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From the Office of Sarah Kate Ellis, President and CEO of GLAAD

For nearly 40 years, GLAAD's mission has been to increase fair and accurate LGBTQ representation across all forms of media. Our founders knew that media exposure would drive acceptance and understanding of our community. GLAAD has successfully worked with networks, studios, talent and content creators in news and Hollywood for decades to grow fair and accurate representation of LGBTQ people and has expanded our advocacy into other media industries including advertising, social media, corporate communications, and theater in more recent years. In today's fragmented media world, media includes more platforms, touchpoints, and opportunities to see ourselves represented and GLAAD is a trusted resource and expert on representation and the media itself.

We cannot move what we do not measure. This is why our annual reports, like Where We Are on TV, the Studio Responsibility Index, the Advertising Visibility Index, and now our State of LGBTQ Inclusivity in Gaming Report, measure LGBTQ representation in these forms of media. Similarly, our Social Media Safety Index documents LGBTQ safety across social media platforms. We are transparent about our measurement and are collaborative with industry leaders and businesses. **This report was created to educate the game industry on the current state of LGBTQ representation that exists, make a facts-based business case for LGBTQ inclusion, and provide a playbook for more authentic representation**.

Statista data shows that the estimated global revenue of gaming surpasses that of filmed entertainment and recorded music combined.¹ For both LGBTQ and non-LGBTQ Gen Z and Millennial gamers, their weekly time spent gaming rivals the amount of time they spend watching TV. According to a 2023 gaming report by **YPulse**, a Gen Z- and Millennial-focused market research firm, gamers spend 8 hours watching TV and 7 hours playing console games each week. 95% of young consumers play video games² and the most recent **Gallup** poll shows that 1 in 5 members of Gen Z are LGBTQ.³

The estimated global revenue of gaming surpasses that of Filmed Entertainment and Recorded Music combined.



Our research shows that, particularly for LGBTO gamers, gaming can not only be an escape and a way to cope, but also an important outlet of self-expression.

Our research with Nielsen this year found that 17%—nearly 1 in 5—active gamers are LGBTQ. And yet, in our analysis of currently available console games, we found that games with LGBTQ characters or storylines account for less than 2% of all games. We are nearly invisible in game representations despite being a significant percentage of gamers.

LGBTQ gamers also experience alarming levels of harassment. This must change. GLAAD, together with game companies and industry leaders on our Game Advisory Council, is committed to not only increase LGBTQ representation in games, but create a safer gaming culture for LGBTQ gamers. The interactive nature of games, the opportunity to build community in gaming, and the long history of LGBTQ game industry professionals makes this medium a uniquely powerful tool for LGBTQ people to safely discover, connect, and express themselves. **Particularly for LGBTQ gamers, gaming can not only be an escape and source of entertainment, but also an important outlet of self-expression**. This is pronounced and urgent for LGBTQ gamers who live in places around the world where anti-LGBTQ violence is rising or in states where anti-LGBTQ legislation has been introduced. More than 500 anti-LGBTQ bills were introduced in states across the U.S. in 2023. Rhetoric and legislation limiting access to healthcare, education, books, and other resources limits freedoms and sparks increases in hate rhetoric, discrimination, and violence.

We developed this report and the GLAAD Media Institute's Gaming program as a resource for the critical need to increase the representation and options for LGBTQ characters and storylines in games. **Games should include an array of characters and stories, including LGBTQ ones, and every gamer should be safe**. Thank you for your partnership to make this vision a reality.

Thank you for your support. In solidarity,

Hale m

Sarah Kate Ellis, President & CEO, GLAAD



Introduction

The video game industry has existed for just over 50 years, with the earliest arcade, console, and home computer games hitting the market in the early 1970s. For context, the first video arcade game arrived on the market just 2 years after the Stonewall Riots in 1969, and the first gaming console was released just a year before homosexuality was removed from the American Psychiatric Association's Diagnostic and Statistical Manual of Mental Disorders (DSM) in 1973. The video game industry has been growing for decades, yet it has lagged behind every other media industry and continues to inadequately represent LGBTQ people.

There are several reasons for the lack of LGBTQ representation in the game industry. Some reasons for exclusion are passive. Often, game companies have not considered that they should represent LGBTQ people, nor do they see us as a major part of the core gaming audience. Some reasons for exclusion are active. Companies worry about pushing away a core audience that they assume are resistant or hostile to LGBTQ content.

This imagined core audience, however, is a myth, and it is one of the reasons it was paramount for GLAAD to create this gaming report. LGBTQ gamers are a significant part of the existing active gamer market and, by and large, non-LGBTQ gamers are not nearly as resistant to this content as many assume. Gaming represents a vast and lucrative market. By some measures, the global revenue from video games exceeds that of the film and music industries **combined**.⁴ Despite its reach, the game industry is out of step with contemporary media in terms of LGBTQ representation, and it is failing its LGBTQ consumers.

Our data shows that 17% of active gamers—nearly 1 in 5—are LGBTQ, a figure that has been replicated and confirmed by Nielsen in multiple recent surveys. Moreover, LGBTQ gamers are as dedicated to gaming as non-LGBTQ gamers in terms of regular time spent playing PC and console games and average financial spend per month. In stark contrast to the fact that 1 in 5 active gamers are LGBTQ, games with LGBTQ content account for less than 2% of all games currently available on consoles.

Over 60% of non-LGBTQ gamers say it would make no difference to them if a game had an LGBTQ player character or non-player character storyline. When asked if a game had the option for the player character to be gay, lesbian, or bisexual, 70% of non-LGBTQ gamers say that would make no difference in their decision to buy the game. The resistance toward LGBTQ content in games is waning, as each successive generation of gamers is more diverse and more open to seeing LGBTQ representation in their games.

The message is clear: gamers want more inclusive LGBTQ representation in their games. The industry must become more inclusive.

1 in 5 Active Gamers are LGBTQ

The lack of LGBTQ representation in video games is often explained by the assumption that the stereotypical core video game consumer is a white, heterosexual, cisgender man between the ages 18 and 34. However, our data shows that 17% of active gamers are LGBTQ, a 70% percent increase from the 10% counted in Nielsen's 2020 **report**.⁵

"GLAAD's finding that 17% of active gamers are LGBTQ, and the growth from 10% of active gamers being LGBTQ from Nielsen's Games360 study in 2020, proves their tremendous influence on the gaming industry. The study shows that for LGBTQ gamers, a safe and inclusive environment goes beyond the game itself—with nearly 70% indicating they are less likely to buy from a studio with a history of mistreating LGBTQ workers." (Stacie de Armas, SVP, Diverse Insights and Initiatives, Nielsen)

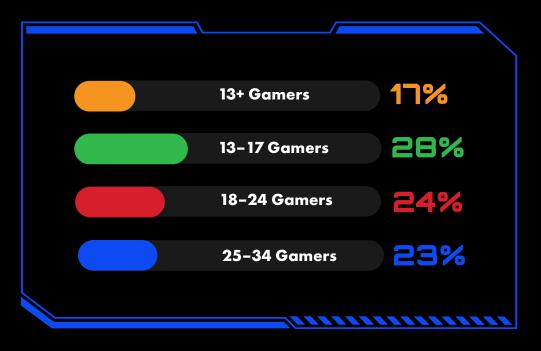
The scale and growth of LGBTQ gamers is significant. Notably, the percentage of LGBTQ gamers is even higher among younger age groups, with 23 to 28% of gamers under 35 identifying as LGBTQ. The percentage of LGBTQ people in gaming far surpasses that of the general population, according to <u>Gallup's</u> 2022 survey.⁶ Although Gallup only surveyed respondents over the age of 18 (our survey sample was people 13–55 years old), they conservatively estimate that 7.2% of American adults are not cisgender and/or heterosexual. Similarly, <u>Gallup's</u> most recent data indicate that Gen Z adults have the highest percentage of lesbian, gay, bisexual, and transgender respondents over 18 (19.7%).

LGBTQ active gamers overall report similar levels of dedication to games as non-LGBTQ gamers in terms of average hours played and money spent. One point of divergence is that LGBTQ gamers play significantly more on mobile platforms than non-LGBTQ gamers. While this report primarily focuses on PC and console games, this disparity is clearly an area for future research.

Counter to stereotypes, LGBTQ gamers make up 19% of heavy/core gamers (defined as playing 10+ hours per week on PCs or consoles).

LGBTQ active gamers skew younger

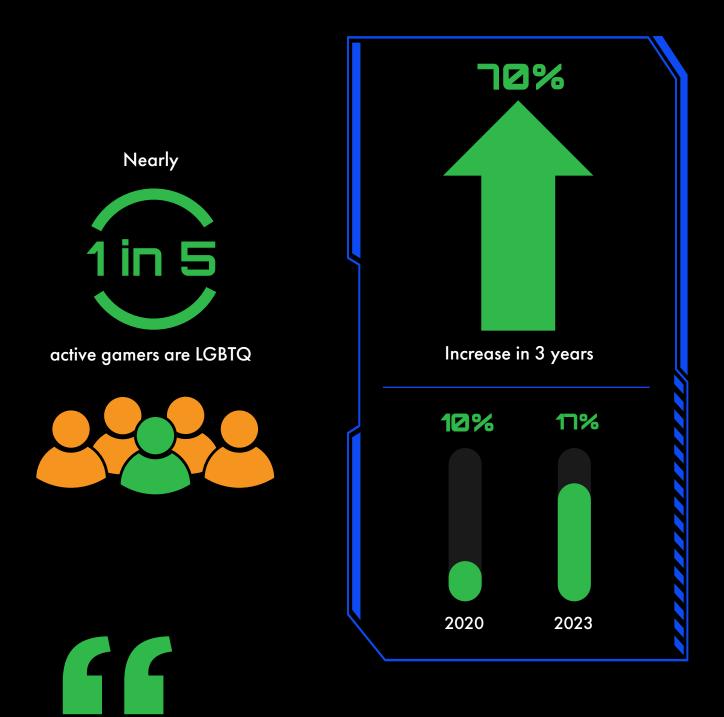
Active gamers under 35 that are LGBTQ



LGBTQ gamers spend similar amounts of money on gaming

Monthly Game Spend





GLAAD's finding that 11% of active gamers are LGBTQ, and the growth from 10% of active gamers being LGBTQ from Nielsen's Games360 study in 2020, proves their tremendous influence on the gaming industry. The study shows that for LGBTQ gamers, a safe and inclusive environment goes beyond the game itself with nearly 70% indicating they are less likely to buy from a studio with a history of mistreating LGBTQ workers. The vast majority, 69%, of LGBTQ gamers play 4+ hours per week on PCs or consoles, compared to 64% of non-LGBTQ gamers. LGBTQ and non-LGBTQ gamers report similar percentages regarding which platforms they use and which genres they play. The exceptions are 39% of LGBTQ gamers who play on the Nintendo Switch consoles, compared to 32% of non-LGBTQ gamers. LGBTQ gamers are also more likely than non-LGBTQ gamers to play on a Nintendo Switch Lite (12% versus 9%).

While LGBTQ gamers are more likely to play on Nintendo Switch consoles, we found that the Nintendo Switch Store has the <u>lowest</u> percentage of available games that contain LGBTQ characters or storylines.

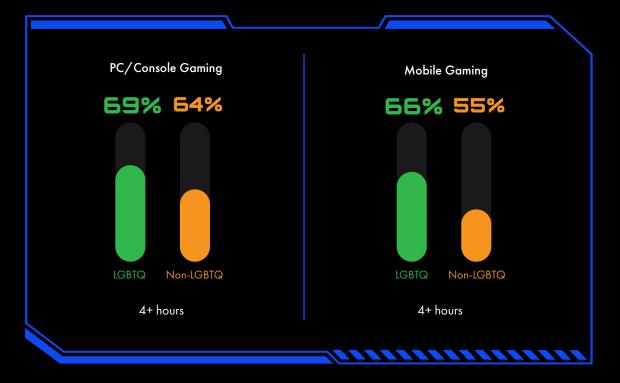
One potential explanation for the popularity of the Switch consoles among LGBTQ gamers might be the lower cost of entry, compared to other platforms, and the fact that LGBTQ gamers in our study have relatively lower incomes than non-LGBTQ gamers. This will be explored more deeply in our future research.

In terms of the types of games played, while single-player games are the most often played by both LGBTQ and non-LGBTQ gamers, LGBTQ gamers are more likely to play single-player games and cooperative multiplayer games than non-LGBTQ gamers. Conversely, non-LGBTQ gamers are more likely to play competitive multiplayer games.

On PCs and console, LGBTQ gamers are more likely to play certain genres of games, like open world, simulation games, role playing (RPG), horror, and puzzle games. Non-LGBTQ gamers, in contrast, are more likely to play shooter games, with both cohorts just as likely to play genres like adventure, action RPG, fighting, and battle royale games.

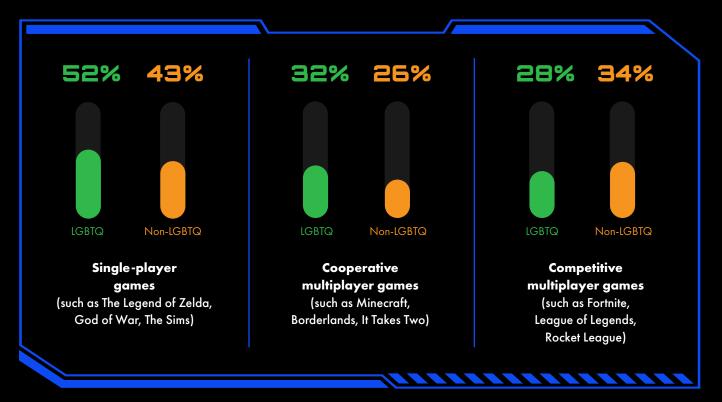
And when it comes to the most played mobile genres, LGBTQ gamers are more likely to play puzzle, simulation, RPG, and music and rhythm games, while non-LGBTQ gamers are more likely to play shooter games. Both LGBTQ and non-LGBTQ gamers are equally as likely to play strategy, racing/carting, fighting, action-adventure, and survival games on mobile devices.

LGBTQ gamers spend more time playing across all platforms



Weekly Time Spent by Gaming Platform

LGBTQ gamers have a slight preference for single-player and co-op games



Types of Games Played Often

The Case for LGBTQ Inclusion in games

Games offer the opportunity to explore fantastical worlds, experience narratives in new ways, simulate day-to-day life, and recreate real events ranging from key historical moments to contemporary sporting events. As LGBTQ people exist in our world, they must be included in these imagined or recreated worlds. Not only is seeing LGBTQ representation in games important to LGBTQ gamers, it is clear from our data that non-LGBTQ gamers are more open to playing games with LGBTQ content than the industry might assume.

Being able to play characters that match their gender and/or sexual orientation matters to LGBTQ gamers. 72% of LGBTQ gamers say that seeing characters with their gender identity and/or sexual orientation represented well makes them feel better about themselves, and the percentage is even higher for younger age groups (78% of 13–17-year-olds).

LGBTQ gamers are 1.4 times more likely than non-LGBTQ gamers to buy or play a game because it allows them to play as a character that matches their gender.

LGBTQ gamers are seeking more representation in games, as are non-LGBTQ gamers. 68% of LGBTQ gamers wish there were more prominent LGBTQ storylines in games. While they are 3.2 times more likely than non-LGBTQ gamers to believe this, 1 in 5 (21%) non-LGBTQ gamers, and 29% of gamers overall also wish there were more prominent LGBTQ storylines in games. This sentiment is largely driven by younger gamers (under 34) and heavy/ medium spenders.

Quality of representation matters to both LGBTQ and non-LGBTQ gamers as well. 70% of LGBTQ gamers and 46% of non-LGBTQ gamers are less likely to buy or play a game if it contains harmful tropes or stereotypes about the LGBTQ community. Notably, 51% of heavy/core gamers are less likely to buy or play such a game.

I feel like there are so many stories that have yet to be told in the LGBTQ+ community, and I hope game developers continue to tell those stories.

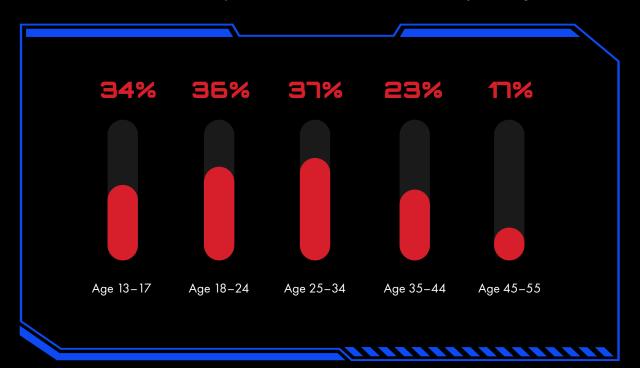
> —30, Mexican/Mexican Am/Chicano, white, cisgender woman, straight, in Illinois

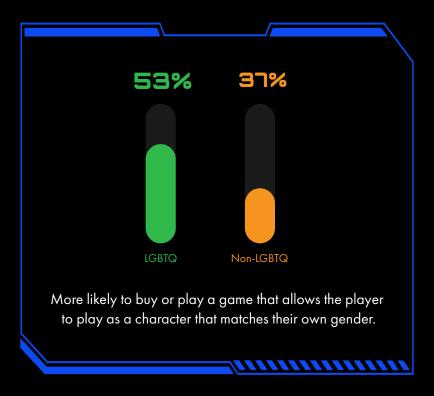


Desire to see more LGBTQ representation is highest among younger gamers All gamers

Gamers by age that agree:

I wish there were more prominent LGBTQ characters and storylines in games





LGBTQ gamers care more about being able to play as their own gender

A majority of LGBTQ gamers, and 1 in 5 non-LGBTQ gamers, wish there were more prominent LGBTQ storylines in games

Agree: I wish there were more prominent LGBTQ storylines in games



Opinions on LGBTQ Main Characters

A recent large-scale study of representation in video games shows that among the top 100 games sold in the United Kingdom in 2017, women characters accounted for only 22% of all characters and people of color only accounted for 20% of all characters.⁷ Research from the LGBTQ Game Archive on games released between 1985 and 2005 finds that less than 30% of LGBTQ characters were playable characters.⁸ Building on that work, Cody Mejeur and Xavier Ho have shown that in the context of all games released between 1985 and 2020, very few video game characters were LGBTQ and those that were LGBTQ tended to be cisgender men and white.⁹ Games are a medium in which players can be anything, but the game industry has continued to rely on very narrow representational options.

Game companies have avoided making more games with central LGBTQ characters because they have assumed that the majority of the gaming audience would not be interested in or openly reject such games. **However, our research found that having games with** central/main LGBTQ characters would make no difference to the majority of non-LGBTQ gamers.

Honestly, I haven't really experienced any games that had anything to do with LGBTQ+. But if a game did, it wouldn't make a difference to me. At least not a negative difference. I think it would be cool to see LGBTQ+ represented more in video games.

-29, white, cisgender man, heterosexual, California I don't NEED to have a game have a protag like me, but I am more likely to play one that does but it shows the devs acknowledge gaming isn't for one demographic only. I am less likely to play a game with a typical white straight masc male protag, however. Boring. I just want queer characters of all kinds to exist as readily as straight ones get to.¹⁰

-34, white, transgender man, bisexual, in Oregon

The majority of Non-LGBTQ gamers are not dissuaded by representation, and LGBTQ gamers are much more likely to play a game with representation

Impact of an LGBTQ main playable character on likelihood to buy or play a game



When it comes to playing as a main character who is gay, lesbian, bisexual, or transgender, over 60% of non-LGBTQ gamers say that it <u>would not make a difference</u> in their decision to buy or play a game. Perhaps surprisingly, 8% of non-LGBTQ gamers would be more likely to buy or play a game with a gay or transgender main player character (and the numbers are even higher for lesbian or bisexual main characters).

It is important to note that of non-LGBTQ gamers, 18–34-year-olds are least likely to be dissuaded by LGBTQ content. Further analysis shows that non-LGBTQ gamers of color are less resistant to games with LGBTQ main characters than non-LGBTQ white gamers. White, non-LGBTQ gamers are 15% to 23% more likely than non-LGBTQ gamers of color to avoid buying or playing a game after learning the game's main playable character is LGBTQ.

Among all cohorts we studied, the biggest net negative is among the lowest monthly spenders.¹¹ In fact, heavy/core gamers have a less than 10% difference between those who would be more versus less likely to buy a game with a gay man, lesbian, or bisexual main character.

Notably, LGBTQ gamers are 4–5 times more likely than non-LGBTQ gamers to buy or play a game because it allows them to play as an LGBTQ main character. The buying power of the LGBTQ community and our allies far outweighs any detractors.

Opinions on Optional or Secondary LGBTQ Representation

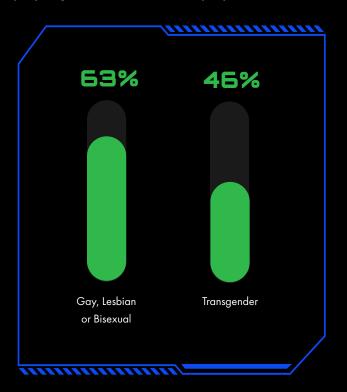
Optional or secondary representation has been one of the primary ways the game industry has thus far included LGBTQ characters. Allowing players to decide if they want their character to romance same-sex non-player characters, and increasingly adding more diverse options for character customization, have been stand-ins for more robust and impactful LGBTQ representation for decades.

When it came to our questions about optional or secondary representation, the proportion of non-LGBTQ players who say they would be less likely to buy or play a game decreased significantly compared to our questions about main/playable characters. 68–70% of non-LGBTQ gamers say the option to be LGBTQ, or having an LGBTQ non-player character storyline in a game, makes no difference to their intention to buy it or play it. Moreover, 63% of LGBTQ gamers are more likely to buy or play a game with the option to be lesbian, gay, or bisexual, and only 36% say it would make no difference to them. 43% of LGBTQ gamers are more likely to buy or play a game with a trans non-player character storyline, and 55% of LGBTQ gamers are more likely to buy or play a game with a lesbian, gay, or bisexual non-player character storyline. This is unsurprising because although games have rarely included main LGBTQ characters, some genres have long included LGBTQ identities as possible within character creation or romance options. These findings suggest that gamers can become more comfortable with content as they are introduced to it. However, this can only be borne out if games begin to have more LGBTQ content and LGBTQ protagonists.

While overall 30% of non-LGBTQ gamers affirm they'd be less likely to buy or play a game with a transgender main character, only 20% affirm they'd be less likely to buy or play a game with the option of a playable transgender character, and 24% affirm they'd be less likely to buy or play a game if there was a storyline involving a transgender non-player character. We saw the most resistance among all respondents to transgender representation in games, and yet when that content is optional or secondary, that resistance lessens. Among LGBTQ gamers, 46% are more likely to buy a game if there is an option to be transgender. 48% state it would not make a difference.

Although secondary or optional representation is not as impactful when it comes to creating meaningful LGBTQ content, such options would be profoundly meaningful for LGBTQ gamers and could pave the way for more LGBTQ inclusion. Optional representation should be seen as a starting place and not an end goal when it comes to LGBTQ inclusion in video games.

LGBTQ gamers are much more likely to buy or play a game with LGBTQ representation



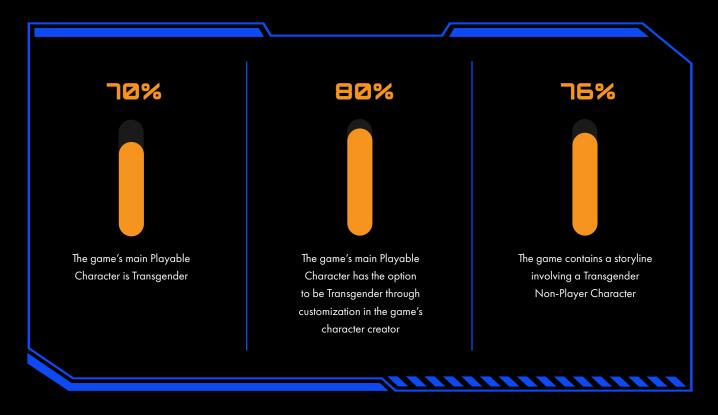
More likely to buy or play a game where the main playable character has the option to be...

More likely to buy or play a game that contains a storyline involving...



The majority of non-LGBTQ gamers are not dissuaded from trans representation in games

Non-LGBTQ gamers who are just as likely or more likely to buy or play a game when learning....



Games Are a Vital Resource in an Increasingly Hostile World

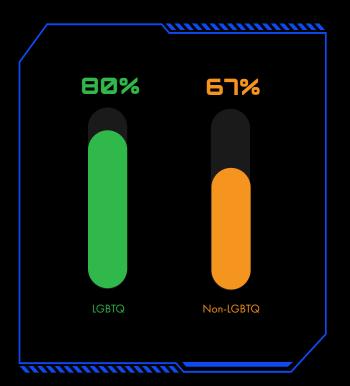
Across demographics in our study, over 90% of gamers report gaming is something they do for fun, almost equally across all age groups. Gaming is also used to release stress and relax.

A majority of all gamers enjoy that games allow them to be immersed in fictional worlds and that games allow them to experience the perspective of people different from them. LGBTQ gamers specifically are 12% and 19% more likely than non-LGBTQ gamers to enjoy these experiences that gaming allows. That said, given how little LGBTQ representation exists in games, LGBTQ gamers have had little chance to experience games from the perspective of people like them, and non-LGBTQ people have little chance to experience games from the perspective of LGBTQ people.

LGBTQ gamers are 11% more likely than non-LGBTQ gamers to use gaming to escape from difficult situations in the real world and 24% more likely to depend on gaming to get them through tough times. For LGBTQ gamers, gaming can not only be an escape and a way to cope but also an important outlet of self-expression. 74% of LGBTQ gamers say they can be their true selves while gaming (which is 16% more likely than non-LGBTQ gamers). And 66% of LGBTQ gamers say gaming allows them to express themselves in a way they don't feel comfortable doing in the real world (which is 35% more likely than non-LGBTQ gamers).

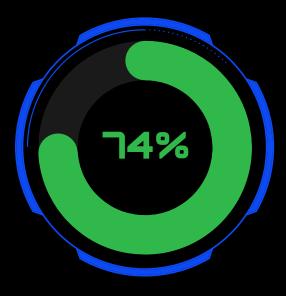
These percentages are even higher for LGBTQ gamers in states that have proposed or passed anti-LGBTQ legislation.¹² Since January 2023, Equality Federation has tracked over 500 anti-LGBTQ bills across the United States, with a majority of those bills targeting transgender people (primarily youth). This is over 250 more bills in 2023 compared to 2022, which was also an unprecedented year for anti-LGBTQ legislation. Even though a majority of these bills do not become law, their introduction causes great harm to LGBTQ people, specifically LGBTQ youth.

LGBTQ gamers are more likely to appreciate gaming as a way to experience different perspectives



Agree: I like that gaming allows me to experience the perspectives of people different from myself

3 out of 4 LGBTQ gamers seek opportunities to explore their true selves through gaming



Agree: I can be my true self while gaming

In these states, 65% of LGBTQ gamers note that they depend on video games to help get them through tough times, and 75% say games allow them to express themselves in ways they don't feel comfortable doing in the real world. For these LGBTQ gamers, gaming is necessary to cope with real-world discrimination and targeting. **Game developers need to understand the role gaming plays for LGBTQ gamers in the United States and especially LGBTQ gamers in states where they are disproportionately targeted and attacked**.

Overall, 36% of LGBTQ gamers state that video games helped them discover their sexual orientation or gender identity. This number is even higher (41%) for LGBTQ gamers of color. 44% report video games help them cope with the lack of LGBTQ acceptance in the real world, and 50% feel more accepted in gaming communities than where they live. These numbers are even higher among heavy/core LGBTQ gamers (48% and 59%).

Still, 51% of LGBTQ gamers wish video games did more to help them express or explore their identity, and 74% wish there were more opportunities to explore their true selves through gaming.

Anti-LGBTQ

Bills Proposed in 2023

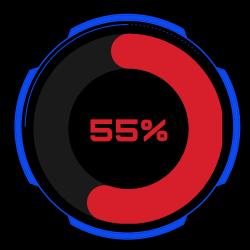
Data from Equality Federation shows over 500 anti-LGBTQ bills this year. Each of the previous 2 years—2022 and 2021 was a record-setting year for anti-LGBTQ legislation.

Gaming is even more important to LGBTQ gamers who live in states that have proposed or passed anti-LGBTQ legislation

Agree: I feel more accepted in the gaming community than by the general public in the area where I live

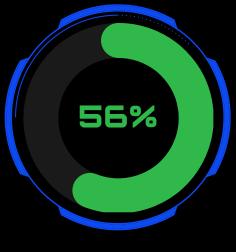


All LGBTQ gamers



LGBTQ gamers who reside in states where there has been recent anti-LGBTQ legislation proposed or passed

Agree: I depend on video games to get me through tough times



All LGBTQ gamers



LGBTQ gamers who reside in states where anti-LGBTQ legislation has been recently passed or proposed

Agree: Gaming allows me to express myself in a way I don't feel comfortable doing in the real world



All LGBTQ gamers



LGBTQ gamers who reside in states where anti-LGBTQ legislation has been recently passed or proposed

Gaming Provides a Social Outlet but Harassment Concerns Remain

LGBTQ gamers are much less likely than non-LGBTQ gamers to feel welcomed within the gaming community. Over half (52%) feel the gaming community is welcoming to people like them, but 38% sometimes feel like they don't belong. In contrast, 59% of non-LGBTQ gamers feel welcome, and only 24% sometimes feel like they don't belong.

This is very likely due to harassment. 52% of LGBTQ gamers report experiencing harassment while playing online, compared to 38% of non-LGBTQ gamers. 42% of LGBTQ gamers report that they have avoided playing a game because they thought they would be harassed, and 27% have quit a game because of harassment.

LGBTQ gamers also recount feeling more uncomfortable using voice chat in online games (61%), compared to non-LGBTQ gamers (40%). Although a greater percentage of LGBTQ gamers (62%) say experiencing harassment makes them want to play less, 40% of non-LGBTQ gamers say the same thing. And 20% of non-LGBTQ gamers have avoided playing a game if they thought they'd be harassed.

Gaming is an important social outlet for LGBTQ gamers. 71% say they have friends they can game with, and 63% wish they had more friends they could play or talk about games with. 35% of LGBTQ gamers feel that gaming is their only outlet for socializing with other people, compared to 28% of non-LGBTQ gamers.

Half (50%) of LGBTQ gamers say that they feel more accepted by the gaming community than they do where they live, and that goes up to 55% for those residents of states that have proposed or passed anti-LGBTQ legislation. Over half (51%) of LGBTQ residents of those states report feeling stress or anxiety when thinking about the level of LGBTQ acceptance around them, compared to 45% of LGBTQ gamers overall.



of LGBTQ gamers feel they sometimes don't belong in the gaming community



of LGBTQ gamers have reported that they avoided playing a game because they thought they would be harassed, and 27% have quit a game because of harassment

Most Gamers Do NOT Think the Game Industry Thinks About People Like Them

A minority of both LGBTQ and non-LGBTQ gamers believe major video game companies think about people like them when designing their games (27% of LGBTQ gamers and 38% of non-LGBTQ gamers). Further, nearly double the percentage of LGBTQ gamers (29%) **think the game industry does not think about people like them**, compared to non-LGBTQ gamers (15%). Relatedly, 48% of LGBTQ gamers feel more represented in indie games created by small teams than in mainstream games created by large companies, while only 28% of non-LGBTQ gamers feel that way.

Interestingly, there is a relationship between those who spend more money on games each month and those who feel like the game industry thinks about people like them and feel welcome in the gaming community. Although only a minority of gamers believe game companies think about people like them when designing their games (36%), 47% of high spenders do. Similarly, 74% of high spenders feel the gaming community is welcoming, compared to 58% of gamers overall. By creating a more welcoming environment for LGBTQ gamers, where they feel represented, game companies can increase the possibility that such gamers will spend even more money on games than they do already.

LGBTQ gamers are



as non-LGBTQ gamers to believe major video game companies do not think about people like them when designing their games

Most Gamers Think the Industry Has a Responsibility to Be More Inclusive

Half (50%) of non-LGBTQ gamers and 65% of LGBTQ gamers feel that game developers have a responsibility to make gaming and gaming spaces more inclusive. LGBTQ gamers also pay more attention to the internal dynamics of studios. While the vast majority of non-LGBTQ gamers (72%) say such dynamics do not matter to them, over half of LGBTQ gamers (54%) would be more likely to buy or play a game if they learn that the game is developed by a studio with a significant proportion of LGBTQ workers. Moreover, 69% of LGBTQ gamers and nearly half of non-LGBTQ gamers (48%) are less likely to buy or play a game from a company with a history of mistreating its LGBTQ workers. International Game Developers Association's **2021 report** finds that 78% of LGBTQ people in the game industry have experienced inequity in the workplace. They also tend to be paid less, make up a smaller percentage of management, and experience more inequity and harassment when compared to heterosexual workers.¹³

Both LGBTQ and non-LGBTQ gamers are highly conscious of how gaming companies treat their LGBTQ workers



Less likely to buy or play a game from a company with a history of mistreating its LGBTQ employees

LGBTQ Video Game Content is Lacking

For the purposes of this report, and to set a baseline against which future industry efforts can be measured, GLAAD quantified the number of available games with LGBTQ content against the total number of games presently available.¹⁴ We did this by identifying games on the major PC and console distribution platforms that are publicly tagged or listed as having LGBTQ content. As this report looks at the current gaming world, we focused on games that the average consumer looking for LGBTQ content could easily find in the console/platform stores when searching for LGBTQ tags.

GLAAD counted the number of games that have been tagged as having LGBTQ content as of November 2023 from Xbox, PlayStation, Nintendo, and Steam (PC). According to Microsoft, there were 146 console games available in the Xbox store that had LGBTQ content. PlayStation maintained a list that includes 90 games. The Nintendo Switch eShop listed 50 games with the tag LGBT. Steam's LGBTQ+ tag returned 2302 games available in English (as of November 2023), but that number dropped to 1506 when games with "adult only sexual content" were filtered out.¹⁵

In context, however, these games account for less than 2% of Xbox, PlayStation, and Nintendo's total digital libraries. For Steam, it is less than 2.5%, but drops to just 1.7% when adult-only games are excluded. Mejeur and Ho, comparing data from the LGBTQ Game Archive to games represented in the MobyGames database, similarly <u>found that only</u> approximately 1% of all games released in the 2010s included LGBTQ content.

It is clear that the game industry lags far behind other media industries in terms of quantity of LGBTQ representation. The 2023 GLAAD <u>Advertising Visibility Index</u> showed that just "3% of all reviewed ads could be counted as including LGBTQ representation."¹⁶ GLAAD's 2023 <u>Studio Responsibility Index</u> found that 28.5% of films from the top 10 distributors in 2022 contained an LGBTQ character.¹⁷ For the 2022–23 season, GLAAD's <u>Where We Are on TV</u> report found that 10.6% of series regulars on primetime scripted broadcast series were LGBTQ and in total, GLAAD counted 596 LGBTQ characters across primetime scripted broadcast, primetime scripted cable, and scripted streaming original series.¹⁸

We acknowledge that gaming is a different medium than film, television, and advertising in that representation is not applicable to every type of game. However, video games have come a long way since the days of Pong. Most games today are rich, multimedia experiences that broadly incorporate aspects of world-building, narrative, and characterization. Additionally, because our representation data is based on PC and console games (excluding mobile), we believe it is an accurate reflection of gaming's overall lack of progress. That less than 2% of available games have LGBTQ content is out of step with contemporary media, and the game industry is failing LGBTQ consumers and our allies.





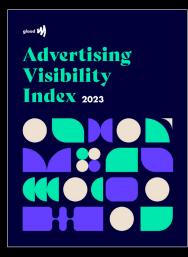
28.5%

Films from top 10 distributors in 2022 contained LGBTQ characters



10.6%

Of all series regulars on primetime scripted broadcast series in the 2022-2023 television season were LGBTQ



З%

LGBTQ inclusive ads from top 10 spenders on linear TV in 2022

A Message from Blair Durkee, Associate Director of Gaming at GLAAD

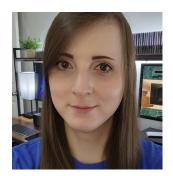
When GLAAD was founded in 1985, our pressing mandate was to stem the tide of harmful and defamatory narratives being spread about LGBTQ people in the media. Since that time, the LGBTQ community has made incredible strides in both visibility and acceptance, and media—while still lagging behind—has similarly come a long way. This is especially true for the video game industry, where games like Dragon Age: Inquisition and The Last of Us Part II have illustrated a growing interest from studios and developers to meaningfully represent LGBTQ people. To that end, GLAAD's enduring mission to hold the media accountable is embodied today by our work alongside creators to help them tell LGBTQ stories accurately and authentically.

In 2018, we founded the GLAAD Media Institute as a resource for media industries, backed by our decades of institutional knowledge and expertise. Through training, research, and consultation, we help creators navigate the complexities of authentic representation and ensure that LGBTQ content is well-received by audiences. We're gamers ourselves, so our advocacy is always driven by a passion to make games more enticing, engaging, and fun to play for everyone.

Our work can be seen in games like *Tell Me Why*, where we collaborated with Xbox Game Studios and DON'T NOD to produce the first game from a major publisher featuring a playable transgender protagonist. We also partnered with Electronic Arts and Respawn Entertainment to introduce Catalyst, a trans woman character, into the popular online shooter game Apex Legends.

We believe that LGBTQ inclusion benefits both the video game industry and community. As this report shows, the presence of LGBTQ characters or storylines doesn't meaningfully deter non-LGBTQ people from buying or playing games, but it makes a huge difference to LGBTQ gamers. Nearly 7 in 10 LGBTQ gamers wish there were more prominent LGBTQ storylines in games. Developers have the opportunity to meet a critical need for our community while also expanding their audience.

Despite the significant progress we've seen, gaming remains woefully behind other forms of entertainment media when it comes to representation. Many creators want to work toward a better future but feel like they lack the knowledge and expertise. The GLAAD Media Institute exists to fill that gap. To find out more information and work with us, visit glaad.org/contact.



Blair Durkee, Associate Director of Gaming, GLAAD

Recommendations

Given the growing proportion of LGBTQ gamers as a percentage of the gaming audience, the game industry should be on the leading edge of representation compared to other media industries.

The percentage of games with LGBTQ representation should be proportional to the share of gamers who are LGBTQ

As a baseline, there should at least be an equal proportion of games with LGBTQ characters as there are LGBTQ people who are gamers. That representation should also appear across game genres and platforms, so that all LGBTQ gamers, regardless of what they play, can see themselves represented.

Game developers should strive for representation that promotes inclusivity and acceptance

Encouraging acceptance will help make gaming culture less toxic, and, as we have found, gamers who feel more accepted and included in games spend more on games. While not the only metric for meaningful representation, the GLAAD Media Award for Outstanding Video Game criteria can provide developers with a solid framework to evaluate their LGBTQ content:

- Authenticity is a measure of how fair and accurate the depictions of LGBTQ characters are, including whether the content avoids harmful tropes and stereotypes.
- Boldness and originality are determined by how a game builds on prior instances of representation, telling underrepresented stories in fresh and thought-provoking ways.
- Impact is driven by the salience of the LGBTQ content within the game, as well as the game's availability and reach.
- Quality is everything else that goes into making a game a rewarding and enjoyable experience. Gamers should not have to lower their standards for the games they play to see authentic LGBTQ representation.

The game industry should take responsibility for making their communities more inclusive

LGBTQ gamers say that they feel freer in expressing themselves in gaming than they do in the real world, and yet most also believe the video game industry does not think about gamers like them. A majority of all gamers assert that the game industry has a responsibility to make gaming spaces more inclusive. Some LGBTQ gamers have avoided or stopped playing games because of harassment. Companies should actively ensure they are creating communities that are hospitable to LGBTQ gamers.

The game industry should consult LGBTQ media content experts

The historical, social, and political complexities of LGBTQ representation require specialized knowledge and training. Game industry jobs do not inherently require training in these topics, but there are many media content experts and organizations who have spent years thinking through these issues and can help game companies avoid problematic tropes and conventions when adding LGBTQ representation to games. These experts need to be included throughout the development process, not just at the end.

LGBTQ game industry workers should be hired in positions of authority

Although being LGBTQ does not necessarily make one equipped to implement needed changes, more representation in leadership roles can improve working conditions as well as player experiences and in-game representation. Having LGBTQ people in positions of authority may allow them to see where more inclusive workplace, game content, and community management decisions can be made.

Methodology

GLAAD partnered with the Nielsen Games team for the custom survey portion of this report. Nielsen is a global leader in audience measurement, data, and analytics. Nielsen's gaming team was formed in 2005 to provide "exclusive market research and consumer insights across physical and digital platforms, devices, and hardware. With comprehensive metrics including awareness and resonance over time, [Nielsen] provides proprietary ratings to help...understand gamer preferences and demographics."¹⁹

Nielsen fielded a 10-minute survey among active PC/console gamers in the United States with a boost sample of LGBTQ+ gamers to help GLAAD better understand the relationship between the LGBTQ+ community and the game industry in terms of representation, harassment, and overall attitudes and behaviors.

This study was fielded by Nielsen between June and August 2023 via a trusted third-party panel. 1,452 active PC/console gamers were identified by their self-reported behavior.

Other GLAAD-owned or third-party usage of data and insights is properly sourced or linked within the report.

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- 10. We have included verbatim quotes from open-ended responses to capture the original spirit of our respondents. Here, "devs" refers to developers and "masc male protag" refers to masculine male protagonist.
- 11. High spenders were defined as spending USD \$41+ per month on games. Medium spenders were defined as spending USD \$11-40 per month on games. Low spenders were defined as spending USD \$10 or less per month on games.
- 12 Such states include Alabama, Arkansas, Arizona, Florida, Georgia, Idaho, Indiana, Iowa, Kansas, Kentucky, Mississippi, Missouri, Montana, Nebraska, North Dakota, Oklahoma, South Carolina, South Dakota, Tennessee, Texas, Utah, West Virginia, and Wyoming.
- 13. International Game Developers Association, Developer Satisfaction Survey 2021: Diversity in the Game Industry Report LGBTQA2+ (Sacramento: International Game Developers Association, 2022). https://igda-website.s3.us-east-2.amazonaws.com/wp-content/uploads/2022/11/15161912/IGDA DSS-2021_-LGBTQA2-Diversity-Report_Final-1.pdf.
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GLAAD rewrites the script for LGBTQ acceptance. As a dynamic media force, GLAAD tackles tough issues to shape the narrative and provoke dialogue that leads to cultural change. GLAAD protects all that has been accomplished and creates a world where everyone can live the life they love.





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