

Building Confidence Through Connection

How intersectionality impacts women mobile players in the US

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THE **GAME**



Introduction

This is an exciting time for mobile gaming, particularly for women players who represent almost half (**47%**¹) of US mobile gamers. As more women enter into the world of gaming² and our audience continues to diversify³, the gaming industry has an opportunity to evolve and meet emerging player needs. With this report we aim to empower mobile game creators to build even more inclusive gaming experiences.

Our research found that female players are using mobile games as a tool to solve real-world challenges and build confidence, and we identified **two key** routes to building better experiences for women. For the women we engaged with, mobile gaming is a means to find themselves, and find community with others.

What do we mean by “intersectional women / identity”?

Intersectional women are women with additional protected characteristics. For this research, we’ve focused on the intersectional experiences of women in the LGBTQAI+ community, women living with disabilities, and women of color. Women without any of these additional protected characteristics are referred to as ‘non-intersectional’ women.

Any data points not using the phrase “intersectional women” refers to all women surveyed as there was not a statistically significant difference for the related question when comparing intersectional women vs. non-intersectional women.

¹ Newzoo, Global Mobile Market Report, 2021

² In 2021, almost two-thirds of women globally are playing games. Source: Newzoo, Gamer Sentiment Study, DEI, 2022

³ 16% of US gamers identify as LGBTQAI+. 31% identify as having a disability. 15% identify as Black, 20% as Latinx, 5% as Asian American. 51% of players in the US find diversity, equity, and inclusion important. Source: Newzoo, Gamer Sentiment Study, DEI, 2022



Finding herself

7 in 10 of the women we surveyed agree that playing mobile games helps them feel more confident as a person or in their skills and abilities⁴

For the women we engaged in this research, mobile games can provide an environment to build confidence away from the pressures of day-to-day life⁵. Especially for intersectional women, mobile games can foster a more welcoming and accepting environment than the physical world. The confidence women acquire in mobile gaming transfers to the physical world and everyday experiences. Mobile games can improve problem solving and team building skills, enhance creativity, and instill a sense of belonging.

“I have ADHD and dyslexia. Mobile gaming really helped me learn how to read and think when I was younger and insecure about it.”
Noelle, 17, Mid-Engaged Player, Black

“Mobile gaming helps you express your creative side and stimulate your mind. It helps you to be part of a larger community of creators. It also enhances your hand-eye coordination abilities. Mobile gaming makes you feel confident.”
Olivia, 18, Casual Player, LGBTQIA+

Key Learnings



Mobile gaming builds fundamental confidence for women players - **69%** feel more confident as a person or in their abilities as a result of playing mobile games



Women players receive real-world benefits from the games they play (such as improved problem solving skills and creativity)



43% of intersectional women agree that they feel more accepted for who they are when playing mobile games than they do in everyday life

⁴ Q: For each set of statements below, please tell us which best reflects how you feel when playing mobile games. “Compared to everyday life, when I play video games I feel...” (NET “more”: confident as a person, confident in my skills and abilities) Base: Women players (N=2,132)

⁵ 43% of intersectional women say they feel more accepted for who they are when playing mobile games than they do in their everyday life (vs 6% who say they feel less accepted). Q: For each set of statements below, please tell us which best reflects how you feel when playing mobile games. (accepted for who I am). Base: Intersectional women players (N=1,267)





Finding her community

Our research has shown that women who engage in mobile gaming communities become more confident as a person, compared to everyday life⁶

Sharing resources, finding walkthroughs, discussing tactics, or teaming up when playing mobile games all contribute to forming communities, which can ultimately become meaningful networks of support and care in the real world. Community building through mobile gaming has positive benefits on women's social lives, helping them build confidence, and friendships that transcend the gaming world⁷.

Key Learnings



Community and connection is especially important for intersectional women - **42%** say they are proud of the connections they have made through mobile gaming



Communities are key to building confidence, with those who engage in communities being **77%** more likely to feel more confident from playing mobile games

⁶ Q: For each set of statements below, please tell us which best reflects how you feel when playing mobile games. "Compared to everyday life, when I play video games I feel..." (NET "more")
Base: Women players who connect with others (N=1,361)

⁷ 58% of women players agree that connecting with other mobile players helps them feel more confident in their everyday life. 59% agree that it helps them develop skills they can use in the real world. Q: How strongly do you agree or disagree with the following statements? "Connecting with other mobile game players..." (NET agree). Base: Women players who connect with other players (N=1,351)

Methodology

Change The Game, in partnership with Crowd DNA, conducted three phases of in-depth research to understand women who play games. From September 2021, to February 2022, we engaged with a variety of 18-35 year old women, including women with additional protected characteristics, US nationwide, who spend at least 5 hours a week mobile gaming across a range of different titles and genres.

- Industry perspective from 4 expert interviews
- In-depth qualitative research with 25 participants in the US
- Online survey with 2,132 women mobile players⁸ in the US, including 1,267 intersectional women

⁸ Detailed quant sample breakdown: Total Women mobile players (N=2,132) | Core Players (game 5-10 hours per week, N=810), Mid-Engaged Players (game 10-15 hours per week, N=912), Core Players (game 15+ hours per week, N=410) | LGBTQIA+ women (N=476), Black women (N=323), women living with disabilities (N=590) | Android Users (N=1,010), Apple Users (N=1,122)

Breakdown

2,132

Women mobile players in total

810

Casual Players,
game 5-10 hours per week

912

Mid-Engaged Players,
game 10-15 hours per week

410

Core Players,
game 15+ hours per week





Finding Herself

Mobile gaming is a platform that helps women build confidence, and express themselves in a safe space. For the majority of women we engaged in this research, mobile games allow them to explore aspects of their identities in ways that are often impossible IRL⁹. Mobile gaming represents the freedom to be their true selves¹⁰, without the pressures and expectations that weigh heavily on them. Our research has shown that this freedom from judgment is of particular value for intersectional women¹¹, who face by far the highest degrees of prejudice and judgment IRL.




“In a mobile space it is a great way for girls to be able to understand themselves because everyone has a phone. The point of entry is lower because everyone has one. What we don’t talk enough about is how the principles of gaming are used for so many other things. Almost everything you do is gamified and based on game theory. I think mobile is a great space for girls to be able to connect more.”

- ANASTASIA STATEN, EXECUTIVE DIRECTOR, ESA FOUNDATION

⁹ 59% of women players agree “I feel I can express myself in different ways” when playing mobile games (vs 10% who say “I’m restricted in how I can express myself”). Q: We’re going to present you with a set of statements relating to your experiences when playing mobile games. Base: Women players (N=2,132)

¹⁰ 58% of women players feel they are able to “express themselves authentically” when playing mobile games

¹¹ 43% of intersectional women feel more accepted for who they are when playing mobile games than they do in everyday life. 47% of intersectional women agree “a welcoming gaming community” is important when playing mobile games (vs 40% non-intersectional women)



“When I’m mobile gaming I don’t have to think about the real life me. I am who I am in the game, whatever that means, whatever I decide to be that day, whatever character I’m taking on. That changes my mindset, I don’t have to worry about someone who has spoken about my appearance, or called me a slur.”

ALEX, 27, CASUAL PLAYER, MULTI-RACIAL BISEXUAL

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Mobile gaming is a space of self discovery - where mistakes and failures are seen as productive and enlightening. They contribute to personal development rather than things to be avoided, and new skills can be found and are allowed time to flourish. The freedom of mobile gaming gives **72%** of the women we surveyed the chance to develop their creativity, and **77%** see mobile gaming as something that improves their problem solving.



“I love sharing creativity with my friends. When we play sandbox and building games, we can play together but also show each other what we’ve done. We can work together to build something, that’s not something you can always learn in regular life.”

- AMBER, 18, CORE PLAYER, NON-BINARY

For intersectional women, Role Playing games (RPG) and Action games are especially powerful for building confidence. **70%** of those who play RPG games said the games they play help them feel more comfortable expressing themselves. For Action games, this figure is **68%**. Of those who play Battle Royale games, **81%** of the women we surveyed said they help them grow in confidence with their skills, while the same number find Sandbox games best for creativity.

Despite this, certain unwelcome experiences can compromise the great potential mobile gaming has for the wellbeing and personal

development of women and intersectional women. **44%** of women players (**49%** intersectional women, **35%** non-intersectional women) have experienced negativity or received abuse when mobile gaming, which can compromise the confidence-boost they get from playing.

While some of these women feel that stricter enforcement against abuse (**38%**¹²) and of game rules (**26%**¹³) would improve their gameplay, almost **1 in 3** feel their gaming experience would improve if it was made easier to connect with other players like them.

“I decided to play mobile games today because I had a really long day at school. It was just really hard for me today. I genuinely struggled with all my assignments and all my classes. I wasn’t feeling very confident. This game, however, works my mind and if I can pass this level it will allow me to gain some confidence back.”

- MIA, 16, LATINX

¹²Q: Which, if any, of the following would improve your experience of playing mobile games? (“Stricter enforcement against abuse / discrimination”). Base: Women players who have experienced negativity / abuse when playing mobile games (N=892)

¹³Q: Which, if any, of the following would improve your experience of playing mobile games? (“Stricter enforcement of the game’s rules”). Base: Women players who have experienced negativity / abuse when playing mobile games (N=892)



An interview with

Laila Shabir

Laila Shabir is the co-founder and CEO of Girls Make Games. A Pakistani immigrant raised in the United Arab Emirates, Laila started off her career as an economist, before discovering her passion for video games. By seeing the skills that can be acquired through playing, she realized that a connection between education and video games needed to be formed.

How did you get into gaming and its power to change things?

I belong to a traditional Pakistani family. As a kid I remember having to put on a baseball cap (to hide my gender) and play soccer with the neighborhood boys. I loved programming and computers from an early age too, which is still considered a “boys thing”. These differences in perception made me painfully aware of being a girl. So when I got to MIT as an undergraduate and studied economics, it opened up my understanding on how optimal resource allocation had the power to change things for all demographics.

Soon after, I met my husband who played HALO competitively and was a really inspiring spokesperson for gaming. I found myself drawn to the influential power of video games as a medium. I decided I wanted to make games that would make learning accessible to kids, so both my husband and I quit our jobs to start an educational small games studio. In our early brainstorming sessions when my team was composed of myself and 6 other young men, I realized that they approached game design very differently from me, possibly because of the gender difference. And that there are so many misconceptions around how or why women game or don't game. It was then that I found my calling.

What's changed in gaming since you started out?

There was a time you had to play more than two hours a day and own a serious console to be considered a “gamer”. Which meant a lot of girls didn't see themselves as “gamers”. But now gaming is so much more accessible through mobile phones and social media apps. Playing games is now more part of our lives and an everyday way to connect with people.

How are women benefiting from gaming today?

I love that video games create a safe space for girls to fail, and to normalize the start-fail-repeat cycle needed to reach success. It can be really hard to fail publicly, and especially so at an age where you are becoming extremely self aware. It can take a lot for young women to put themselves out there and try new things with the risk of public failure.

My favorite aspect of video games is that they can help us step into someone else's shoes and build empathy for more people. The way Gen Z interact with mobile gaming and the kinds of games they're interested in making and playing gives us a lot to look forward to. They're not in it just for the entertainment, they want to do more.

How are intersectional women benefiting from gaming?

Representation is so important, and minority groups are too often portrayed as one-dimensional stereotypes in nearly all media, video games being no exception. This has to change. The environment, subject and characters have to reflect the real world we live in - a world which is immensely diverse. In the case of women, the damaging tropes included things like “not like the other girls” or “smartest kid in class” which isn't an authentic or intersectional representation of most women. These characters are shown as the ‘exception’, but we need to see more of the ‘rule’.

What do you see as the main challenges facing women players today?

Online harassment, damaging stereotypes, lack of safe spaces and communities are some of the main drivers keeping women from fully engaging in gaming.

As an industry we're still making games based on what people are currently playing (you can see this from the number of sequels popular franchises have) but we are not doing enough to raise a new generation of gamers, including girls, who are interested in different things.

What advice do you have for the gaming industry?

As an industry we need to take more risks to try new things, find new markets and demographics to include. Inclusivity broadens the gamer base, which is not only great for society it's also good for business. But for this tactic to work, the inclusivity has to be authentic. No tokenizing - that is simply lazy and doesn't lead to immersive, memorable experiences.

How do we change the future of gaming?

It starts with people making the games - individuals and organizations. Including women on your teams, being real and authentic about crafting the experiences people can relate to, can make all the difference. We are nowhere near realizing the full potential of video games, but we cannot get there without including everyone.



Finding Her Community

For the women we engaged with, community building through mobile gaming has positive benefits on their social lives. **61%** of women players agree that connecting with other players has made them feel more comfortable in speaking out and sharing their views¹⁴. Players of battle royale games are the most likely to feel confident in the real world because of community engagement (**77%** vs **58%** average)¹⁵.

That said, connections formed through mobile gaming are more than just socialising, but a way to build networks of solidarity that help them overcome the challenges of inequality, discrimination and prejudice. For the majority of women players (**60%**¹⁶) connections happen in-game, through chat functions, resource sharing, sending out invites, or teaming up. Outside gameplay, mobile gaming communities become deeply meaningful networks of support and care. **1 in 4** women players turn to social media platforms to strengthen the bonds they start in-game¹⁷.

1.



1 in 2
women players

like to connect with other mobile players who are like them¹⁸.

2.

77%

Women who engage in mobile gaming communities are **77%** more likely to agree that playing mobile games makes them feel more confident as a person, compared to everyday life¹⁹.

3.

53%

Women who feel valued, supported and free to express themselves in their mobile gaming communities are **53%** more likely to feel more confident in their everyday life²⁰.

¹⁴ Q: How strongly do you agree or disagree with the following statements? Please select one answer per statement. "Connecting with other mobile game players..." (NET "agree") Base: Women players (N=2,132)

¹⁵ Q: How strongly do you agree or disagree with the following statements? Please select one answer per statement. "Connecting with other mobile game players..." (NET "agree" - Helps me feel more confident in my everyday life) Base: Women who play battle royale games (N=126)

¹⁶ Q: Which of the following have you done in the past 6 months in relation to mobile gaming? (NET: Within mobile games) Base: Women players (N=2,132)

¹⁷ Q: Which, if any, of these platforms do you use to learn and talk to other people about mobile games? Base: Women players (N=2,132)

¹⁸ Q: Please let us know how strongly you agree or disagree with each of the following. (NET: agree - I like to connect with other mobile players who are like me) Base: Women players (N=2,132)

¹⁹ Q: For each set of statements below, please tell us which best reflects how you feel when playing mobile games. "Compared to everyday life, when I play video games I feel..." (NET "more") Base: Women players who connect with others (N=1,361)

²⁰ Q: How strongly do you agree or disagree with the following statements? (Helps me feel more confident in my everyday life) Base: Women players who feel they can express themselves AND feel supported, feel valued, feel it's easy to find players like them (N=347) vs Women who feel neutral or they negatively experience all these factors (N=1,785)

“The current mobile gaming world is slowly starting to include women. There are few within this world that accept us. The good thing is that the community of female gamers is growing! The not so good thing is that we’re still being excluded in some areas of the gaming world. Being a female in the gaming world can be toxic. Imagine being in an amazing relationship, but his family snarls are your existence. Yeah, it’s like that. Even if you show up and show out for your team (consisting of men) they still ridicule your every move. The biggest need in mobile gaming is connection and community - as a woman and a disabled woman, I definitely have found myself searching to connect with other people, with the same type of injury, or similar issues, we can connect over this shared experience.”

– JESSICA, 35, ASIAN/PACIFIC ISLANDER, PWD



For intersectional women particularly, gaming communities serve as a platform to connect around shared real life experiences²¹ and problem solve challenges with others who can empathize. Mobile gaming communities provide an easier route to connect with players who share protected characteristics - especially for LGBTQIA+ women and those living with disabilities, who are more likely to want to bond with players who share aspects of their identity²².



“There are a lot of new girl gaming groups, non-binary gaming groups and non dominated male groups that basically become communities for us to play and appreciate games, learn to be better, enjoy, have fun and make new friends. We didn’t have this previously, but now it’s coming up more and bringing in non-gamers and making them gamers. It’s showing the gaming space is not a closed circle, it’s accepting. My friend invited me to a LGBTQ gaming community. It was a completely different experience. You can be real. You feel more comfortable to share, and I can be myself without me worrying about the reaction.”

- ALEX, 27, CASUAL PLAYER, MULTI-RACIAL BISEXUAL

“Bringing people together through things they can relate to allows for people to come into the community. A lot of people see gaming from the outside as a toxic thing only men do and there’s no merit to it, but that’s not true... there’s a lot of merit to it and it can create a lot of opportunity. We all need a space where we can belong and relate, gaming is the perfect opportunity because you can create your own space, characters and world. There’s so many opportunities with VR now to do so.”

- ALEX 27, CASUAL PLAYER, MULTI-RACIAL BISEXUAL

As a result, intersectional women are **56%** more likely than non-intersectional women to use platforms such as Twitch or Discord to connect with other players²³. They’re also more likely to turn to professional gamers and influencers for inspiration (**39%** vs **32%** non-intersectional women).

²¹ Intersectional women are significantly more likely to say they connect with players in order to: “find others with the interests” (34% vs 28% non-intersectional), “bond with others who share similar aspects of my identity” (27% vs 21%) | Q: Which of the following are reasons you connect with other players?. Base: Intersectional women players (1267), Non-intersectional women players (865)

²² Q: Which of the following are reasons you connect with other players? Base: LGBTQIA+ women (N=347), women living with disabilities (N=365) - “To bond with others who share similar aspects of my identity” - 35% LGBTQIA+, 29% women living with disabilities vs 25% average

²³ 29% intersectional women vs 19% Non-intersectional women Q: Which, if any, of these platforms do you use to learn and talk to other people about mobile games?(NET: Twitch, Discord) Base: Intersectional women players (N=1267), Non-intersectional women players (N=865)

So Why Does This Matter For Developers?

Listening to the needs of women players and taking action builds social capital in a world where we are increasingly in-tune with social injustices. Taking action now will help build a brighter future for those who for too long have been under or misrepresented in mobile gaming. Taking action now has the power to drive fundamental change.

As mobile gaming continues to diversify, it's important for developers to optimize the gaming experience for women from diverse backgrounds. Intersectional women players represent a lucrative market, spending on average around \$30 per month on mobile gaming²⁴ (compared to \$26 for non-intersectional women), but the motivations for creating greater inclusivity should be more altruistic.

From our research, we have identified three key opportunity spaces for developers to consider:

Refine the in-game experience

- Go beyond default customization options to give women more choice. Offer hair options that represent different cultures, hair textures, and ethnicities. Additional body types, gender-fluid clothing options, or ways to glam up their crutches or wheelchairs.
- Avoid tokenistic representation and move away from hyper-sexualized clothing and customization features.
- Develop storylines that reflect the challenges and variety in women's lives, with characters that grow and evolve with them as their play advances.

Foster safe spaces

- Create forums, chat rooms and discussion spaces on subjects broader than game tactics or reviews. Enable women to speak about their experience and receive emotional support from other women.
- Create and invest in improved moderation strategies and tools that minimize harassment.
- Clearly present and enforce a strict code of conduct which demonstrates the community values.

Bring players together

- Amplify groups, pages and forums on platforms that enable intersectional players and content creators to express themselves more freely and connect with others in a more playful environment.
- Consider showcasing community ambassadors who defy gender-norms and can inspire women communities with their stories, creating a greater sense of belonging.
- Establish partnerships with causes that amplify how gaming-focused networking events could help women connect for the benefit of themselves and the community.

²⁴ Q: On average, how much do you spend in a typical month on mobile gaming? Please consider any in-game subscriptions, in-app purchases or download payments you make. Base: Intersectional women players (N=700)

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