging. That's especially true for surveyed mobile gamers who identify as diverse, non-white, or who identify as LGBTQ+. For publishers, this kind of positive engagement can be the key to driving retention and building long-term success for titles.

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Considerations for fostering diversity and inclusion

"Specific to LGBTQ+ communities, the way that they want to be represented has a lot to do with acknowledging their identity and marketing to them in a way that's not exploitative. For people with disabilities, practicing inclusion has to go beyond just name checking them with other marginalized groups; successful diversity, equity and inclusion with this audience requires executing on things that will improve their experience, not just acknowledging their (visible or invisible) differences."

— Jennifer Ekeleme,
CHIEF OF STAFF & HEAD OF DE&I AT THE BLACK SHEEP AGENCY

Percentage of US mobile gamers who say they enjoy the ability to customize the in-game experience[2]

Total US gamers	75%
Diverse gamers	74%
LGBTQ+	78%
Women & nonbinary	75%
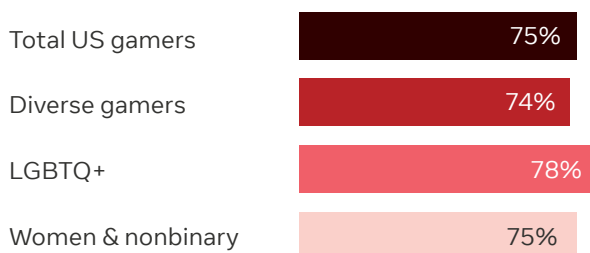
Percentage of US mobile gamers who say they have noticed people represented in a stereotypical or clichéd way in gameplay[2]

Total US gamers	49%
Diverse gamers	46%
LGBTQ+	57%
Women & nonbinary	49%
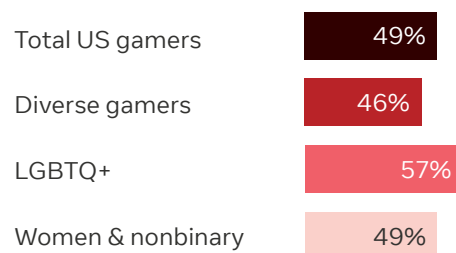
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Gamers expect a variety of customization options across a spectrum of characteristics. To help ensure representation is diverse and intersectional, game publishers should consider integrating "sliding scales" for the customization of different attributes. Misrepresentations can also be avoided through approaches such as developing feedback loops with underrepresented gaming communities and providing carefully considered and nuanced character traits (e.g., a Pride pin). Promoting diversity should go hand-in-hand with ensuring gaming environments are safe.

[2] HarrisX Gaming Diversity and Inclusion Study (Meta-commissioned online study of 6,045 respondents 18+ across the US, UK, Germany, Brazil and South Korea who play mobile games for at least 3-4 hours per week, July-August 2021). Mobile gamer definition: play 3+ hours gaming per week and at least some games played have human characters.

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Authentic advertising plays an important role

"Highlighting a minority or an orientation is not the right thing. Incorporating it in the ad within the storyline is a good way of showing not telling."

— Nonbinary, 25, LGBTQ+, USA[3]

Percentage of US mobile gamers who say that when an ad features a diverse set of characters they are likely to download the mobile game[4]

Total US gamers	55%
Diverse gamers	65%
LGBTQ+	55%
Women & nonbinary	53%
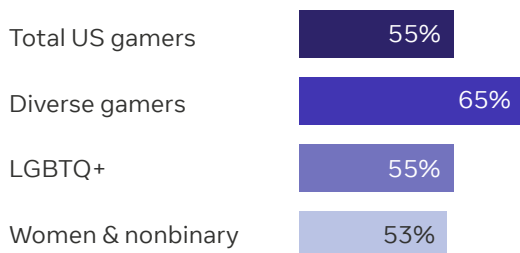
Percentage of US mobile gamers who say that if they saw stereotypical/clichéd representation in mobile game advertising they would spend less money on the game[4]

Total US gamers	44%
Diverse gamers	49%
LGBTQ+	57%
Women & nonbinary	43%
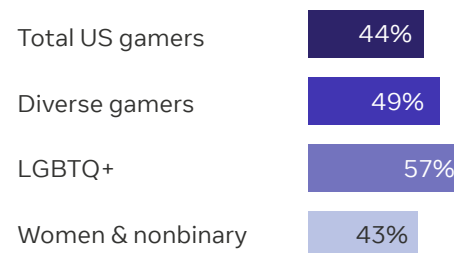
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Incorporating elements that elevate diversity and inclusion in creative—such as featuring a diverse set of characters or showcasing a story arc that subtly nods to diverse experiences—could even help to address some of the currently existing ad pain points, such as the repetitiveness of advertisements. Seeing diversity reflected in an advertisement is important only if it's an accurate portrayal of the real in-game experience. Looking ahead, ads that reflect gamer diversity will be key in helping publishers reach and retain new audiences in an increasingly crowded landscape.

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