

Bryter.

Female Gamers Study 2022:
eSports & Streaming



Intro

Year on year, the number of women and girls attracted to gaming has been on the rise, with women now making up almost half of the gaming population. And within the gaming industry, more and more women gamers have begun to participate in streaming and eSports, both as participants and as viewers.

Unfortunately, female representation in these two sectors is low, and toxicity and discrimination runs rampant. This has led many women gamers to wonder whether there is a place for them in the world of streaming and eSports.

Going forward, the onus will be on the gaming industry to provide a safe and encouraging environment for women gamers, so that they can participate fully and actively in streaming and eSports.

In Bryter's 2022 Female Gamers Study, we explore the behaviours and experiences of women gamers and how we can tackle toxicity. In this report, we will focus specifically on streaming and eSports, highlighting what we have learned about the experiences of women gamers (and the toxicity they have faced) in these two areas.



Methodology

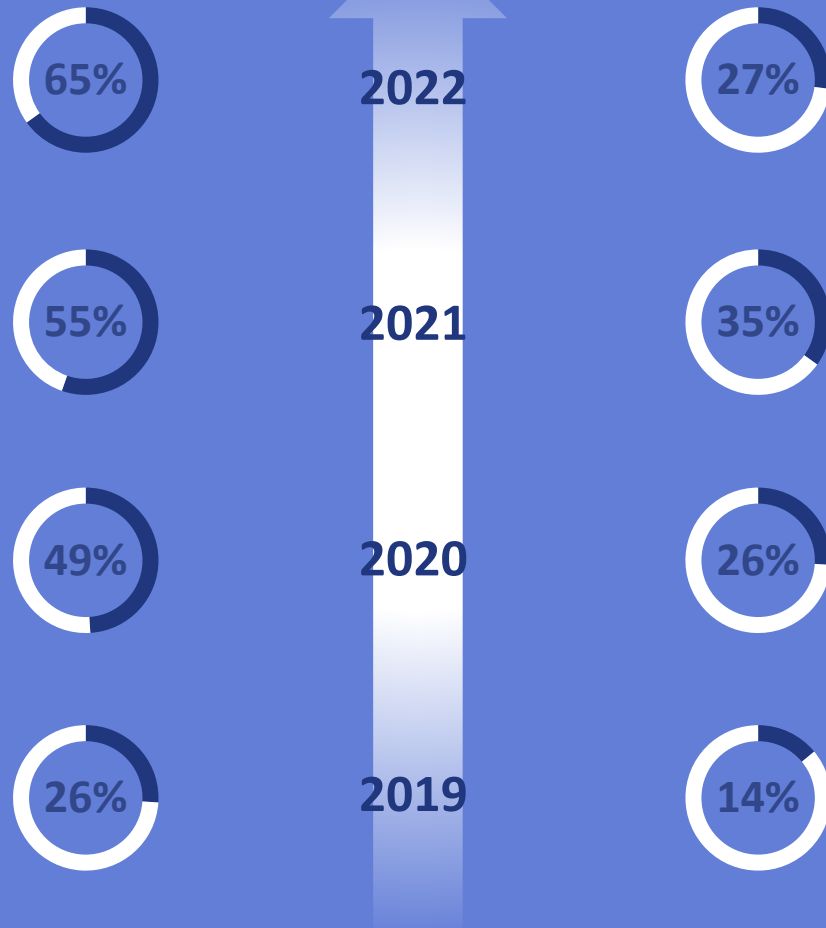
Bryter's Annual Female Gamers Study has been running for five years, tracking gaming behaviours and experiences over time.

In this 2022 study, we surveyed 1,500 women gamers spread evenly across the US, UK and China (year on year comparisons refer to the US & UK, as China was a later addition).

Respondents were aged 16+ and played on console or gaming PC/laptop at least monthly. Fieldwork was conducted in March 2022.

% of women gamers that
stream *others* online
(weekly+)

% of women gamers that
stream *themselves* online
(weekly+)



Streaming continues to gain traction

In recent years, streaming has taken off in popularity. More and more women gamers hopping on to the trend each year, whether it be by watching others play games online or by broadcasting themselves while they play. And the increasing popularity of streaming has led to lucrative monetization opportunities driven by ad revenue, subscriptions, and viewer donations.

We have tracked streaming popularity over the years, both in terms of the proportion of women gamers that stream *others* online, and the proportion that stream *themselves* online. Over time, we have seen the proportion of women gamers who stream *others* online rise steadily, nearly tripling since 2019. The story differs for women gamers streaming *themselves* online. While this metric rose steadily between 2019 and 2021, this year's findings suggest otherwise, with fewer women gamers reporting that they stream themselves online this year than last. This trend may reflect the return to normalcy that we have seen post-COVID and decreases in free time that many experienced in 2022.

The Chinese market is one to watch in the world of streaming, with over 90% of women gamers in China claiming to stream other gamers on at least a weekly basis. Streaming platforms here can draw in over 100 million viewers per day, across all games, with League of Legends, Honor of Kings and PlayerUnknown's Battlegrounds amongst the most popular.

Lack of diversity and widespread toxicity are limiting the growth of streaming

With around 2 in 3 women gamers streaming other gamers online on a weekly basis, it is clear that streaming has caught the attention of a wide portion of the gaming market.

In our 2020, we saw that men were significantly more likely than women to watch gaming streams for pure entertainment, while women, are more likely to use it as a resource; to learn tips and tricks in order to play better, or to find out about new game releases and content.

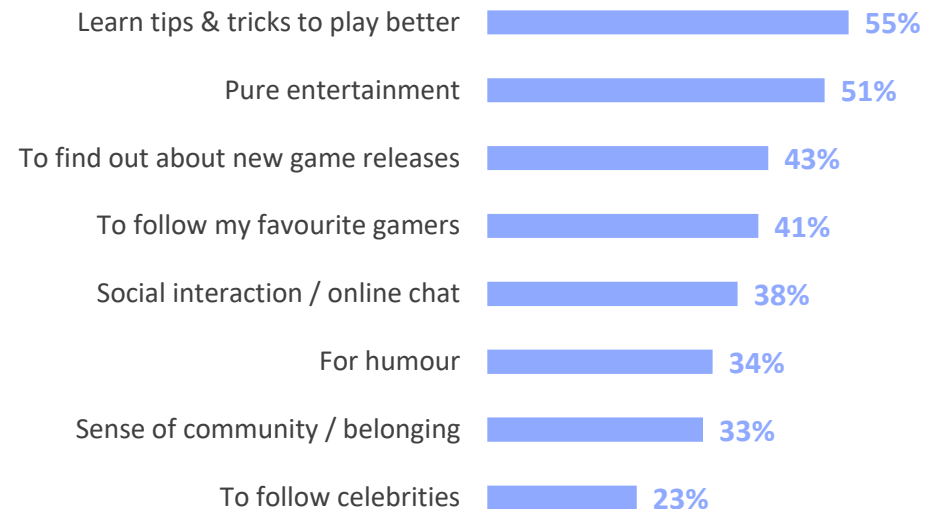
However, our data also suggests that the growth of games streaming is likely being hindered by the apparent toxic atmosphere surrounding streaming; 46% of women gamers feel that a lot of streaming content is sexist, and 41% feel there is a lot of toxicity. Not surprising then, that over half of women gamers feel there aren't enough women streamers.

The negative experiences women gamers often have or witness in the streaming space, likely have a strong correlation to the lack of diversity. Women gamers who have negative experiences streaming are probably less likely to participate in streaming themselves in the future.



41%
of women
gamers are **put
off streaming**
because of the
**toxicity they've
seen online**

Reasons for streaming others



Barriers to streaming

(T2B - Strongly Agree or Agree)



54%

Feel there **aren't
enough female gamers**
streaming



46%

Feel a lot of content
seems **sexist or
misogynistic**



41%

Feel there is a lot
of **toxicity /
discrimination**

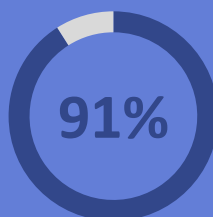
eSports is growing in popularity but driven by China

The global eSports economy has grown significantly in recent years, with viewership totals hitting new heights - the 2022 League of Legends World Championship final reached a peak of over 5 million concurrent viewers online. Revenue from eSports is also booming, as sponsorship and media rights deals generate hundreds of millions of dollars. eSports players themselves also have the chance to win millions of dollars in prize money alone, with some of the largest tournaments boasting a total prize pool of over \$40 million.

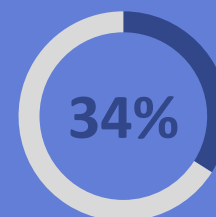
South Korea may be viewed as the creator of eSports, but China is perhaps the biggest market for eSports in terms of viewers and players. Amongst women gamers in China, 9-in-10 watch eSports events on a weekly basis, significantly more than the US and UK, where these figures are just 1-in-3.

However, perhaps the growth of eSports in other markets will be driven further as it reaches a more global stage – in 2022, the Commonwealth Games introduced the Commonwealth eSports Championships alongside the main event, and the Olympic Committee is set to follow with their own inaugural eSports event ahead of the Summer games in 2023.

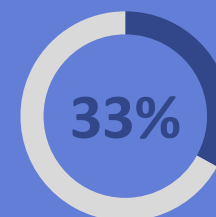
% of women gamers that watch eSports events/tournaments online (at least 1x per week)



China



United States



United Kingdom

All female gamers – US, UK, CN

Female representation in eSports



56%

Feel that there is a great **lack of women gamers** in eSports



54%

Feel that the gaming community **isn't doing enough to encourage women gamers** in eSports

Attending eSports tournaments



36%

Would consider **entering an eSports tournament themselves**



33%

Would feel **intimidated / uncomfortable** going to watch a live eSports tournament



16%

Have experienced **abuse or discrimination from male gamers at gaming events**

*All female gamers – US, UK, CN
% T2B Agree*

Toxicity and lack of representation in eSports stops women gamers from participation

Despite the growing popularity of eSports and monetization opportunities for both professionals and amateurs alike, more than half of women surveyed feel that female representation in eSports is severely lacking.

This likely contributes to the fact that only one third of women gamers would consider entering a local or international eSports tournament themselves. In fact, we found that one in three women gamers would feel intimidated and uncomfortable even watching a live eSports tournament, and 16% have experienced abuse or discrimination from male gamers at similar gaming events in the past (with this number being even greater for women gamers in China).

It is clear that women and girls currently face major barriers to getting involved in eSports. In order to improve female representation in this sector, players feel that more needs to be done to ensure that women gamers feel safe and supported in the eSports industry and at tournaments.

Summary

In recent years, streaming and eSports have emerged as two of the fastest growing sectors within the gaming industry. More and more players are spending time watching their favourite players streaming or taking part in tournaments, sometimes even enjoying it more than playing themselves.

Unfortunately, these aren't always welcoming spaces for all gamers. The majority of women gamers sense the lack of diversity in streaming and eSports, and how this ultimately fosters misogyny and discrimination.

As a growing industry, with such potential, it is important to ensure that is welcoming to all and that there are opportunities for all gamers to get involved.





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Understand gamers, design for the future

We work with a broad range of gamer audiences to understand behaviours, needs and experiences. Ultimately, what is shaping and influencing gamer behaviour in relation to what they play and how they play.

Build, test and launch with confidence

We support our gaming clients through the full spectrum of the development cycle and beyond. From early-stage concepts, playtesting, pre-launch marketing assets and post launch evaluation.

Partner with industry experts

Our experience spans console, mobile, VR and hardware. Bringing together diverse audiences to help our clients understand gamer behaviours in different markets. We utilize a broad suite of quantitative and qualitative methodologies to deliver insight that makes impact.

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