



Bryter.

Female Gamer Survey

2020

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London,
New York
Established 2010

LONDON

NEW YORK



Global Market Research in over
40 countries

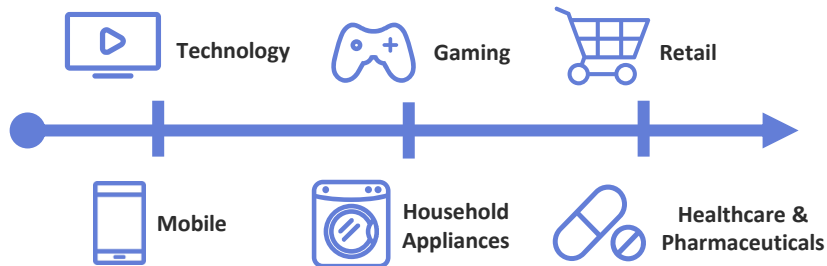
Using a variety of qual and quant methodologies



And delivered over

1,000 projects

to clients in a variety of sectors



We work with clients to

deliver insight
with real commercial
advantage





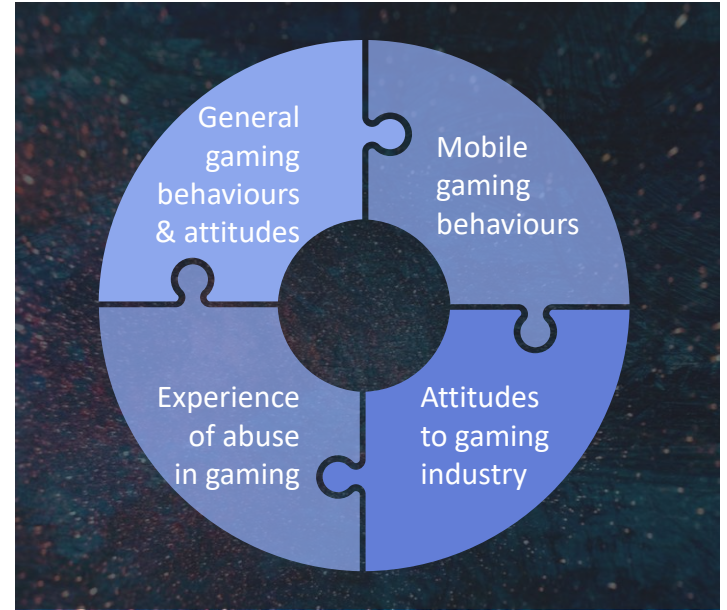
Background

Bryter's Female Gamer Survey 2020

2018, Bryter's first Female Gamers study with female gamers in the UK

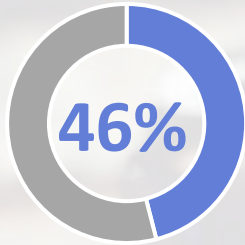
In 2019, we repeated the survey, but included respondents from the US in order to compare differences across market

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



Females gamers are an important audience, accounting for nearly half of all gamers

The changing face of gaming



Almost half of all game enthusiasts are female

Although long thought to be a male-dominated activity, the number of female gamers has continued to increase, now accounting for nearly half of all gamers.

Advancements in technology have made gaming more accessible, meaning the audience is more diverse than ever, and not just in terms of gender.

Popularity of online gaming

Gaming – and particularly online gaming – is growing year on year...

- There are thought to be over 2.5 billion gamers worldwide, and the global gaming market is predicted to be worth over \$180 billion by 2021
- There are an estimated 877.3 million online gamers globally (Jan 2020), estimated to exceed 1 billion by 2024.
- Online games' revenue amounts to \$17 billion globally so far in 2020 – a YOY growth of +1.2%.

We surveyed over 2,000 gamers across the UK and US

Respondents were male and female, aged 16+ and played video games on a PC or console at least monthly...



Respondents did not *have* to play mobile games to qualify, although the majority (90%) did



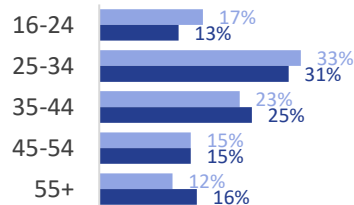
Gaming behaviours

Respondent demographics and behaviours

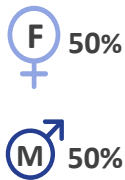
DEMOGRAPHICS



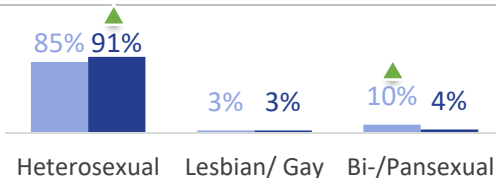
Age



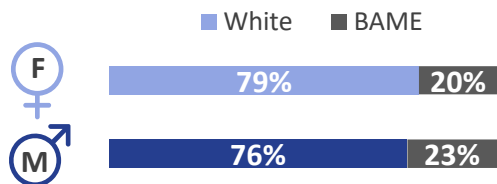
Gender



Sexuality

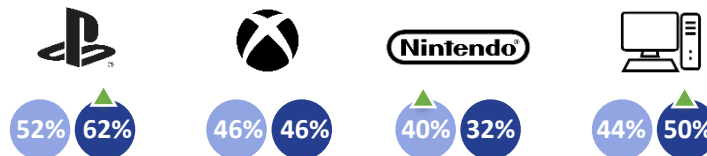


Ethnicity



GAMING PROFILE

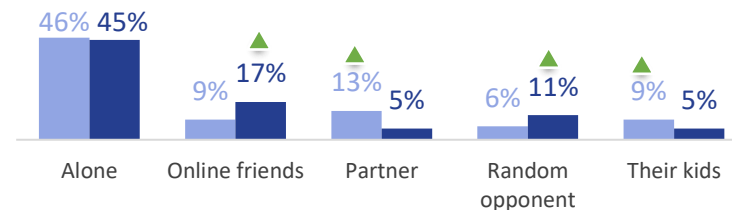
Consoles owned



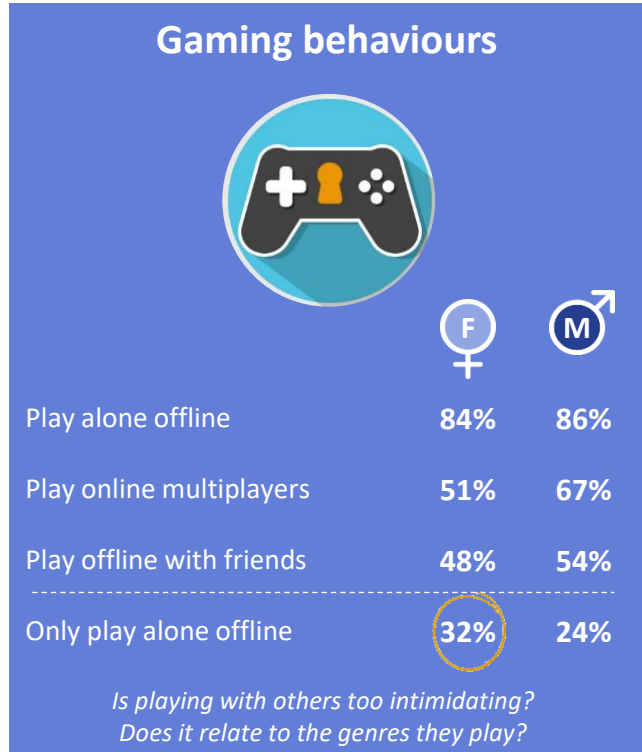
Hours played (weekly average)



Who do they typically play with

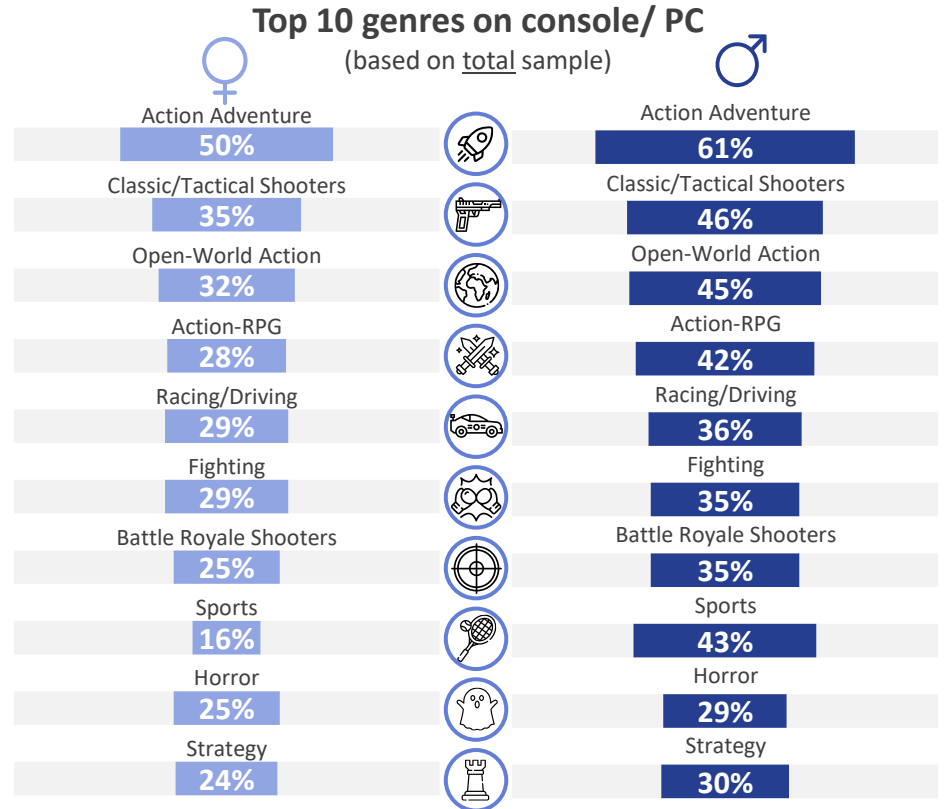


For 1 in 3 female gamers, the only gaming they do is offline alone



Q1.1/Q1.5x

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)

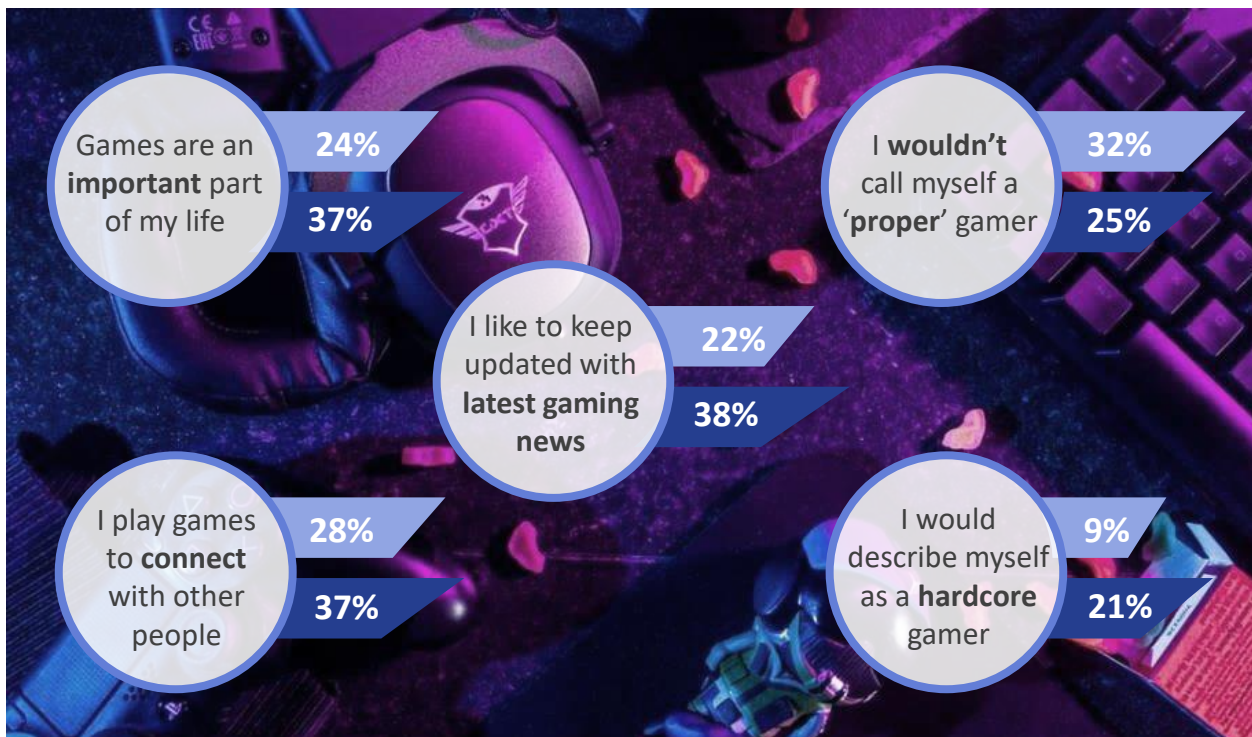


Females more likely to play Puzzle/card (36%),
Simulation/RM (32%), Platformers (30%)

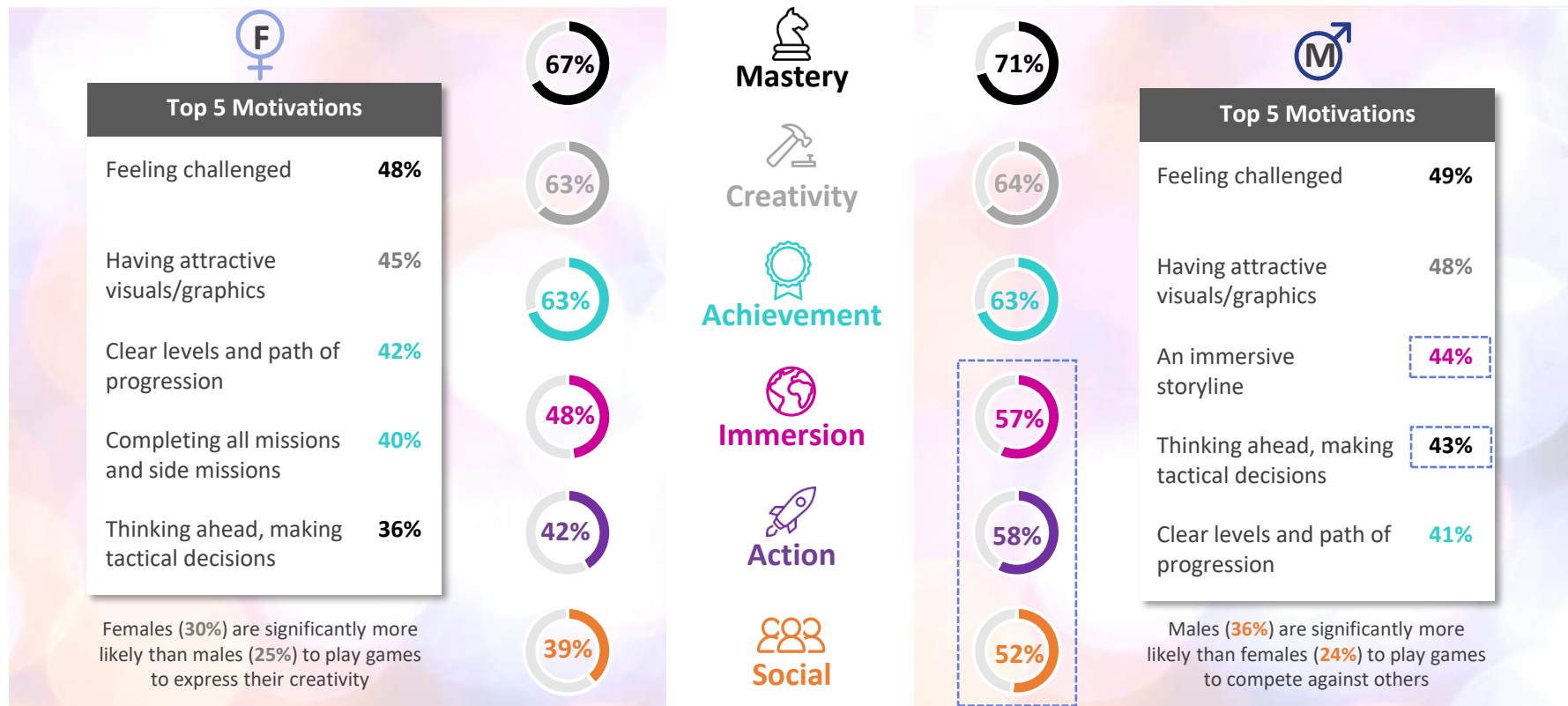
1 in 3 females don't consider themselves 'proper' gamers while males are significantly more likely to say they are hardcore gamers

Motivations

Reasons for gaming are similar across genders;
69% play to **relax**,
40% for the intellectual **challenge**,
39% play to help with their **mental health**



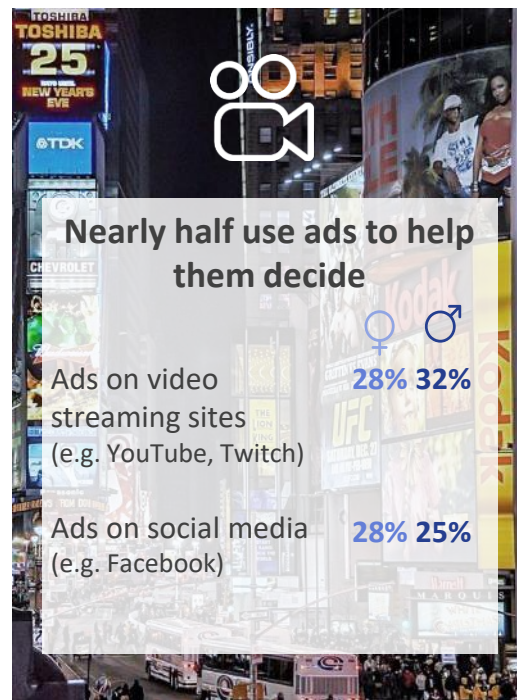
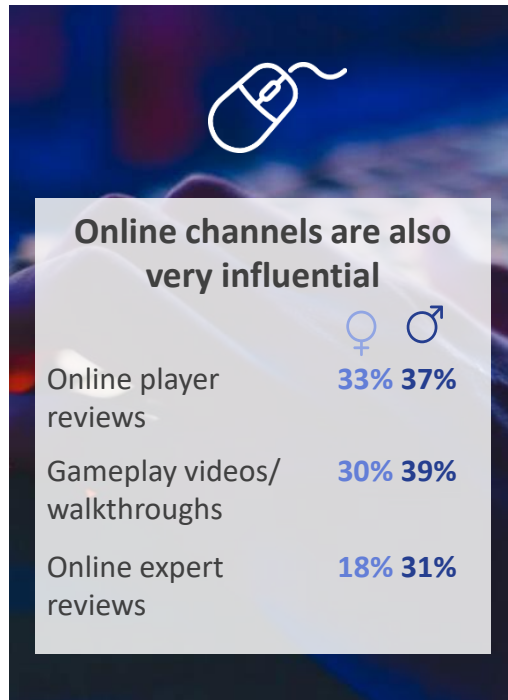
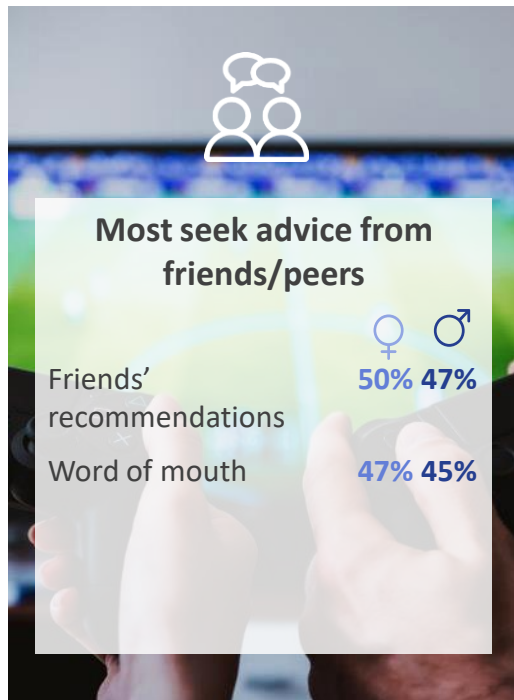
Males are motivated more by action and social aspects. Females are more likely to want to express their creativity



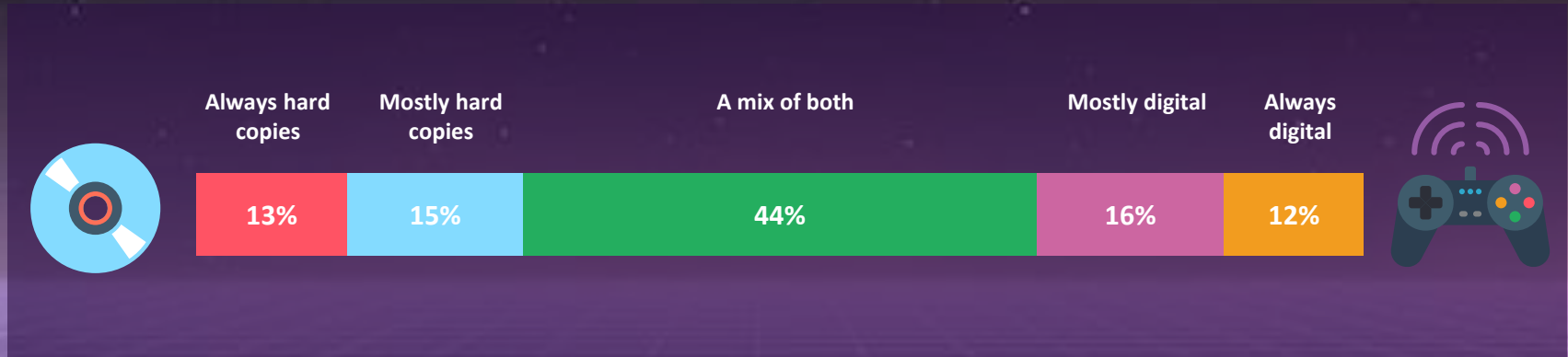
Q1.3 Which of the following, if any, are important to you when playing video games?

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)

When searching for their next game, the majority look to peers for advice, but online reviews & ads are also influential factors



The majority of gamers tend to buy a mix of digital and hard copies, with males more likely to buy hard copies

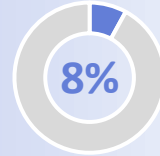
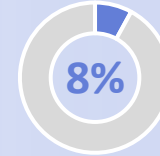
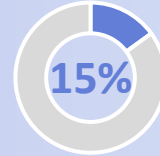
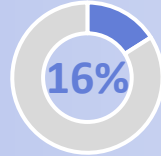


Figures from The Entertainment Retailers Association showed that 80% of UK video game sales in 2018 were digital, and data from the US showed a similar story with 83% of all computer and video games being sold in digital form (statista.com). Despite this, a 2018 gamesindustry.biz article reported that 'when it comes to AAA launches, an estimated 75% of an average game's sale still comes via physical goods sold via Amazon, GAME, GameStop etc.'

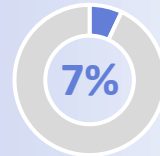
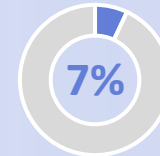
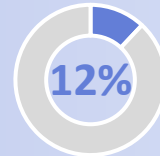
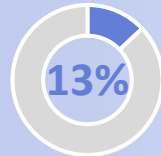
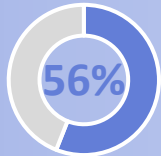
Although awareness of Cloud gaming platforms is sometimes limited, there is potential for high uptake in the future



% Aware



Currently use/
would consider



Overall awareness is higher amongst males, particularly for PS Now, Stadia and Geforce Now

% Aware of at least one of the above services



75%



84%

A wide-angle, high-angle shot of a massive esports arena, likely the Esports Arena at the 2017 Asian Games. The arena is packed with thousands of spectators. In the center, a large circular stage is illuminated with blue and red lights. A large screen above the stage displays a League of Legends match. The stage features a circular platform with a red and blue design, and a smaller circular platform with a blue and white design. The arena's roof is visible, with red structural beams and bright stage lights.

Streaming & eSports



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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

Watch other people play games online (weekly+)



By gaming frequency



Stream themselves playing online (weekly+)



Why do they stream others?

56% 62% Pure entertainment

48% 50% Learn tips

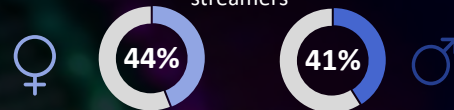
34% 39% Find out about new releases

32% 34% For the humour

Attitudes to streaming

Those who watch others play weekly+ (% Agree)

There are not enough female streamers



A lot of streaming content is sexist or misogynistic



There is a lot of toxicity/ discrimination in online games streaming

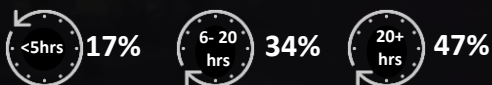


Males are more likely to be regular eSports viewers, however, better representation could increase female viewership

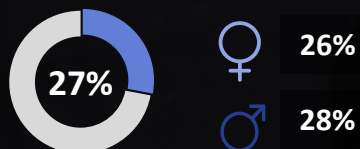
Watch eSports events/ tournaments (weekly+)



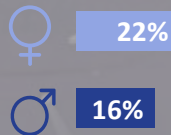
By gaming frequency



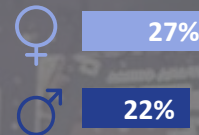
Have attended a live eSports event



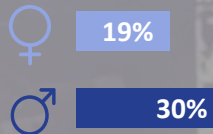
Would feel intimidated/uncomfortable going to eSports tournament



There is a lack of diversity in eSports



Would consider entering eSports tournament themselves



There is a lack of female gamers in eSports



Would watch more eSports if there were more female teams/tournaments



Gaming community isn't doing enough to encourage female gamers in eSports



A person is shown in profile, wearing a headset with a microphone, working at a computer. The scene is dimly lit, with the primary light source being the computer screen on the left, which displays some graphical data. The person's hands are visible on the keyboard. The overall mood is professional and focused.

Abuse & discrimination

Over half of male and female gamers have experienced abuse, and for nearly a third this abuse happens regularly

58%

Have ever experienced abuse from other gamers

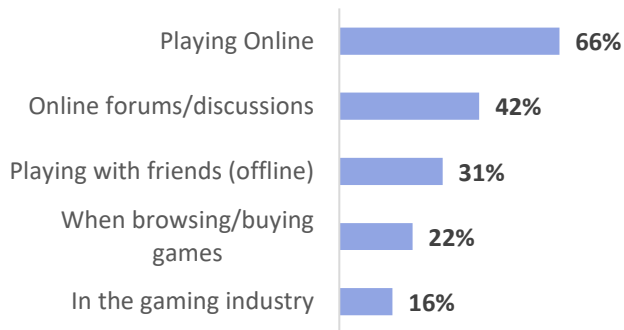
28%

Experience it very/ quite regularly

22%

Experience it regularly from male gamers (vs. 14% from females)

Where they experience this abuse



62%

Have ever experienced abuse from other gamers

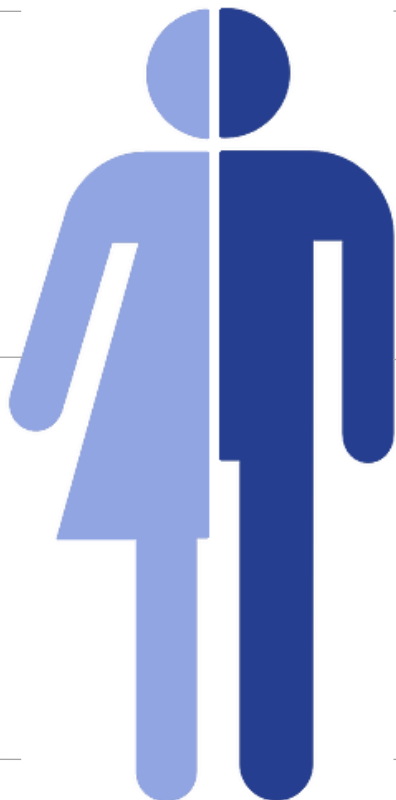
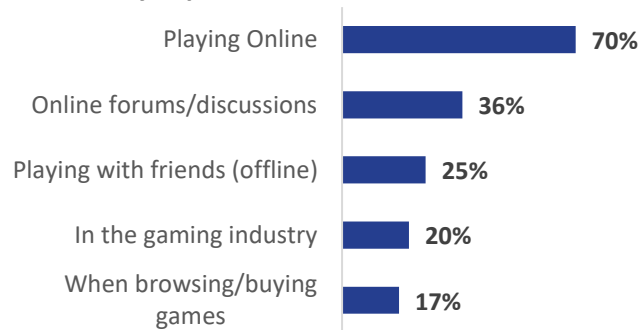
29%

Experience it very/ quite regularly

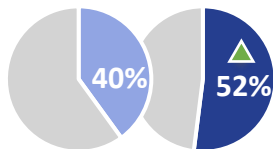
24%

Experience it regularly from male gamers (vs. 15% from females)

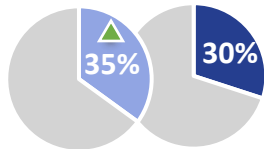
Where they experience this abuse



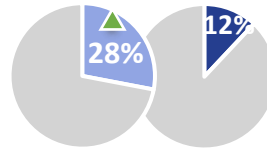
Females gamers are more likely to experience sexually inappropriate behaviour, and being excluded from games



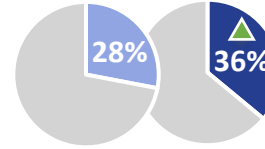
Verbal abuse from male gamers while **playing online multiplayer**



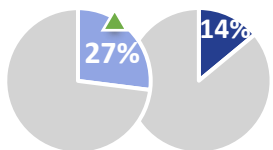
Being sent **inappropriate content** or messages from male/ other gamers



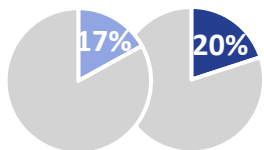
Sexual harassment from male/ other gamers



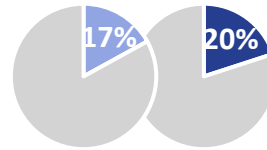
Negative actions or gameplay in online games from male/ other gamers



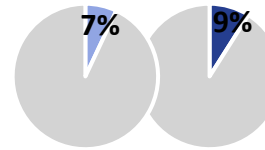
Excluded from participation in games because of their gender



Verbal abuse from male/ other gamers **offline**



Abuse on social media/ other digital channels



Threats of rape from male/ other gamers

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)

▲ Significantly higher than other gender

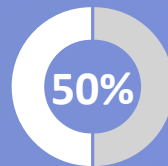
20

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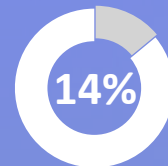
This widespread toxicity is having an impact on players' gaming, particularly so for female gamers

Females are significantly more likely to feel upset and intimidated by abuse, and **1 in 4** say it makes them **not want to play again**

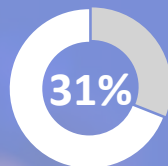
Depressed
Upset
Intimidated
Scared
Anxious Angry
Like not playing again



Feel I'd **have to practice** before joining an online multiplayer game

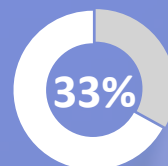


Avoid online multiplayer altogether, through fear of negative reactions from male players



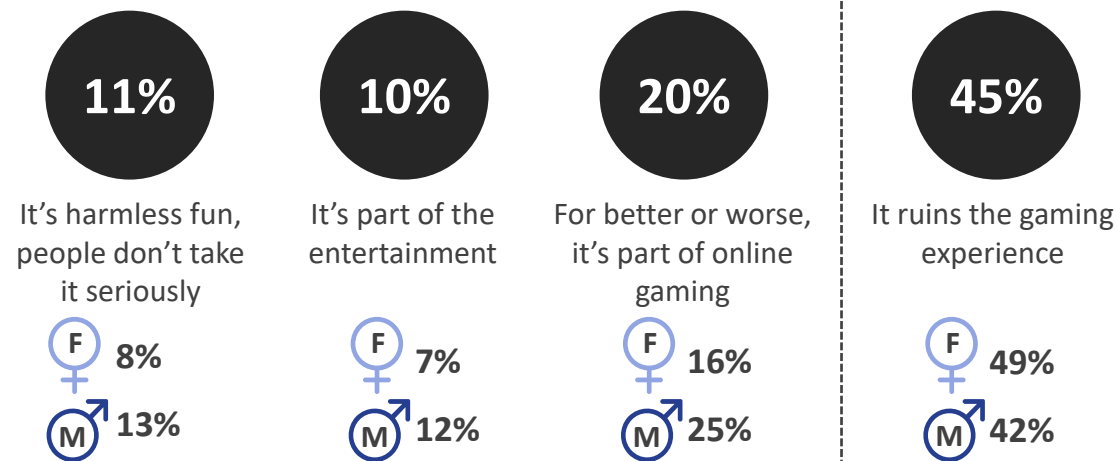
I often don't reveal that I am a female gamer when playing online multiplayer games

No improvement since 2019 (30%)



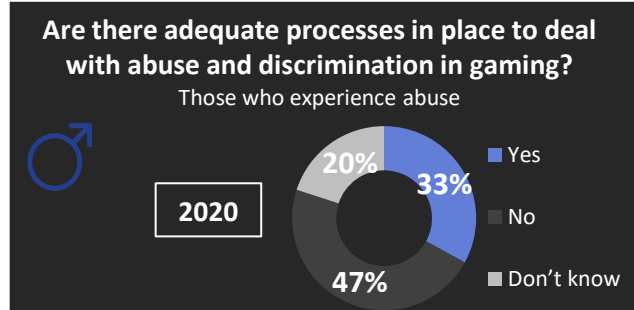
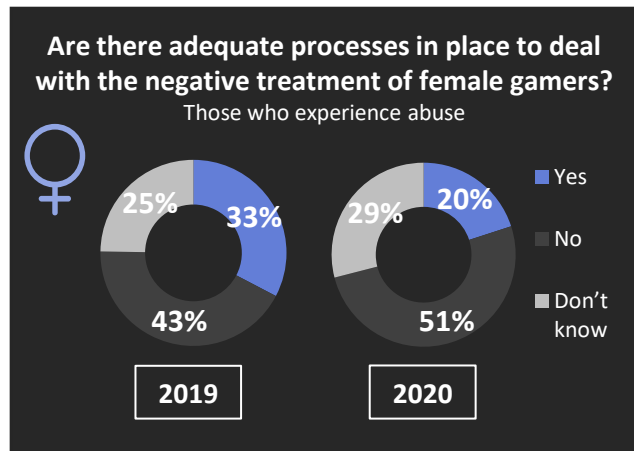
Avoid speaking in online multiplayer, through fear of negative reactions from male/other players

Although males are more likely to view abuse as an unavoidable part of gaming, both believe there are inadequate processes to deal with it



It's just general abuse, you have to accept there are so many ppl online you won't get on with. It's part and parcel, best thing to do is ignore the fools and enjoy your friends
Male, 36 | UK | Xbox One, Nintendo Wii, PC

[I've been called] the usual things that most people get called. Retard, idiot, dumbass, etc... I've also been told to kill myself. None of it bothers me though
Male, 31 | US | PS4, Xbox One, Nintendo Switch, PC



A minority of players admit to taking part in abuse, and those who do largely report it as a response to abuse





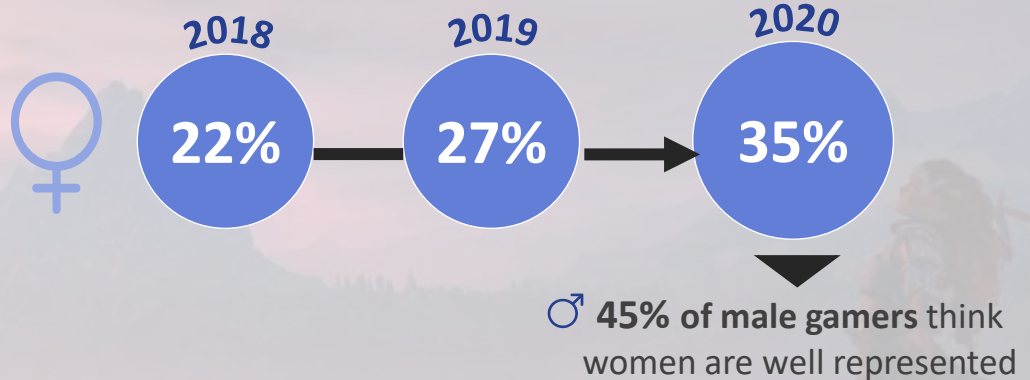
Attitudes towards the industry

Female representation in the gaming industry has continued to improve, but 1 in 5 female gamers still see it as masculine

Males are more likely to be *wholly* positive about the gaming industry, more often describing it as 'progressive', 'inclusive' and 'innovative', whereas females were significantly more likely to describe it as 'sexist' and 'masculine'

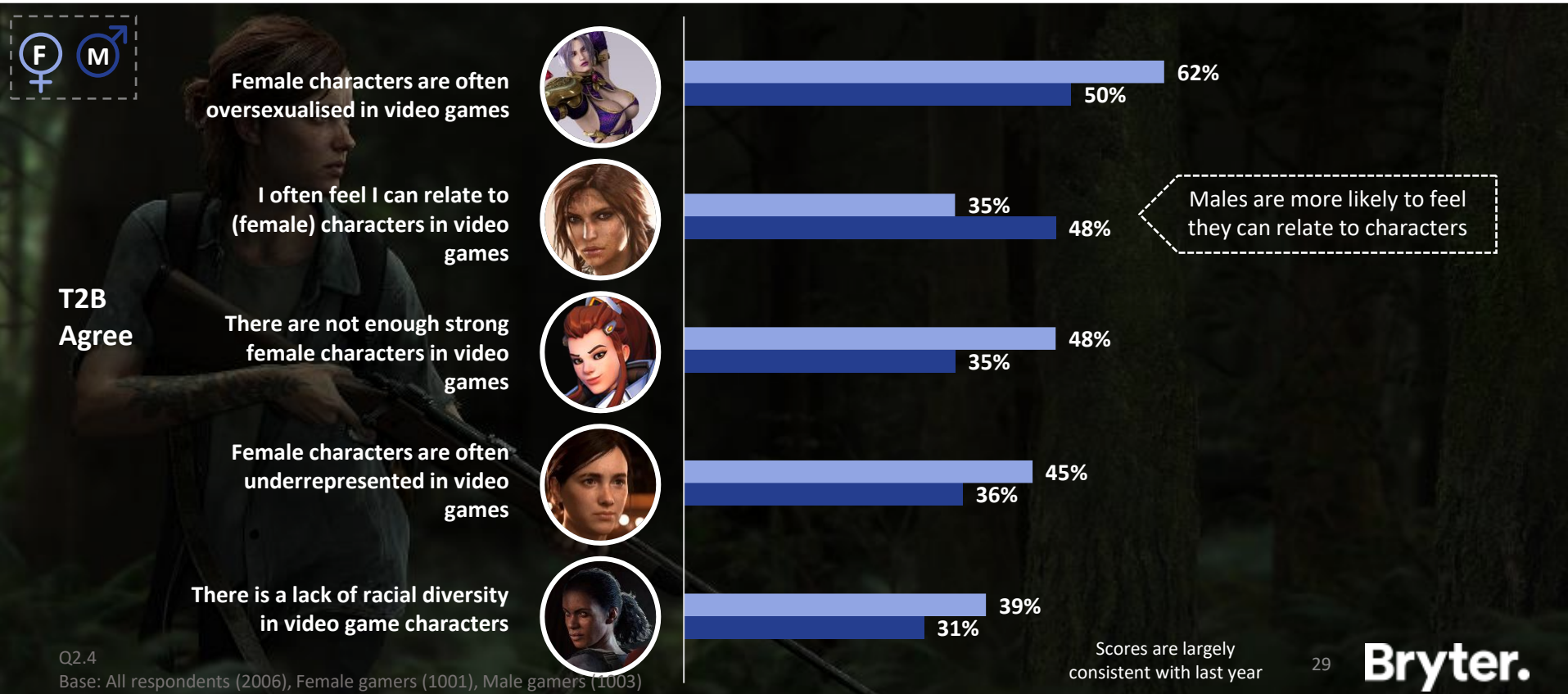
Inclusive
Sexist
Universal
Open
Exciting
Elitist
Boring
Innovative
Progressive
Cliquey
Geeky
Masculine

'Women are very/quite well represented in the gaming industry'



41% of gamers agree that the industry is doing more to encourage females into gaming careers

Male gamers are more likely to feel they can relate to characters, while females largely still feel that female characters are lacking

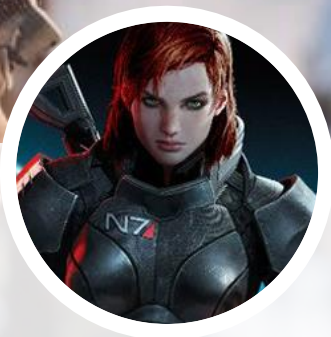


Males are more likely to feel that progress is being made, although there has also been positive change among female gamers since last year



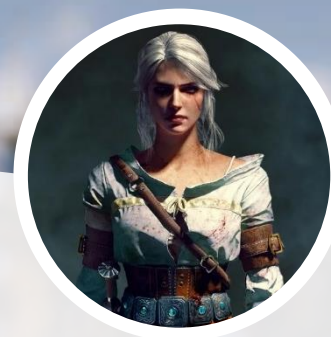
54% 56%

Number of female characters has increased



45% 52%

Depiction of female characters has improved



44% 47%

More games are being designed with females in mind



42% 50%

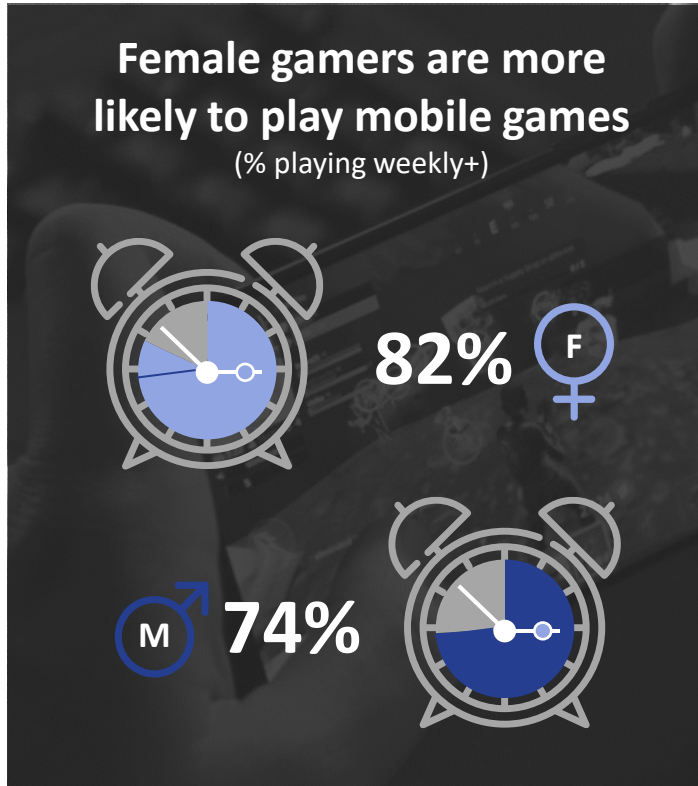
The industry is doing more to encourage female gamers



A person's hands are shown holding a smartphone, with the screen displaying a game. The entire image is covered by a semi-transparent blue filter. A dark grey rectangular box is positioned on the left side, containing the text 'Mobile gaming' in white.

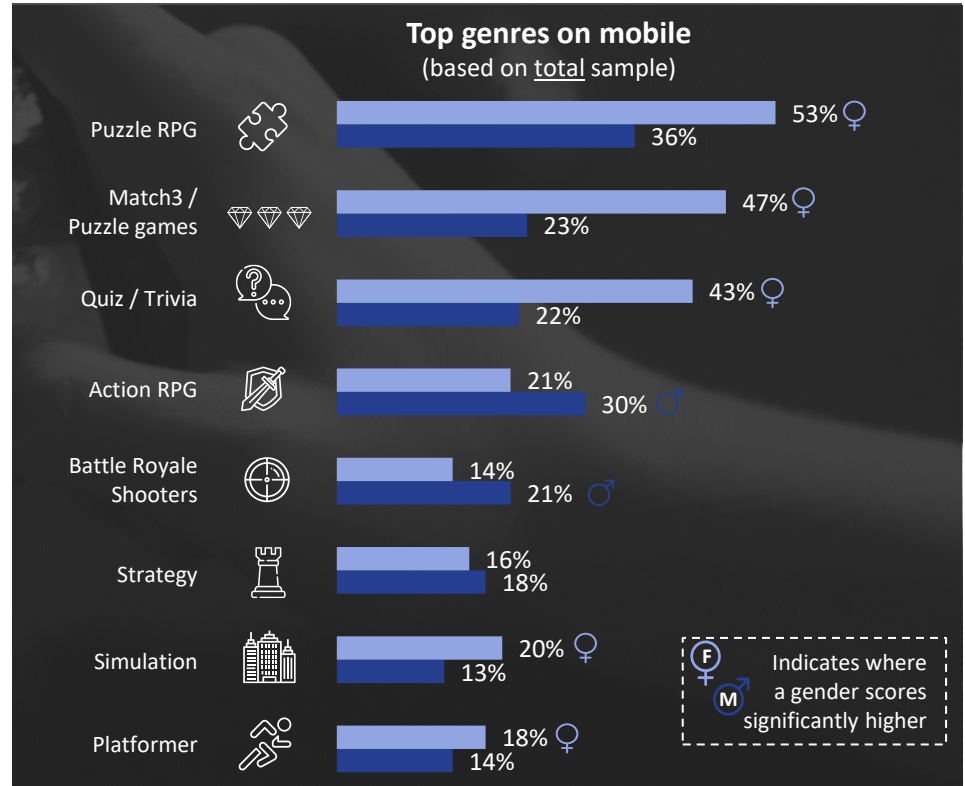
Mobile gaming

The majority of gamers are playing mobile games weekly, and are more likely to play casual genres

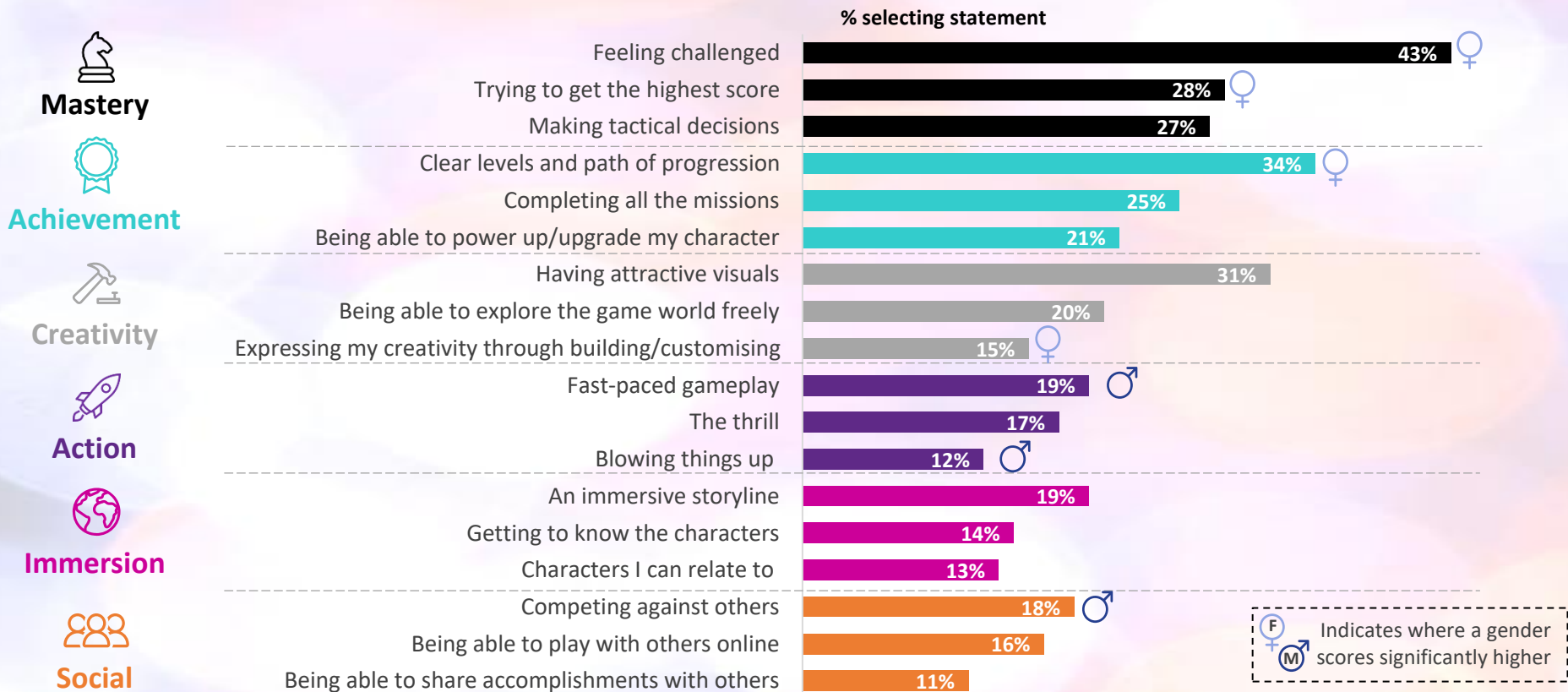


Q4.1/Q4.2

Base: All respondents (2006), Female gamers (1001), Male gamers (1003), Those who play mobile games (1803): Female (934), Male (867)



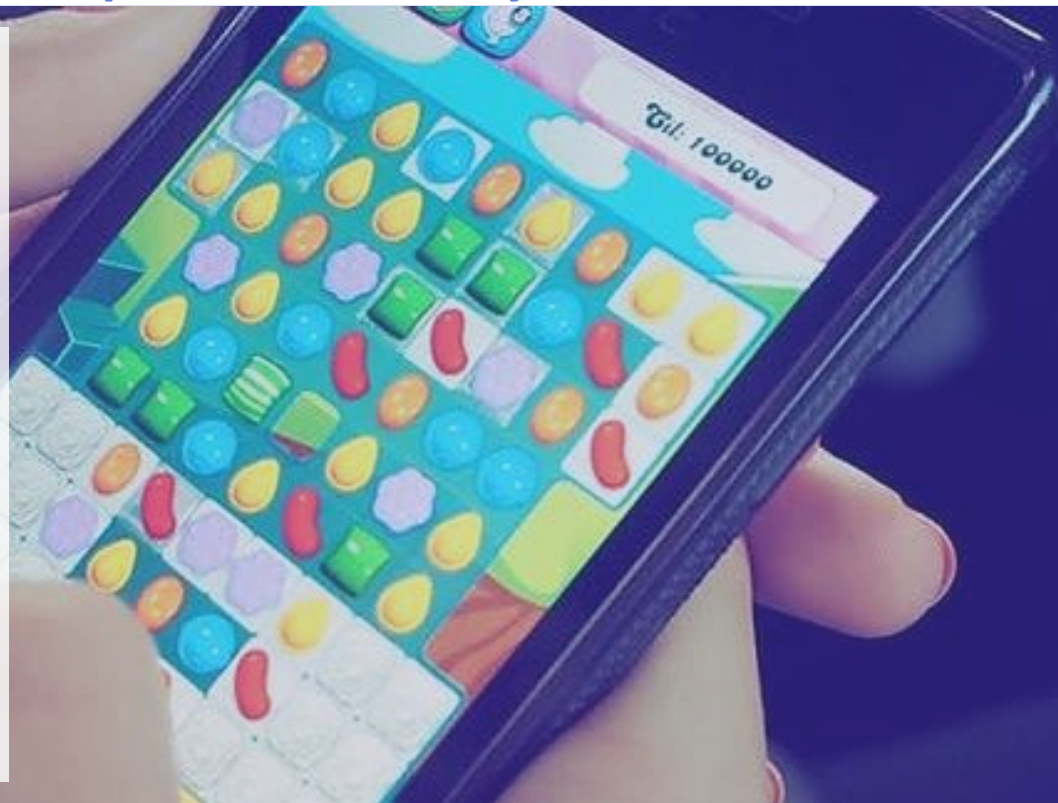
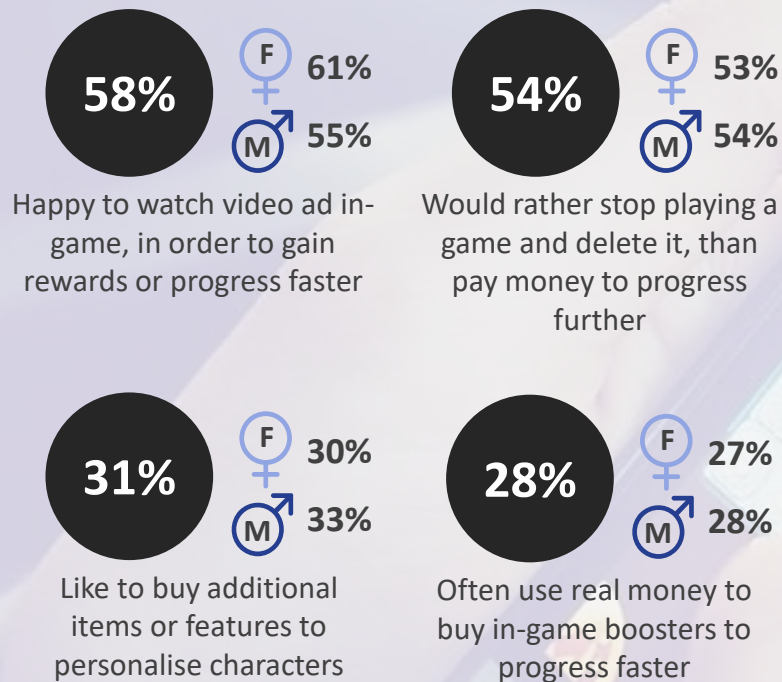
As with console and PC, challenge is the top priority for mobile games



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)

Females are significantly more likely to watch video ads to progress, but both genders are reluctant to spend real money



The background of the entire slide is a deep blue color, overlaid with a pattern of numerous jellyfish. The jellyfish are depicted in various sizes and orientations, some appearing as simple, glowing spheres while others show more detailed tentacles and internal structures. They are scattered across the frame, creating a sense of depth and movement.

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Introducing Bryter

www.bryter-research.co.uk

We combine the latest thinking with innovative approaches, to deliver insights that help businesses connect with customers or players



Who buys and why

Understand who to target and how to connect with them



How they buy

Identify how to get noticed and chosen by potential players



Why they stay

Discover why players stick with you or why they choose competitors



NPD

Uncover opportunities and create compelling products & experiences

More about our playtesting methodologies...

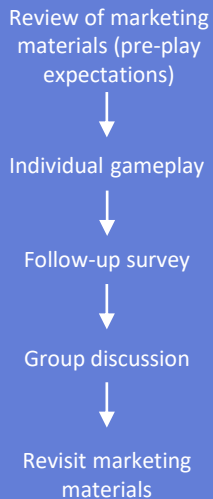


Face-to-face playtests

Face-to-face qualitative groups held in a viewing facility. Consisting of gameplay and focus group discussion. We can also test other assets such as name/logo design, key artwork, narrative etc.

- ✓ Easy observation for clients in real time (streaming up to 6 screens simultaneously to the viewing room or online)
- ✓ In-the-moment responses captured
- ✓ Hardware and technical issues can be dealt with instantly
- ✓ Audience are brought to life to a greater extent

Example Structure

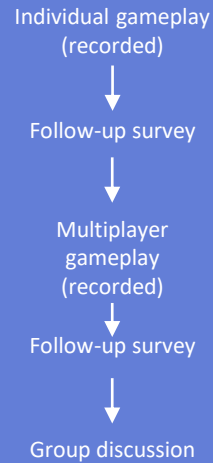


Online playtests

Playtesting via an online platform. This can be set up as a one-off session, or to run over several days. We can set specific tasks/objectives or allow 'free-play'. As well as recording gameplay, we can also include follow-up surveys

- ✓ Players play in a more natural environment
- ✓ Screen recording functionality to capture natural gameplay (video montage of gameplay can be created as a deliverable)
- ✓ Individual surveys to capture unbiased responses before any group discussion
- ✓ Longitudinal; gamers play over an extended period and we can see attitudes evolve
- ✓ Geographical spread of respondents

Example Structure



CASE STUDY | Face to face mobile playtesting

We helped a mobile gaming developer with the development of a brand new midcore title



CHALLENGE

Our client was in the progress of developing a new midcore mobile title, and wanted to test both the gameplay mechanics and the gameplay experience, in order to establish whether it was engaging and to which audiences. As a secondary objective, they also wanted to identify which marketing assets would be the most effective in driving players to download the game.



SOLUTION

A series of playtest focus groups, with players from a mix of possible relevant genres. We firstly tested the marketing assets and players' perceptions of the game based on these. We then invited players to play the game during the session (live streaming each player's gameplay screen into the observation room), and then evaluate it, before open group discussion. Conversation covered a range of aspects such as narrative, characters and comprehension, as well as general enjoyment of the game.



OUTCOME

Our research identified which elements of the game were most engaging and which could be further developed in order to increase retention. We also identified which marketing assets would be most likely to encourage download, and possible improvements for these.

CASE STUDY | Remote PC playtesting

We helped a PC/console developer understand the initial onboarding experience of their new title in order to help final development before game launch



CHALLENGE

Our client were finalising their new PC title, ready to launch the following month. After previous research had showed some player churn in the initial levels, our client wanted to understand player's perceptions of the onboarding process, and also to identify any specific pain points during early gameplay that may prevent player retention.



SOLUTION

We conducted two phases of playtesting in order to test different game modes, with two different target audiences. The test was carried out on an online platform, allowing individual gameplay sessions with screen recording, follow-up surveys, group gameplay sessions, and focus group discussion. This allowed us to observe players' gameplay experience in both solo and multiplayer mode, as well as to further explore their reactions to the game, both at an individual and group level.



OUTCOME

We were able to identify specific points within the game that resulted in confusion or frustration, and consequently, suggest player-based solutions. The insights also uncovered the key game components or features driving player engagement, helping to identify which to build on more or prioritise in comms.

CASE STUDY | It's all in the name

We helped a PC/console developer identify the most engaging game name, logo and boxart for their next shooter instalment



CHALLENGE

Our client was developing the next instalment of a game franchise for PC and console. They wanted to identify the most engaging title, that would appeal to their current loyal fans, but also attract new players to the franchise. They also wanted to refine their logo and boxart design, in terms of colour, font and imagery.



SOLUTION

We conducted an online quantitative survey, using a mixed sample of the client's own franchise players, plus a broad spectrum of 'competitor' shooter players. The survey used a laddered approach, first testing the name alone, then gradually adding elements, such as the logo, and boxart.



OUTCOME

Our survey helped identify the ideal game name and logo/boxart combination to maximise interest amongst both current franchise players and prospective players. We were also able to offer general feedback and suggestions for the new title, based on open opinions from fans.

CASE STUDY | Understanding brand awareness and brand identity

We helped a major AAA developer/publisher understand their brand identity and how this could be leveraged for their development in the mobile space



CHALLENGE

Our client – well known in the PC and console space – were developing their mobile offering and wanted to understand how they could leverage the overall brand within this space. They wanted to understand brand awareness and perceptions, and how these compared to competitors. It was also important to explore this brand identity across different markets.



SOLUTION

We recommended a two-stage approach, covering two key but very different markets; S. Korea and the US. The first, qualitative stage was conducting four focus groups in each market, in order to understand how players perceive brands and how this transfers to the mobile category. We then conducted an online survey within both markets, using advanced statistical tools such as drivers analysis and perceptual mapping, in order to quantify the key brand attributes across the competitor landscape.



OUTCOME

Firstly, we uncovered brand awareness issues, looking across platforms and at a brand versus IP level. The insights also created clear maps of the market landscape, identifying which attributes drove brand affinity, and which ones were distinct to the brand in question versus competitors.

CASE STUDY | Increasing Virtual Reality engagement

We helped a major console developer identify possible barriers to usage/ purchase for their VR hardware



CHALLENGE

Our client wanted to grow the player base of their VR hardware, by driving positive engagement and avoiding purchase regret. In order to do this, we wanted to understand how players used their VR hardware, how this may have changed over time, and if there were any barriers to usage.



SOLUTION

We conducted research across 6 markets, using a two-stage approach. Firstly, we carried out 20 in-home interviews with VR owners to see first-hand how they interacted with the VR hardware. We then used these insights to create an online survey to help identify the key barriers and behaviours.



OUTCOME

The insights generated helped the client to really understand the player experience, through videos and photos. We also identified key causes of declining usage and possible purchase barriers, that needed to be addressed in order to grow the player base.

CASE STUDY | Identifying a target audience and shaping marcomms

We helped a major mobile games developer in shaping their creative and marcomms. strategy for a new game



CHALLENGE

Our client wanted to develop their launch strategy for a new game:

- Firstly, understanding which game elements were most appealing, in order to inform development of the creative and production strategy.
- Secondly, they wanted to test different game positionings in order to identify the most engaging marcomms.



SOLUTION

Online quantitative survey to test appeal of different creative routes for the game, both in terms of actual gameplay elements and game messaging (app store description, images, video, game titles).



OUTCOME

Our research provided the client with the insight that helped them decide which elements of gameplay should be further developed or prioritised.

We also helped them identify how best to position the game, in terms of the name, the imagery and messaging used



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