



DEMYSTIFYING THE FEMALE ESPORTS COMMUNITY IN SOUTHEAST ASIA

ONE ESPORTS INSIGHTS SERIES
JUNE 2021

UNDERSTANDING THE FEMALE ESPORTS FAN



The esports and gaming fanbase is a growing and dynamic community that is highly engaged through social media and streaming platforms. Our research has revealed that this is especially true in Southeast Asia.

But are there any differences between men and women within this community? Are female fans equally as engaged as their male counterparts? What motivates women to immerse themselves in esports? To address these questions, this report will turn the spotlight on female esports fans – a group that is getting more and more attention from brands.

Women account for almost half of the esports community in this region. Understanding their needs, values, preferences, and behavior is key to connecting with them. Creating content and products that resonate with them has been part of our mission at ONE Esports since day one.

This report collects our high-level learnings about female esports fans based on research studies we conducted in 2020, spanning the Philippines, Indonesia, Thailand, Singapore, Vietnam, and Malaysia. It was fascinating to see and hear their passion for esports, and their perspectives and personal stories were the highlights of our research, adding context and meaning to the numbers.

The more we demystify the female esports community, the more determined we are to build the best esports content for this growing demographic and to bring diversity and inclusion to our booming industry. We invite you to join us and drive forward this important initiative in Asia and beyond.

Stay tuned for more fresh insights about gamers and esports fans.

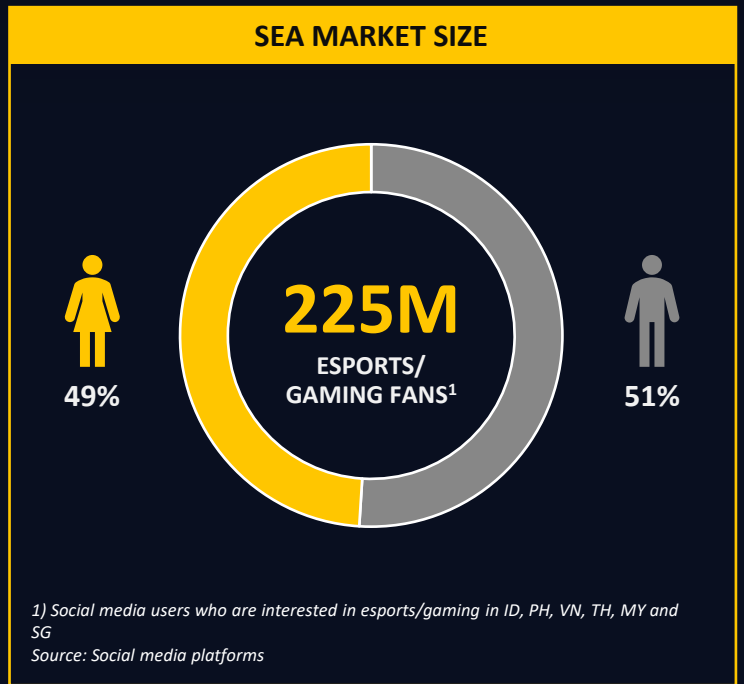
#WeAreONE

WOMEN ARE DRIVING THE GROWTH OF ESPORTS

Recent studies show that esports is no longer a man's world.

The esports landscape has evolved drastically over the past few years, prompting new audiences to enter the scene.

With women now **accounting for half of the esports and gaming community** in Southeast Asia, marketers and content creators need to offer inclusive content that resonates with a wider audience.

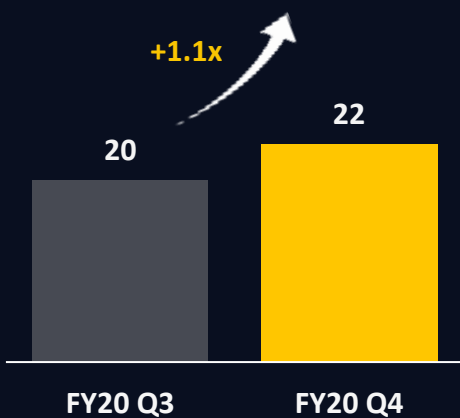


Widespread adoption of mobile phones and the rise of new players in the video streaming market have enabled easier access to more gaming titles and esports/gaming content. A wide variety of esports content now caters to the needs of viewers with different experience levels and appetites. There are countless opportunities for brands to engage this growing audience.

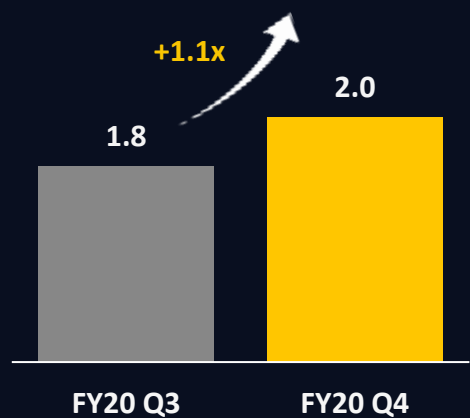
The idea that female fans are less engaged is a common misconception. In FY20 Q4, women spent more money and more time on esports/gaming content compared to FY20 Q3.

FEMALE FAN ENGAGEMENT WITH ESPORTS/GAMING

MONTHLY MONEY SPENT (USD)



WEEKLY HRS SPENT WATCHING CONTENT



Q: How much time do you spend watching esports/gaming-content in a week?
Q: How much money do you spend on esports/gaming in a month?
(Base: Female FY20 Q3 n=698; Q4 n=796)

FEMALE FANS SEEK CONNECTION AND VIEW ESPORTS AS AN OUTLET FOR SELF-EXPRESSION

To successfully engage female fans, brands need to understand the motivations that draw them to esports. We have identified four key areas that set them apart from male fans.

1. BONDING

As many women are still finding their way in esports and gaming, they rely on friends to navigate through the scene. They also seek social interaction with the community, looking to bond with likeminded people and make new friends.

On the other hand, men tend to be more competitive and geared toward advancing in rank.

2. RECOGNITION

While women tend not to be as competitive as men, it does not mean that they are not interested in improving their skills. Nevertheless, their motivation to improve is not about rank advancement, but to seek approval from their friends in the community.

3. SELF-EXPRESSION

Many women see esports and gaming as an avenue for self-expression. Some use cosplay to share their love for their favorite characters, while for others, it is a way to showcase a different side of themselves.

4. IDOLIZE INFLUENCERS

Female fans are more likely to follow influencers (e.g. streamers and pro players) on social media than male fans. These personalities are idolized and perceived as relatable friends who share the same passion for esports and gaming.

MOTIVATION FEMALE FANS VS. MALE FANS

	INDEX ¹
Make new friends via platform chat	132
Follow friend's recommendations	131
Follow esports/ gaming personalities	125

1) Female fans against male fans

Q: Please rate how much each statement represents your involvement in esports/gaming / Q: Which of these activities have you done in the past 6 months?

(Base: Female n=796; Male n=4,529)

"I NEED TO IMPROVE MY GAMEPLAY, BECAUSE I DON'T WANT TO BE A STRUGGLE FOR MY FRIENDS WHEN I PLAY WITH THEM."

- FEMALE FAN, 18-24YO

"(COSPLAY) IS MY WAY TO EXPRESS MYSELF AND SHOW MY LOVE TO THE CHARACTERS I LIKE."

- FEMALE FAN, 25-34YO



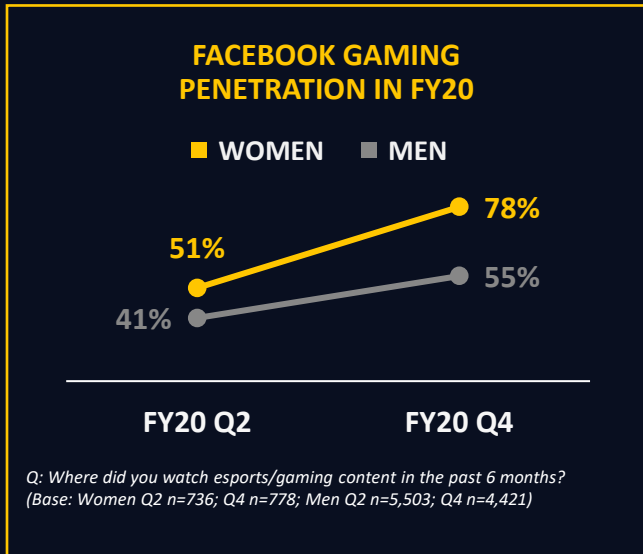
TO ATTRACT FEMALE FANS, IT IS KEY TO CHOOSE THE RIGHT PLATFORM, CONTENT AND INFLUENCERS

Besides having unique needs, female fans show distinct preference for certain touchpoints and content compared to male fans.



1. PLATFORMS:

Facebook Gaming has grown massively, especially amongst women. It has now become one of the leading platforms in the esports and gaming space by successfully capturing women's desire to bond and stay connected with friends.



REASONS TO USE FACEBOOK GAMING

	INDEX ¹
My friends use the same platform	132
I can chat with other passionate viewers	117

1) Women vs men
Q: Why did you choose Facebook Gaming to watch any esports events or gaming-related content?
(Base: Female n=442; Male n=2,822)

2. CONTENT:

While male fans show higher engagement with established esports content, female fans are more open to consuming entertaining and fictional content.

3. INFLUENCERS:

Besides expecting influencers to be good at playing games, female fans look for idols that are funny, and who they admire. Selecting influencers with likeable and entertaining personalities is key to engaging women.

ESPORTS/GAMING CONTENT WATCHED

	INDEX ¹
Live gaming stream	123
Fictional/comedy esports dramas	123
Funny gaming videos and memes	115

Q: Which esports/gaming content have you watched in the past 6 months? (Base: Female n=778; Male n=4,421)

"I LIKE SHROUD. HE IS A SUPER-HUMAN TO ME, BECAUSE OF HIS SKILLS. I WANT TO KNOW MORE ABOUT HIS PERSONALITY."

- FEMALE FAN, 25-34YO

TOP 3 REASONS TO FOLLOW INFLUENCERS

	INDEX ¹
#1 Like the way they play	99
#2 They are funny	137
#3 People that I like and admire	138

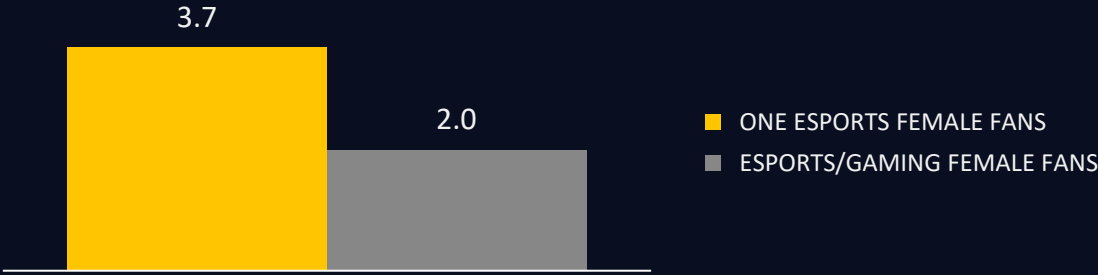
1) Women vs men
Q: Which esports/gaming content have you watched in the past 6 months?
(Base: Female n=527; Male n=2,614)

ONE ESPORTS' FEMALE FANS ARE VERY ENGAGED

ONE Esports is committed to creating a more inclusive esports and gaming community and has been actively supporting female gamers from the start. As a result, we have managed to attract a highly engaged audience.

ONE Esports' female fans spend almost twice as much time each week watching esports and gaming content than overall female fans.

WEEKLY TIME SPENT WATCHING ESPORTS/GAMING



Q: How much time do you spend watching esports/gaming-content in a week?
 (Base: OES female fans n=178; Esports/gaming female fans n=119)

ONE Esports' female fans also watch more esports content, such as live tournaments and highlights.

ESPORTS CONTENT CONSUMPTION AMONG ONE ESPORTS FEMALE FANS

	INDEX ¹
Esports tournament highlights	204
Live esports tournament	166

1) OES female fans against overall esports/gaming female fans
 Q: Which esports/gaming content have you watched in the past 6 months?
 (Base: OES female fans n=176; Esports/gaming female fans n=778)

There is a great opportunity for brands to engage ONE Esports female fan. Their lifestyle and purchase behavior show that they live vibrant and active lives.

ONE ESPORTS FEMALE FANS LIFESTYLE

Index: ONE Esports female fans against overall esports/gaming fans



1.7x
ORDER FOOD DELIVERY EVERY WEEK



1.3x
DINE OUT A FEW TIMES A MONTH



1.3x
CONSUME WINE REGULARLY



1.4x
PURCHASE SKINCARE EVERY MONTH



1.3x
EXERCISE MULTIPLE TIMES/WEEK



1.5x
ENGAGE IN COMMUNITY SERVICE EVERY MONTH

Q: How often do you do [activity]? / Q: How often do you purchase [category]?
 (Base: OES female fans n=209/n=380/n=131; Esports/gaming fans n=7,765/n=11,705/n=6,010)

BUILDING ASIA'S FEMALE ESPORTS COMMUNITY IS A CRITICAL PART OF ONE ESPORTS' MISSION

As part of our mission to support women in the industry, ONE Esports has actively offered female esports athletes a platform to showcase their skills. Recently, we teamed up with Mobile Legends: Bang Bang Woman Star League in Indonesia as their official media partner. Following the success of season 1 last year, the tournament was renewed for season 2, which took place this year. We will also cover season 3 which is scheduled to start later this month (June 2021).

COVERAGE OF FEMALE ESPORTS LEAGUES



ONE ESPORTS HAS BEEN THE OFFICIAL MEDIA PARTNER OF THE MOBILE LEGENDS: BANG BANG WOMAN STAR LEAGUE IN INDONESIA

5M+ ESTIMATED VIEWS PER SEASON

70K PEAK CONCURRENT VIEWERS

COVERAGE OF FEMALE ATHLETES



METHODOLOGY

The findings of this report are the results of quantitative and qualitative research we conducted in Southeast Asia.

- We surveyed over 6,000 social media users engaged with esports content in Southeast Asia. The sample was representative of the esports/gaming community on social media in the six surveyed markets, aged 13 to 49 years old.
- We followed-up with 90 minute in-depth-interviews with 20 esports/gaming fans from Indonesia and the Philippines, both men and women, aged 18 to 35 years old

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