



ANYONE'S GAME: THE GLOBAL OPPORTUNITY TO ACTIVATE FEMALE GAMERS

5 TIPS FOR GAMING COMPANIES SEEKING
TO ATTRACT HALF THE WORLD

BY LIONBRIDGE GAMING



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WHEN YOU THINK OF A “GAMER,” WHAT IMAGE COMES TO MIND?

If it's a scruffy, bespectacled young man, you're not alone. For years, the stereotype of the nerdy male gamer has persisted—and it's had ramifications on both the demographic composition of the gaming industry and the content and messaging that industry creates.

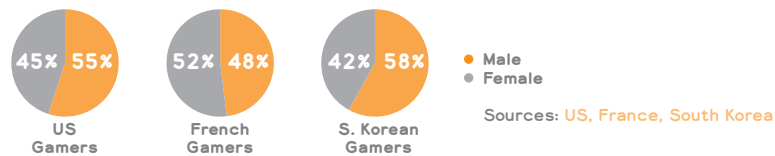
But women represent a large and growing share of the global gaming market, with a particular penchant for mobile games. Their burgeoning interest has arisen despite significant headwinds: the gaming industry is largely run by men, the most popular game types are not the ones women most widely embrace, most game protagonists are male, and women are not being encouraged to make in-app purchases, despite spending more time on mobile games than men do.

Gaming companies are leaving money on the proverbial table by not activating female gamers. This underrepresented population presents incredible opportunity for activation and associated revenue-generation. If you're a game developer or publisher looking to enhance the gaming experience for women around the globe, read on.

IN THIS PAPER, YOU WILL LEARN:

- Where to find women in the worldwide gaming market
- What motivates female gamers
- Women's current gaming options
- 5 tips for creating games with women in mind

Over the years, women around the world have significantly increased their volume of gameplay. In the US, nearly half of all gamers are women—and in some countries, the ratio of female to male gamers even exceeds 50%.



WHERE ARE THE WOMEN?

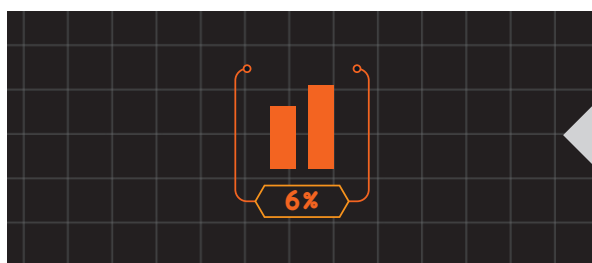
Globally, women gamers seem to be ideal customers—their gaming behavior is growing, they over-index on mobile, and they're ready and willing to spend money on the games they love.

In the US, **65% of women play mobile games.** 43% of women play mobile games 5 times per week or more, vs. 38% of men. [\[Source\]](#)



US women make 31% more in-app purchases, spend 35% more time in gaming apps, and have a **42% higher retention rate than men.** [\[Source\]](#)

In Europe, **44% of women play games,** and the amount of time they spend gaming—particularly within mobile apps—is increasing. In 2012, women spent 3 hours per week playing mobile games, and that number grew to 4.6 hours in 2016. [\[Source\]](#)



In China, the number of female gamers grew 6% between 2016 and 2017, resulting in 264 million Chinese gaming women—or 45% of the country's total gaming population. The Chinese gaming market is set to be worth 56.84 billion yuan by 2020. [\[Source\]](#)



Despite these promising statistics, the lingering notion that gaming is an inherently male activity continues. According to a Pew Research Center study that found nearly equal splits between men and women gamers, 60% of survey respondents characterized gaming as a “male activity.”

Why? For various longstanding reasons, which may have originated after the 1983 crash of the video game industry and a subsequent decision to target sub-18-year-old boys as primary consumers of video gaming content.

Over the past 30+ years, gaming companies have hyper-focused on that stereotypical gaming persona. They’ve created games uniquely suited for the interests and motivations of young male gamers. They’ve designed rich narratives focused around bold, strong male protagonists. They’ve created female characters who are hyper-sexualized and ancillary to the protagonist’s needs and actions.

They didn’t necessarily need to create nuanced, female-focused games—so, in large part, they didn’t. Now, we see that slowly beginning to change.

As times and numbers have changed, the development of female-focused games hasn’t kept pace.

WHAT ARE WOMEN’S CURRENT GAMING OPTIONS?

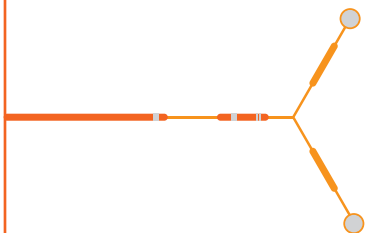
Today, most popular multiplayer games don’t necessarily cater to women. Around the world, gamers choose to play for a few distinct reasons. They enjoy destruction, perhaps, or they pursue the thrill of competition. Some love being transported to a fantasy world, and others are motivated by a game that continues to provide them with tasks to complete, so they can move ever-further up the rankings as they play.

Women **tend to be motivated** by design, completion, and fantasy games, whereas men tend to be motivated by competition, destruction, and challenge games. In the aggregate, women aren’t drawn to the types of games that were highly marketed and successful in 2017—games like Call of Duty, NBA, Grand Theft Auto, and Madden NFL. Indeed, women account for only 2% of sports game-players.

And even among the types of games that proportionately attract women, most game protagonists are male. Of 59 new video games showcased at the 2016 E3 trade event, **only 3%** featured exclusively female protagonists. Of the top 100 grossing games on Google Play, male characters are featured **on 44% more** icons than female characters.

If you think this disparity doesn’t matter to female gamers, think again. A Quantic Foundry survey **found** that 75% of female gamers rated female protagonists as “very” or “extremely” important to them.

Women want to (and do) play games in growing numbers, but their current options leave them underrepresented. Gaming companies have a massive, largely untapped, revenue source in women who want to see themselves and their interests reflected in the games they play.





CREATING GAMES WITH WOMEN IN MIND: 5 STEPS TO SUCCESS



Do you want to activate millions of gamers around the world with games that represent their personalities, interests, and motivations? Get started today with these five steps.

1. Develop a Narrative that Appeals to Female Gamers

We've seen it for years when companies localize their gaming content to new markets: you can't force-fit a narrative that works for one group or culture upon another. That logic applies when transcreating a Chinese game's script for a South American audience, and it applies when striving to excite female gamers with narratives and goals that were originally designed for men. To compel women to play games, you need to design narratives that appeal uniquely to their interests and behaviors.

One company that has done that successfully is Shinezone Network. In 2011, the Shanghai-based company launched **Flower Shop**, a beautifully-designed game in which players run their own stores.

"Targeted at women in Europe and US markets," writes Shi Jing in a *ChinaDaily* article, "[Flower Shop] became one of the most profitable of its kind within less than a year, according to

Facebook rankings." The game found success largely due to its social networking functionality—a strong motivator for women.

When creating new games, take a page from Shinezone's book. Consider the types of games that might most appeal to women—strong design, ease of use, social connectivity—and design with those themes in mind.

And while you're taking one page, take another—from the film industry, whose **Bechdel Test** celebrates gender equality-promoting films and exposes those that relegate women to purely secondary roles. In 2011, UX designer Elsa Bartley retrofitted the Bechdel Test to games. **Her standard?** "There must be a female character with whom you can interact, who doesn't need rescuing, and who isn't a prostitute." Ensure your games meet—or better yet, exceed—that standard.





2. Re-Engineer Your Marketing Strategy
Similarly, think about *how* women are searching for and finding new games—and make sure yours doesn't miss out.

According to [consumer research from Newzoo](#), social networks are integral in introducing female gamers to new games. 39% of women discover games through friends or family, and 20% find them through social networks. Conversely, only 27% of men discover games through friends or family. Men largely find new games through game review sites and online videos channels.

Effective marketing necessitates a deep understanding of your target customer. Understanding both what games female gamers want to play and where they'll look to find them can catapult your company ahead of the curve.

3. Target a Growing Gaming Community of e-Gamers

Look east for a unique opportunity to target a growing gaming population: leverage female e-sports players in China.

For context, China comprises more than half of the world's e-sports audience, which watches professional video game players compete at their craft. In 2017, there were [an estimated 170 million](#) e-sports players and fans in China. Most of those players are men, who generate massive social media followings and earn up to \$2M per year. Professional female gamers earn less money, but they're just as eager as their male counterparts to make a living doing what they love.

If you're looking to make a name for yourself in an under-tapped market with large upside potential, consider collaborating with female e-sports players—a portion of the multi-billion-dollar industry could be yours.



Most women who play mobile games think that 30% or fewer of these games are designed specifically for them.

4. Hire Women to Build Games (and to Break Them)

Across industries, studies have shown that diversity in corporate leadership helps yield diversity in the products and services they offer. This is certainly true of the games industry, which has historically staffed a disproportionately high volume of men.

It's been a vicious circle, says Tanya Short, a Montreal-based game developer in a 2017 [interview with IGN](#). "If you create products primarily targeting a certain demographic, and that's the prestigious product, then the people who play that product are more likely to want to build more of that product." So, male developers create products for male gamers, who in turn are motivated to become game developers. Interrupting the cycle can be difficult for women—but it's imperative in creating games that better represent what female gamers want, and thus promote further game play and purchasing.

"Having more women in the industry would help a lot," said Will Wright, creator of *The Sims*, in a 2008 [Fast Company interview](#). "We've been making games that cater to ourselves, to 40-year-old men...I think one of the reasons *The Sims* did so well with women is that 40% of our development team were women."

But how can you encourage women to join the ranks at your company? First, ensure your corporate culture is inclusive, respectful, and encouraging of diverse perspectives and voices. When recruiting, think carefully about the language you use in your job description. "In general, when a woman looks at a job description, she typically won't apply if she doesn't fit all the criteria," says Jeaneane Falkler, VP of Lionbridge Gaming. "Conversely, if a man fits half of the criteria, he'll apply. We've seen gaming companies that prioritize recruiting women change the way they phrase their descriptions, using words that excite and inspire women."

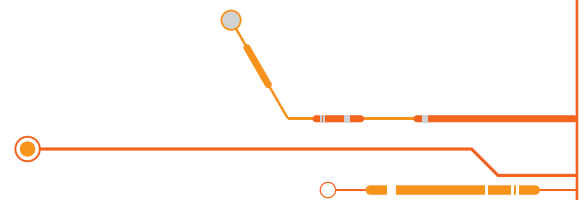
But promoting diversity doesn't stop at the top. Hire women to lead your teams and to create your games, yes—but also hire women to test them. Make sure diverse groups of people are interacting with your games before they ever go live, so you can learn from them whether you've succeeded or failed in resonating with the demographic they represent.


5. Continue to Invest in Mobile

The numbers are in: women are flocking toward mobile games, where they're spending more time and money than their male counterparts—and this despite more male characters inhabiting and promoting these games. Most women who play mobile games [think](#) that 30% or fewer of these games are designed specifically for them.

Despite the rapid growth of mobile games and the prominence of women among the ranks of mobile players, [53% of game developers](#) were developing games for PC and Mac computers in 2018, while only 38% were developing games for smartphones and tablets.

If you want to start attracting female customers, go where they go. Invest in mobile. When coupled with strong female-driven narratives and a targeted marketing strategy, the investment could pay dividends.





At Lionbridge, we know a thing or two about activating and inspiring new groups of people at scale. We're committed to helping our customers bring their games to millions of gamers in hundreds of markets and helping them forge deeper connections that keep their players coming back for more.

If you're looking to develop, publish, market, or test the next great game for any audience, we can help. Partner with us to figure out how to activate female gamers—and any gamers—down the street or across the world.



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