Global Market Research in over 40 countries

And delivered over 1,000 projects to clients in a variety of sectors

Using a variety of qual and quant methodologies

We work with clients to deliver insight with real commercial advantage
2018, Bryter’s first Female Gamers study with female gamers in the UK

In 2019, we repeated the survey, but included respondents from the US in order to compare differences across market

In 2020, building further on previous years, we targeted both female and male gamers, and explored areas such as eSports and toxicity in more detail
Gaming behaviours
Respondent demographics and behaviours

Gender

Age

Consoles owned

Hours played (weekly average)

Who do they typically play with

Ethnicity

Sexuality

- **Age**
  - 16-24: 31% (F), 33% (M)
  - 25-34: 25% (F), 23% (M)
  - 35-44: 15% (F), 15% (M)
  - 45-54: 15% (F), 12% (M)
  - 55+: 16% (F), 15% (M)

- **Gender**
  - 50% (F)
  - 50% (M)

- **Sexuality**
  - Heterosexual: 91% (F), 85% (M)
  - Lesbian/Gay: 3% (F), 3% (M)
  - Bi-/Pansexual: 10% (F), 4% (M)

- **Ethnicity**
  - White: 79% (F), 76% (M)
  - BAME: 20% (F), 23% (M)

- **Consoles owned**
  - PlayStation: 52% (F), 62% (M)
  - Xbox: 46% (F), 46% (M)
  - Nintendo: 40% (F), 32% (M)
  - Desktop: 44% (F), 50% (M)

- **Hours played (weekly average)**
  - Female: 8.3 hrs
  - Male: 12.1 hrs

- **Who do they typically play with**
  - Alone: 46% (F), 45% (M)
  - Online friends: 9% (F), 17% (M)
  - Partner: 13% (F), 5% (M)
  - Random opponent: 6% (F), 11% (M)
  - Their kids: 9% (F), 5% (M)

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
1 in 3 female gamers only game alone, offline

<table>
<thead>
<tr>
<th>Activity</th>
<th>Female (%)</th>
<th>Male (%)</th>
<th>Significantly higher than other gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Play alone offline</td>
<td>84%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Play online multiplayers</td>
<td>51%</td>
<td>67%</td>
<td></td>
</tr>
<tr>
<td>Play offline with friends</td>
<td>48%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Only play alone offline</td>
<td>32%△</td>
<td>24%</td>
<td></td>
</tr>
</tbody>
</table>

Less likely to play online

Reluctant to identify as a gamer

I wouldn’t call myself a ‘proper’ gamer

Reluctance to call themselves ‘proper’ gamers (despite gaming an average of 8hrs per week)

Q1.1/Q1.5x
Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
Males are more motivated by action and social aspects, females by creativity

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Male (%)</th>
<th>Female (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mastery</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>Achievement</td>
<td>42%</td>
<td>40%</td>
</tr>
<tr>
<td>Creativity</td>
<td></td>
<td>34%</td>
</tr>
<tr>
<td>Immersion</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Action</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Social</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Ability to share accomplishments with others</td>
<td>16%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Q4.3 Which of the following, if any, are important to you when playing mobile games?
Base: Those who play mobile games (1803): Female (934), Male (867)
In mobile gaming, females are more motivated by mastery

Mobile gaming motivations

- **Mastery**
  - Feeling challenged
  - Trying to get the highest score: 28%
  - Making tactical decisions: 27%
  - Clear levels and path of progression: 34%
  - Completing all the missions: 25%
  - Ability to power up/upgrade my character: 21%
  - Having attractive visuals: 31%

- **Achievement**
  - Ability to explore the game world freely: 20%
  - Expressing creativity through building/customising: 15%
  - Fast-paced gameplay: 19%
  - The thrill: 17%
  - Blowing things up: 12%

- **Creativity**
  - An immersive storyline: 19%
  - Getting to know the characters: 14%
  - Characters I can relate to: 13%

- **Action**
  - Competing against others: 18%
  - Ability to play with others online: 16%
  - Ability to share accomplishments with others: 11%

Q4.3 Which of the following, if any, are important to you when playing mobile games?
Base: Those who play mobile games (1803): Female (934), Male (867)
Males play a greater range of genres. Females over index on simulation and resource management.

Top 10 genres on console/PC:
- Action Adventure: 50%
- Classic/Tactical Shooters: 35%
- Open-World Action: 32%
- Action-RPG: 28%
- Racing/Driving: 29%
- Fighting: 29%
- Battle Royale Shooters: 25%
- Sports: 16%
- Horror: 25%
- Strategy: 24%

Top 5 genres on mobile:
- Puzzle RPG: 53%
- Match3/Puzzle games: 47%
- Quiz/Trivia: 43%
- Action RPG: 30%
- Battle Royale Shooters: 21%

Females more likely to play Puzzle/card (36%), Simulation/RM (32%), Platformers (30%)

Q4.1/Q4.2
Base: All respondents (2006), Female gamers (1001), Male gamers (1003), Those who play mobile games (1803): Female (934), Male (867)
Streaming & eSports
Half of all gamers are regularly watching other gamers online, of which, 1 in 3 feel there is a lot of toxicity in this space.
Males are more likely to be regular eSports viewers, however, better representation could increase female viewership

- **Watch eSports events/ tournaments (weekly+)**
  - Female: 24%
  - Male: 33%

- **Would feel intimidated/uncomfortable going to eSports tournament**
  - Female: 22%
  - Male: 16%

- **There is a lack of diversity in eSports**
  - Female: 27%
  - Male: 22%

- **Would consider entering eSports tournament themselves**
  - Female: 19%
  - Male: 30%

- **There is a lack of female gamers in eSports**
  - Female: 44%
  - Male: 37%

- **Would watch more eSports if there were more female teams/tournaments**
  - Female: 33%
  - Male: 29%

- **Gaming community isn’t doing enough to encourage female gamers in eSports**
  - Female: 40%
  - Male: 33%

Base: All gamers (2006), Female gamers (1001), Male gamers (1003), Those who watch others play weekly+ (985): Female (446), Male (537)
Toxicity
Over half of male and female gamers have experienced abuse, mostly when playing online.

- **Have ever experienced abuse from other gamers:**
  - Male: 62%
  - Female: 58%

- **Experience it very/quite regularly:**
  - Male: 29%
  - Female: 28%

Where they experience this abuse:
- **Playing Online:**
  - Male: 70%
  - Female: 66%
- **Online forums/discussions:**
  - Male: 36%
  - Female: 42%
- **Playing with friends (offline):**
  - Male: 25%
  - Female: 31%

Base: All respondents (2006), Female gamers (1001), Male gamers (1003), Those who have experienced abuse (1114): Female (530), Male (582).
Female gamers are more likely to experience sexually inappropriate behaviour, and be excluded from games.

Q3.2 Which of the following types of abuse or discrimination have you ever experienced in and around gaming?
Base: Gamers who have experienced abuse (1114); Female (530), Male (582)

- **Verbal abuse** from male gamers while playing online multiplayers
  - Female: 52%
  - Male: 40%

- **Negative actions or gameplay** in online games from male/other gamers
  - Female: 36%
  - Male: 28%

- **Abuse on social media/other digital channels**
  - Female: 20%
  - Male: 17%

- **Verbal abuse** from male/other gamers offline
  - Female: 20%
  - Male: 17%

- **Excluded from participation** in games because of their gender
  - Female: 30%
  - Male: 27%

- **Being sent inappropriate content** or messages from male/other gamers
  - Female: 35%
  - Male: 30%

- **Sexual harassment** from male/other Gamers
  - Female: 17%
  - Male: 12%

- **Threats of rape** from male/other gamers
  - Female: 7%
  - Male: 9%

▲ Significantly higher than other gender
We asked participants for examples of abuse they had experienced. Although all were unacceptable, the severity amongst females was more notable.

<table>
<thead>
<tr>
<th>Male gamers most commonly experience foul or aggressive language, but also many instances of racial or homophobic slurs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• General abusive language</td>
</tr>
<tr>
<td>• Ageism</td>
</tr>
<tr>
<td>• Death / suicide related</td>
</tr>
<tr>
<td>• Racism / homophobia</td>
</tr>
<tr>
<td>• Threats of rape against female family members (even from gamers as young as 12yrs old)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most female gamers experience regular sexist comments, but this sometimes escalates to much darker, threatening behaviours</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sexist comments, stereotypes</td>
</tr>
<tr>
<td>• Negative reactions to game accomplishments</td>
</tr>
<tr>
<td>• Racism / homophobia</td>
</tr>
<tr>
<td>• Violent threats of rape</td>
</tr>
<tr>
<td>• Sexual harassment, being sent inappropriate content</td>
</tr>
<tr>
<td>• Stalking them on other platforms, and even offline</td>
</tr>
</tbody>
</table>
This widespread toxicity is having an impact on players’ gaming, particularly so for female gamers.

1 in 4 females say it makes them not want to play again.

- **All female gamers**
  - 50% say they feel they need to practice before joining an online multiplayer game.
  - 14% avoid online multiplayers altogether, through fear of negative reactions from male players.

- **Females playing online**
  - 31% often don’t reveal that they are a female gamer when playing online multiplayer games.
  - 33% avoid speaking in online multiplayers, through fear of negative reactions from male/other players.

**Significantly higher than other gender.**

**Q3.4a/Q3.6**
Base: All gamers (2006), Female gamers (1001), Male gamers (1003), Those who play online multiplayer games (1188): Female (509), Male (607).
The majority of gamers, both male and female, don’t feel there are adequate processes in place to deal with toxic behaviour.
Tackling toxicity requires a long term goal of a cultural shift...

**Education**
- In schools
- Resources for parents/teachers
- Defining unacceptable behaviour
- Reforming the ‘abusers’

**Corporate responsibility**
- Clear corporate position & action plan
- Clear social conduct rules
- Investment in staff support programmes
- Companies praising players/employees
As well as providing in-game tools and encouraging the community to take an active role

<table>
<thead>
<tr>
<th>In-game mechanics</th>
<th>Utilising community environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎉 Rewards for positivity</td>
<td>🟢 Encourage self-regulating flag &amp; review</td>
</tr>
<tr>
<td>🟠 Clear reporting processes</td>
<td>🟠 Community moderators &amp; ambassadors</td>
</tr>
<tr>
<td>🚨 Clear warnings &amp; consequences</td>
<td>🟢 Community endorsements</td>
</tr>
<tr>
<td>✨ More moderation (utilising AI)</td>
<td></td>
</tr>
</tbody>
</table>
Attitudes towards the industry
Female representation in the gaming industry is seen to be improving, but 1 in 5 female gamers still view it as masculine.

While the majority of gamers are positive about the industry, describing it as ‘progressive’ and ‘innovative’, females are significantly more likely to also view it as ‘masculine’ (22%) and ‘sexist’ (14%).
Male gamers are more likely to feel they can relate to characters, while females largely still feel that female characters are lacking.

Female characters are often oversexualised in video games:
- 50% agree (Female)
- 62% agree (Male)

There are not enough strong female characters in video games:
- 35% agree (Female)
- 48% agree (Male)

Female characters are often underrepresented in video games:
- 36% agree (Female)
- 45% agree (Male)

There is a lack of racial diversity in video game characters:
- 31% agree (Female)
- 39% agree (Male)

I often feel I can relate to (female) characters in video games:
- 35% agree (Female)
- 48% agree (Male)

Q2.4
Base: All respondents (2006), Female gamers (1001), Male gamers (1003)
Female gamers do feel the number of female characters has increased, although progress on character and game design is slower

- Number of female characters has increased
  - 2020: 54% (△)
  - 2019: 48%

- Depiction of female characters has improved
  - 2020: 45%
  - 2019: 43%

- More games are being designed with females in mind
  - 2020: 44%
  - 2019: 42%

- The industry is doing more to encourage female gamers
  - 2020: 42%
  - 2019: 40%

% of those agreeing with the statement: Q2.5
Base: All respondents (2006), Female gamers (1001)