THE IMPACT OF WOMEN IN GAMING

How women gamers & fandom are shifting the landscape of gaming and esports.





Index

Overview & Methodology	1
Top Industry Interests of Women Fans	2
Most Popular Game Titles & Leagues Amongst Women Fans	3
Collaborations at the Center of Gaming and Music	4
Why Luxury Brands Should Continue to Invest	5
Brands Leading the Movement into Women Gaming	6
What is the Power of Women Creators	8
Women Leaders in Esports	9



Overview & Methodology

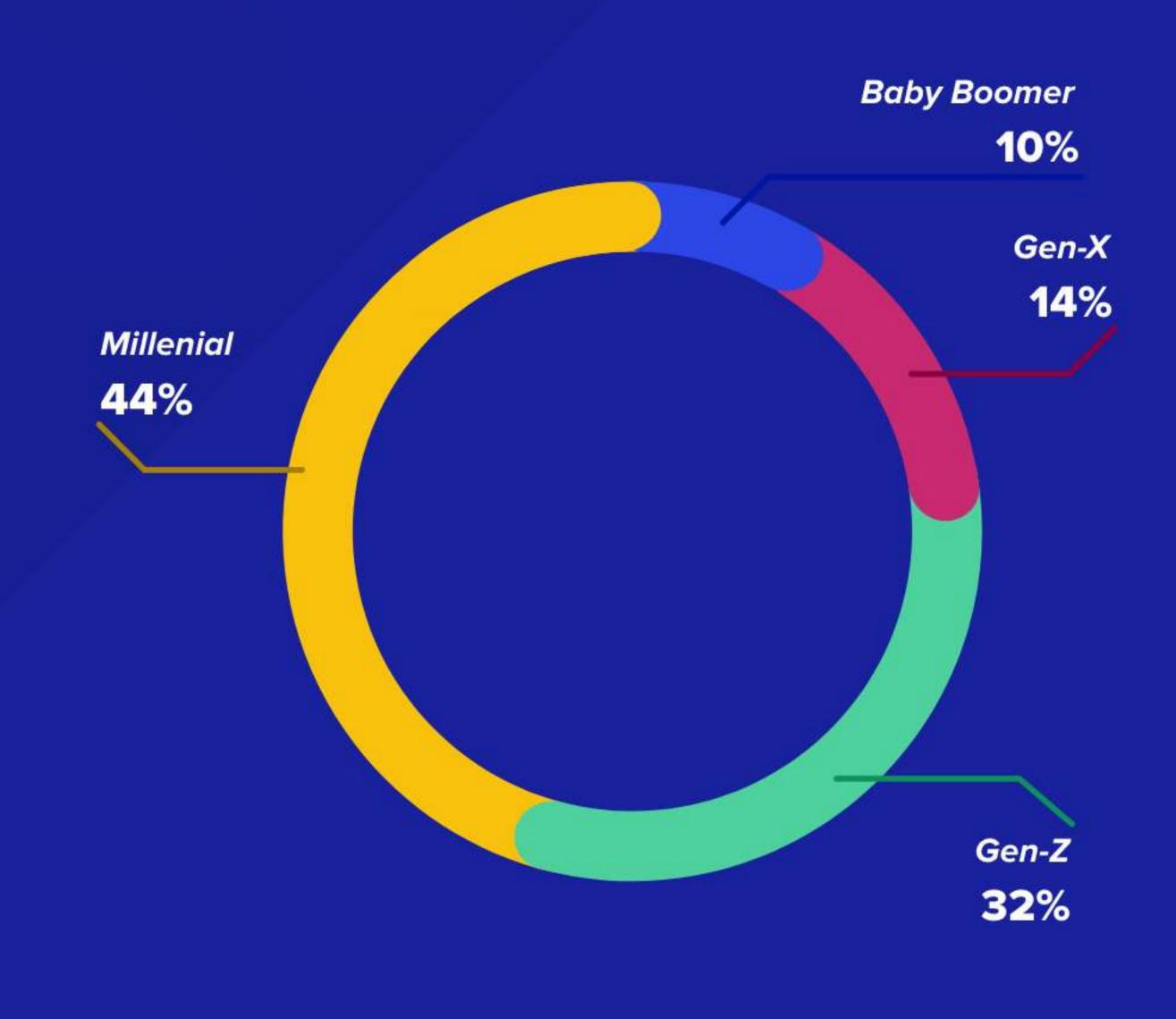
There's no question that gaming's role in contemporary culture has grown significantly. What was once a niche activity for a passionate core is now being embraced by entire industries across sports, music, and film. As gaming directly inspires and evolves various forms of entertainment by providing new ways to engage individual and powerful communities, it's clear that esports and gaming have set themselves apart as a highly valuable and creative space.

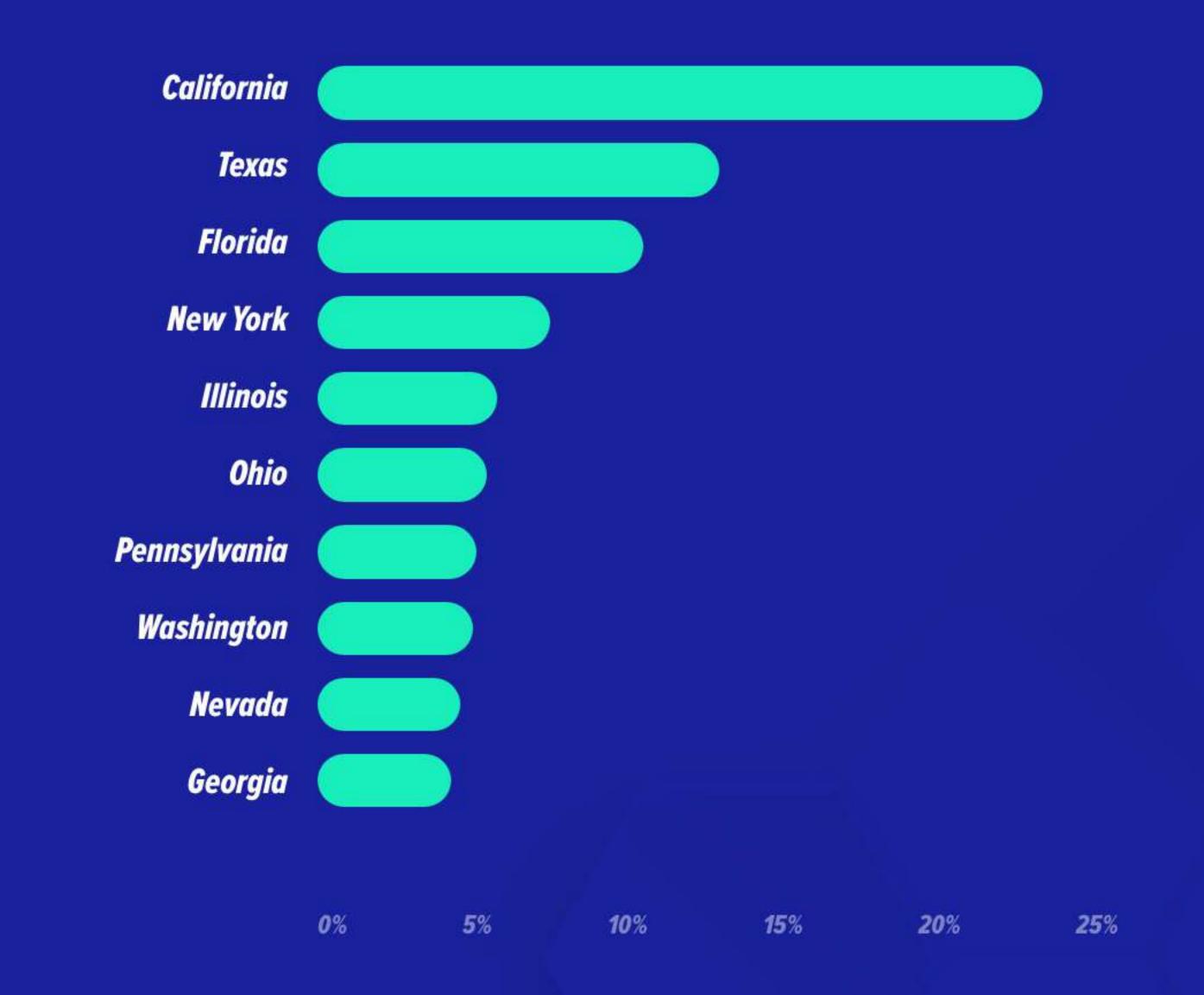
One demographic with undeniable power that has driven much of this intersectional growth is to women talent and fans in gaming. The women gaming communities have taken a significant role in powering unique partnerships and redefining outdated gamer stereotypes.

Using the Zoomph audience analytics database, we sought to uncover the distinctive features of women gaming fans and where the opportunities lie, with a unique focus on cross-cultural intersections. Using the audience tool, we built three unique audiences to compare: women gaming fans, male gaming fans, and a general female audience.

Women gaming fans were defined as social users that identified themselves as female and showed an interest in gaming, either by accounts they follow, interact with, or topics they talk about. The male gaming audience was made similarly to the women gaming audience, but with social users who identified themselves as male. And lastly, our general female audience was built from social users that identified themselves as females.

Women Gaming Audience Overview







Top Industry Interests of Women Fans

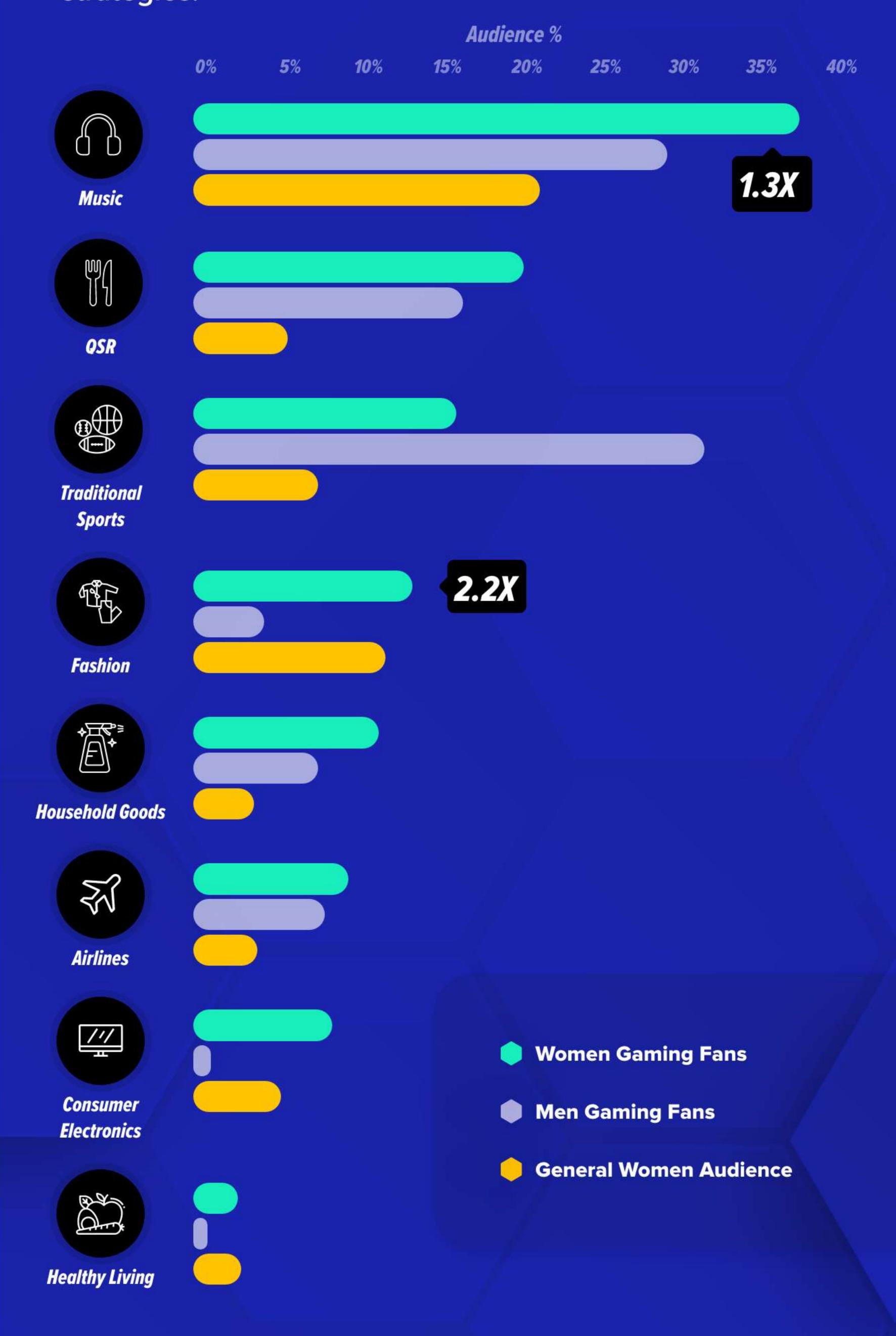
When analyzing and comparing the interests and passions of women gaming fans, we found several industries that showed higher identification with women gaming fans vs. male gaming fans and women gaming fans vs. general female audiences.

The top interest among women gaming fans is music, with 38% of fans indicating an interest in music. That is 1.3x higher than male gaming fans, and even higher than general female audiences. The intersection of music and gaming has already risen significantly with a continuous rise of new strategic partnerships, concert activations and collaborations, and these organizations have an exciting opportunity to extend their focus on women gaming audiences as a part of these music initiatives.

Another area of interest women gaming fans over-indexed in was fashion. Women gaming fans are 2.2x more likely to have an association for fashion than male gaming fans. This is evidence as to why brands such as NYX, MAC, Burberry, Louis Vuitton, Gucci, Balenciaga, Burberry, ColourPop, and others are developing dedicated gaming strategies. In addition to this growth, we continue to see, we continue to see exciting whitespaces for more women-focused brands. In particular, recognizing the gaming audience's demand for premium and creative designs, fashion brands can leverage beloved gaming IP to create quality merchandise that turns passionpoints into forms of self expression.

Further still, women's cuts and sizes continue to be a rarity among collaborations, and an area for brands to lean into.

Beyond music and fashion, we see women gaming fans have a powerful alignment with QSR, airlines & travel, consumer electronics and health & wellness – each of which are increasingly active brand categories in the space. These brands have an especially strong opportunity to create initiatives that empower, celebrate and inspire women in games within their strategies.



Most Popular Game Titles Amongst Women Fans

1	LEAGUE OF LEGENDS	2.8%
2	POKEMON GO	2.2%
3	FIFA	1.3%
4	CALL OF DUTY	1.3%
5	ASSASSIN'S CREED	1.2%
6	FORTNITE	1.2%
7	WORLD OF WARCRAFT	1.1%
8	MINECRAFT	0.7%
9	NBA 2K	0.6%
10	HALO	0.6%

Most Popular Esports Leagues Amongst Women Fans

1		OVERWATCH LEAGUE	18.3%
2		TWITCH RIVALS	15.1%
3	MIORANT	VALORANT CHAMPIONS TOUR	14.7%
4	LOL ESPORT	LOL ESPORTS	14.6%
5	The Substitute of the Substitu	THE INTERNATIONAL	13.8%
6		DREAMHACK	11.8%
7	ES	ESL	11.5%
8	EVO	EVO	10.3%
9	FLASH	FLASHPOINT	9.8%
10	CALL-DUTY EAGLE	CALL OF DUTY LEAGUE	9.1%
11	NBA2	NBA 2K LEAGUE	8.8%
12		ROCKET LEAGUE ESPORTS	8.0%

Collaborations at the Center of Gaming and Music

Music is one of the most active industries to intersect and collaborate with gaming. Gaming's culturally driven audience, alongside its general flexibility, make it an ideal space for music integrations. Examples of activations we've seen include:



Virtual concerts with Travis Scott x
Fortnite and Post Malone x
Pokemon, which continue to create
major headlines.



Gaming merchandise collaborations such as Steve Aoki x Street Fighter that showcase unique ways to integrate musician's fashion lines with their favorite fandoms.



A rising focus on music artists livestreaming on Twitch – from top talent to emerging musicians – to create new ways to grow, monetize and engage with their audience.



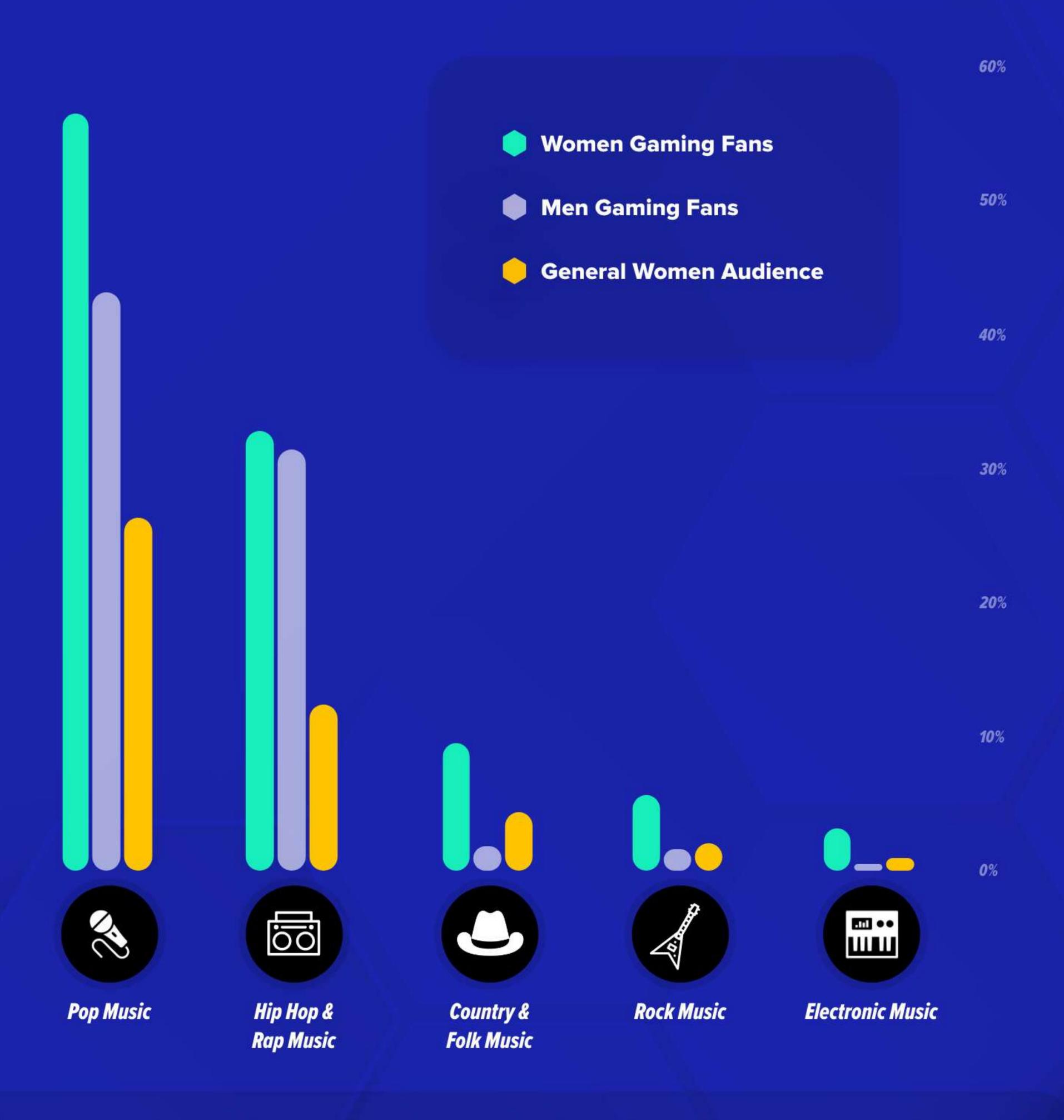
Marketing launches, such as the Call of Duty Warzone Season 3 trailer, which included cameos like Young Thug alongside sports and gaming personalities.

In our analysis, we aimed to identify the genres with which women gaming fans aligned strongly, in order to identify the strongest areas of crossover.

Ultimately we found that non music

Ultimately, we found that pop music was the most popular, followed by hip hop & rap. A particularly interesting finding is that among these top genres, women gaming fans didn't simply surpass male gaming fans, but significantly exceeded the general women audience. This shows a powerful point of diversification among women gamers, with a particularly unique passion for music.





Women gaming fans are 1.5x more likely to have an association with each music type than male gaming fans on average, and 2.3x more than the general women audience.

5

Why Luxury Brands Should Continue to Invest

After recognizing the strong alignment with fashion, we investigated this further by analyzing individual fashion brands, with the goal of identifying the affinities among brands who are both active and yet to be active in gaming. During this analysis, not only did we find specific brands that have a strong affinity among women gamers, but we also found women gaming fans were 2.8x more likely than male gaming fans to have an affinity for the 11 brands we analyzed and 1.2x more likely than the general female audience.

It is worth noting that among luxury fashion brands, Louis Vuitton has been one of the most active in gaming, esports and nerd culture. Women gaming fans are
1.2x more likely to have
affinity with the 11 luxury
brands than the general
women audience on
average.

Women Gaming Fans



Women gaming fans are 1.2x more likely to have affinity to the 11 luxury brands than general female audience on average.

Brands Leading the Movement into Women Gaming





Valkyrae & Sweetgreen

Staying true to their focus around health and wellness, Sweetgreen teamed up with Valkyrae in a partnership that drove a focus on healthy eating in the gaming audience, featuring her own custom salad bowl in the Sweetgreen app.

172.3K
IMPRESSIONS

871
ENGAGEMENTS

0.51%

ENGAGEMENT RATE

\$3,256

SOCIAL VALUE



Tampax

One of the more recent adopters into the women gaming industry,

Tampax put on the Tampax Gaming Fest. Tampax joins the industry

with a mission of wanting to make women feel included and supported
in the industry.

136.6K
IMPRESSIONS

1,760 ENGAGEMENTS

1.29%

ENGAGEMENT RATE

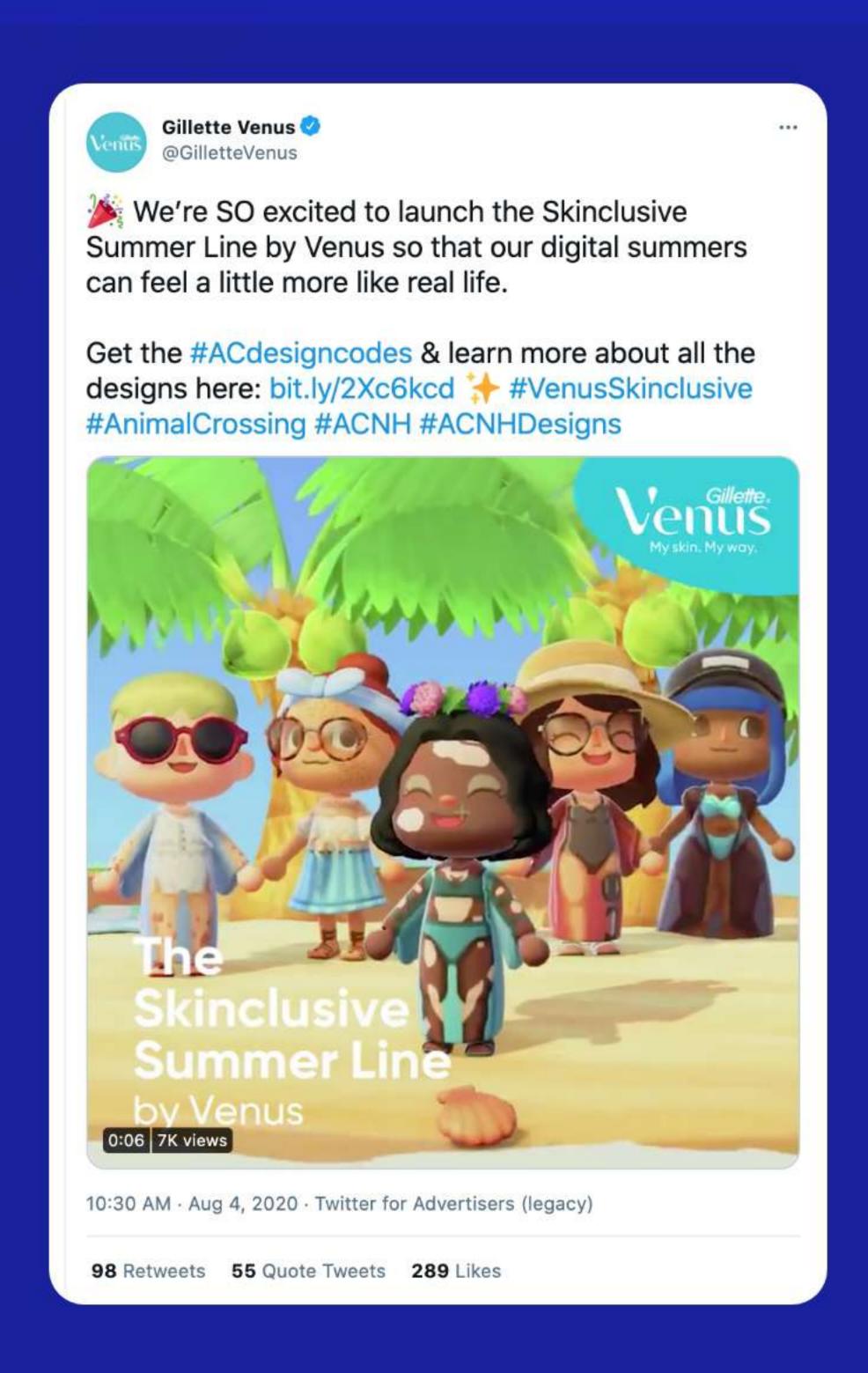
\$4,774
SOCIAL VALUE



"Brands looking to make an positive impact in gaming should consider first and foremost how they can add value to the community. This is particularly true when it comes to engaging women in gaming and esports. Helping create and support an environment of inclusion and representation is becoming even more important across the industry – take a look at the growing sponsor interest within the NWSL and WNBA – and gaming proves similar. When approaching the space, consider how your brand can create experiences, access, narratives and more in a way that connects, empowers and inspires this passionate community."









Gillette Venus & Animal Crossing

Another partnership built on inclusion and support, last summer, Venus introduced a line of skins available in the popular game on Nintendo Switch, Animal Crossing.

145.7K
IMPRESSIONS

387
ENGAGEMENTS

0.26%

\$3,079

ENGAGEMENT RATE SOCIAL VALUE

"Every woman deserves to feel represented and beautiful in her own skin. Everywhere. Which is why we created our NEW Animal Crossing Fashion Line designed for players who want to replicate the look of their IRL skin within the game."

- Gillette Venus



Mac

Inspired by and in collaboration with Honor of Kings, a growing mobile MOBA game, MAC Cosmetics has released collections of lipstick, eyeshadow palettes, and other beauty products.

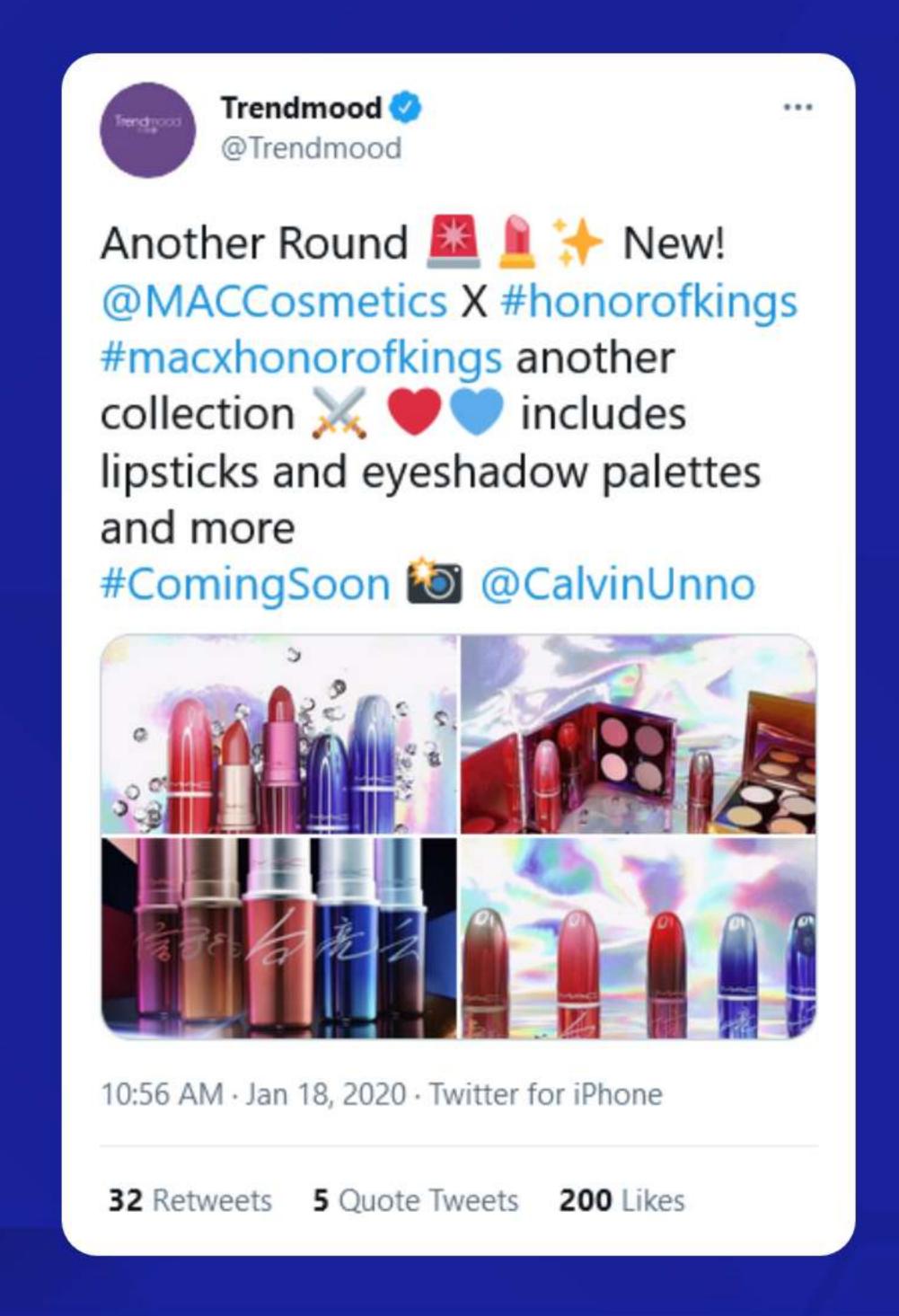
20.7K
IMPRESSIONS

233 ENGAGEMENTS 1.12%

ENGAGEMENT RATE

\$449

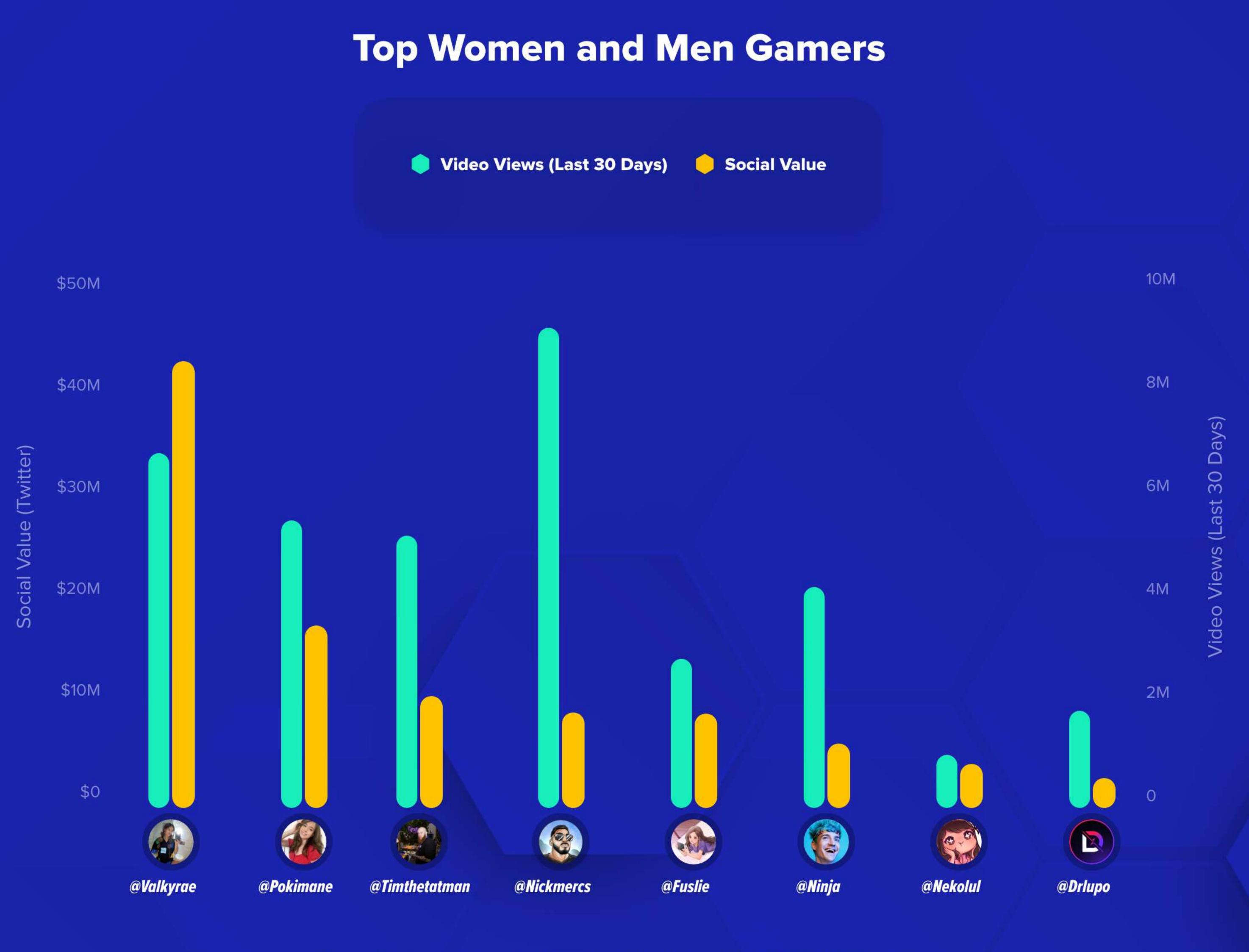
SOCIAL VALUE



What is the Power of Women Creators?

The last 2 years has seen a massive increase in the name recognition and scale of women streamers, and as a result, brands have responded with sponsorships and partnering on collaborations. Brands like Hyper X, Sweetgreen, Lexus and others have leveraged women streamers to create campaigns and activate bespoke live streamed content.

Content Creators such as Valkyrae, Pokimane and Fuslie have not only been able to monetize their content, but increase their value and impact as personalities as their active communities continue to grow. Valkyrae and Pokimane have seen social values of \$43 million and \$17 million respectively since the beginning of this year and 6.9 million and 5.5 million total video views respectively over the past 30 days, showcasing the value they carry and the passion of their fans.



Source: Twitter owned content from 1/1/2021 12:00am ET - 5/18/2021 12:00am ET and owned YouTube and Twitch data from the last 30 days.

9

Women Leaders in Esports

O DIGNITAS

Dignitas, one of the leading esports organizations globally, is one of the early teams to have a roster of women gamers. Dignitas' Women's FPS team has become a fierce competitor in the sport, highlighted by their 1st Place finish in the Super Girl Gamer Pro Championships in 2020, and their multiple other top finishes since 2017.

Coupled with some of the biggest content creators in games such as VALORANT and Rocket League, Dignitas is building the prototype for other teams in esports.

Creators and Women's FPS Team Overview





CLOUD9 Cloud9: VALORANT White

Previously known as MAJKL, Cloud9 welcomed Alexis "alexis" Guarrasi, Annie "Annie" Roberts, Jasmine "Jazzy" Manankil, Katsumi, and Melanie "meL" Capone to their organization in October of 2020 to compete on their VALORANT team. Since December 2020, the team has competed in 10 total qualifiers and events, with their biggest achievement coming in the form of a 1st place finish at VCT 2021: Game Changers North America Series 1.





Florida-based esports and entertainment company Misfits Gaming Group (MGG) not only represents stars like Breebunn and Proxyfox but just recently launched a new women's advocacy program called "Women of Misfits." With an approach that will focus on the four core pillars of mentorship, development, network and advocacy. The platform will be curated and led by women executives at MGG.

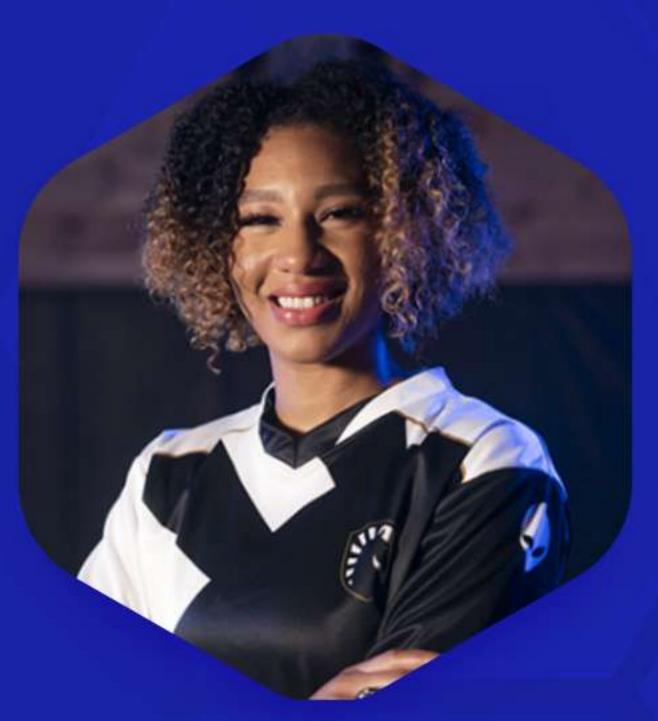






TEAM LIQUID WNBA Star Power In Gaming

In January of this year, Team Liquid announced it was adding WNBA Champion and avid gamer Aerial Powers to their organization as a content creator, brand ambassador, and to lead the promotion of diversity for the organization and gaming industry. Powers is also a brand ambassador in the gaming division for Ford Models Inc. and a brand ambassador for HyperX.



"Women continue to pioneer innovation and boundaries in esports. More leaders, more players, and more content creators all changing the landscape. The more the ecosystem continues to add more women the further the industry will go. The day we don't have to continue to highlight the progress is the day we know we have made a massive shift. Esports I believe will be one of the first sports to make this shift."



"Brands who are developing bespoke strategies toward the women esports & gaming market are realizing that there are a major whitespace and untapped value," says Tacca. "While they are making a positive impact on the inclusivity in the gaming space, it's also good business: 62% of women esports fans believe that brands do not market to them, and 72% believe that women are not well represented in the esports space."



READY TO MEASURE YOUR STREAMING SUCCESS AND KNOW YOUR AUDIENCE? ZOOMPH CAN HELP.

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