Google for Games

Diversity, Equity, and Inclusion

February 2023

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Objectives

Understand how gamers perceive diversity, equity, and inclusion within the games they play.

Determine how to improve player experience.

Methodology

18,029 male, female, and non-binary respondents, ages 18 to 87, participated in this study.

Within the target audience, all respondents:

• Are ages 18 and older

• Play games on a qualifying device* for at least 2 hours in a typical week

• Currently live in North America, Asia-Pacific, Europe, the Middle East and Africa, or Latin America

* Qualifying devices: Android phone, android tablet, iMac/MacBook, iPad, iPhone, Nintendo Switch, PlayStation 4, PlayStation 5, Steam Deck, Xbox One, Xbox Series X/S, Windows PC/laptop. Note: Detailed methodology and segmentation information can be found in the Methodology section at the end of the report.

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Diversity, Equity, and Inclusion
February 2023 Report

Including diverse players in advertisements and promoting positivity and inclusivity in games encourages player engagement

Most participants say that it is very or extremely important that games feature diverse stories (69%), diverse characters (68%), and diverse character creation/customization options (65%).

The majority of respondents (59%) feel they are represented by characters in games they play somewhat or very well (e.g., they often encounter characters like themselves).

- Most players (**59%**) say they are more or much more likely to download or purchase a game if they see ads for it that feature a variety of types of players (e.g., different ages, genders, nationalities).
    - Similarly, **60%** of respondents say they are more or much more likely to download or purchase a game if they see ads for it featuring players similar to themselves (e.g., similar age, gender, nationality).

Most participants (93%) play games with social and/or multiplayer elements at least rarely, and almost half of these multiplayer gamers (47%) say they sometimes or often experience discrimination or toxic behavior in games they play.

Among players that experience discrimination or toxic behavior in games, **49%** say this behavior sometimes or often leads them to quitting a game.

To promote positivity and inclusivity in games, players most often say developers should ban users who engage in toxic behavior (**50%**), remove vulgar or hateful player-created content (**45%**), create an easy-to-understand code of conduct (**35%**), and/or ban certain words or phrases from use in text chat, forums, etc. (**33%**).

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Players want developers to promote a positive work environment and include accessibility options in their games

Most players (71%) say that game developers promoting a positive work environment is very or extremely important to them.

- A positive work environment entails things such as diversity and inclusivity as well as fair working hours.
- About half of participants (**47%**) say they are sometimes or often discouraged from playing a game because a game developer/publisher has a reputation for not promoting a positive working environment.

The majority of players (81%) say it is at least moderately important that a game includes accessibility options (impairment aids).

- **50%** of non-disabled players say it is very or extremely important that a game includes accessibility options, while **79%** of players with disabilities say the same.
- Many respondents (**42%**) say there are accessibility options that they wish more games supported.
    - Among these participants, the accessibility options that they are most often interested in games adding are color adjustments (**42%**), audio descriptions (**41%**), changes to text (**41%**), custom button assignments (**40%**), and/or adaptive accessories (**38%**).
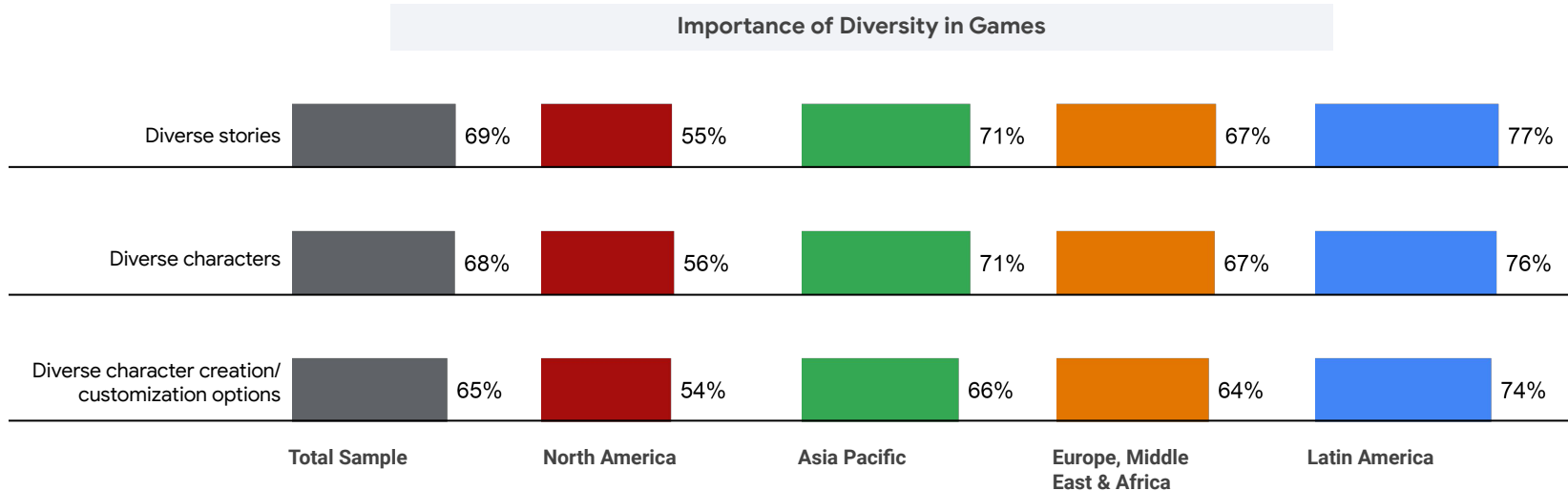
Google for Games
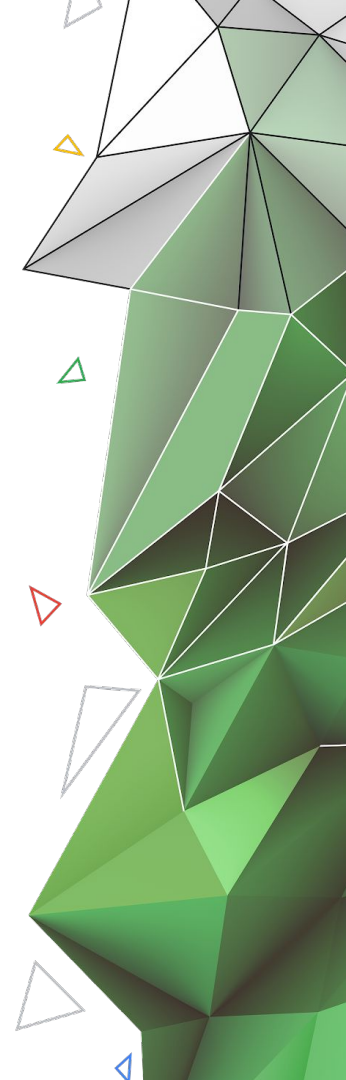
Global
Overview

February 2023

Most participants say that it is very or extremely important that games feature diverse stories, characters, and character creation options

Participants in North America have a lower percentage of respondents that express these sentiments compared to other regions. Respondents in Latin America have the highest percentage of participants that say it is very or extremely important that games feature diverse stories, characters, and character creation options.

Importance of Diversity in Games

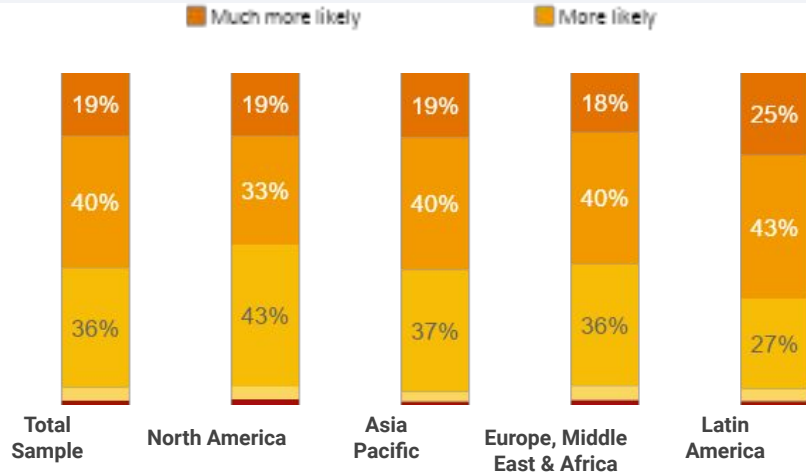|	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Diverse stories	69%	55%	71%	67%	77%
Diverse characters	68%	56%	71%	67%	76%
Diverse character creation/customization options	65%	54%	66%	64%	74%

Q - How important is it to you that games feature each of the following, if at all?
Percentages shown above are the sum of participants that selected "Extremely important" and "Very important"
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

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Most participants (59%) say they are more or much more likely to download or purchase a game if the ads feature diverse players

Similarly, **60%** of respondents say they are more or much more likely to download or purchase a game if they see ads for it featuring players similar to themselves (e.g., similar age, gender, nationality).

Variety of Player Types in Ads
Download/Purchase Intent

■ Much more likely   ■ More likely   ■ Neither more nor less likely   ■ Less likely   ■ Much less likely

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Much more likely	19%	19%	19%	18%	25%
More likely	40%	33%	40%	40%	43%
Neither more nor less likely	36%	43%	37%	36%	27%

Player Identification in Advertisements
Download/Purchase Intent

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Much more likely	19%	17%	19%	18%	26%
More likely	41%	31%	43%	41%	42%
Neither more nor less likely	35%	48%	35%	35%	28%

Q - Are you any more or less likely to download or purchase a game if you see ads for it featuring a variety of types of players (e.g., different ages, genders, nationalities)? This would make me _____ to download/play the game.
Q - Are you any more or less likely to download or purchase a game if you see ads for it featuring players similar to yourself (e.g., age, gender, nationality)? This would make me _____ to download/play the game.
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708); Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)
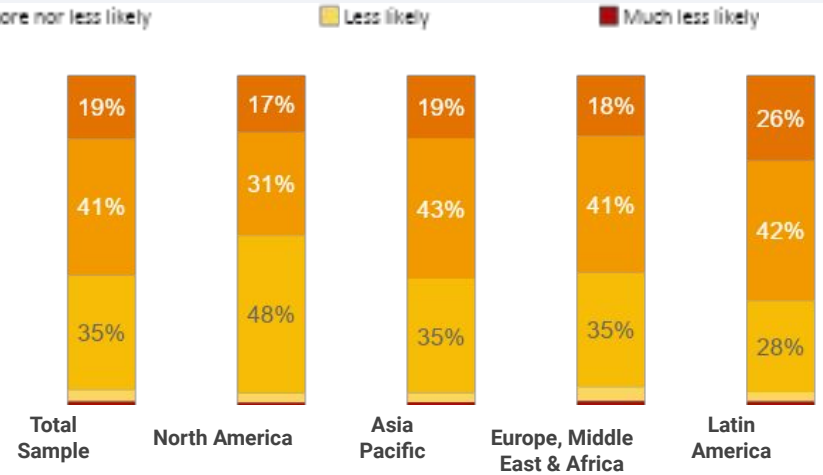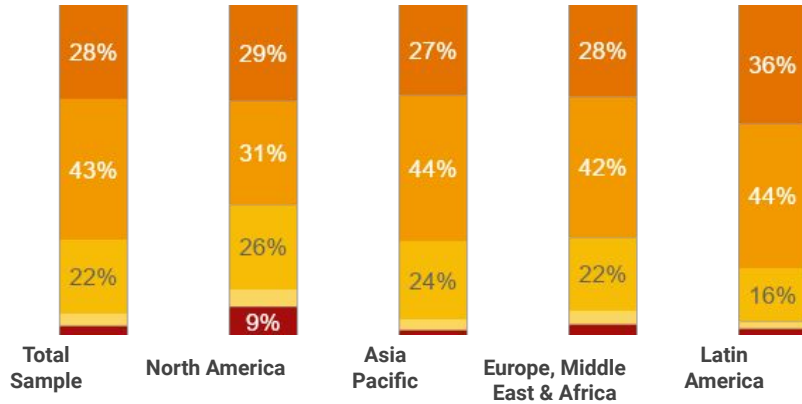
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Most players say that game developers promoting a positive work environment is very or extremely important to them (71%)

A positive work environment entails things such as diversity and inclusivity as well as fair working hours. About half of participants (**47%**) say they are sometimes or often discouraged from playing a game because a game developer/publisher has a reputation for not promoting a positive working environment.
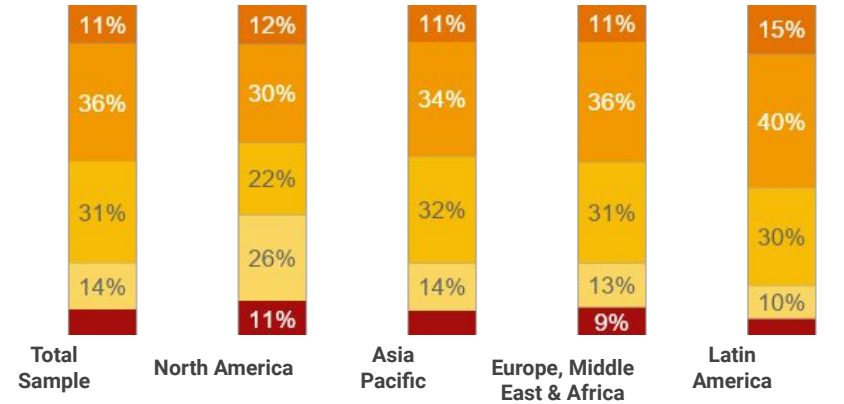
Game Developer Positive Working Environment Importance to Gamers

- Extremely important
- Very important
- Moderately important

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Extremely important	28%	29%	27%	28%	36%
Very important	43%	31%	44%	42%	44%
Moderately important	22%	26%	24%	22%	16%
		9%			

Game Developer Positive Working Environment Frequency of Discouraging Player Engagement

- Often
- Sometimes
- Rarely
- Never
- I'm not sure

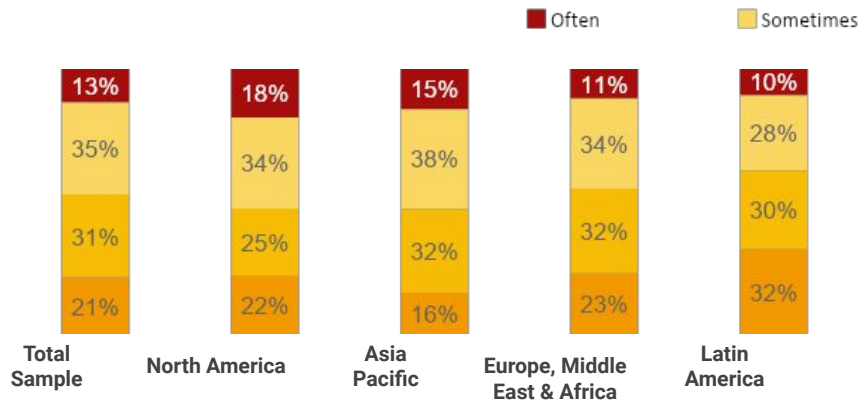|	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Often	11%	12%	11%	11%	15%
Sometimes	36%	30%	34%	36%	40%
Rarely	31%	22%	32%	31%	30%
Never	14%	26%	14%	13%	10%
I'm not sure		11%		9%	

Q - How important is it to you, if at all, that a game developer/publisher promotes a positive working environment (e.g., diversity and inclusivity, fair working hours)?
Q - How often do you feel discouraged from playing a game, if ever, because a developer/publisher has a reputation for not promoting a positive working environment (e.g., diversity and inclusivity, fair working hours)?
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708); Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)
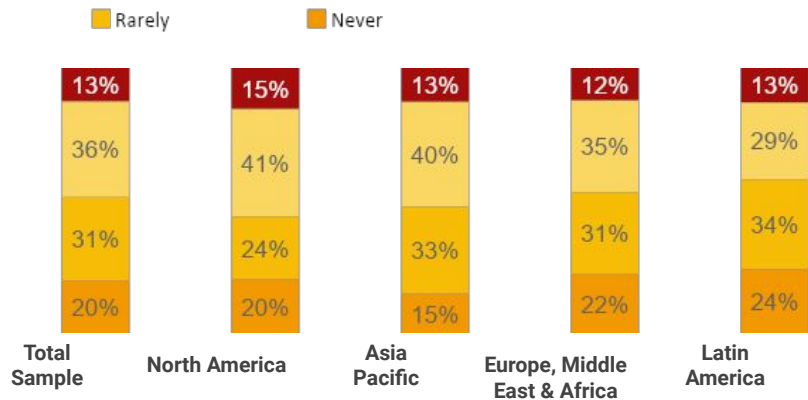
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Among multiplayer gamers, 47% say they sometimes or often experience discrimination or toxic behavior in games they play

Players with disabilities have a higher percentage of participants that say they sometimes or often experience discrimination or toxic behavior in games they play (**83%**) compared to non-disabled players (**43%**). Among respondents that experience discrimination or toxic behavior in games, **49%** say this behavior sometimes or often leads to them quitting a game.

Frequency of Experiencing Discrimination or Toxic Behavior in Games*

■ Often □ Sometimes

	Often	Sometimes	Rarely	Never
Total Sample	13%	35%	31%	21%
North America	18%	34%	25%	22%
Asia Pacific	15%	38%	32%	16%
Europe, Middle East & Africa	11%	34%	32%	23%
Latin America	10%	28%	30%	32%

Impact of Discrimination or Toxic Behavior on Players Quitting Games**

□ Rarely ■ Never

	Often	Sometimes	Rarely	Never
Total Sample	13%	36%	31%	20%
North America	15%	41%	24%	20%
Asia Pacific	13%	40%	33%	15%
Europe, Middle East & Africa	12%	35%	31%	22%
Latin America	13%	29%	34%	24%

*Asked among respondents that play games with social and/or multiplayer elements rarely or more often.
Q - How often do you typically experience discrimination or other toxic behavior in games, if ever?
Total Sample (n = 16,811); North America (n = 672); Asia Pacific (n = 5,329), Europe, Middle East & Africa (n = 9,428); Latin America (n = 1,382)
**Asked among respondents that play games with social and/or multiplayer elements rarely or more often that experience discrimination or toxic behavior in games rarely or more often.
Q - When you've experienced discrimination or other toxic behavior, how often has that led to you quitting a game, if ever?
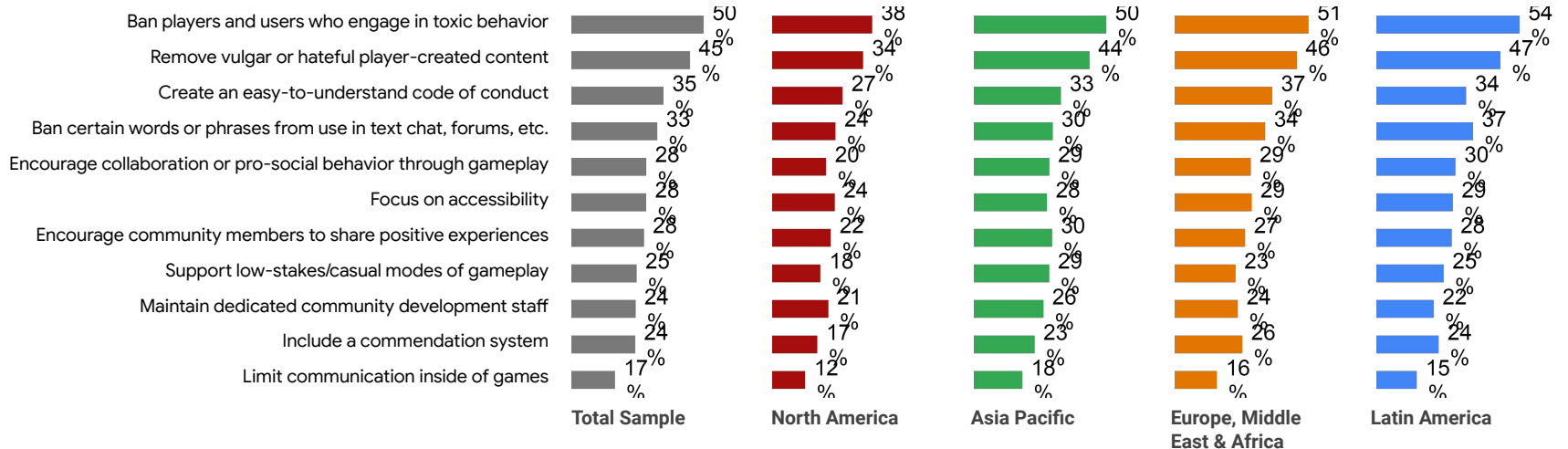Total Sample (n = 13,220); North America (n = 523); Asia Pacific (n = 4,491), Europe, Middle East & Africa (n = 7,266); Latin America (n = 940)

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To promote positivity and inclusivity in games, players most often say developers should ban users who engage in toxic behavior (50%)

Other common steps that participants often want developers to take to foster positivity and inclusivity include removing vulgar or hateful player-created content (**45%**), creating an easy-to-understand code of conduct (**35%**), and/or banning certain words or phrases from use in text chat, forums, etc. (**33%**).

Steps Developers Should Take to Promote Positivity & Inclusivity in Games

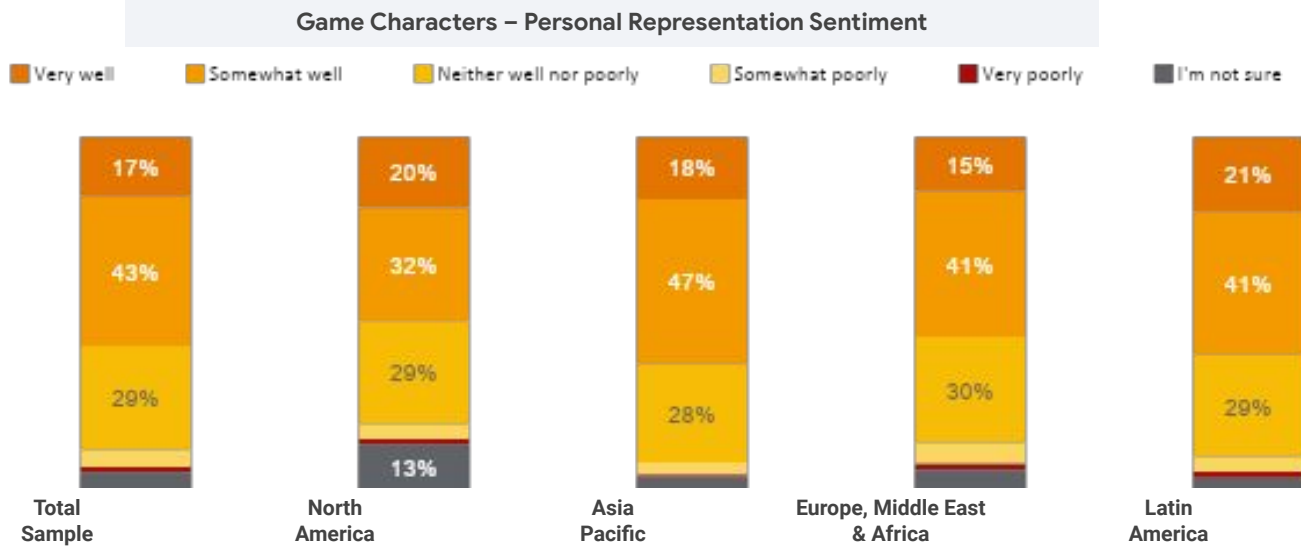|	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Ban players and users who engage in toxic behavior	50%	38%	50%	51%	54%
Remove vulgar or hateful player-created content	45%	34%	44%	46%	47%
Create an easy-to-understand code of conduct	35%	27%	33%	37%	34%
Ban certain words or phrases from use in text chat, forums, etc.	33%	24%	30%	34%	37%
Encourage collaboration or pro-social behavior through gameplay	28%	20%	29%	29%	30%
Focus on accessibility	28%	24%	28%	29%	29%
Encourage community members to share positive experiences	28%	22%	30%	27%	28%
Support low-stakes/casual modes of gameplay	25%	18%	29%	23%	25%
Maintain dedicated community development staff	24%	21%	26%	24%	22%
Include a commendation system	24%	17%	23%	26%	24%
Limit communication inside of games	17%	12%	18%	16%	15%

Q - What actions do you want game developers to take to promote positivity and inclusivity within their games, if any? (Select all that apply.)
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708); Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

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Source: VGM

The majority of respondents feel they are represented by characters in games they play somewhat or very well (59%)

Another **29%** of participants feel they are represented neither well nor poorly in games they play. Respondents in the Asia Pacific have the highest percentage of players that feel that they are somewhat or very well represented by characters in games they play (**64%**), while participants in North America has the lowest percentage that express this sentiment (**52%**).

Game Characters – Personal Representation Sentiment

Very well | Somewhat well | Neither well nor poorly | Somewhat poorly | Very poorly | I'm not sure

Total Sample: 17%, 43%, 29%
North America: 20%, 32%, 29%, 13%
Asia Pacific: 18%, 47%, 28%
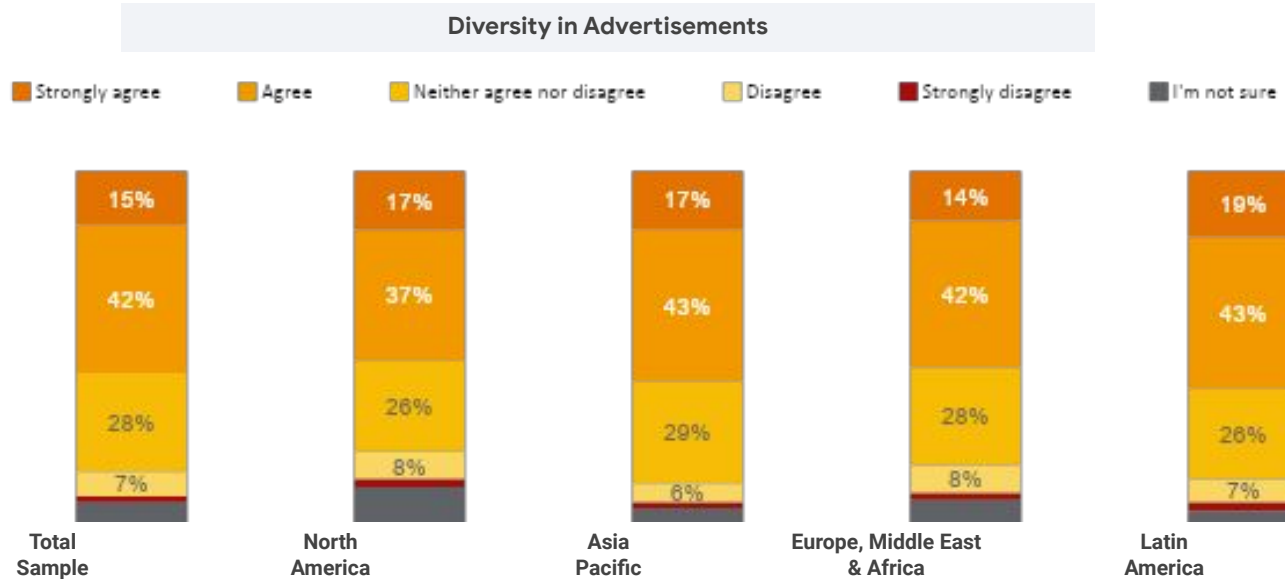Europe, Middle East & Africa: 15%, 41%, 30%
Latin America: 21%, 41%, 29%

Q - How well or poorly do you feel personally represented by characters in games you play?
This refers to how often you encounter characters like yourself and how true-to-life they feel.
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708);
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

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Over half of respondents (57%) agree or strongly agree that ads for games often portray diverse types of players

Another **28%** of respondents neither agree nor disagree that games often portray diverse types of players, while **9%** of participants disagree or strongly disagree with this statement.

Diversity in Advertisements

■ Strongly agree　■ Agree　■ Neither agree nor disagree　□ Disagree　■ Strongly disagree　■ I'm not sure

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Strongly agree	15%	17%	17%	14%	19%
Agree	42%	37%	43%	42%	43%
Neither agree nor disagree	28%	26%	29%	28%	26%
Disagree	7%	8%	6%	8%	7%

Q - How much do you agree or disagree with the following statement?
Ads for games often portray diverse types of players.
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708);
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)
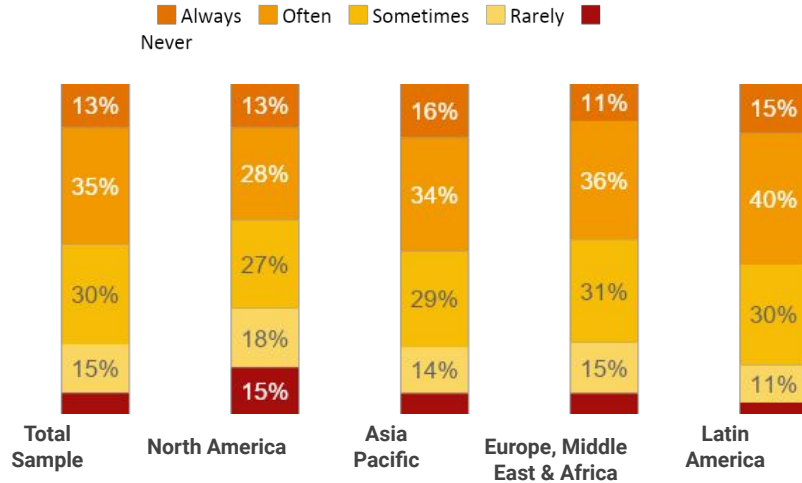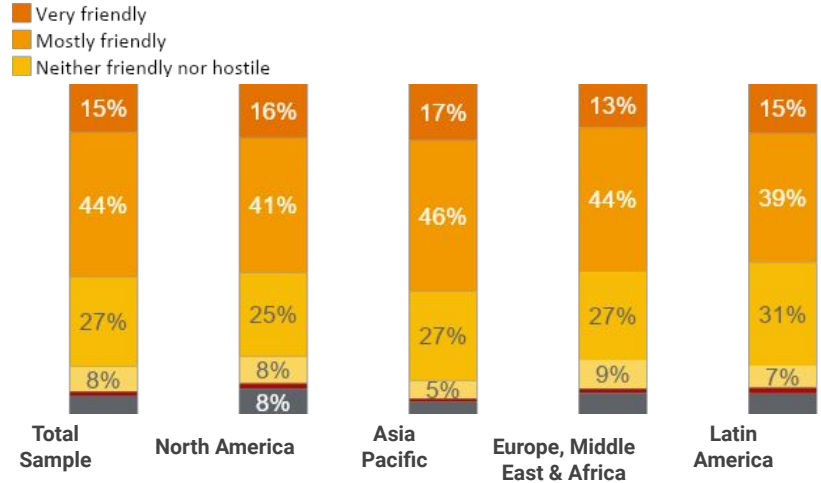
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The majority of multiplayer gamers (58%) feel that the communities in the games they play are mostly or very friendly

Most participants (**93%**) play games with social and/or multiplayer elements at least rarely.

Frequency of Playing Games with Social or Multiplayer Elements

■ Always ■ Often ■ Sometimes ■ Rarely ■ Never

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Always	13%	13%	16%	11%	15%
Often	35%	28%	34%	36%	40%
Sometimes	30%	27%	29%	31%	30%
Rarely	15%	18%	14%	15%	11%
Never		15%			

Friendliness of Gaming Communities*

■ Very friendly ■ Mostly friendly ■ Neither friendly nor hostile

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Very friendly	15%	16%	17%	13%	15%
Mostly friendly	44%	41%	46%	44%	39%
Neither friendly nor hostile	27%	25%	27%	27%	31%
	8%	8%	5%	9%	7%
		8%			

Q - How often do you play games with social and/or multiplayer elements, if ever?
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)
*Asked among respondents that play games with social and/or multiplayer elements rarely or more often.
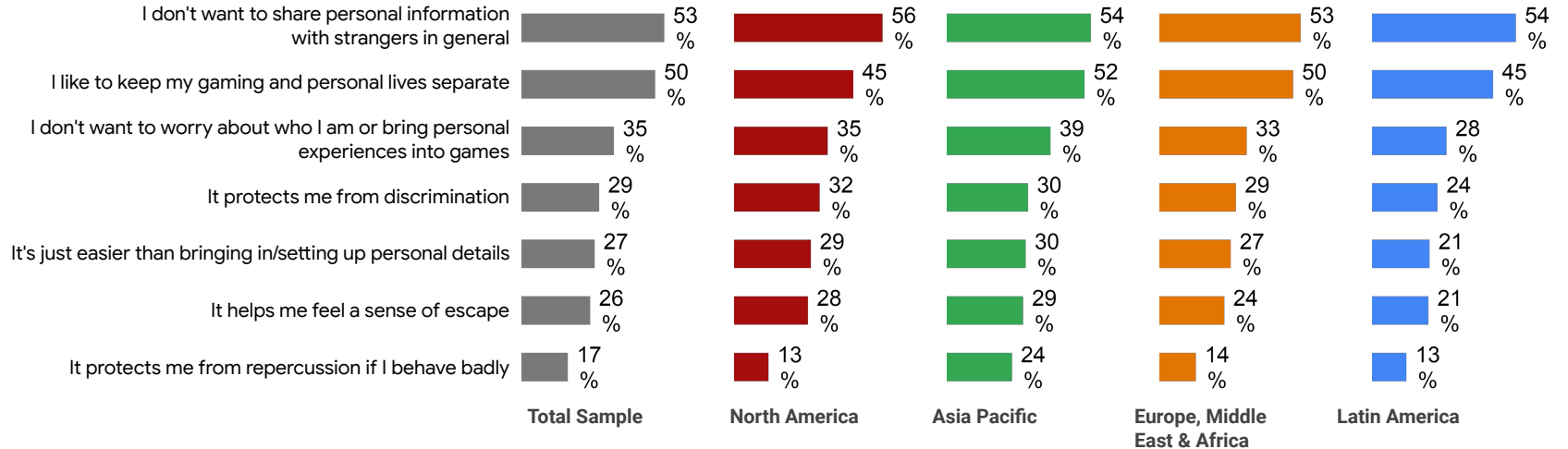*Q - How friendly or hostile do you think the communities are in the games you play?*
Total Sample (n = 16,811); North America (n = 672); Asia Pacific (n = 5,329),
Europe, Middle East & Africa (n = 9,428); Latin America (n = 1,382)

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Among players that prefer to be anonymous in games, 29% say the reason they prefer to do so is protecting themselves from discrimination

Other common reasons that players that prefer to be anonymous in games is because they do not want to share their personal information with strangers in general (**53%**) and/or they like to keep their gaming and personal lives separate (**50%**). Over half of respondents (**54%**) prefer or strongly prefer to be anonymous while playing games with others.

Reasons for Preferring to Be Anonymous in Games

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
I don't want to share personal information with strangers in general	53%	56%	54%	53%	54%
I like to keep my gaming and personal lives separate	50%	45%	52%	50%	45%
I don't want to worry about who I am or bring personal experiences into games	35%	35%	39%	33%	28%
It protects me from discrimination	29%	32%	30%	29%	24%
It's just easier than bringing in/setting up personal details	27%	29%	30%	27%	21%
It helps me feel a sense of escape	26%	28%	29%	24%	21%
It protects me from repercussion if I behave badly	17%	13%	24%	14%	13%

Asked among respondents that prefer or strongly prefer to be anonymous while playing games with others.
Q - Why do you prefer to be anonymous when playing games? (Select all that apply.)
Total Sample (n = 9,665); North America (n = 365); Asia Pacific (n = 3,417);
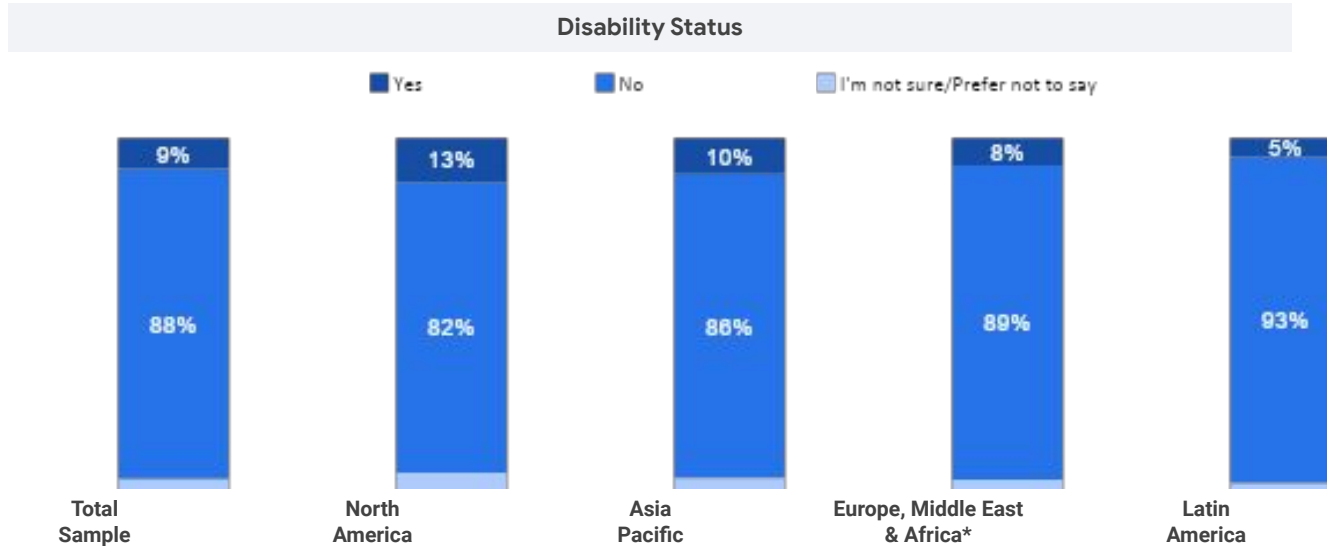*Europe, Middle East & Africa (n = 5,141); Latin America (n = 742)*

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Accessibility Options

February 2023

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Among global participants, 9% have a disability or impairment that affects the way they play games

Respondents in North America have the highest percentage of participants that report having a disability or impairment that affects the way they play games (**13%**), while Latin America has the lowest percentage of respondents that say the same (**5%**).

Disability Status

■ Yes　　　■ No　　　□ I'm not sure/Prefer not to say

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa*	Latin America
Yes	9%	13%	10%	8%	5%
No	88%	82%	86%	89%	93%

*In Europe, the Middle East, and Africa, this question was only asked in select countries.
Q - Do you have a disability or impairment that affects the way you play games?
Total Sample (n = 15,336); North America (n = 786); Asia Pacific (n = 5,708),
Europe, Middle East & Africa (n = 7,405); Latin America (n = 1,437)

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Half of non-disabled players say it is very or extremely important that a game includes accessibility options or impairment aids

A higher percentage of disabled players say that it is very or extremely important that a game includes accessibility options or impairment aids (**79%**) compared to non-disabled players (**50%**).

In Latin America, a higher percentage of non-disabled players say it is very or extremely important that a game includes accessibility options or impairment aids (**74%**) compared to other regions (**42%-51%**).

Importance of Accessibility Options in Games

Non-Disabled Players

Players with Disabilities

■ Extremely important ■ Very important ■ Moderately important ■ Slightly important ■ Not important at all

Non-Disabled Players

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Extremely important	19%	19%	13%	19%	38%
Very important	31%	27%	28%	32%	37%
Moderately important	27%	25%	29%	28%	18%
Slightly important	10%	11%	11%	11%	4%
Not important at all	13%	18%	19%	10%	3%

Players with Disabilities

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Extremely important	36%	41%	43%	29%	36%
Very important	43%	36%	44%	44%	46%
Moderately important	17%	12%	11%	23%	17%

Q - How important is it to you that a game includes accessibility options (impairment aids), if at all?
Non-Disabled Players: Total Sample (n = 13,487); North America (n = 648); Asia Pacific (n = 4,919),
Europe, Middle East & Africa (n = 6,590); Latin America (n = 1,330)
Players with Disabilities: Total Sample (n = 1,344); North America (n = 99); Asia Pacific (n = 584),
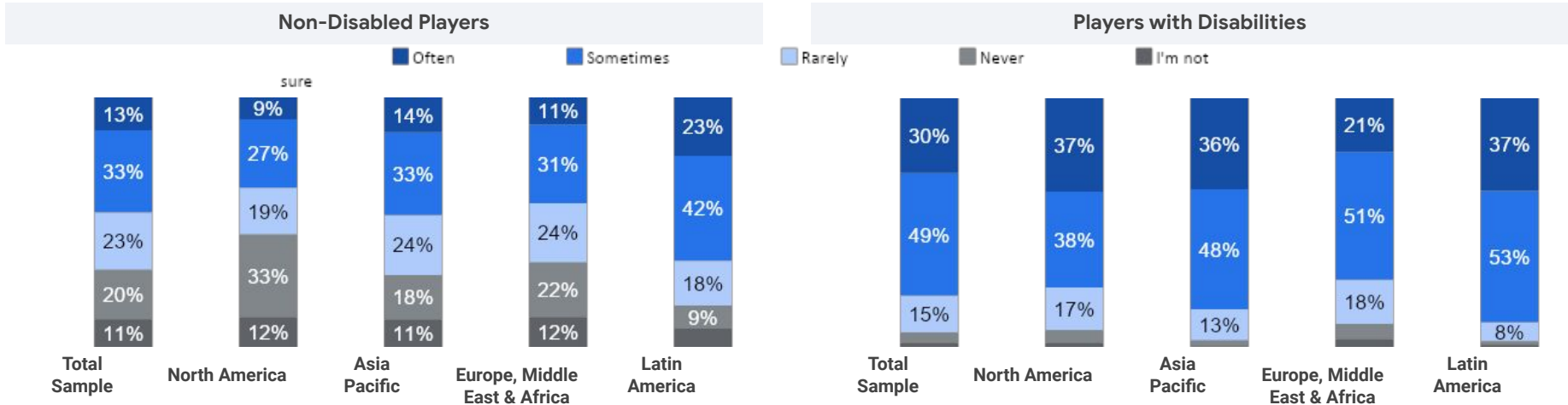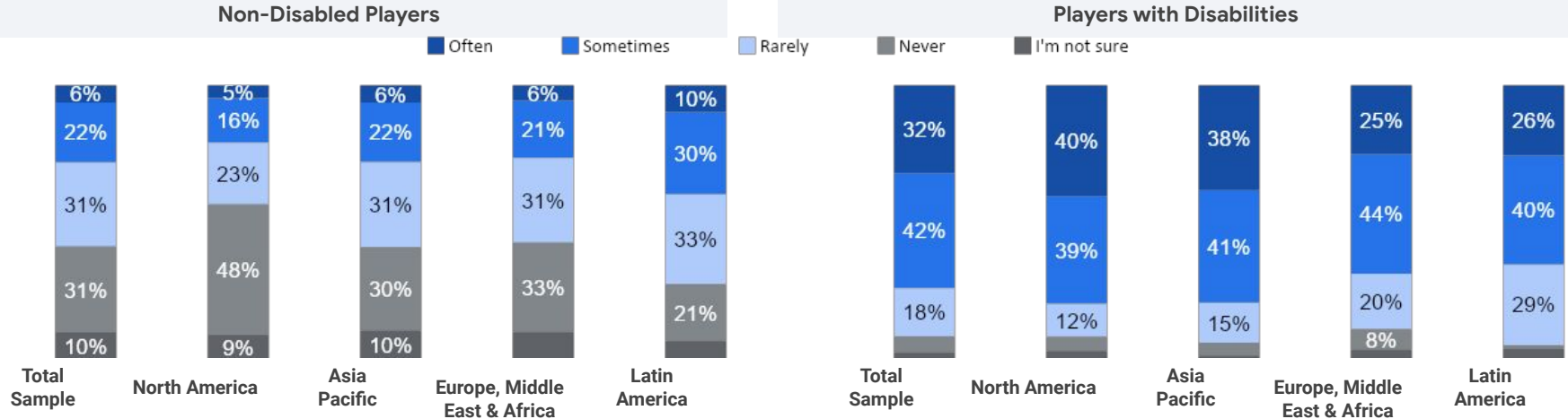*Europe, Middle East & Africa (n = 583); Latin America (n = 78)*

Source: **VGM**

Many non-disabled players (46%) sometimes or often feel encouraged to play a game based on its accessibility options

A higher percentage of disabled players sometimes often feel encouraged to play a game based on its accessibility options or impairment aids (**79%**) compared to the percentage of non-disabled players that say the same (**46%**).

In Latin America, a higher percentage of non-disabled players say sometimes or often feel encouraged to play a game based on its accessibility options (**65%**) compared to other regions (**36%-47%**).

Accessibility Options – Frequency of Encouraging Play Interest

| Non-Disabled Players | Players with Disabilities |

■ Often   ■ Sometimes   ■ Rarely   ■ Never   ■ I'm not sure

Non-Disabled Players

Total Sample: Often 13%, Sometimes 33%, Rarely 23%, Never 20%, I'm not sure 11%

North America: Often 9%, Sometimes 27%, Rarely 19%, Never 33%, I'm not sure 12%

Asia Pacific: Often 14%, Sometimes 33%, Rarely 24%, Never 18%, I'm not sure 11%

Europe, Middle East & Africa: Often 11%, Sometimes 31%, Rarely 24%, Never 22%, I'm not sure 12%

Latin America: Often 23%, Sometimes 42%, Rarely 18%, Never 9%

Players with Disabilities

Total Sample: Often 30%, Sometimes 49%, Rarely 15%

North America: Often 37%, Sometimes 38%, Rarely 17%

Asia Pacific: Often 36%, Sometimes 48%, Rarely 13%

Europe, Middle East & Africa: Often 21%, Sometimes 51%, Rarely 18%

Latin America: Often 37%, Sometimes 53%, Rarely 8%

Q - How often do you feel encouraged to play a game, if ever, based on its accessibility options (impairment aids)?
Non-Disabled Players: Total Sample (n = 13,487); North America (n = 648); Asia Pacific (n = 4,919),
Europe, Middle East & Africa (n = 6,590); Latin America (n = 1,330)
Players with Disabilities: Total Sample (n = 1,344); North America (n = 99); Asia Pacific (n = 584),
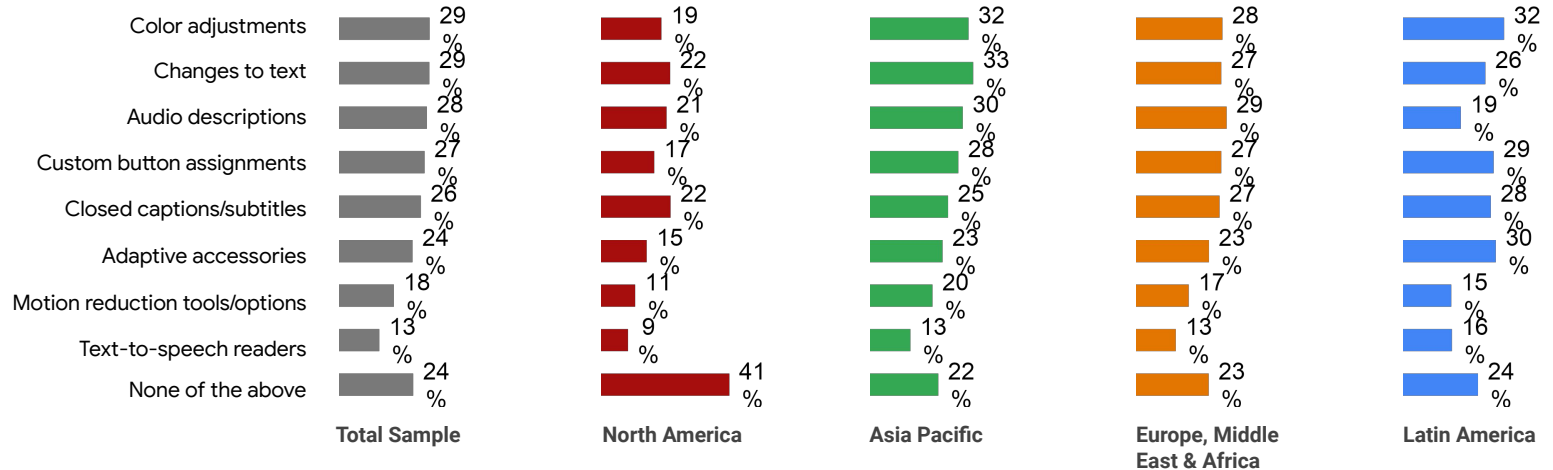*Europe, Middle East & Africa (n = 583); Latin America (n = 78)*

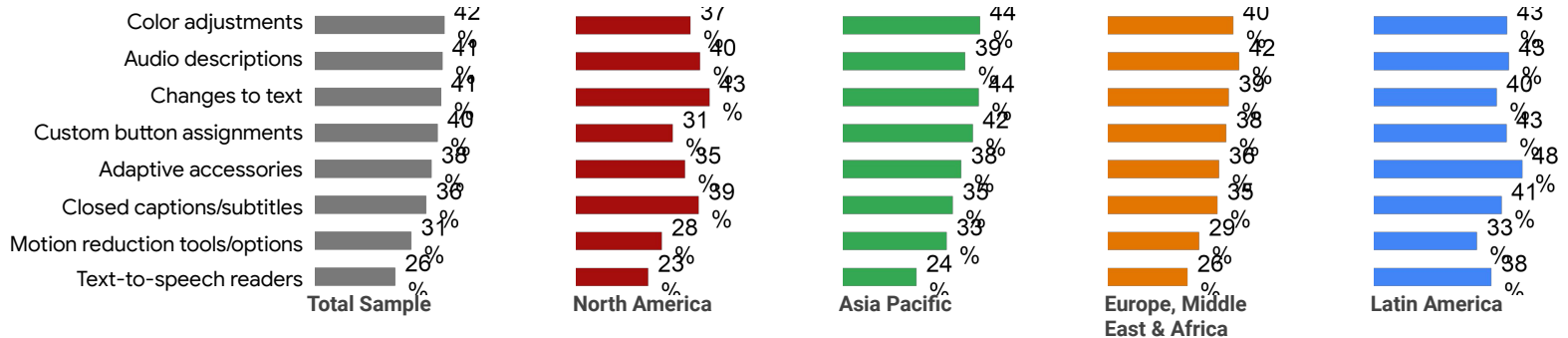Google for Games

Most players with disabilities (74%) are sometimes or often discouraged from playing a game due to lack of accessibility options

In contrast, just **28%** of non-disabled players are sometimes or often discouraged from playing a game based on its lack of accessibility options or impairment aids.

Participants in North America have the lowest percentage of non-disabled players that are sometimes or often discouraged from playing a game based on its lack of accessibility options (**21%**) compared to other regions (**26% - 40%**).

Lack of Accessibility Options – Frequency of Discouraging Play Interest

Non-Disabled Players

Legend: ■ Often ■ Sometimes ■ Rarely ■ Never ■ I'm not sure

Total Sample: 6%, 22%, 31%, 31%, 10%
North America: 5%, 16%, 23%, 48%, 9%
Asia Pacific: 6%, 22%, 31%, 30%, 10%
Europe, Middle East & Africa: 6%, 21%, 31%, 33%
Latin America: 10%, 30%, 33%, 21%

Players with Disabilities

Total Sample: 32%, 42%, 18%
North America: 40%, 39%, 12%
Asia Pacific: 38%, 41%, 15%
Europe, Middle East & Africa: 25%, 44%, 20%, 8%
Latin America: 26%, 40%, 29%

Q - How often do you feel discouraged from playing a game, if ever, based on its lack of accessibility options (impairment aids)?
Non-Disabled Players: Total Sample (n = 13,487); North America (n = 648); Asia Pacific (n = 4,919);
Europe, Middle East & Africa (n = 6,590); Latin America (n = 1,330)
Players with Disabilities: Total Sample (n = 1,344); North America (n = 99); Asia Pacific (n = 584);
Europe, Middle East & Africa (n = 583); Latin America (n = 78)

Google for Games

Accessibility options that players use most often when playing games include color adjustments (29%) and changes to text (29%)

Other common accessibility options that participants use often when playing games include audio descriptions (**28%**), custom button assignments (**27%**), closed captions/subtitles (**26%**), and/or adaptive accessories (**24%**).

In general, respondents in North America use accessibility features less often when playing games compared to other regions.

Accessibility Options – Current Engagement

Accessibility Option	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Color adjustments	29%	19%	32%	28%	32%
Changes to text	29%	22%	33%	27%	26%
Audio descriptions	28%	21%	30%	29%	19%
Custom button assignments	27%	17%	28%	27%	29%
Closed captions/subtitles	26%	22%	25%	27%	28%
Adaptive accessories	24%	15%	23%	23%	30%
Motion reduction tools/options	18%	11%	20%	17%	15%
Text-to-speech readers	13%	9%	13%	13%	16%
None of the above	24%	41%	22%	23%	24%

Q - Which of the following accessibility features do you typically use when playing games, if any? (Select all that apply.)
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708);
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

Many respondents (42%) say there are accessibility options that they wish more games supported

Among respondents that wish more games supported accessibility options, the options that they are most often interested in games adding are color adjustments (**42%**), audio descriptions (**41%**), changes to text (**41%**), custom button assignments (**40%**), and/or adaptive accessories (**38%**). North America has the lowest percentage of participants that say there are accessibility options that they wish more games supported (**29%**) compared to other regions (**39% - 48%**).

Accessibility Options in Games - Interest

■ Yes   ■ No

	Yes	No
Total Sample	42%	58%
North America	29%	71%
Asia Pacific	48%	52%
Europe, Middle East & Africa	39%	61%
Latin America	48%	52%

Accessibility Options Desired in Games*

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Color adjustments	42%	37%	44%	40%	43%
Audio descriptions	41%	40%	39%	42%	43%
Changes to text	41%	43%	44%	39%	40%
Custom button assignments	40%	31%	42%	38%	43%
Adaptive accessories	38%	35%	38%	36%	48%
Closed captions/subtitles	36%	39%	35%	35%	41%
Motion reduction tools/options	31%	28%	33%	29%	33%
Text-to-speech readers	26%	23%	24%	26%	38%

Google for Games

Global Insights

North America

February 2023

Google for Games

DIVERSITY, EQUITY, AND INCLUSION

North America

In North America, over half of participants say it is very or extremely important that games feature diverse characters (**56%**), diverse stories (**55%**), and or diverse creation/customization options (**54%**).

About half of respondents say they are more or much more likely to download or purchase a game if they see ads for it featuring a variety of player types (e.g., different ages, gender, nationalities) (**52%**) or if they see ads for a game featuring players similar to themself (e.g., age, gender, nationality) (**48%**).

- Ages 18-34 (**68%**) and ages 34-44 (**56%**) say they are more or much more likely to download or purchase a game if they see ads for it featuring diverse people compared to the percentages of ages 45-54 (**42%**) and ages 55+ (**25%**) that say the same.

- Over half of participants (**52%**) say they feel somewhat or very well represented by characters in games they play.

Most respondents (**60%**) say it is very or extremely important that a game developer/publisher promotes a positive working environment (e.g., diversity and inclusivity, fair working hours), and younger age groups express this sentiment more often than older respondents do.

Among multiplayer gamers, **53%** of participants say they sometimes or often experience discrimination or other toxic behavior
in games.

- Among participants that have experienced discrimination or toxic behavior in games, **56%** say it has sometimes or often led to them quitting a game.

- A higher percentage of players with disabilities express this sentiment (**84%**) than non-disabled players do (**47%**).

    - **13%** of participants say they have a disability or impairment that affects the way they play games, while **82%** do not report having a disability that affects gameplay.

To promote positivity and inclusivity within games, respondents most often say developers should ban players who engage in toxic behavior (**38%**), remove vulgar or hateful player-created content (**34%**), and/or create an easy-to-understand code of conduct (**27%**).

Google for Games

ACCESSIBILITY OPTIONS

North America

49% of participants in this region say it is very or extremely important that a game includes accessibility options.

Almost one-third of respondents (**29%**) say there are accessibility options that they wish more games supported.

- Gamers ages 13-34 (**42%**) and ages 35-44 (**37%**) have a higher percentage of participants that wish more games supported accessibility options compared to ages 45-54 (**17%**) and ages 55+ (**6%**) that say the same.
  - o Of those that say there are accessibility options that they wish more games supported:
    - Players with disabilities most often wish more games supported closed captions/subtitles (**43%**), changes to text (e.g., font, text size, bold text) (**39%**), and/or audio descriptions (**37%**).
    - Non-disabled players most often wish more games supported changes to text (**47%**), audio descriptions (**42%**), and/or color adjustments (e.g., filters, inverted colors, high contrast) (**41%**).

Many participants in North America (**41%**) say they sometimes or often feel encouraged to play a game based on its included accessibility options.

- A higher percentage of respondents aged 13-34 (**49%**) and ages 35-34 (**53%**) sometimes or often feel encouraged to play a game based on its accessibility options compared to the percentage of ages 45-54 (**30%**) and ages 55+ (**19%**) that say the same.

Currently, participants typically use closed captions/subtitles (**22%**), changes to text (e.g., font, text size, bold text) (**22%**), audio descriptions (**21%**), and/or adaptive accessories (**15%**) most often when playing games.

- Players in North America typically use accessibility features less often when playing games compared to other regions.

Google for Games

Global Insights

Asia Pacific

February 2023

Google for Games

Asia Pacific

In the Asia Pacific region, the majority of participants say it is very or extremely important that games feature diverse characters (**71%**), diverse stories (**71%**), and or diverse creation/customization options (**66%**).

Most respondents (**59%**) say they are more or much more likely to download or purchase a game if they see adds for it featuring a variety of player types (e.g., different ages, gender, nationalities) or if they see ads for a game featuring players similar to themselves (e.g., age, gender, nationality) (**62%**).

- Gamers ages 18-34 (**68%**) and ages 34-44 (**55%**) say they are more or much more likely to download or purchase a game if they see ads for it featuring diverse people compared to the percentages of ages 45-54 (**43%**) and ages 55+ (**31%**) that say the same.

- Almost two-thirds of players (**64%**) say they feel somewhat or very well represented by characters in games they play.

Most respondents (**71%**) say it is very or extremely important that a game developer/publisher promotes a positive working environment (e.g., diversity and inclusivity, fair working hours), and younger age groups express this sentiment more often than older respondents do.

Among multiplayer gamers, **53%** of participants say they sometimes or often experience discrimination or other toxic behavior in games.

- Among participants that have experienced discrimination or toxic behavior in games, **52%** say it has sometimes or often led to them quitting a game.

- A higher percentage of players with disabilities express this sentiment (**88%**) than non-disabled players do (**48%**).

  - **10%** of participants say they have a disability or impairment that affects the way they play games, while **86%** do not report having a disability that affects gameplay.

To promote positivity and inclusivity within games, respondents most often say developers should ban players who engage in toxic behavior (**50%**), remove vulgar or hateful player-created content (**44%**), and/or create an easy-to-understand code of conduct (**33%**).

Google for Games
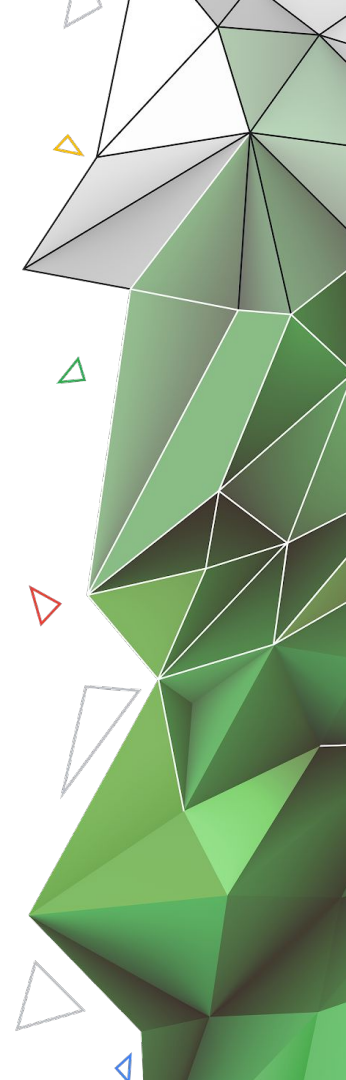
Asia Pacific

46% of participants in this region say it is very or extremely important that a game includes accessibility options.

Almost half of respondents (**48%**) say there are accessibility options that they wish more games supported.

- Ages 13-34 (**55%**) and ages 35-44 (**45%**) have a higher percentage of participants that wish more games supported accessibility options compared to ages 45-54 (**37%**) and ages 55+ (**27%**) that say the same.
  - Of those that say there are accessibility options that they wish more games supported:
    - Players with disabilities most often wish more games supported adaptive accessories (**47%**), color adjustments (e.g., filters, inverted colors, high contrast) (**44%**) and/or changes to text (e.g., font, text size, bold text (**44%**).
    - Non-disabled players most often wish more games supported color adjustments (**44%**), custom button assignments (**44%**), and/or changes to text (**44%**).

50% of players in the Asia Pacific say they sometimes or often feel encouraged to play a game based on its accessibility options.

- A higher percentage of respondents aged 13-34 (**60%**) sometimes or often feel encouraged to play a game based on its accessibility options compared to the percentage of ages 35-34 (**44%**), ages 45-54 (**34%**), and ages 55+ (**26%**) that say the same.

Currently, players with disabilities use adaptive accessories (**42%**) in games more often than non-disabled players do (**21%**).

- Non-disabled players most often use changes to text (e.g., font, text size, bold text) (**33%**), color adjustments (e.g., filters, inverted colors, high contrast) (**31%**), and/or audio descriptions (**29%**).
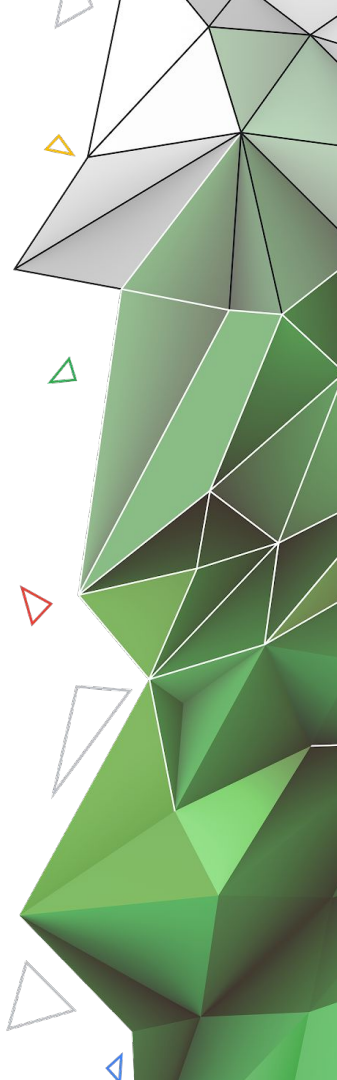
DIVERSITY, EQUITY, AND INCLUSION

Europe, Middle East, & Africa

In Europe, the Middle East, and Africa, the majority of participants say it is very or extremely important that games feature diverse characters (**67%**), diverse stories (**67%**), and or diverse creation/customization options (**64%**).

Most respondents (**57%**) say they are more or much more likely to download or purchase a game if they see adds for it featuring a variety of player types (e.g., different ages, gender, nationalities) or if they see ads for a game featuring players similar to themself (e.g., age, gender, nationality) (**60%**).

- Gamers ages 18-34 (**62%**) and ages 34-44 (**57%**) say they are more or much more likely to download or purchase a game if they see ads for it featuring diverse people compared to the percentages of ages 45-54 (**45%**) and ages 55+ (**31%**) that say the same.

- Most players (**57%**) say they feel somewhat or very well represented by characters in games they play.

Most respondents (**70%**) say it is very or extremely important that a game developer/publisher promotes a positive working environment (e.g., diversity and inclusivity, fair working hours), and younger age groups express this sentiment more often than older respondents do.

Among multiplayer gamers, **45%** of participants say they sometimes or often experience discrimination or other toxic behavior in games.

- Among participants that have experienced discrimination or toxic behavior in games, **47%** say it has sometimes or often led to them quitting a game.

  o A higher percentage of players with disabilities express this sentiment (**79%**) than non-disabled players do (**41%**).

    ▪ Of the countries polled, **8%** of participants say they have a disability or impairment that affects the way they play games, while **89%** do not report having a disability that affects gameplay.

To promote positivity and inclusivity within games, respondents most often say developers should ban players who engage in toxic behavior (**51%**), remove vulgar or hateful player-created content (**46%**), and/or create an easy-to-understand code of conduct (**37%**).

Note: In Europe, the Middle East, and Africa, "Q - Do you have a disability or impairment that affects the way you play games?" was only asked in select countries.

Google for Games

Europe, Middle East, & Africa

58% of participants in Europe, the Middle East & Africa say it is very or extremely important that a game includes accessibility options (impairment aids).

Many respondents (**39%**) say there are accessibility options that they wish more games supported.

- Gamers ages 13-34 (**45%**) and ages 35-44 (**35%**) have a higher percentage of participants that wish more games supported accessibility options compared to ages 45-54 (**25%**) and ages 55+ (**17%**) that say the same.
  - Of those that say there are accessibility options that they wish more games supported:
    - Players with disabilities most often wish more games supported changes to text (e.g., font, text size, bold text (**42%**), color adjustments (e.g., filters, inverted colors, high contrast) (**38%**) and/or adaptive accessories (**34%**).
    - Non-disabled players most often wish more games supported color adjustments (**42%**), custom button assignments (**41%**), and/or changes to text (**40%**).

Over half of players in Europe, the Middle East, and Africa (**54%**) say they sometimes or often feel encouraged to play a game based on its accessibility options.

- A higher percentage of respondents aged 13-34 (**58%**) and ages 35-34 (**53%**) sometimes or often feel encouraged to play a game based on its accessibility options compared to the percentage of ages 45-54 (**39%**) and ages 55+ (**29%**) that say the same.

Currently, players with disabilities typically use changes to text (**38%**), audio descriptions (**32%**), and/or adaptive accessories (**28%**) most often when playing games.

- Non-disabled players most often use closed captions/subtitles (**25%**), custom button assignments (**24%**), and/or color adjustments (e.g., filters, inverted colors, high contrast) (**24%**).

Note: In Europe, the Middle East, and Africa, "Q - Do you have a disability or impairment that affects the way you play games?" was only asked in select countries.

Google for Games

Global Insights

Latin America

February 2023

Google for Games

Latin America

In Latin America, the majority of participants say it is very or extremely important that games feature diverse stories (**77%**), diverse characters (**76%**), and or diverse creation/customization options (**74%**).

Most respondents (**68%**) say they are more or much more likely to download or purchase a game if they see adds for it featuring a variety of player types (e.g., different ages, gender, nationalities); another **68%** of respondents report the same effect if they see ads for a game featuring players similar to themself (e.g., age, gender, nationality).

- Most players (**62%**) say they feel somewhat or very well represented by characters in games they play.

Most respondents (**79%**) say it is very or extremely important that a game developer/publisher promotes a positive working environment (e.g., diversity and inclusivity, fair working hours), and younger age groups express this sentiment more often than older respondents do.

Among multiplayer gamers, **38%** of participants say they sometimes or often experience discrimination or other toxic behavior in games.

- Among participants that have experienced discrimination or toxic behavior in games, **42%** say it has sometimes or often led to them quitting a game.

  - A higher percentage of females that have experienced this behavior say it has sometimes or often led to them quitting a game (**47%**) compared to the percentage of males that say the same (**37%**).

- A higher percentage of players with disabilities express this sentiment (**72%**) than non-disabled players do (**36%**).

  - **5%** of participants say they have a disability or impairment that affects the way they play games, while **93%** do not report having a disability that affects gameplay.

To promote positivity and inclusivity within games, respondents most often say developers should ban players who engage in toxic behavior (**54%**), remove vulgar or hateful player-created content (**47%**), and/or ban certain words or phrases from use in text chat, forums, etc. (**37%**).

Latin America

75% of participants in this region say it is very or extremely important that a game includes accessibility options.

Many respondents in Latin America (**48%**) say there are accessibility options that they wish more games supported.

- Gamers ages 13-34 (**51%**) and ages 35-44 (**47%**) have a higher percentage of participants that wish more games supported accessibility options compared to ages 45-54 (**38%**) and ages 55+ (**35%**) that say the same.

  - Of those that say there are accessibility options that they wish more games supported:

    - Players with disabilities most often wish more games supported color adjustments (e.g., filters, inverted colors, high contrast) (**54%**), changes to text (e.g., font, text size, bold text) (**49%**), and/or audio descriptions (**40%**).

    - Non-disabled players most often wish more games supported adaptive accessories (**49%**), custom button assignments (**44%**), and/or audio descriptions (**44%**).

Almost two-thirds of players in Latin America (**66%**) say they sometimes or often feel encouraged to play a game based on its accessibility options.

- A higher percentage of females (**70%**) sometimes or often feel encouraged to play a game based on its accessibility options compared to the percentage of males that say the same (**62%**).

Currently, players with disabilities typically use adaptive accessories (**35%**) changes to text (**35%**), and/or color adjustments (e.g., filters, inverted colors, high contrast) (**31%**) most often when playing games.

- Non-disabled players most often use color adjustments (e.g., filters, inverted colors, high contrast) (**33%**), custom button assignments (**29%**), and/or adaptive accessories (**29%**).
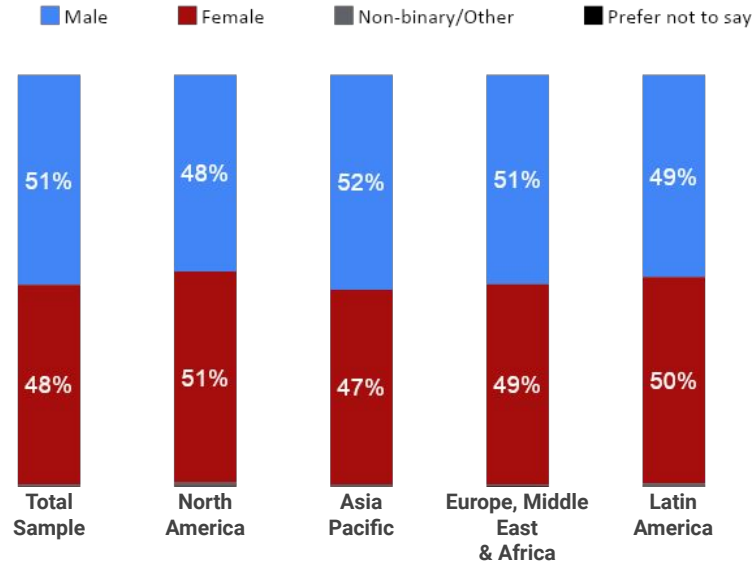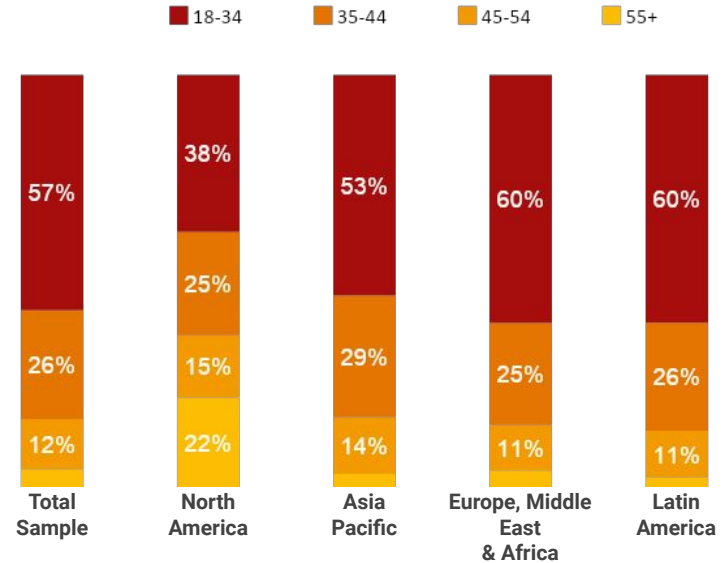
In this study, 51% of participants are male, while 48% are female

The majority of participants (**57%**) are in the 18-34 age range, **25%** are in the 35-44 age range, **12%** are in the 45-54 age range, and **5%** are in the 55+ age range.

Source: VGM

Gender

- ■ Male
- ■ Female
- ■ Non-binary/Other
- ■ Prefer not to say

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Male	51%	48%	52%	51%	49%
Female	48%	51%	47%	49%	50%

Age Range

- ■ 18-34
- ■ 35-44
- ■ 45-54
- ■ 55+

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
18-34	57%	38%	53%	60%	60%
35-44	26%	25%	29%	25%	26%
45-54	12%	15%	14%	11%	11%
55+		22%			

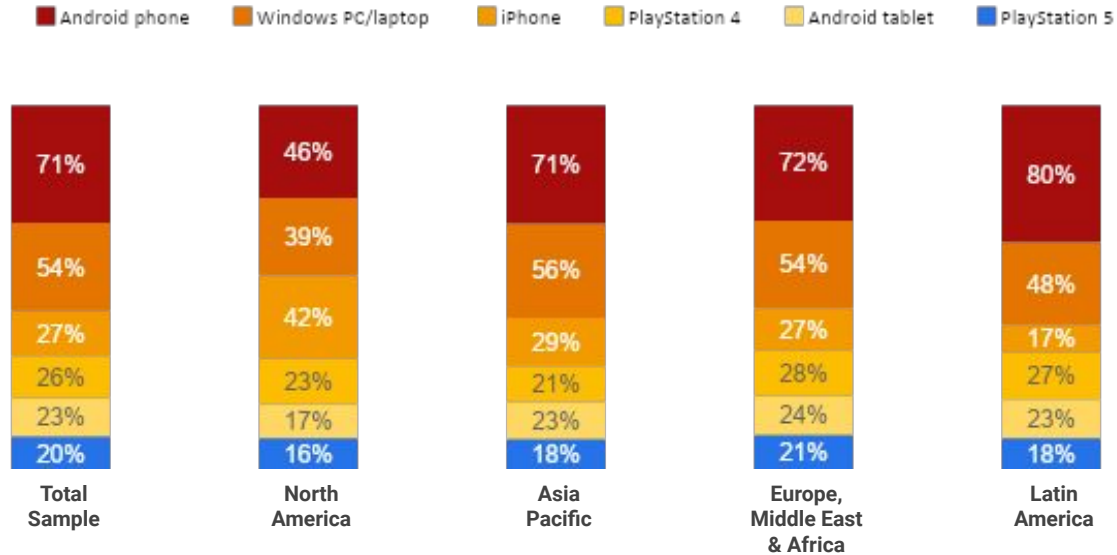*Q - What is your gender? What is your age?*
Total Sample (n = 18.029); North America (n = 786); Asia Pacific (n = 5,708);
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)
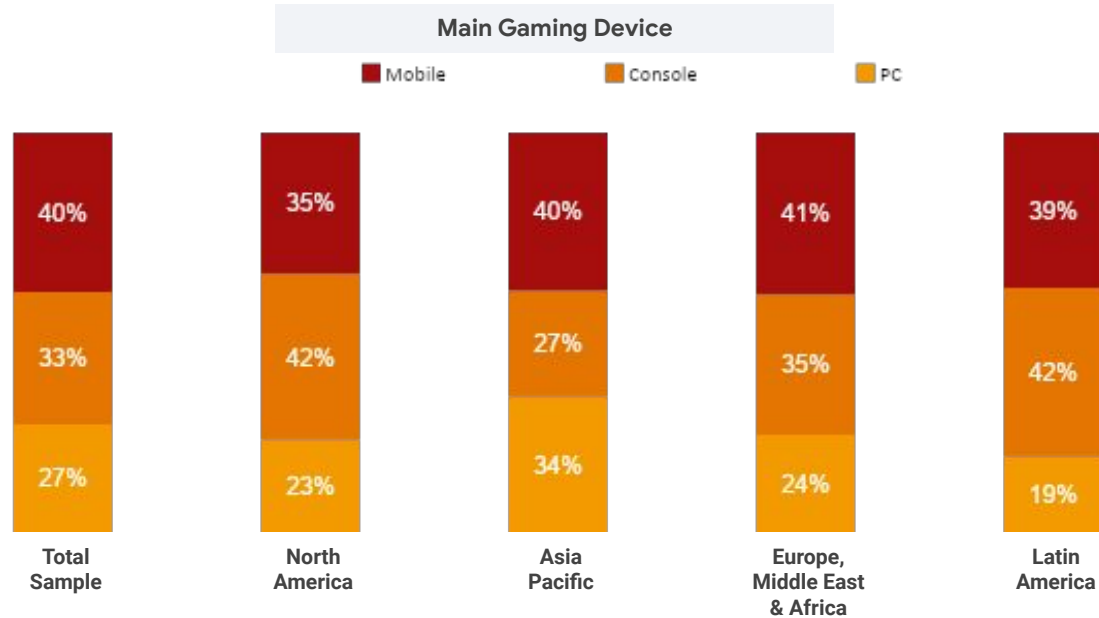
Google for Games

Among respondents that play games on mobile and PC/console, players most often say mobile is their main device for gaming

Source: VGM

This study aimed to recruit a 50/50 split between mobile-primary gamers and PC/console primary gamers.

- The final sample has 51% mobile primary gamers and **49%** PC/console primary gamers.

Main Gaming Device

■ Mobile   ■ Console   ■ PC

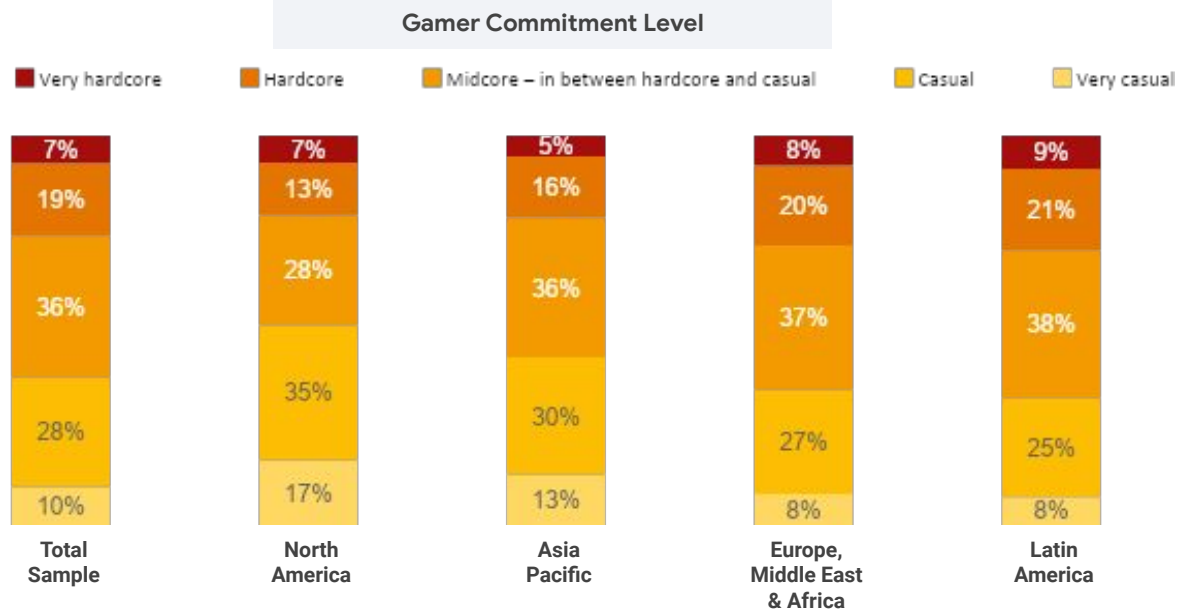|	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Mobile	40%	35%	40%	41%	39%
Console	33%	42%	27%	35%	42%
PC	27%	23%	34%	24%	19%

*Asked among respondents that play games on both mobile devices and PC or consoles:
What is your main device for playing games?
Total Sample (n = 10,422); North America (n = 390); Asia Pacific (n = 3,419),
Europe, Middle East & Africa (n = 5,737); Latin America (n = 876)*

Google for Games

Participants most often prefer single-player missions/levels among the different possible types of gameplay

Many respondents also prefer multiplayer competitive player vs. player (PvP) (**40%**) and/or single-player linear story (**31%**) among different gameplay types.

Gameplay Type Preferences

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Single-player missions/levels	50%	47%	48%	51%	56%
Multiplayer competitive player vs. player (PvP)	40%	27%	39%	40%	46%
Single-player linear story	31%	37%	28%	32%	29%
Massively multiplayer online (MMO)	28%	20%	32%	28%	23%
Multiplayer cooperative player vs. environment (PvE)	27%	20%	29%	26%	33%
Casual or party games	25%	33%	29%	22%	20%
Single-player sandbox/open world	23%	24%	24%	23%	22%

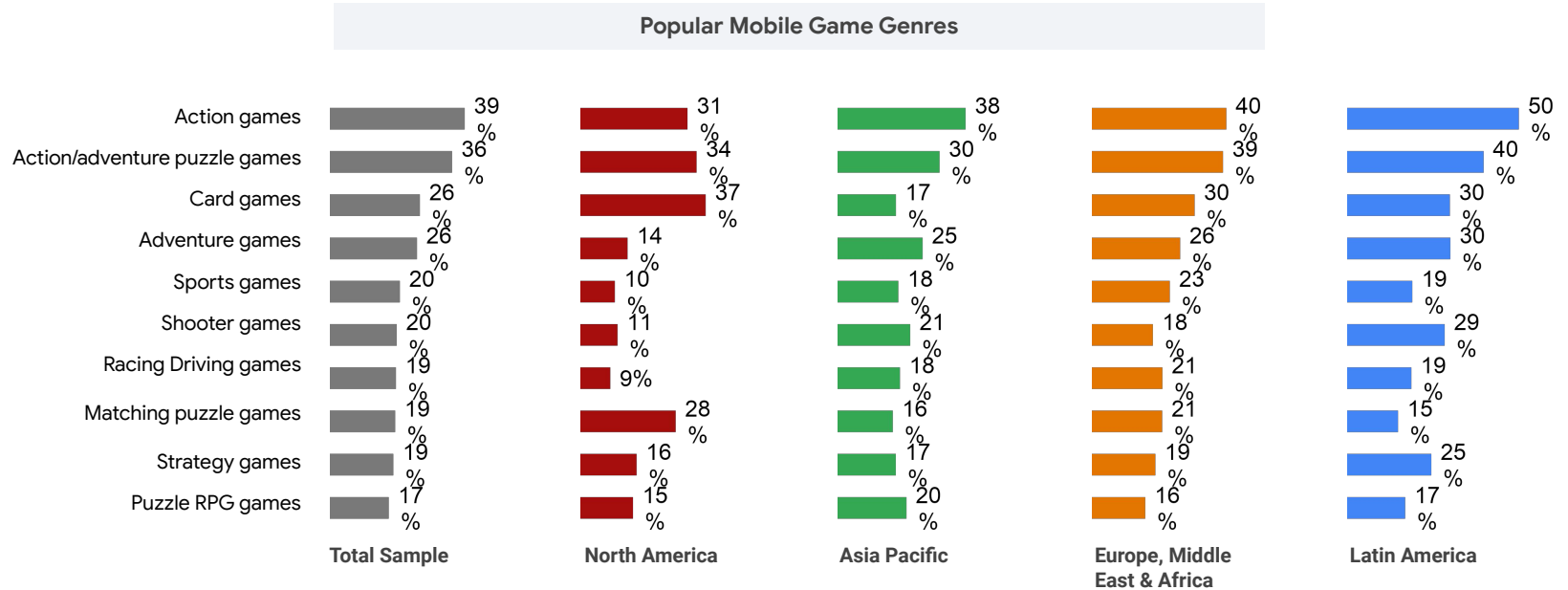*Q - Which of these types of gameplay do you prefer playing? (Select up to three that you most prefer.)*
Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708);
Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

Action (39%) and action/adventure puzzle (36%) are the genres that mobile gamers play most often

Among mobile gamers in North America, card games are chosen most often as the genre that respondents typically play on mobile devices (**37%**).

Popular Mobile Game Genres

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Action games	39%	31%	38%	40%	50%
Action/adventure puzzle games	36%	34%	30%	39%	40%
Card games	26%	37%	17%	30%	30%
Adventure games	26%	14%	25%	26%	30%
Sports games	20%	10%	18%	23%	19%
Shooter games	20%	11%	21%	18%	29%
Racing Driving games	19%	9%	18%	21%	19%
Matching puzzle games	19%	28%	16%	21%	15%
Strategy games	19%	16%	17%	19%	25%
Puzzle RPG games	17%	15%	20%	16%	17%

Asked among respondents that play games on mobile devices: Which of the following types of games do you typically play on a mobile device? (Select all that apply.) The top 10 selections are shown above.
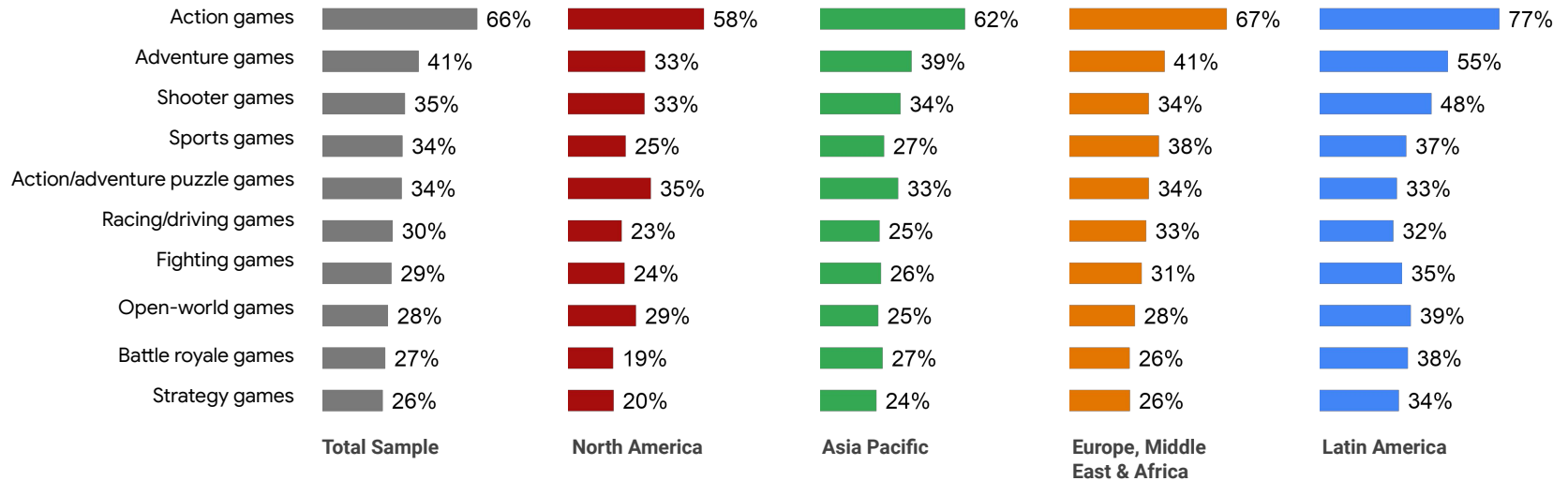*Total Sample (n = 9,123); North America (n = 376); Asia Pacific (n = 2,887),*
Europe, Middle East & Africa (n = 5,145); Latin America (n = 715)

Google for Games

Action (66%) is the genre that PC/console gamers play most often

Many PC/console gamers typically play adventure games (**41%**), shooter games (**35%**), sports games (**34%**), and/or action/adventure puzzle games (**34%**) on PCs/consoles.

Popular PC/Console Game Genres

	Total Sample	North America	Asia Pacific	Europe, Middle East & Africa	Latin America
Action games	66%	58%	62%	67%	77%
Adventure games	41%	33%	39%	41%	55%
Shooter games	35%	33%	34%	34%	48%
Sports games	34%	25%	27%	38%	37%
Action/adventure puzzle games	34%	35%	33%	34%	33%
Racing/driving games	30%	23%	25%	33%	32%
Fighting games	29%	24%	26%	31%	35%
Open-world games	28%	29%	25%	28%	39%
Battle royale games	27%	19%	27%	26%	38%
Strategy games	26%	20%	24%	26%	34%

Asked among respondents that play games on PC or consoles: Which of the following types of games do you typically play on PC or Console? (Select all that apply.) The top 10 selections are shown above. Total Sample (n = 8,906); North America (n = 410); Asia Pacific (n = 2,821), Europe, Middle East & Africa (n = 4,953); Latin America (n = 722)

Google for Games

Segmentation

Respondents are divided into segments according to their region, gender, age, and disability status:

North America (n = 786)

Asia Pacific (n = 5,708)

Europe, Middle East & Africa (n = 10,098)

Latin America (n = 1,437)

Males (n = 9,165)   **Females** (n = 8,721)

Ages 18-34 (n = 10,277)   **Ages 35-44** (n = 4,745)

Ages 45-54 (n = 2,178)   **Ages 55+** (n = 829)

Players with Disabilities (n = 1,344)

• Have a self-reported disability or impairment that affects the way they play games

Non-disabled Players (n = 13,487)

• Does not have a self-reported disability or impairment that affects they way they play games

Google for Games

About Us

VGM is a leading global market research firm and the largest provider of custom research to the video game industry. We provide superior market research services in seven areas:

1. **Extensive Experience:** VGM has conducted 1,000+ qualitative and quantitative studies.

2. **Unique Significant Live Sample (SLS) Methodology:** High sample size in-person testing. Hybrid qualitative and quantitative deliverable. Total security of confidential assets.

3. **Expansive Normative Database:** We have aggregated consistent data points across hundreds of thousands of survey responses to create the largest normative database of video game playtest scores in the industry, as well as an extensive database of non-playtest online survey scores.

4. **Unparalleled Recruiting Capabilities:** Superior quality, higher accuracy, and faster turnaround time on recruiting. We are one of the only full-service vendors that handles recruiting internally.

5. **Fast Delivery:** Topline report delivered in 48 hours upon completion of all projects, including weekends.

6. **Exceptional White Glove Service:** Your dedicated project manager, moderator, and analysts will customize the research to your needs, take ownership of the project, and provide the highest level of support.

7. **In-House Capabilities:** VGM is unique in that each component of your research is handled internally. As a result, our quality, speed, and pricing is superior to other full-service research firms that generally outsource various components of the project.