Play like a girl: Key ways to engage one of Asia's fastest growing gaming audiences

In the past five years, the profile of a "typical gamer" in Asia has been totally transformed. As the number of genres increases and storylines become more/lesser, more and more female gamers are getting in on the action.

Check out highlights from the first installment in our new series of insights on Asia's gaming market, commissioned and organized in partnership with Hiku Partners, to understand the evolving landscape and uncover new ways to engage the growing audience of female gamers.

Welcome to the world capital of gaming

Asia has long been a leader in video game fandom. In 2019, the region drove nearly half (**48%**) of the world's total gaming revenue.

2019 global gaming revenue ($145B)

As internet access has expanded and gaming technology has continued to improve, games have become more immersive and accessible to the masses. Among the millions of gamers joining the ranks every year, **females** have been a huge catalyst for growth.

The number of female gamers in Asia is growing at a faster rate than male gamers, and they're leveling the playing field in every one of Asia's key markets.

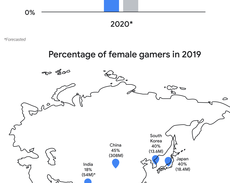
2017
1.13B total gamers
32% are female

2019
1.33B total gamers
38% are female
+18% growth

YOY growth of gamers in Asia

*Forecasted

Percentage of female gamers in 2019



*Expected to significantly rise with smartphone penetration and mobile internet access

Where female gamers played in 2019

While PC and console games once dominated, widespread mobile access has given more gamers the ability to play whenever and wherever they want. And **mobile** has become the most popular platform among female gamers by far.

500M total*

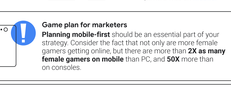
*Overlap from users on multiple platforms

95% — **473M** on mobile
40% — **201M** on PC
2% — **8.5M** on consoles

With its on-the-go appeal and wider range of genres and titles, mobile gaming naturally appeals to a wider audience — which is apparent considering the platforms that gamer the most spend from female gamers.

How much female gamers spent in 2019

Female gamers accounted for **35% of mobile games revenue**
Their share of mobile games revenue is forecasted to rise to **39% in 2020.**



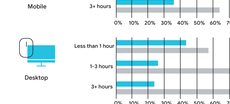
China
$4.4B on PC games
$6.6B on mobile games
60% of spend by female gamers was on **mobile.**

Game plan for marketers
Planning mobile-first should be an essential part of your strategy. Consider the fact that not only are more female gamers getting online, but there are more than **2X as many female gamers on mobile** than PC, and **50X** more than on consoles.

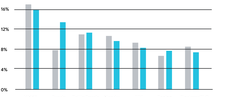
Keeping female gamers wired in

Female gamers are unique in how long they stay wired into their favorite games. Most female gamers (**60%**) spend up to seven hours per week playing, whereas more than half of all male gamers play for more than eight hours a week.

Average gaming session duration

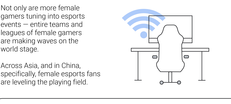


Gaming session duration by device



When it comes to mobile games, female gamers love intense, hardcore titles that feature strategic gameplay and diverse character options — particularly massively multiplayer online role playing games (**MMORPGs**) and Anime, Comics, and Games (**ACGs**), as well as multiplayer online battle arenas (**MOBAs**) and **shooter** games.

Female gamers' favorite mobile genres



Game plan for marketers
Take some inspiration from titles that have successfully attracted and engaged female gamers — "Onmyoji," "Miracle Nikki," and "Jianxiaqingyuan" are just a few with at least 50% female users — and consider including popular features like **strong strategy elements, traditional art styles and design,** and **diverse characters and storylines.**

A new brand of female athletes and fanatics

Not only are more female gamers tuning into esports events — entire teams and leagues of female gamers are making waves on the world stage.

Across Asia, and in China, specifically, female esports fans are leveling the playing field.

Female gaming organizations leading the charge

Female Esports League (FSL)
Independent female-only esports league serving Southeast Asia

Callisto Gaming
Organization founded in 2019 focused on female gamers in esports

Meet Asia's top female esports teams

Girls HK by Logitech
Founded in 2012

Belleton
Indonesia's top female esports organization

Bren Female
#3 in FSL 2019 Mobile Legends Tournament

Asterisk
World's first all-female "DotA" team

Game plan for marketers
Esports present an entire new ecosystem of opportunity. Esports titles with female participation are likely to **attract more female viewers on livestream videos, more female fans,** and as a result, **higher sponsorship values** for advertisers.

How COVID-19 has impacted gamers in Asia

Social distancing and stay-at-home mandates around the world have driven a surge in game time from both males and females. An April 2020 survey in China — Asia's biggest gaming market — revealed that most females are spending more time gaming at home during the pandemic.

Percentage of females in China spending more time gaming

With more time to play at home, female gamers are also spending more money on their favorite games.

Percentage of females in China spending more money on gaming

Female gamers are a crucial piece of the foundation of Asia's fast-growing gaming market. Their impact on the world stage can't be overstated — especially as people spend more time gaming at home in light of social distancing — so it's time for developers to rethink how to attract a wider audience. Whether it's by **implementing new features,** sponsoring **esports tournaments,** investing in **hiring diverse talent,** or creating **entirely new games,** appealing to female gamers is fundamental to future success.

4 key ways to engage female gamers

- Plan for a mobile-first experience — where female gamers are most engaged
- Add storylines, character options, and unique gameplay elements that female gamers can identify with
- Tap into the esports community as more female teams and leagues dive in and compete
- Build a diverse team of developers and designers to better understand female gamers' perspectives and preferences

Sources
Google Mobile Statistics, Counterpoint, Kantar Worldpanel, Newzoo's Global Games Market Report, June 2020