



Female Gamers in Asia

Version for Women in Games Asia Panel
Gamescom Asia 2022

October 2022

Methodology

- A majority of the data in this report is proprietary Niko data and was collected via survey by accessing a panel of survey respondents across China, Japan, Korea, Chinese Taipei, Philippines, Vietnam, Thailand, Malaysia, Singapore, Indonesia, and India
- For China data, Niko conducted an online survey of 2,400 gamers in tier 1 to tier 5 cities with forced quotas for each city tier. For all market surveys outside of China for this report, Niko surveyed 4149 gamers, approximately 410 respondents from each market, and delivered the survey in the local language
- Survey respondents were asked complete approximately 60 questions over 20-25 minutes to ascertain data on demographics, purchase behavior, preferences, sentiment, intentions, and other relevant data. Survey respondents were randomized and survey responses were collected from individuals who identified as "gamers": those who own a mobile device, computer, or video game console and have played games on that device at least once in the past 30 days
- Niko conducted further qualitative analysis using open-source, reputable third-party data sources to gather additional data that can be found within this report
- In order to maintain like comparisons, all data for this report was drawn from Niko's 2021 pool of data, which is the most recent data available at time of publication for certain markets covered in this report
- A further breakdown of our methodology can be made available upon request



Get complete insights and an in-depth breakdown of Asia's female gamer market, including gaming, esports, and streaming, along with market size and potential in the paid version of the report here.

Games Market in Asia



THE ASIA-10 GAMES MARKET


**MOBILE AND
PC GAMERS**




**MOBILE AND PC
GAMES REVENUE**



ASIA-10 MARKETS



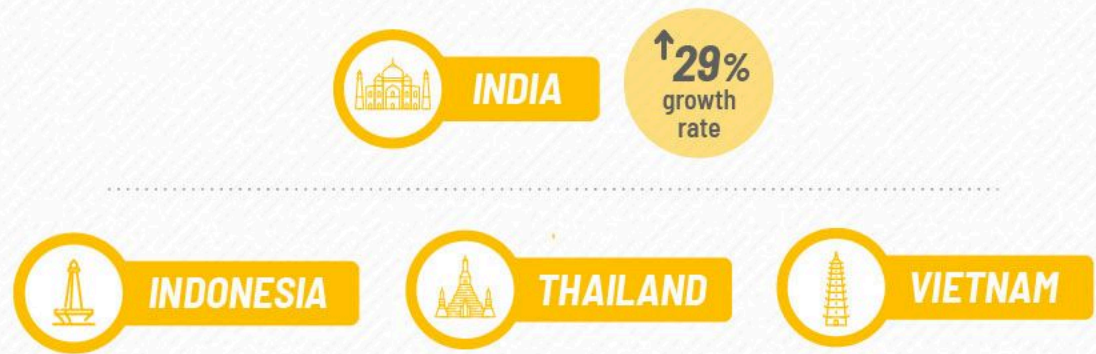
HIGHEST ARPU



Fastest growing:



FASTEST GROWING



US\$81,574,000,000+

2021 est Asia Games Revenue (PC & Mobile)

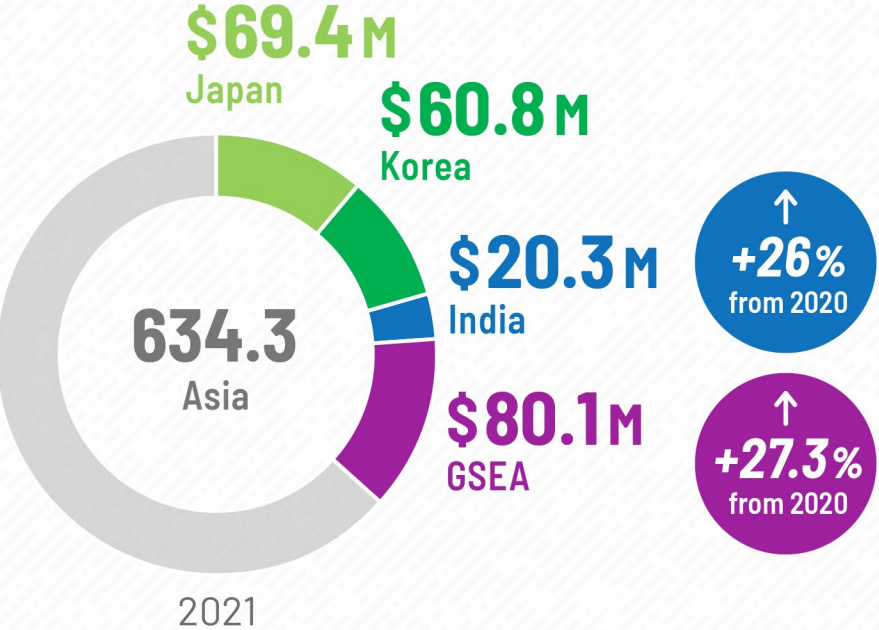
1,427,500,000+

2021 est Asia Gamers

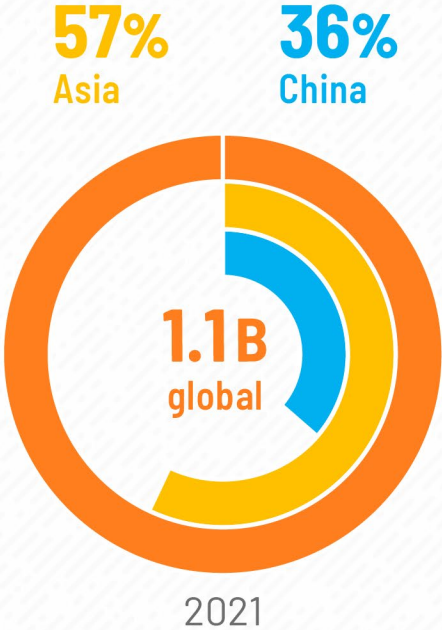
Includes: China & Asia-10 (Chinese Taipei, India, Indonesia, Japan, Korea, Malaysia, Philippines, Singapore, Thailand, Vietnam)



ASIA MARKET SHARE



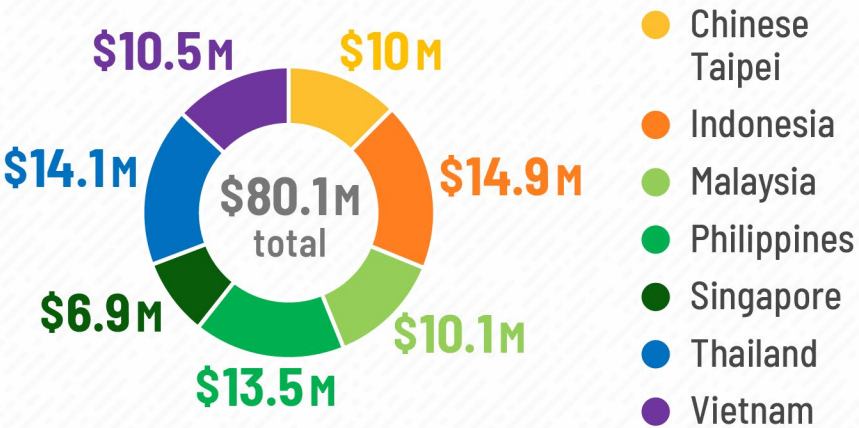
ESPORTS MARKET



ESPORTS AUDIENCE SIZE (MM)



GREATER SOUTHEAST ASIA



Gender inclusivity matters



Niko Partners believe that the diversity within our team, not just in terms of **gender** but also **cultures, ethnicities and nationalities**, makes **our research more robust**



Our **local expertise** enables us to provide a deeper understanding of developments for all demographic criteria, as well as a more **holistic view** of the market



Games should appeal to all genders.

There should be no boundary for who feels welcome and inspired to play video games, and games should be developed for different audiences, interests and gaming behavior



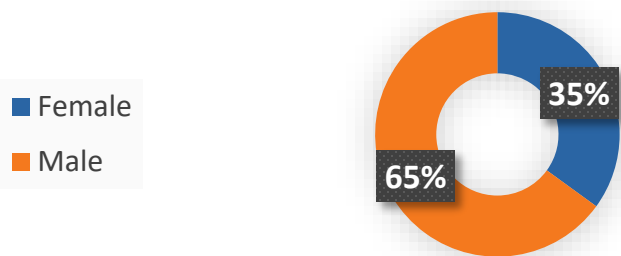
We observe that **female gamers** are one of the **drivers of growth in the Asian games market**. This report provides data and analysis about female gamers in Asia—who they are and how they compare to their male counterparts

Female Gamer Data in Asia



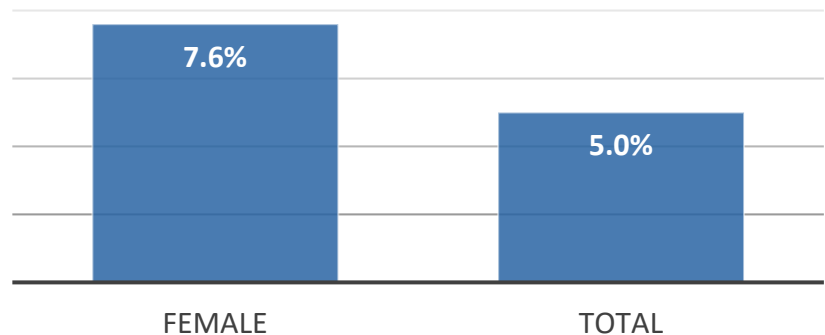
Women comprise 35% of the 1.46 billion gamers in Asia

Share of female gamers in Asia (2021)



Source: Niko Partners

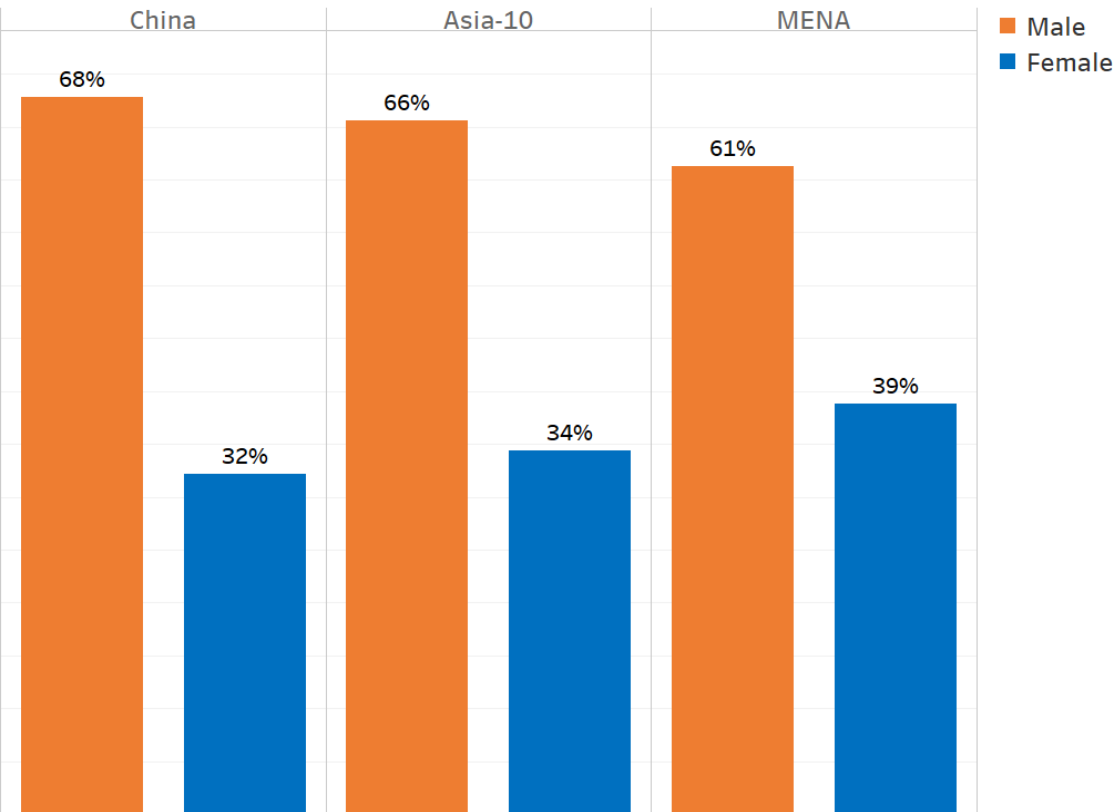
YoY growth of gamers in Asia (2021)



Source: Niko Partners

Asia -10 refers to the markets of Chinese Taipei, India, Indonesia, Japan, Korea, Malaysia, Philippines, Singapore, Thailand, and Vietnam.
Asia refers to the Asia-10 markets plus China

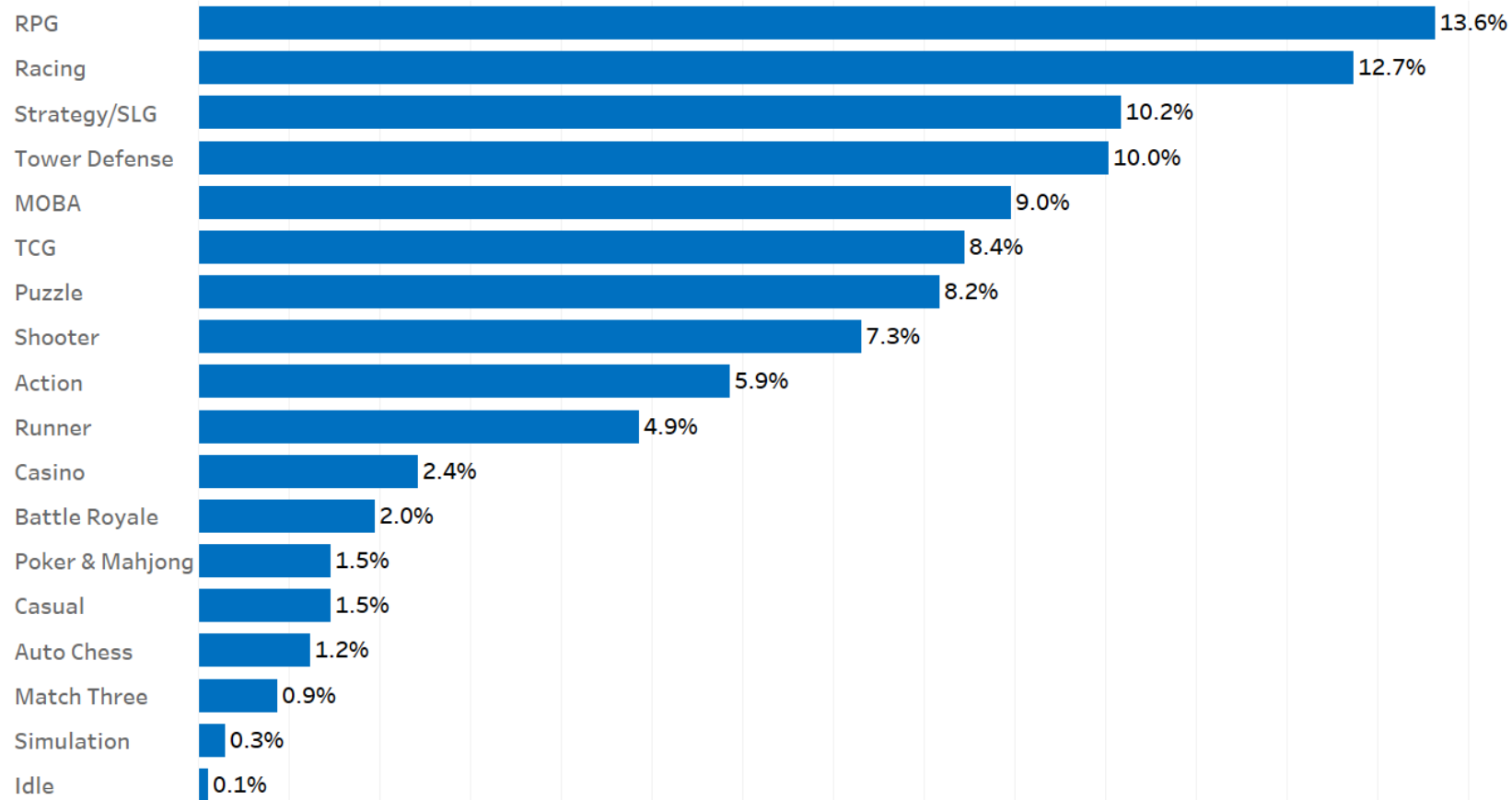
Percentage of female gamers by region (2021)



Source: Niko Partners

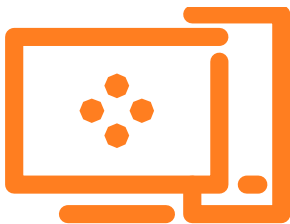
Female gamers in Asia prefer role-playing, racing and strategy games as their top 3

Preferred Genre

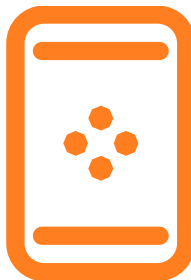


Source: Niko Partners

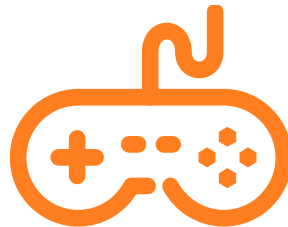
Female gamers play mobile more than other platforms



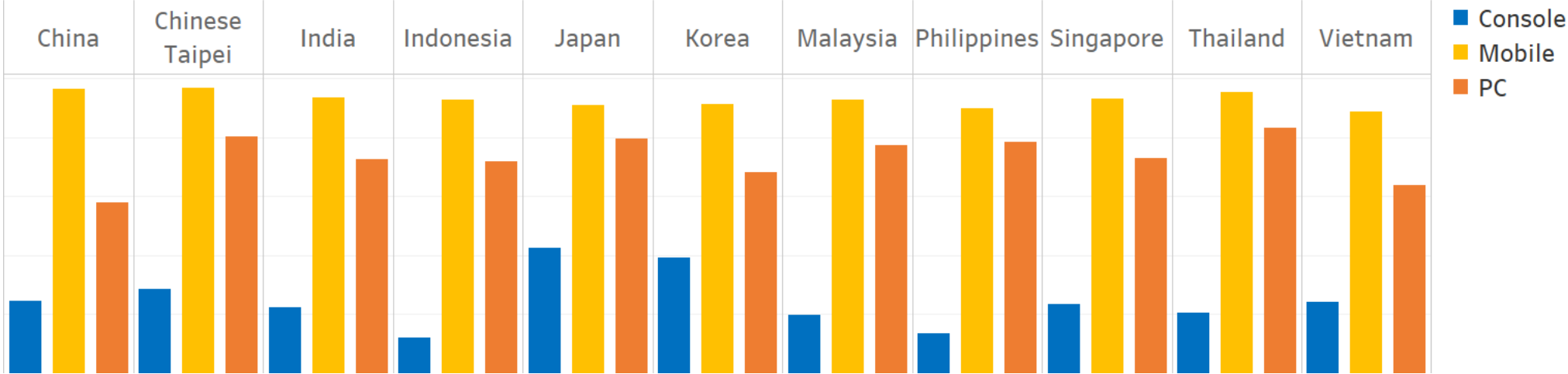
60%



95%



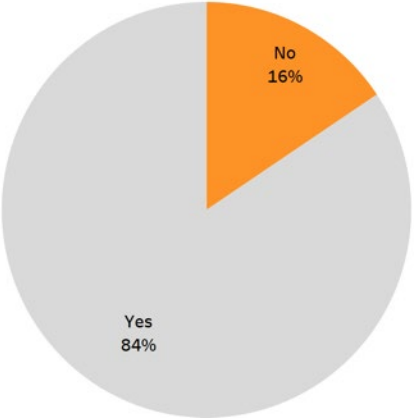
17%



Source: Niko Partners

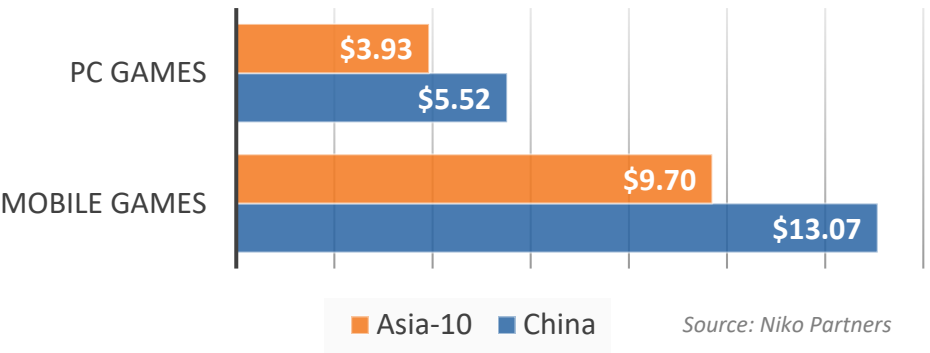
84% of female gamers willing to spend make in-game purchases

Female gamers are more likely to make in-game purchases



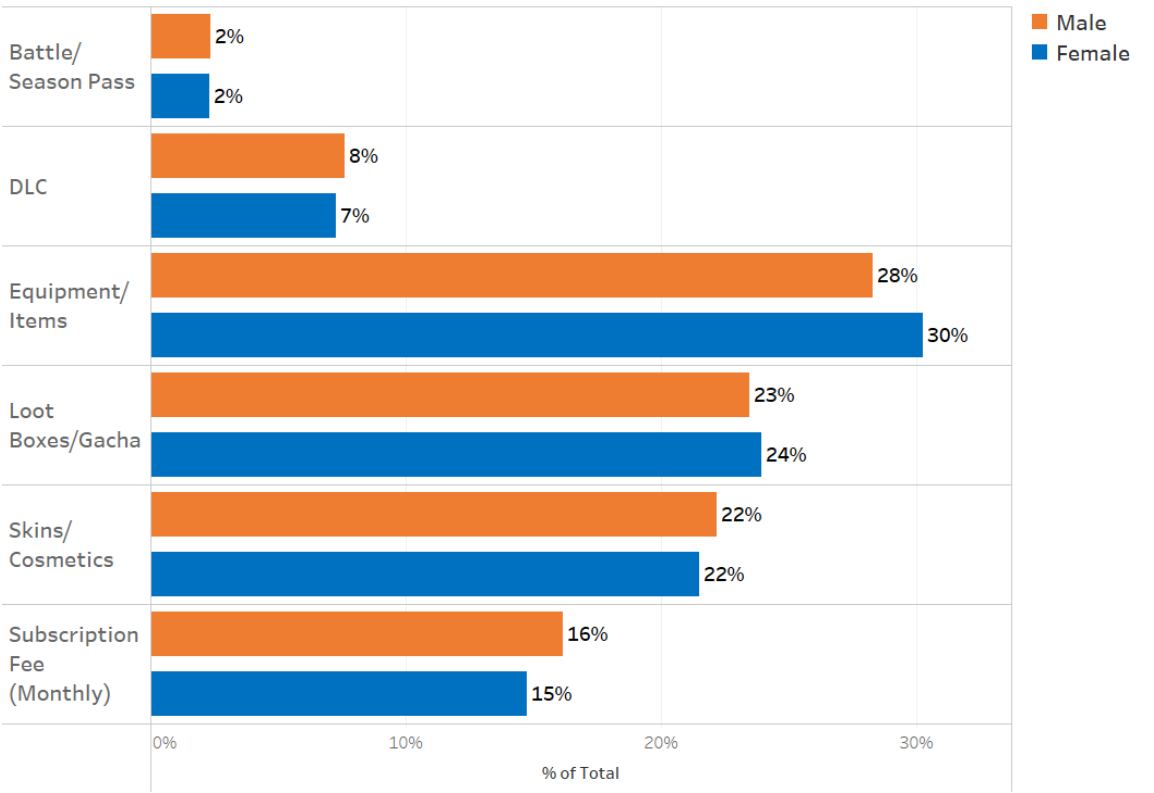
Source: Niko Partners

Female gamer spending in 2021 (US\$ Billions)



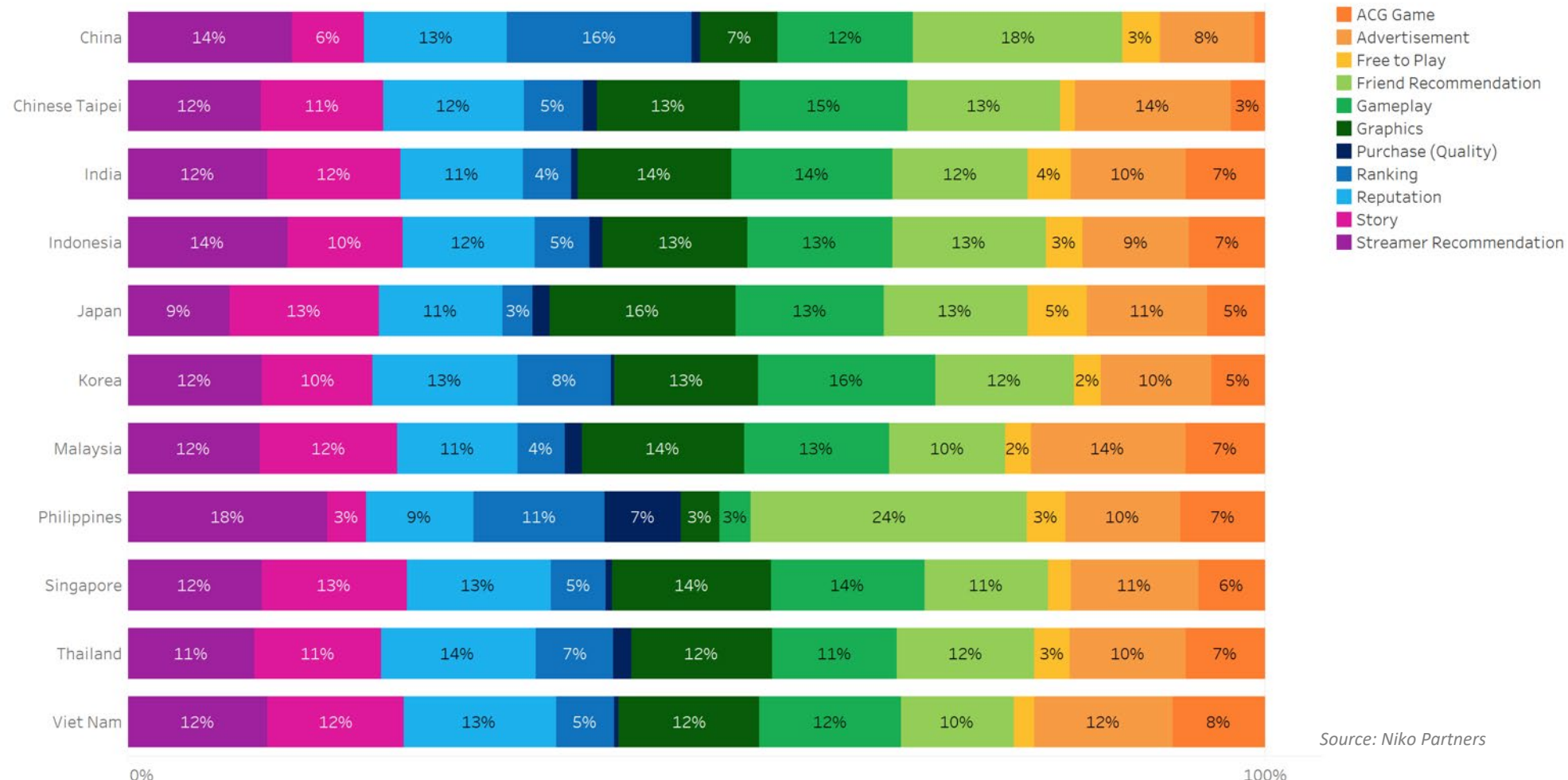
Source: Niko Partners

Female gamers are more likely to spend on items and gacha



Source: Niko Partners

Female gamers in Asia tend to try new games based on friends' recommendations, graphics, and gameplay



Source: Niko Partners

About Niko

The most trusted provider of games market intelligence on Asia and the Middle East

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