Bryter.

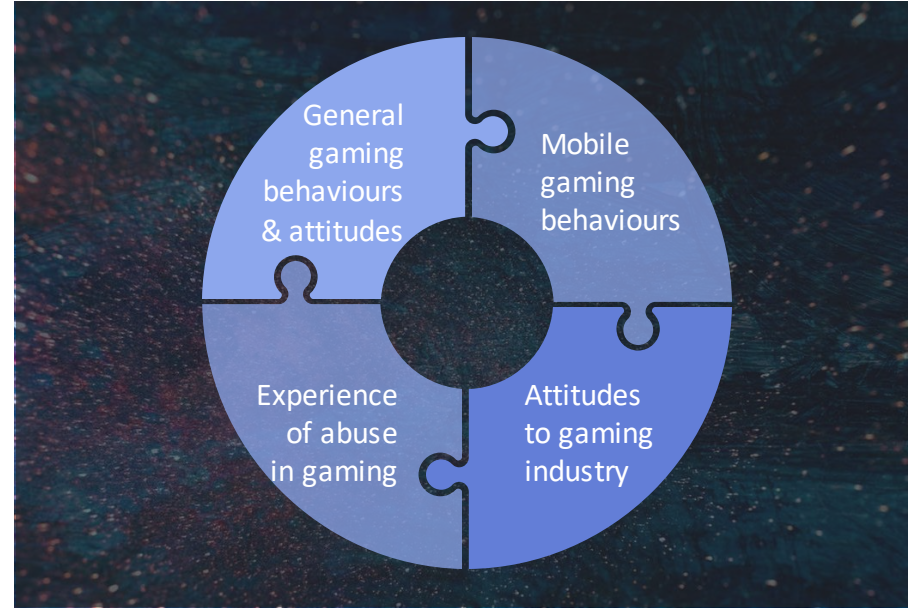## Female Gamer Survey
2019

Bryter.

Background

Bryter.

Bryter's Female Gamer Survey 2019

In 2018, we conducted an online survey with female gamers in the UK.

In 2019, we re-ran the same study but this time including gamers from the US as well.

We retained the same survey structure, but also added questions around eSports and attitudes towards mobile gaming

General gaming behaviours & attitudes

Mobile gaming behaviours

Experience of abuse in gaming

Attitudes to gaming industry

Bryter.

We spoke to a range of console and PC gamers

All respondents were female, aged 16+ and played video games on a PC or console at least monthly…

PlayStation	Nintendo	Xbox	PC
42%	**45%**	**38%**	**42%**

Console only
58%

PC Only
19%

Bryter.

Gaming habits

Bryter.

How female gamers compare in the UK and US

OVERVIEW

Overall, female gamers in the US and UK are very similar in their general gaming behaviours, but there are slight differences in more specific behaviours and attitudes

PERCEPTIONS

The UK tends to have a slightly more negative perception of the games industry in terms of its gender equality and representation.

More gamers in the US have experienced abuse from male counterparts while gaming.

STREAMING

Female gamers in the US are more likely to stream themselves or others gaming, and watch eSports (with the latter having a bigger presence in the US).

MOBILE

Gamers in the US seem to take mobile gaming more seriously, more likely to play RPG/strategy/action-adventure genres, whereas the UK don't feel it's as good an experience as on PC/console

We'll pull out some of these differences as we go through…

Bryter.

Gaming habits: female gamers are playing an average of 7hrs a week, with online multiplayer becoming more popular

7 hrs
Average time playing console/PC per week
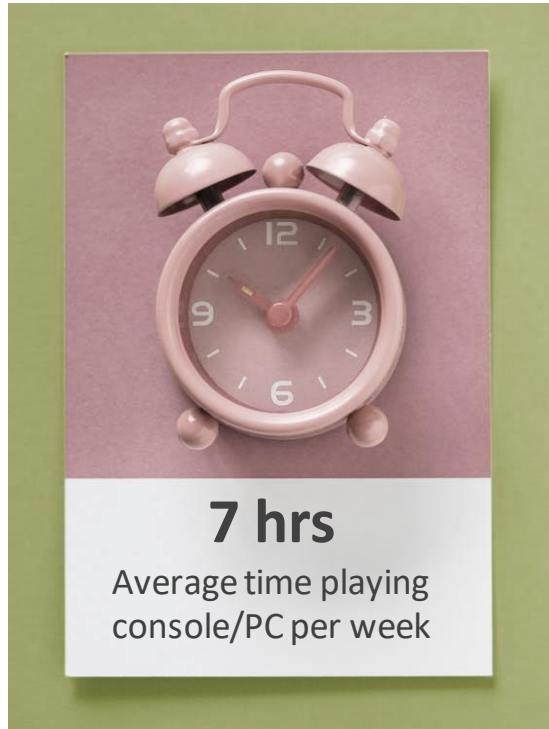
Top genres on console/ PC

65%		Action/ Adventure
57%		Puzzle/ card
36%		Strategy
30%		Platform games
28%		Simulation
27%		Shooters
27%		Music/ dance

Top genres amongst males tend to be:
Shooters, Sports, Action/Adventure, Strategy

Proportion playing online multiplayer games has increased since last year...

45% ➡ **52%**

2018   2019

55%

49%

Genres <27% not shown

Bryter.
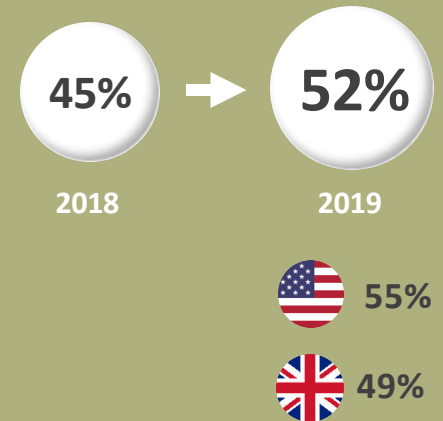
2 in 5 don't consider themselves as 'proper' gamers. They tend to play to relax and unwind, but still want to feel challenged

38%
Wouldn't call themselves a 'proper gamer'

Is this label too intimidating?

Does it relate to how they game?

63%
Play games to relax and unwind

....however, they are still looking to be challenged...

What's important to them?

Feeling challenged **46%**

Clear levels/ progression **45%**

Attractive visuals **45%**

Gameworld exploration **34%**

Immersive storyline **31%**

Elements low in priority are multiplayer/ community related

Bryter.

When looking for the next game to play, most seek advice from their peers, although online reviews also play a key role

Most look to friends/peers for advice on which games to play

Friends' recommendations	**52%**
Word of mouth	**52%**

Online channels are also very influential

Online player reviews	**39%**
Gameplay videos/ walkthroughs	**26%**
Online expert reviews	**25%**

🇬🇧 UK are more likely to use online reviews from either players (41%) or experts (29%)

Around 1 in 5 use rankings to help them decide

Game charts/ rankings	**18%**

Bryter.
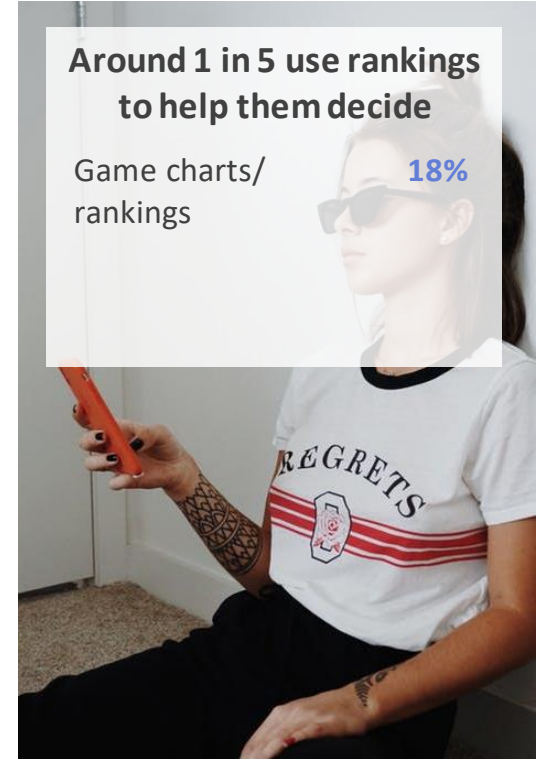
1 in 3 are watching other gamers online regularly, but many feel there is a lack of female streamers
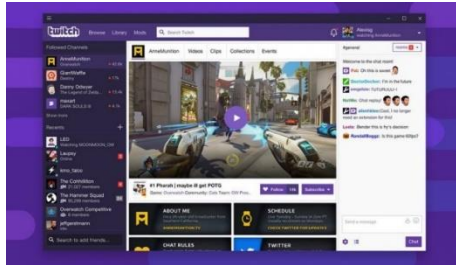
Watch other people play games online
(weekly+)

34%
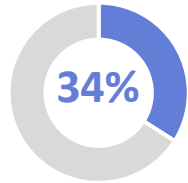
🇺🇸 **38%**

🇬🇧 **30%**

By gaming frequency

⏱ <6hrs **28%**   ⏱ 6-15 hrs **43%**   ⏱ 16+ hrs **49%**

Why do they stream others?

52% Learn tips

48% Pure entertainment

42% Follow favourite gamers

37% For the humour

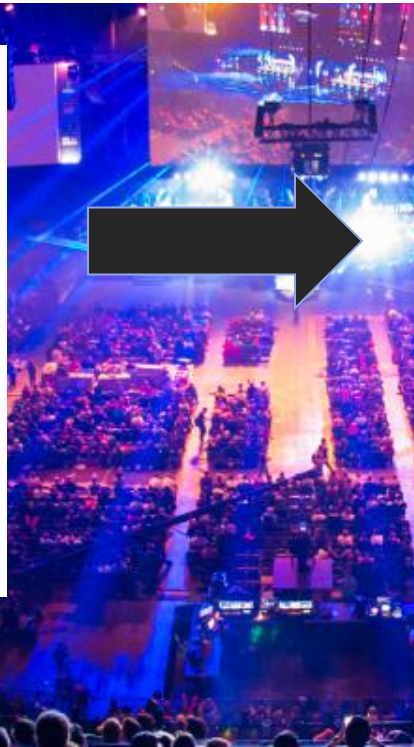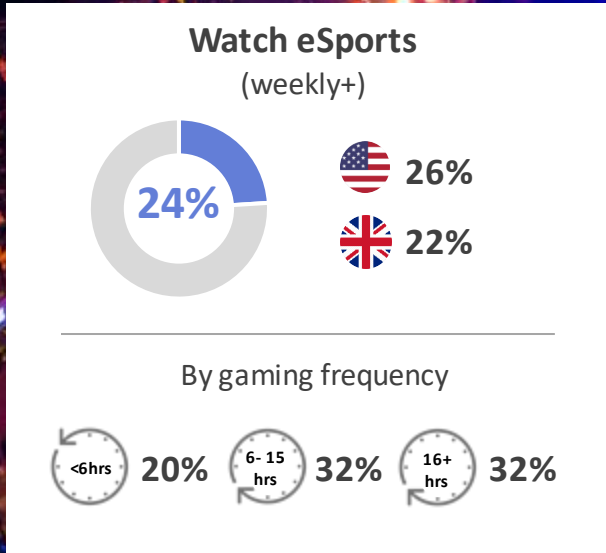**Attitudes to streaming?**
(those who stream weekly+)

58% There aren't enough female gamers streaming
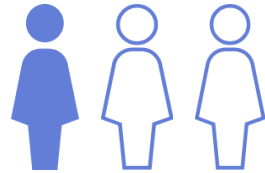
45% A lot of content seems sexist

1 in 4 watch eSports regularly, although majority feel there needs to be better female representation here

Watch eSports
(weekly+)

24%

🇺🇸 **26%**

🇬🇧 **22%**

By gaming frequency

🕐 <6hrs **20%**   🕐 6- 15 hrs **32%**   🕐 16+ hrs **32%**

% Agree

65% eSports community should organise more **mixed gender tournaments**

60% There is a great **lack of female gamers** in eSports

60% I would **watch more** eSports if there were **more female teams** or tournaments

59% Gaming community **isn't doing enough to encourage** female gamers in eSports

Abuse and discrimination

Bryter.

Level of abuse has not changed since 2018

1 in 3 female gamers have experienced abuse or discrimination from male gamers

Where?

65%
Playing online

36%
In online forums/ discussions

28%
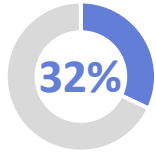Playing with friends offline

1 in 2 amongst those who game online

US gamers are most likely to experience abuse from male counterparts:

40%

28%

Bryter.
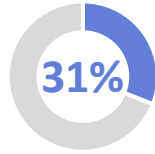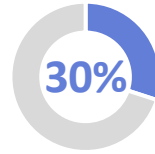
Female gamers are experiencing a range of abuse

32%

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

🇺🇸 35%

31%

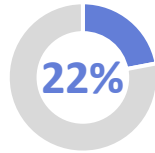**Verbal abuse** from male gamers while **playing online multiplayers**

31%
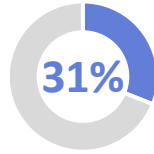
Sexual harassment from male gamers

🇺🇸 35%

30%

Negative actions of gameplay in online games from male gamers
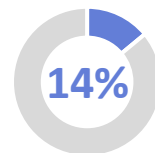
26%
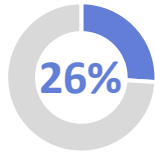
Excluded from **participation** in games because of gender

22%

Verbal abuse from male gamers **offline**

🇺🇸 28%

15%
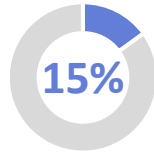
Abuse on **social media/** other digital channels

14%

Threats of rape from male gamers

🇺🇸 17%

US gamers appear to experience a broader range of abuse both online and offline

Bryter.
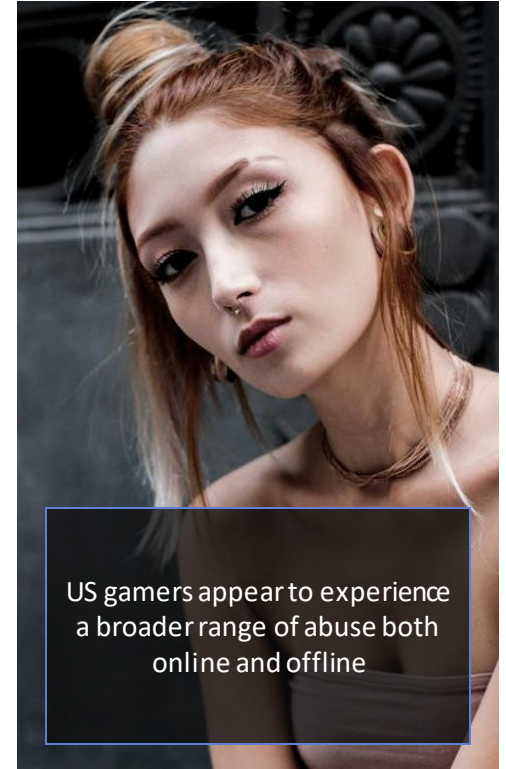
Abuse and comments are often very graphic

"What's your **snapchat**, bitch give me your Snapchat... fine go **make me a sandwich** in the kitchen because that's all women are good for."

Aged 16-24 | PS4

I've had **rape** and **sexual assault** used as a **joke** and when I said 'hey that's not cool or funny' I was told 'Ugh, come on, I'm only kidding. **Women like you are so uptight**.'

Aged 25-34 | Nintendo Switch, Wii, PC

I was told that there are **never real girl gamers**, that we just say we're into video games so we can get dick. He also then said if he knew where I lived **he would stalk me** down and **rape me**.

Aged 25-34 | PS4, Nintendo Switch

I was told that he would **find where I live** and **rape** and **kill** me in my sleep and then possibly kill my **whole family**.

Aged 16-24 | Xbox One, Wii, PC

Bryter.

This has significant impact on their online gaming...

All female gamers

47%

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

12%

I **avoid online multiplayer games** altogether, through **fear** of negative reactions from male players

Those who play online

30%

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

23%

I **avoid speaking** in online multiplayer games, through fear of negative reactions from male players

Fear around revealing gender in online games has dropped slightly since 2018

35%   **30%**

These patterns are consistent across the US and UK, although online gamers in the **US** are more likely to **avoid revealing their gender**

🇺🇸 **33%**

🇬🇧 **28%**

Bryter.

Progress has been made but more needs to be done to reassure female gamers that there are mechanisms in place to help prevent abuse
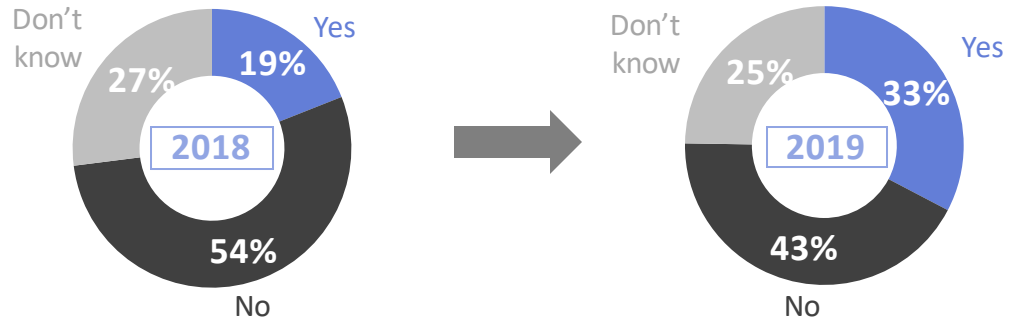
There has been positive change since last year...

More of those who have experienced abuse, feel there are adequate processes in place to deal with such instances

...However, there's still a way to go

Are there adequate processes in place?
Those who experienced abuse

Don't know **27%**
Yes **19%**
No **54%**
2018

Don't know **25%**
Yes **33%**
No **43%**
2019

- The challenge of finding the **balance** between **free speech** and ensuring online gaming is a **safe environment** is a tough one
- Riot games started researching into this over 5 years ago and have found ways to reduce the level of verbal abuse, however, it is a **slow process**
- Some of the methods being used by Riot, and others like Ubisoft and Blizzard, include **rewards for sportsmanship** and virtuous behaviour, using **tips** or **stats** to encourage positive comments, **self-policing** from players etc.
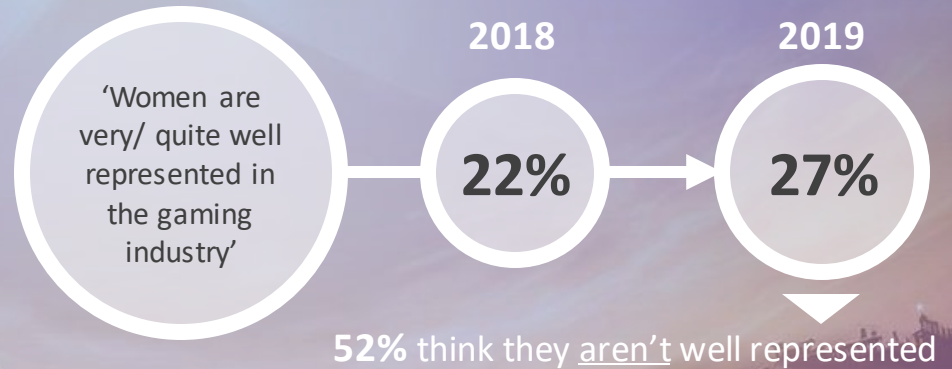
Bryter.

Attitudes to the industry

Bryter.

Representation of females in the games industry has improved but there are still disparities in pay

Both the UK and US are similar in their perceptions of the industry, being largely positive. Although the UK are more likely to view it as masculine and sexist

Inclusive
Universal
Sexist
Open
Exciting
Elitist
Innovative
Masculine   Cliquey   Geeky
Progressive

Perceptions of female representation in the industry have improved slightly, but there is still a way to go

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

2018

22%

2019

27%

52% think they <u>aren't</u> well represented

A recent gamesindustry.biz article reported an increase in the gender pay gap in the UK games industry, despite women increasing their representation throughout gaming.
Of the 19 games-related companies GamesIndustry.biz identified, every single one paid women a lower median wage than men.
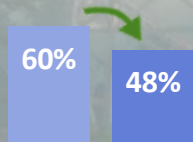
Female character development has seen improvements all round, although 3 in 5 still feel they are often oversexualised
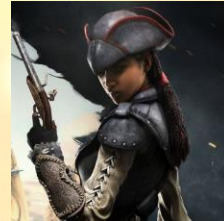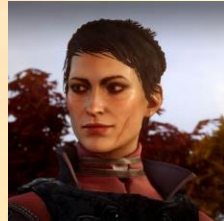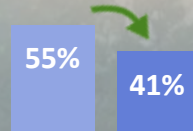
T2B Agree
2018
2019

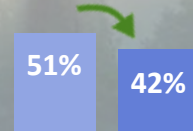|				
71% → 61%	60% → 48%	55% → 41%	51% → 42%	29% → 35%
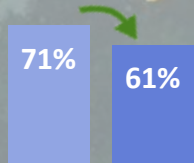
Female characters are often oversexualised

There are not enough strong female characters

🇬🇧 51%
🇺🇸 45%

Female characters are under-represented

🇬🇧 44%
🇺🇸 38%

There is lack of racial diversity with female characters

🇺🇸 45%
🇬🇧 40%
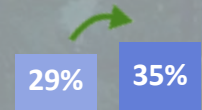
I often feel I can relate to female characters in video games

Bryter.

Similarly to last year, most female gamers recognise that progress is being made
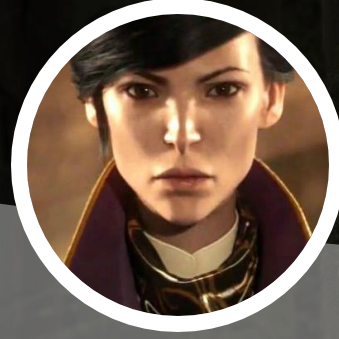

48%
Number of female characters has improved

43%
Depiction of female characters has improved

42%
More games are being designed with females in mind

40%
The industry is doing more to encourage female gamers

% of those agreeing with the statement
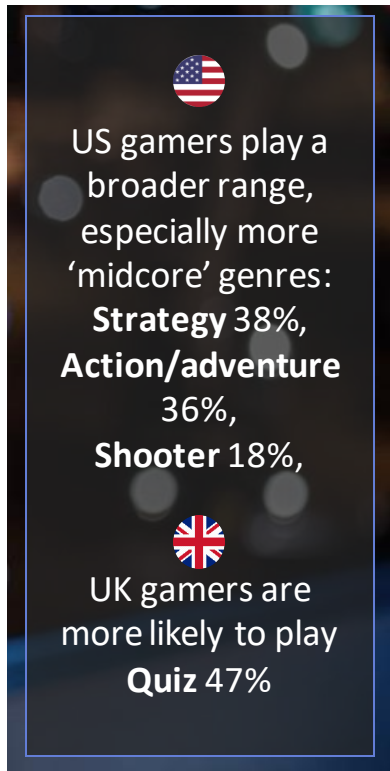Base: All female gamers

24 |

Bryter.

Mobile gaming

Bryter.

Majority of female gamers also play mobile games regularly, although these are more likely to be puzzle games than action/adventure...

73%
play mobile games weekly+

39%
play every day

Gamers in the US are more likely to be playing mobile games regularly...

🇺🇸 **81%**   🇬🇧 **66%**

Genres played on mobile

52% Word puzzle

41% Quiz

39% Arcade

37% Card/ dice

35% Strategy

35% Match 3/ Linker puzzle

32% Action/ Adventure

🇺🇸 US gamers play a broader range, especially more 'midcore' genres: **Strategy** 38%, **Action/adventure** 36%, **Shooter** 18%,

🇬🇧 UK gamers are more likely to play **Quiz** 47%

Bryter.
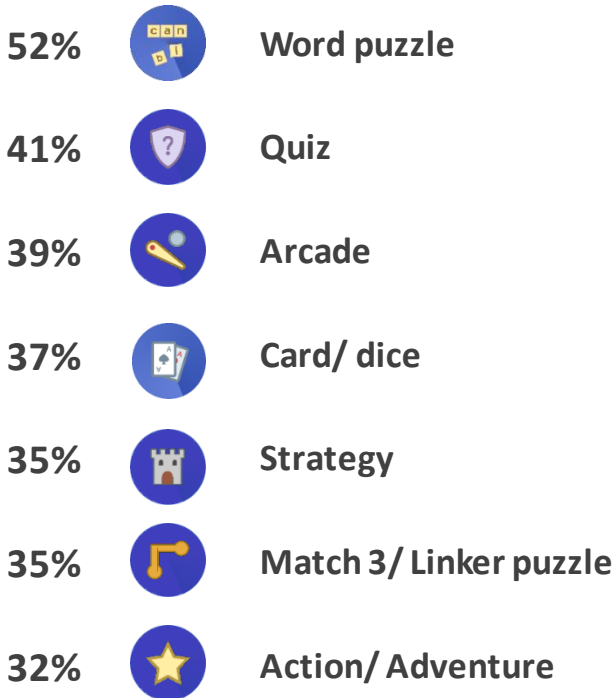
Mobile games are usually played more casually, but doesn't mean they can't offer a similar experience to PC/ console

Attitudes to mobile games   % selecting statement

Statement	%	UK
I play to switch off & unwind	38%	
I only play for short bursts	29%	🇬🇧 33%
I like to be challenged	27%	
I would never pay for mobile games	23%	🇬🇧 29%
I only play mobile games to kill time	19%	
It's not as serious as console/ PC	19%	🇬🇧 24%
I wouldn't class them as video games	17%	🇬🇧 21%
It's not as immersive as console/PC	15%	
I get bored with them very quickly	14%	

Mobile games tend to be played in **shorter bursts**, to **relax** and **unwind**…however, players still want to feel **challenged**

Although **1 in 5** think mobile games **aren't as serious** as PC/console games, this doesn't mean to say they can't be **immersive** and **engaging**.

Bryter.

Half of mobile gamers are females, however, games are often still perceived as being geared towards men

In the US, around 65% of females aged 10-65 play mobile games*. The majority actually prefer to play on mobile. However, the opportunity is not being fully utilised as many games are still being made with males in mind

48%

A lot of midcore/ hardcore mobile games are geared towards males

44%

Mobile games for young children instil gender stereotypes in their design

🇬🇧 48%
🇺🇸 41%

43%

A lot of mobile games use sexist stereotypes in their design

🇬🇧 46%
🇺🇸 40%

42%

I am put off by games that look overly 'girly'

🇬🇧 46%
🇺🇸 38%

% T2B Agree

Bryter.

Jenny McBean
jenny.mcbean@bryter-uk.com

Seb Martin
seb.martin@bryter-uk.com

+44 (0)20 7033 7300
www.bryter-research.co.uk

Bryter.