Newzoo & Intel:

Diversity and Inclusion in Gaming

Insights and Opportunities

Introduction

By the end of this year, there will be around 2.7 billion gamers in the world. The common misconception that all gamers are young males could not be further from the truth. Almost everyone engages with games in some way, shape, or form, and the hobby is connecting people of all kinds across borders, generations, and more.

However, the games market still has challenges to overcome when it comes to representation and diversity. In the past, game developers and publishers tended to cater to men almost exclusively, often overlooking women, ethnic minorities, the LGBTQIA+ community, and people with disabilities.

Catering to the needs of its diverse gaming audience and making hardware and software more affordable and accessible to a broader audience will be key to strengthening diversity and inclusion in the gaming industry.

To that end, we interviewed more than 1,800 people across the U.S. and analyzed playing behavior and sentiment across a representative sample of gamers to identify opportunities and gaps to help make gaming software and hardware more accessible and inclusive.
In this report, created together with Intel, we highlight a selection of key insights from this important research.

Jutta Jacob, Head of Consumer Insights
Newzoo

Details of the Research

Focus Country

Methodology

Respondents: 1,824 gamers recruited.

Target group: Gamers aged 10-65 in the United States

Computer Assisted Web Interviewing (CAWI): Sampled in the United States. Spread over 9 days, including a weekend for a balanced sample (January 27th – February 5th, 2020).

Introduction

In 2021, there are expected to be around 2.7 billion gamers in the world. As gaming continues to grow and influence the greater culture, the identity of who is a gamer is evolving as well. The common misconception that all gamers are young, white males could not be further from the truth; practically everybody engages with games in some way, shape, or form. As gaming continues to grow in popularity, so does its ability to connect people across geographies, generations, and more.

However, there are many challenges to overcome when it comes to representation and diversity in gaming. Intel is constantly looking at how to best serve the gaming community. We know that there are huge visibility, technology, and accessibility gaps impacting marginalized and unrepresented communities.

In order to address this in real, impactful, and sustainable ways, Intel collaborated with Newzoo to gather relevant and actionable data.

The key to strengthening diversity and inclusion in the gaming industry will be framed on catering to the needs of its diverse gaming audience as well as making hardware and software more affordable and accessible to a broader audience.

Diversity and inclusion efforts are a top priority for Intel, and this report is representative of Intel's desire to better understand its diverse global customer base. As part of that continued commitment, Intel is taking key learnings from this report and shaping current internal and external programs to better serve gamers from all backgrounds and walks of life

Intel and Newzoo believe sharing these important insights can result in better products industry-wide and inform efforts to elevate gamers in underrepresented communities.

Marcus Kennedy, General Manager
Intel's Gaming and Esports Segment

Key Insights From This Report

1. Diversity and inclusion in games matter to a diverse audience

Gamers in the U.S. are diverse, and most of them want this diversity reflected in the games they play. While many gamers feel the market has come a long way in terms of representation, the majority feels that games should be more diverse and inclusive.

Half of U.S. gamers claim not to play games they felt are not made for them, which represents a big opportunity for publishers and developers to meet those needs. Video games with more diverse characters naturally appeal to a broader group of gamers and tend to increase a gaming genre or franchise popularity across a wider audience.

2. Accessibility and affordability will be key to strengthening D&I in gaming

Accessibility options in games are improving, and companies' efforts have not gone unnoticed, but there is still room for improvement.

One of the opportunities for hardware and software producers is catering more to the lower socioeconomic groups for whom predictability of cost is key. Hence, not surprisingly, they tend to opt for their already owned laptops/hardware as their primary gaming device as well as gaming subscriptions.

3. Gamers want companies to take a stance

A significant share of gamers in the U.S. feel game companies should take a stance on societal issues, irrespective of the respondent's race, gender identity, sexual orientation, or having a disability.

Sitting on the fence for certain issues may seem like the safer option but taking an active stance may lead to increased engagement and revenue among the diverse gaming audience.

1. Diversity and Inclusion in Games Matter to a Diverse Audience

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The Gaming Audience is Diverse

Impacting gaming behavior, engagement, but also spending and ownership

Demographics is one of the many dimensions that impacts gaming behavior and engagement, besides others such as psychographic and behavioral motivations.
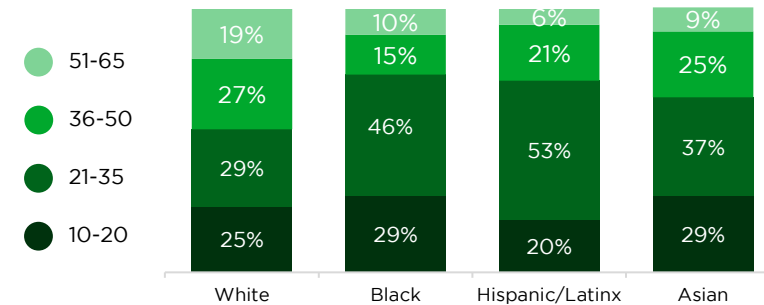
Compared to white PC players, PC players of color generally tend to be younger. The biggest difference exists between white and Black PC players, with roughly three-quarters of the latter group being below 35 years old compared to about half of the white players.

Black and Asian PC players skew more female than the other groups. Among Black PC players, women represent the majority compared to 42% and 38% of white and Hispanic/Latinx gamers, respectively.

Brands that cater their products and marketing to a largely white, male audience are missing out on a large share of gamers and potential customers.

Age
Base: PC Players

Legend	White	Black	Hispanic/Latinx	Asian
51-65	19%	10%	6%	9%
36-50	27%	15%	21%	25%
21-35	29%	46%	53%	37%
10-20	25%	29%	20%	29%

Gender
Base: PC Players

Legend	White	Black	Hispanic/Latinx	Asian
Female	42%	53%	38%	50%
Male	58%	47%	62%	50%

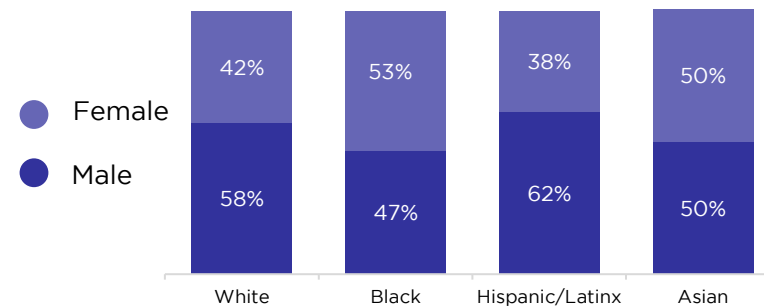Base: U.S. PC players: white PC players (n=864), Black PC players (n=146), Hispanic/Latinx PC players (n=160), Asian PC players (n=78)
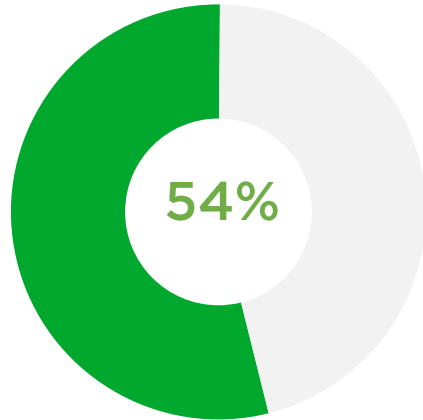
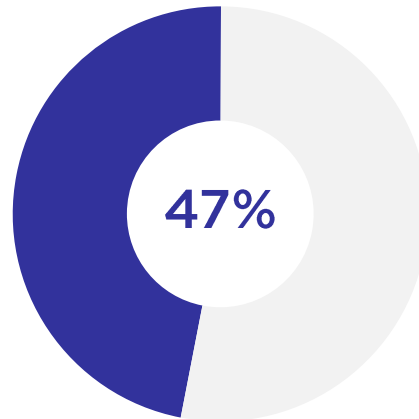# Inclusion of Diverse Characters Is Important to U.S. Gamers

And further improvements in making games more inclusive will certainly be welcomed

Attitudes Toward D&I Among U.S. Gamers
Base: All Players

54%

47%

Feel diversity is important in characters

Do not play games that they feel are not meant for them

According to Newzoo's Diversity and Inclusion research (2020), 47% of all U.S. gamers do not play games they feel aren't made for them.

More than half of all gamers in the U.S. expressed that they find it important that the games they play include diverse characters—a sentiment that was especially present in the LGBTQIA+ community and those with disabilities.

The gaming industry has certainly come a long way, but there is still room for improvement in having greater diversity and representation of characters in video games.

Source: Diversity and Inclusion study, Newzoo, 2020

A Diverse Cast of Characters Attracts a Wider Audience

Representing key opportunities for publishers and developers to cater to a broader group of gamers

Popular Franchises Among People of Color
Base: PC Players

Franchise	White	Black	Hispanic/ Latinx	Asian
Fortnite	24%	30%	33%	21%
Madden NFL	16%	24%	16%	15%
NBA2K	12%	26%	19%	16%
Grand Theft Auto	20%	28%	30%	16%
Apex Legends	11%	15%	16%	12%
FIFA	11%	19%	13%	11%
Roblox	12%	17%	19%	11%

People of color are heavily underrepresented as playable characters in games. A study from 2001 stated that of +-2000 characters analyzed, all Hispanic/Latinx and 83% of Black characters were portrayed as sports competitors.* More recent studies show that this has only slightly improved. The only games with a person of color as the main protagonist nominated for a GOTY award between 2004–2018 are Grand Theft Auto: San Andreas and The Walking Dead.**

*Fair Play? Violence, Gender and Race in Video Games (Glaubke et al., 2001) **Ethnicity in Games (TechCrunch, 2018)

Historically Diverse Community Keeps on Flourishing

The impact of socioeconomic status and a diverse community

Favorite PC Genres | Per Group

	White	Black	Hispanic/Latinx	Asian
#1	Role-playing	**Fighting**	Role-playing	Role-playing
#2	Traditional card games	Simulation	Simulation	Puzzle
#3	Shooter	Adventure	Shooter	Simulation
#4	Adventure	Shooter	Adventure	Match
#5	Simulation	Role-playing	Sports	Strategy

While most of the top five genres look similar across groups, an interesting favorite genre that pops up for Black PC players is the Fighting genre. Historically, the only things needed to play Fighting games were a quarter and transportation, as Street Fighter was on the come up in arcades all over the United States since the late '80s. This meant that Fighting games were accessible to everyone, **regardless of socioeconomic status**.

The diverse scene born in these arcades flourishes until this day, with an abundance of Black members being part of this community. Additionally, recent popular releases on PC, such as Mortal Kombat and Tekken, made sure the community does not have to switch to console to play fighting games.

Even though gaming has moved from arcades into our living rooms, Fighting games remain popular among Black PC Players, **showing the importance of keeping a diverse community**.

Base: U.S. PC players: white PC players (n=864), Black PC players (n=146), Hispanic/Latinx PC players (n=160), Asian PC players (n=78)

2. Accessibility and Affordability Will be Key to Strengthening D&I in Gaming
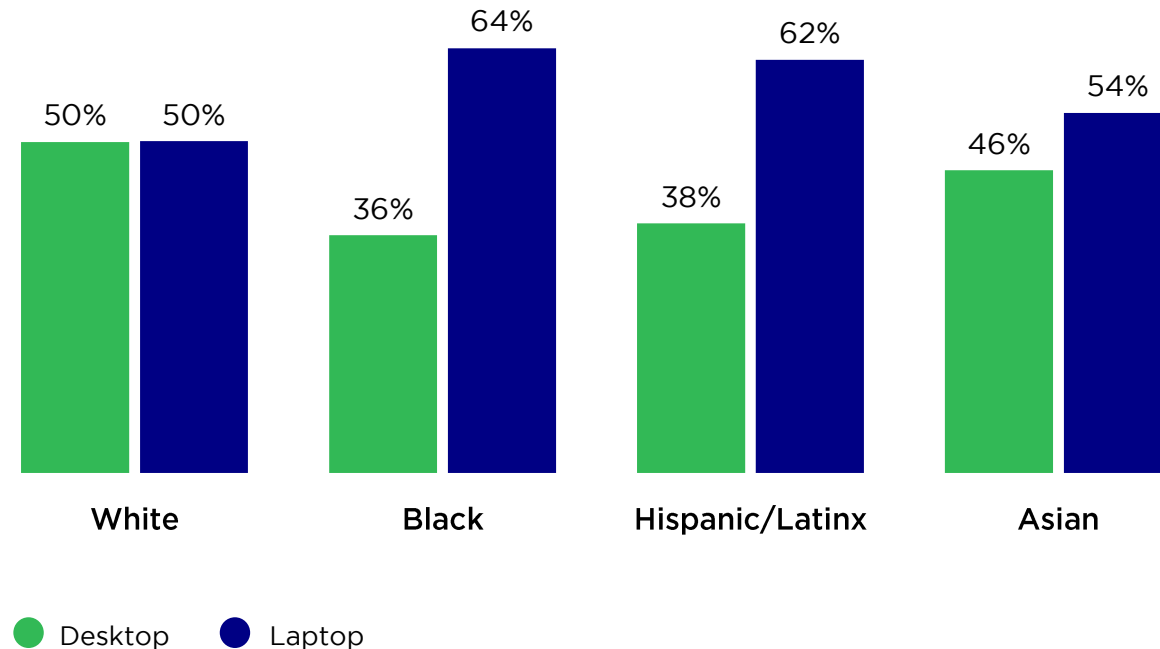
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PC Hardware Choices Seem to Correlate With Economic Status

Black and Hispanic/Latinx PC players more likely to be playing games on a laptop than desktop

Primary System to Play Downloaded/Boxed PC Games On
Base: PC Players

Legend: ● Desktop ● Laptop

White: 50% Desktop, 50% Laptop
Black: 36% Desktop, 64% Laptop
Hispanic/Latinx: 38% Desktop, 62% Laptop
Asian: 46% Desktop, 54% Laptop

Affordability and accessibility are key to strengthening D&I in gaming and making hardware and software more attractive to a wider group of people.

This is reflected in the primary system used to play download/boxed PC games. Most people already own a laptop for non-gaming purposes. Purchasing a high-end gaming-specific system is expensive and less practical, which is why people with lower disposable income will be more likely to use laptops. Black and Hispanic/Latinx PC players tend to have a lower household income (due to both their younger average age and historical economic disparity).

It is important for developers and manufacturers to keep in mind accessibility and affordability when releasing hardware or software or games aimed at attracting a diverse audience, including different socioeconomic groups.

Console Ownership Does Not Differ Widely

But there is a lower barrier to entry compared to desktop gaming

Consoles Owned
Base: Console Players

● White   ● Black   ● Hispanic/Latinx   ● Asian
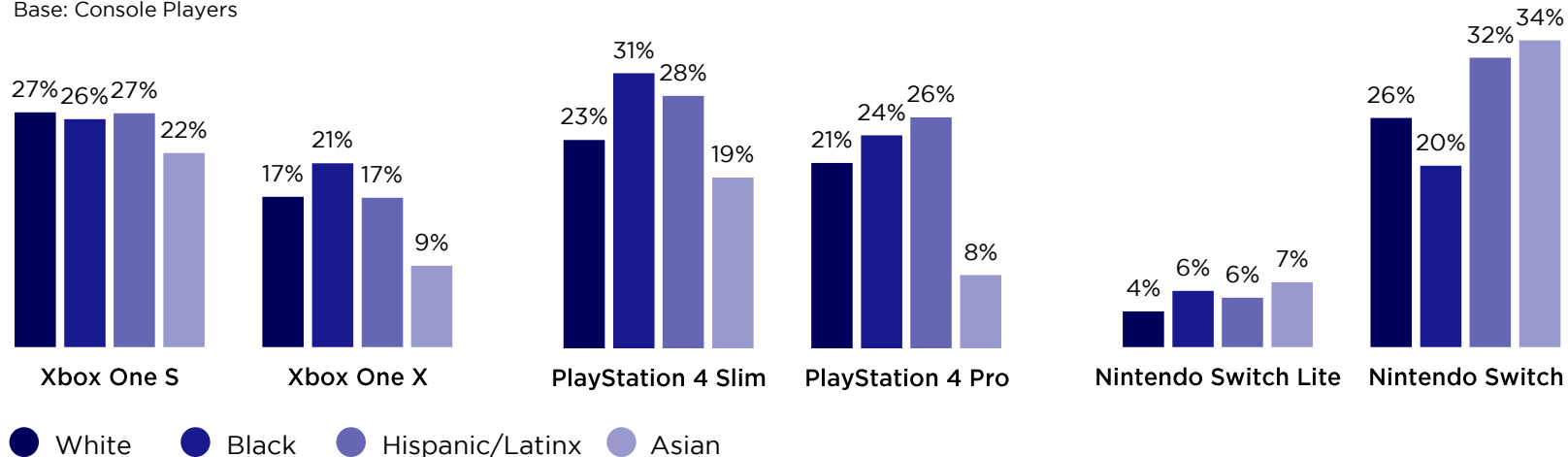
There are no major differences between groups when looking at console ownership. This may be attributed to the value represented by consoles. For a gamer with a lower disposable income who wants to get more seriously into gaming, investing in a high-end desktop seems unlikely due to costs. A one-off, lower investment in a standard console seems more interesting than investing in a desktop as well as screen, keyboard, and other necessary peripherals.

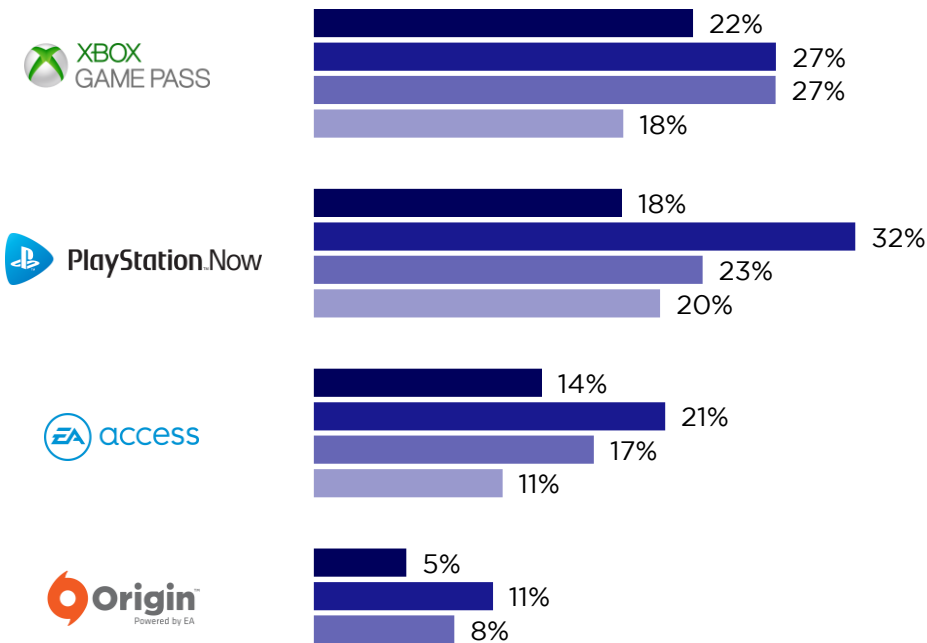Additionally, the prices for the standard/cheaper version (Xbox One S, PlayStation 4 Slim, Nintendo Switch Lite) and their enhanced siblings (Xbox One X, PlayStation 4 Pro, Nintendo Switch) do not differ too much when compared to a standard laptop and a high-end gaming PC. The small price difference can explain why groups with a lower disposable income are not less likely to own a more expensive console.

Subscription Services Provide Lower Cost Access to Content

Game Library subscriptions are especially popular among people of color

Game Subscription Paid For*
Base: PC/Console Players

XBOX GAME PASS
- White: 22%
- Black: 27%
- Hispanic/Latinx: 27%
- Asian: 18%

PlayStation Now
- White: 18%
- Black: 32%
- Hispanic/Latinx: 23%
- Asian: 20%

EA access
- White: 14%
- Black: 21%
- Hispanic/Latinx: 17%
- Asian: 11%

Origin (Powered by EA)
- White: 5%
- Black: 11%
- Hispanic/Latinx: 8%

*Asian Gamers left out for EA Origin Access not shown due to low base (n<50)

● White   ● Black   ● Hispanic/Latinx   ● Asian

An easy way to access a broad range of different games is by paying for a game library subscription. The importance of accessibility becomes even clearer when looking at the popularity of these types of subscriptions. Especially among Black PC gamers, paying a set amount per month to access hundreds of games is popular.

Microsoft is focusing heavily on Game Pass. Major exclusives, such as Halo Infinite, are planned for release on the day the service launches.

With traditional games still being priced at $60 and the Game Pass at $10 per month, these types of services will draw an increasing number of people, especially those with a lower disposable income.
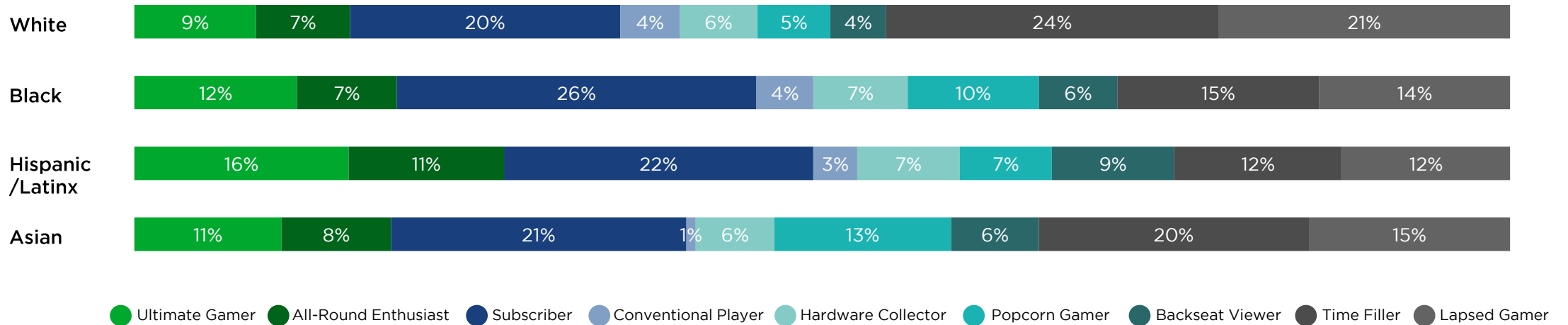
Players of Color are More Likely to be "Serious" Gamers

White gamers have the largest share of time fillers and lapsed gamers

Overall, players of color are more likely to be one of the more "serious" gaming personas than white gamers and have the highest share of Ultimate Gamers. Many white gamers are either Lapsed Gamers or Time Fillers. This makes sense, as the white online population skews older, and these two personas are the oldest on average.

Most Black and Hispanic/Latinx gamers are Subscribers. This persona is characterized by enjoying high-quality games, preferably on discount or for free, and only spending on hardware when necessary. This makes them the perfect audience for game subscriptions, such as Xbox Game Pass, PlayStation Now, and EA Origin Access.

Asian gamers are also often Subscribers as well as Time Fillers. This means they are likely to be interested in gaming subscriptions and casual games, for example on mobile.

	Ultimate Gamer	All-Round Enthusiast	Subscriber	Conventional Player	Hardware Collector	Popcorn Gamer	Backseat Viewer	Time Filler	Lapsed Gamer
White	9%	7%	20%	4%	6%	5%	4%	24%	21%
Black	12%	7%	26%	4%	7%	10%	6%	15%	14%
Hispanic/Latinx	16%	11%	22%	3%	7%	7%	9%	12%	12%
Asian	11%	8%	21%	1%	6%	13%	6%	20%	15%

● Ultimate Gamer ● All-Round Enthusiast ● Subscriber ● Conventional Player ● Hardware Collector ● Popcorn Gamer ● Backseat Viewer ● Time Filler ● Lapsed Gamer
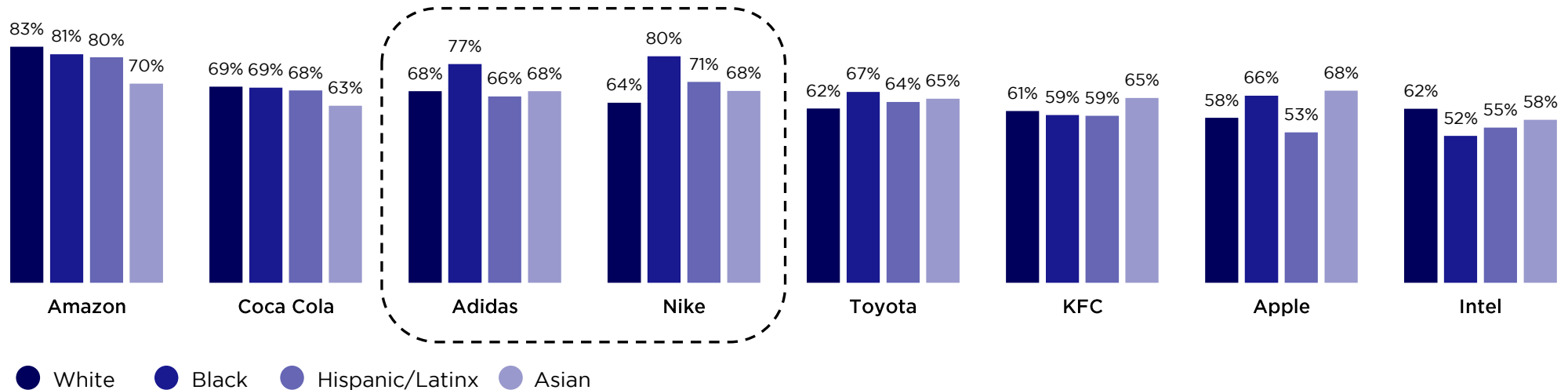
3. Gamers Want Companies to Take a Stance

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Brands that Take a Stance Do Well

Defining and living by their values will be more important than ever for brands

Positive Attitude Toward Brands
Base: PC Players

Amazon: White 83%, Black 81%, Hispanic/Latinx 80%, Asian 70%
Coca Cola: White 69%, Black 69%, Hispanic/Latinx 68%, Asian 63%
Adidas: White 68%, Black 77%, Hispanic/Latinx 66%, Asian 68%
Nike: White 64%, Black 80%, Hispanic/Latinx 71%, Asian 68%
Toyota: White 62%, Black 67%, Hispanic/Latinx 64%, Asian 65%
KFC: White 61%, Black 59%, Hispanic/Latinx 59%, Asian 65%
Apple: White 58%, Black 66%, Hispanic/Latinx 53%, Asian 68%
Intel: White 62%, Black 52%, Hispanic/Latinx 55%, Asian 58%

● White ● Black ● Hispanic/Latinx ● Asian

Brands that are genuine in their response to cultural movements and that have good representation and authentic engagement with the community tend to have more positive brand attitude among diverse ethnicities. For example, **Adidas and Nike** are especially popular among Black PC players. Nike's popularity, in particular, comes as no surprise. For years, the brand has been endorsing Black athletes and taking a stand on social issues, showcasing the power of inclusivity and diversity for brands.

According to Newzoo's Diversity and Inclusion research (2020), almost half of all U.S. gamers feel they're more likely to play games from publishers with an active stance. While sitting on the fence for certain issues may seem like the safer option for publishers, taking an active stance may lead to increased engagement from diverse ethnicities.

Access Newzoo's Full Study on Diversity & Inclusion

Includes **100+ variables** on gamers in the U.S. and U.K.

✓ Understand Gamer Behavior, Motivation, Sentiment

✓ Assess Behavior and Preferences beyond Playing

✓ Identify Opportunities to Make Games More Inclusive

Includes a summary report with key insights, dashboard access to all the data so you can analyze in multiple ways, and client support.

Get the details here.