

WOMEN PLAYED. WOMEN PAID. WOMEN MADE.

THE MANY WAYS IN WHICH WOMEN
CONTRIBUTED TO THE VIDEO GAME
INDUSTRY IN 2020



GAME CHANGERS



Women played. Women paid. Women made.



The video game industry is constantly evolving. Video games can now be played on smartphones, tablets, internet TV and more; access online and through subscription services is also easier than ever before. With this enhanced availability and accessibility of video games, new and growing audiences can discover, engage and spend more time with the medium.



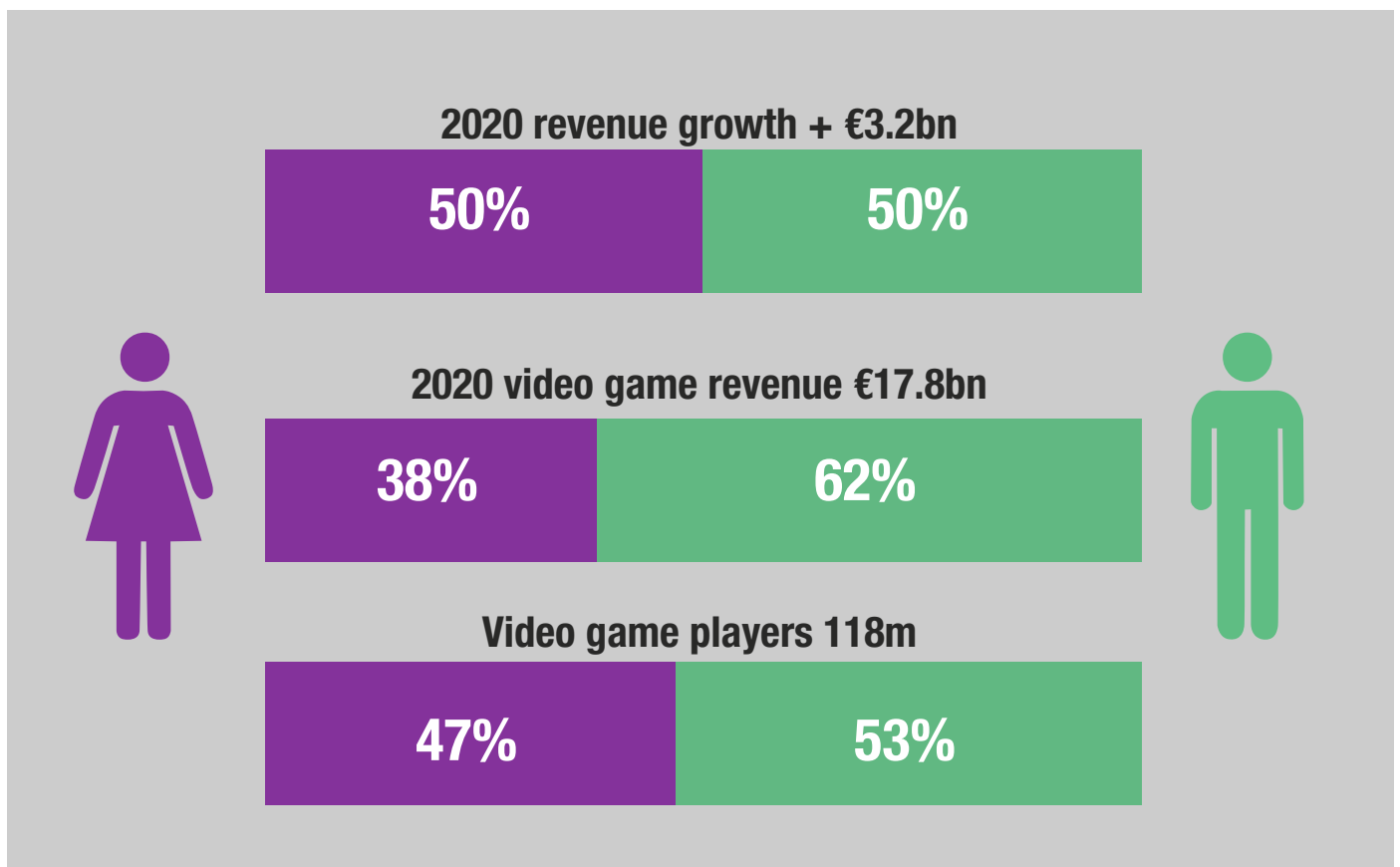
Video game audiences are also changing and expanding. Throughout 2020, women played an influential part in the success of the video game industry. Across key European markets, almost half of all video game players were female, and we estimate that almost 40% of spend on video games can be attributed to women. Of the €3.2 billion growth observed on video games expenditure, approximately half of this was from female consumers, demonstrating just how important female video game players are.

Despite this, women only account for 17% of the video game industry workforce in these European markets, according to 2020 figures. Moreover, only 20% of video game protagonists announced at gaming events, such as E3, were women.

These have been key areas of focus throughout 2020 and important initiatives have been launched to improve inclusivity and representation of women within gaming. However, more can always be done to understand, engage and

empower women further, with the aim of achieving greater equality of opportunity and experience within video gaming, going forward.

This piece looks at the contribution of women to the video game industry, as players, purchasers and creators, as well as exploring key recommendations to further engage female audiences.



Europe's Video Game Industry

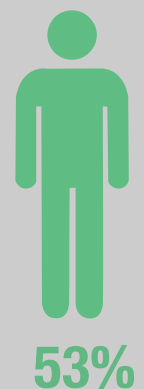
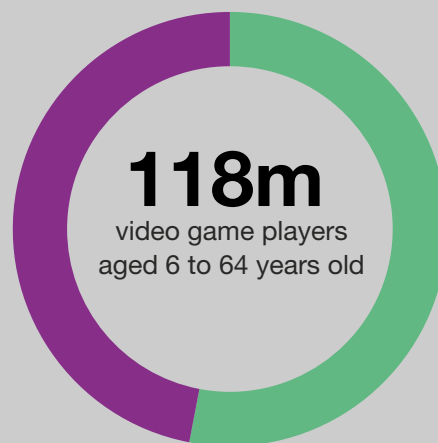
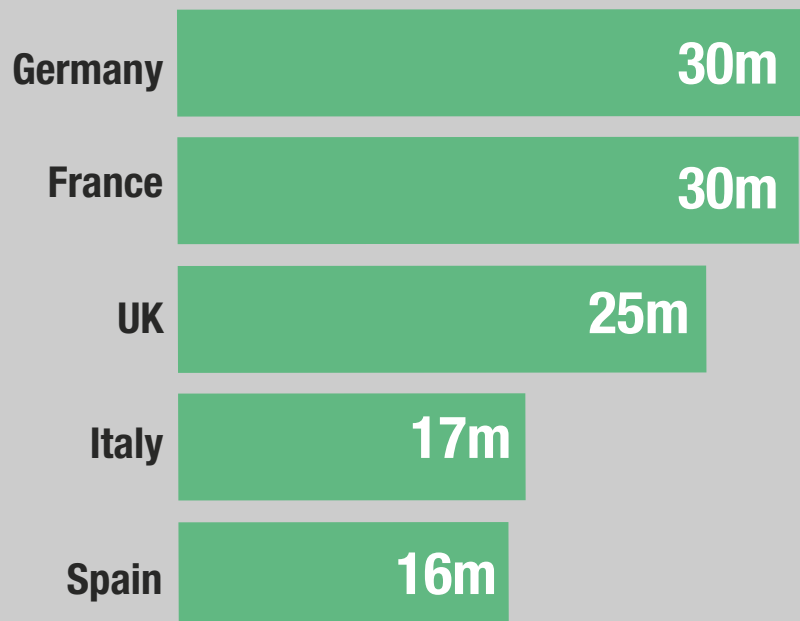
In 2020, a shift in spending habits and pastimes caused substantial impact on some well-established industries, including the video game industry. Here at Ipsos MORI, we work with the [Interactive Software Federation of Europe \(ISFE\)](#) on one of the largest video game studies in Europe, [GameTrack](#). This tracks players and their engagement with video games across a variety of metrics within the UK, France, Germany, Spain and Italy ('European GameTrack markets').

Across these European GameTrack markets, the number of people playing video games in 2020 stood at an all-time high since our measurement began, peaking during the nationwide lockdown restrictions (122 million in Q2 2020), but stabilising by the end of the year (118 million in Q4 2020). This equated to around half of the population aged 6 to 64-years-old within these markets, playing video games on any device.

Interestingly, the overall gender split of players was fairly even at 53% men and 47% women across all countries. This equated to an estimated **56 million women playing video games across these five markets** (vs. 62 million male players).

In 2020, video game revenue also stood at an all-time high within these markets. Moreover, the time spent playing video games increased, reaching a peak during Q2 at 10.2 hours on average per week, coinciding with the first lockdown restrictions.

Player population by country - overall gender split



Women played a significant role in driving these increases.

2019  2020 

118m

video game players aged 6 to 64 years old

8.8 hrs / week

9.5 hrs / week

€ 14.4bn

€ 17.6bn

**Average gaming time
(All Players)**

**Overall video game revenue
(All Players)**

Women played. Women paid. Women made.



Women Played

Nearly half of all people who claimed to play video games in 2020 identified as female (47% in 2020 up from 45% in 2019).

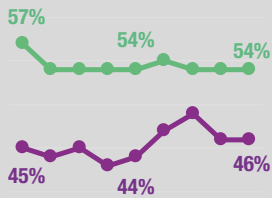
Q2 2020 coincided with first lockdown for many countries and during this time we reached a GameTrack record in the number of women playing video games, with an estimated 60 million women playing on any device. Whilst these peaks were not sustained in Q3 and Q4 once lockdown restrictions eased, female gaming remained up for 2020 overall. App usage clearly played a key role for women during this time, with video game playing on a smartphone or tablet also increasing by 3% points for women, between Q1 2019 and Q4 2020.

Not only did more women play video games in 2020, but those playing them also engaged for longer. This was particularly true on console devices, where gaming time for console users increased by nearly one hour in 2020 compared to 2019, rising during lockdown and being sustained in the later quarters.

INCIDENCE OF PLAYING VIDEO GAMES

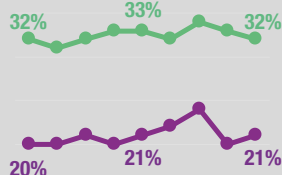


All gaming



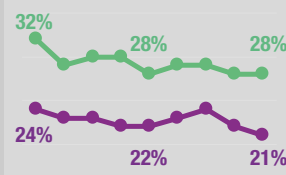
2018 Q4 2019 Q4 2020 Q4

Consoles



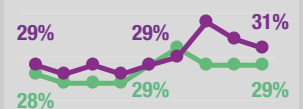
2018 Q4 2019 Q4 2020 Q4

Computers



2018 Q4 2019 Q4 2020 Q4

Smartphones/ Tablets

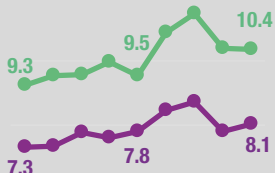


2018 Q4 2019 Q4 2020 Q4

GAMING TIME (HRS/WEEK) BY DEVICE

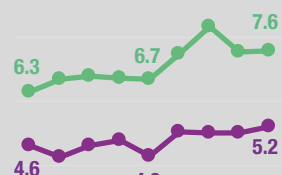


All gaming



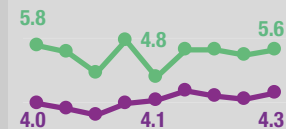
2018 Q4 2019 Q4 2020 Q4

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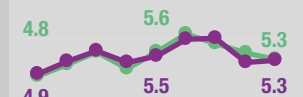
2018 Q4 2019 Q4 2020 Q4

Computers



2018 Q4 2019 Q4 2020 Q4

Smartphones/ Tablets

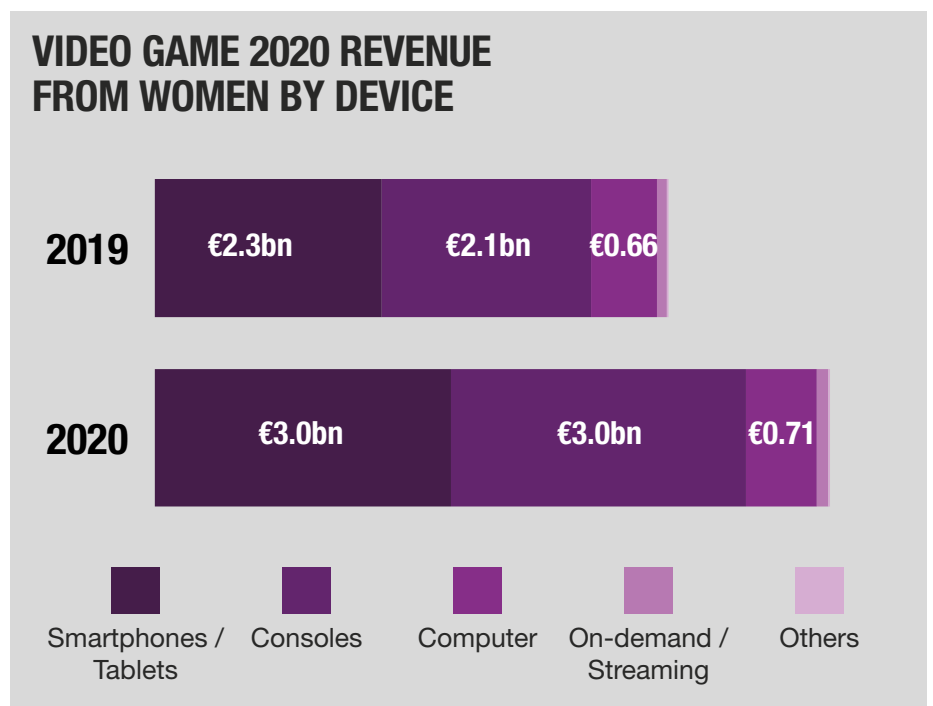
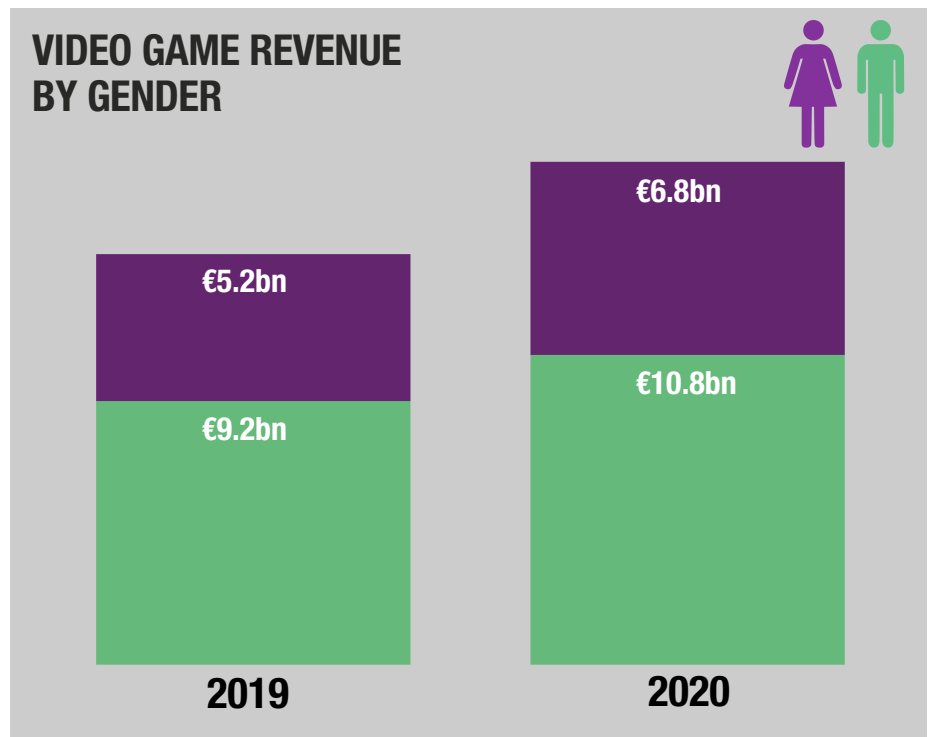


2018 Q4 2019 Q4 2020 Q4

Women Paid

Women's purchasing power within the video game industry also grew. In 2020, we estimate that women contributed 38% of the overall spend on video games, across the European GameTrack markets, totalling c.€6.8 billion revenue to the industry. This represents an increase of 31% vs. 2019, whilst male spending increased by 17% during the same period.

This spend amongst women is shared largely between console and smartphone / tablet games, with an estimated €3 billion being spent on each, in 2020. This reaffirms the importance of apps to engage women in video game playing, whilst also reminding us that console usage is growing, female video gaming is diverse, and women represent an important audience across gaming devices.



Women Made

Despite how much women played and paid towards the video game industry in 2020, the proportion of women working within the video gaming industry was estimated to be around 17% of the total workforce, at a European level¹. Across markets this ranges from 14% in France² to 28% in the UK⁶. There is a clear under-representation of women within the video game industry, compared to the total population and to the population of video game players, so this is a key focus for the video game industry.

This is recognised within the industry and there have already been significant strides to empower women and increase diversity, equality and inclusion in gaming, led and supported by ISFE and local National Trade Bodies. For more information about these initiatives, please follow the links over:

1

[Industry Reports](#)

2

[Local Representation Groups](#)

3

[Parading Women in Games](#)

4

[Celebrating Diversity Leaders](#)

5

[Diversity and Equal Opportunities Templates for Businesses](#)

6

[Industry Campaigns](#)

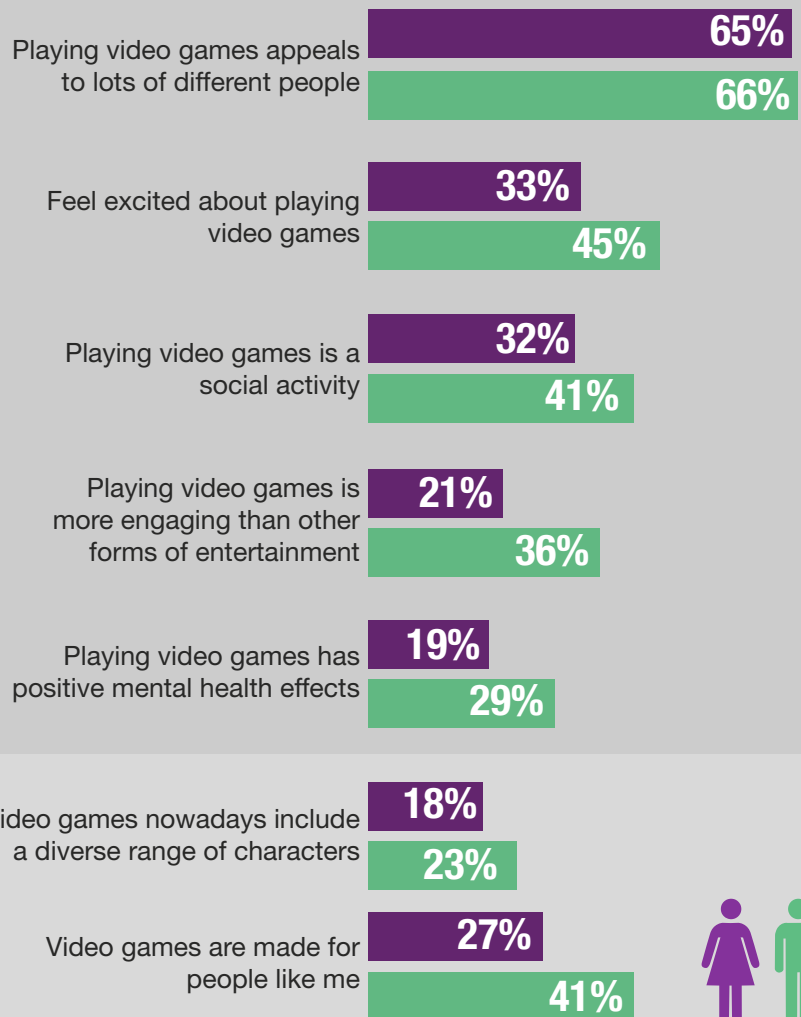
Women played, women paid, women made: A summary of 2020

The video game industry is changing and there have been several campaigns, led and supported by ISFE and National Trade Bodies, which consider, appreciate, empower and represent women in order to increase their representation within the industry. This representation is also extending to video games themselves, with a rising number of female protagonists featuring in video games launched in 2020.

GameTrack records reached new heights in 2020, as more women played and more time and money were spent amongst female gamers, on video games.

That said, our research highlights that women are still less likely to associate themselves with gaming, and this could represent an important opportunity and challenge for the video games industry in 2021 and beyond. When asked if they consider themselves to be 'a gamer' less than one in ten women who play video

WOMEN AND GAMING - STATEMENTS



games agree (compared to one in four men who play video games). Similarly, 27% of women agreed that 'video games are for people like me' compared to 41% of men.

So, why could this be and where are the opportunities for engagement?

1. Association

It is not news that the 'gamer' stereotype is evolving. Today, video game players are of all ages, genders, sexualities and nationalities. They play a wide range of video games across multiple devices, including smartphones. Promoting this diversity further through advertising and communications could be a powerful means of empowering women as video game players and encouraging further participation and trial of video game services among women who partake in the medium, but may not currently feel like they 'fit in'. We should move away from current 'gamer' stereotypes towards a more diverse audience of 'video game players'. Smartphone or tablet video game players are a great example of this. We have demonstrated the importance of apps to women's

growth in video games, but despite app games being a huge part of the video game industry, nearly one in three players still claim that playing video games on smartphones or tablets is not 'real gaming' (31%). Opportunity may lie in challenging these perceptions, to ensure those women partaking in games via apps do feel engaged, included and encouraged to participate within the wider video game eco-system.

Whilst not to the same extent as men, our research has shown a significant proportion of women feel excited about playing video games, view video games as a social activity and believe they are more engaging than other forms of entertainment. The platform is, therefore, there to continue to attract, engage and entertain this already growing audience, but even more focus should be placed on making them feel part of it, if the opportunity is truly to be capitalised on.

2. Representation

Another route to greater inclusivity for women is through representation within games themselves. Studies around representation show that if people can identify with content,

characters and creators of a medium, they are more likely to perceive that it is a medium for them.

Historically, the video gaming industry has faced challenges in the representation of women, including: a relative lack of female protagonists, the hyper-sexualisation of female bodies, and the stereotyping of female players (aka 'Girl Gamers'). The industry has already recognised that if games are to be made for women, it is essential to move away from stereotypes and to represent women's diversities in all their complexity, including appearance, skill, personality, social roles and power.

This has been another key area of focus for the industry, however, our research highlights the potential to do even more, as women are less likely than men to agree that video games nowadays include a diverse range of characters (fewer than one in five females within European GameTrack markets agree with this).

In 2020, the number of female protagonists in games rose to 20% (up from 9% in 2019), which is a positive step to better

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representation. Arguably the most famous of these titles was **The Last of Us Part 2** where players can adopt the characters of Abby and Ellie in an apocalyptic universe. [In The Power of Gaming Storytelling](#), we examine how the game creates a compelling universe and uses its apocalyptic setting to explore social tensions relevant to our contemporary culture. This highlights key issues such as LGBTI+ rights and objectification of the female body, whilst still providing an engaging drama rooted in classic tropes like vengeance, family and struggle for dominance.

Facilitating an on-going dialogue and in-depth understanding of a wide range of women will be crucial to achieving authentic representation in 2021 and beyond. Consultation with audiences will deliver insight into the challenges faced by women, their expectations and their needs, to support character and game design. Research will also provide an understanding of reactions to female portrayals within video games, to maximise identification with characters and the likelihood for diverse female audiences to associate games as being ‘for people like me’.

3. Inspiration

Through successful association and representation initiatives, we believe there is opportunity to inspire the next generation of women working in video gaming.

The key to this is visibility: women should be represented within the industry and celebrate what they achieve. Industry reports such as [GameTrack](#) help us understand the state of the market. Meanwhile, industry diversity awards celebrate those trying to increase diversity and inclusion. The She Plays Games Podcast has created a list of 100 of the video game industry’s most inspiring women who are having a positive impact and are pushing boundaries ([#SPG100](#)). We should see more women associating with the industry as this will help to change perceptions and inspire the future generations to come.

The University of Surrey found that girls who play games are more likely to go on to do STEM qualifications than those who don’t. This is potentially a very important finding for the video games industry, as this could be a possible enabler for future entry into the workforce within the gaming industry. If this holds true, then

association and representation could encourage greater participation by women as video game players, and could have even longer-term benefits to the industry, inspiring the next generation of women in video gaming through the creation of even more games *for* women, *by* women.

At Ipsos, we are passionate about understanding audiences. We have a team of video gaming experts who draw upon our deep knowledge of trends within the video game market and create custom research to get closer to audiences, understand them and build recommendations to support decision making. We believe that connecting with female audiences (as video game players, purchasers and creators) is essential to the continued progress of the video game industry. Through carefully planned research and the expertise of our team, we can build a valuable understanding of needs, perceptions and barriers to overcome. Ultimately, we aim to support better representation, equality of experience and enhanced participation of women within video gaming.



ABOUT IPSOS

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At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

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We are a close knit team of experts who work exclusively to help you understand the media and tech landscape. Through our work we leverage our deep understanding of people, society, and culture to make sense of audiences and how they use technology and consume entertainment. We work with integrated data sources and curated insights to contextualise your business challenges, so we are in the best position to help shape your strategy and ultimately create greater impact.

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1. Europe: <http://www.egdf.eu/wp-content/uploads/2020/08/European-Report-on-the-Game-Development-Industry-in-2018.pdf>
2. France: <http://www.egdf.eu/wp-content/uploads/2020/08/European-Report-on-the-Game-Development-Industry-in-2018.pdf>
3. Italy: https://ideassociation.com/kdocs/1972712/2018_censimento_game_developer_italiani.pdf
4. Spain: <https://www.statista.com/statistics/1027215/presence-of-women-in-the-spanish-video-game-industry/>
5. Germany: https://www.game.de/wp-content/uploads/2020/12/Games-Studie_2018-20_HMS_2021-01-26_V3.pdf
6. UK: <https://ukie.org.uk/UK-games-industry-census-2020>

GAME CHANGERS

