

VIDEO GAMING IN LOCKDOWN

The impact of Covid-19 on video game
play behaviours and attitudes

September 2020

Introduction: Video game play in Lockdown

The start of 2020 saw the spread of Covid-19 (or coronavirus) across the world. Many countries – including those in which we run GameTrack – were seriously impacted by the pandemic, imposing national lockdowns and restricting the movement of people.

During this time, we have seen shifting patterns of behaviour, particularly when it comes to media habits. Streaming services such as Netflix saw their usage surge (so much so they had to place limitations on usage) and people began to adopt new services, including the newly launched Disney+.*

But in video gaming also, there were early indications that COVID-19 and lockdowns would have a notable impact on the video gaming market globally. Lockdowns and the prospect of the foreseeable future spent indoors saw **a spike in hardware sales.**** The closure of retail stores across Europe and America has seen **spending shift online**, adding to the large scale disruption seen across sectors.***

COVID-19 has also seen more positive shifts in the video gaming market and has helped to introduce video game play to a larger audience. Whilst the limitations put on live events and large gatherings have had a short term impact on the esports market, there has been increased engagement in esports during COVID-19, with major sports brands using esports to maintain engagement with their fan bases.****

COVID-19 is still ongoing, and there is likely going to be continued disruption and change in the industry. **In this report we will look at how video game playing habits, attitudes and behaviours were impacted within the GameTrack European markets at the start of the pandemic and lockdowns to get an understanding of how the market is changing and how players (and non-players) are now thinking about video games.**

*<https://deadline.com/2020/03/eu-netflix-ceo-switch-to-standard-definition-coronavirus-1202887374/>

**<https://www.gamesindustry.biz/articles/2020-04-08-nintendo-says-more-systems-on-the-way-as-switch-sells-out-worldwide>

*** <https://www.gamesindustry.biz/articles/2020-03-24-uk-games-retail-shifts-online-as-government-orders-closure-of-all-non-essential-stores>

**** <https://europeansting.com/2020/05/19/how-covid-19-is-taking-gaming-and-esports-to-the-next-level/>

Summary: Q2 2020 Results

Playtime & spending

1. Play time increased weekly by 1.5 hrs compared to the same period in 2019 among players aged 6-64 years old. However, most players resumed their usual playtime as lockdown eased.
2. 14% claim to have discovered *new* video games.
3. Despite increased playtime, only a small proportion of players claim to spend more on in-game extras (6%).

Education

1. Around 1 in 5 parents agree that video games have helped with their child's education and schooling.
2. 1 in 5 parents are playing more video games with their children during lockdown as well as educational video games.

Mental health

1. Around 3 in 10 of players say video games have helped them to feel happier, less anxious and isolated.
2. During the *full* lockdown (April), 29% of players agreed that video games had a positive mental health benefit.
3. 35% of those playing multiplayer online games have a more favourable view of video gaming & mental health.

Playing together

1. 1 in 5 players played more video games online with friends, family or other video game players during lockdown.
2. A fifth of parents claimed they played *more* with their children since COVID.
3. Playing multiplayer online games have provided support during lockdown to feel less isolated.

VIDEO GAME PLAY LOCKDOWN

Playtime and spending

Q2 2020

Playtime:

Engagement in video game play has accelerated during lockdown periods across GameTrack EU countries increasing by 1.5 hrs per week during the last two quarters.



Mean time spent playing hrs/week (Among all video game players on any device)

NET: Euro (UK / FR / GE / SP / IT)

+1.5
hours vs.
Q2 2019



	10.8	11.2	11.7	11.7	11.6	12.5	13.6
	7.7	8.2	8.8	9.0	8.6	9.5	9.2
	8.8	8.5	8.4	7.8	8.3	9.6	9.5
	7.3	6.7	7.1	7.6	6.7	7.9	9.2
	6.7	7.1	6.5	7.6	7.4	8.2	8.5

Base: All players aged 6-64

Playtime:

Across markets there is a notable drop in players claiming playing more when comparing April vs June; a likely consequence of the easing of lockdowns.

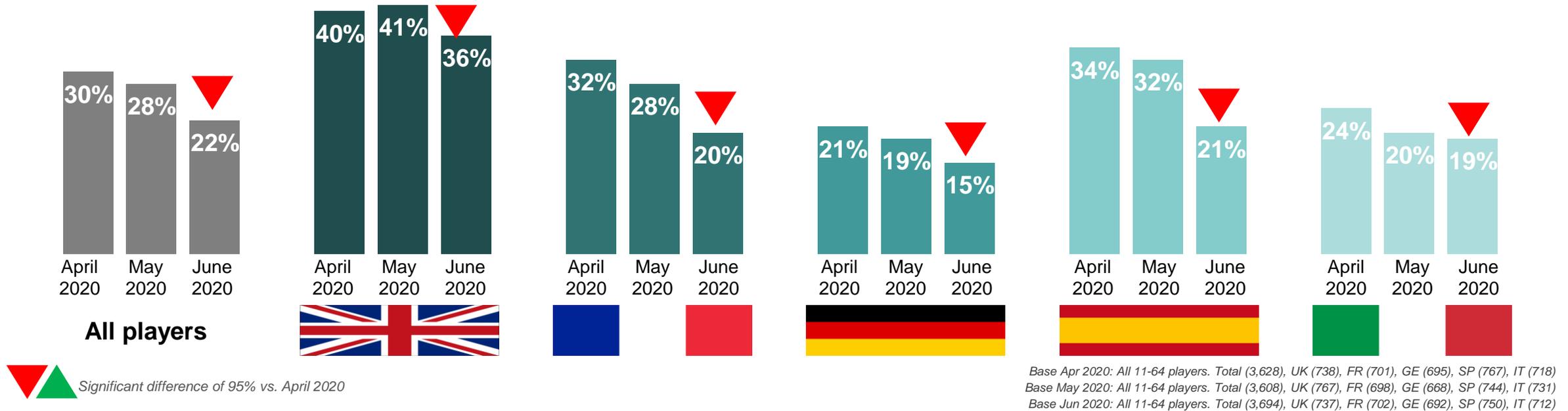


Q2 2020

Activities doing more of since lockdown (amongst players – by market)

“Playing any video games”

NET: Doing this a lot more / doing this a bit more



COVID1. Within the **past month**, which of the follow best describes your behaviour for the following activities?

The coronavirus pandemic has increased video game playing time; players are replacing other hobbies which are not possible under quarantine and have more time overall to spend playing video games due to fewer obligations.



Q2 2020

Reasons for playing more video games in past month

“I get **bored** more easily and have **more time to devote myself**. Also there were attractive **offers**.”

“**No school, keeping my 8 year old entertained**. Also I am stressed about the news and will play games on my phone to **relieve stress/boredom**.”

“Due to the Corona virus my family has self isolated. Playing games makes for a **fun past time**.”

“I am **confined to my home**...so I have **more free time** to play video games.”

“**Covid-19 Quarantine**.”

“I have **more time to fill without work**.”

“I spend more time at home than usual and have **fewer obligations**.”

“I have **more free time** at home, so **replacing activities** like going out for a drink with friends, going to the movies, playing sports **outdoors**.”

“Staying at home has made it possible to **stay in touch with friends**...a way could be to **play together**.”

Base: All who spent more time playing any or new videogames in the past month (5,995)

COVID2. You previously mentioned that you were playing more videogames in the past month than before. What are the main reasons you are playing videogames more in the past month? Please give as much detail as possible



Spending:

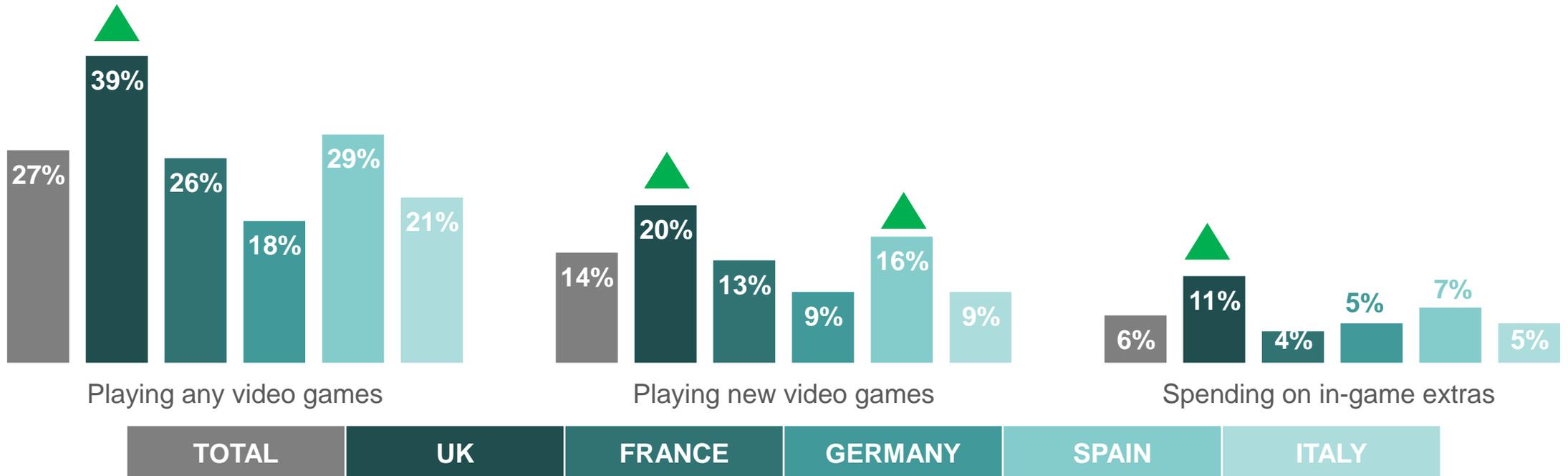
27% of players claim to play more and a 14% claim to have discovered new video games. Despite increased this, a small proportion claim to spend more on in-game extras.



Q2 2020

Activities doing more of since lockdown (amongst players – by market)

NET: Doing this a lot more / doing this a bit more



Significant difference of 95% vs. all

Base: All 11-64 players. Total (10,830), UK (2,242), FR (2,111), GE (2,055), SP (2,261), IT (2,161)

COVID1. Within the **past month**, which of the follow best describes your behaviour for the following activities?

Spending:

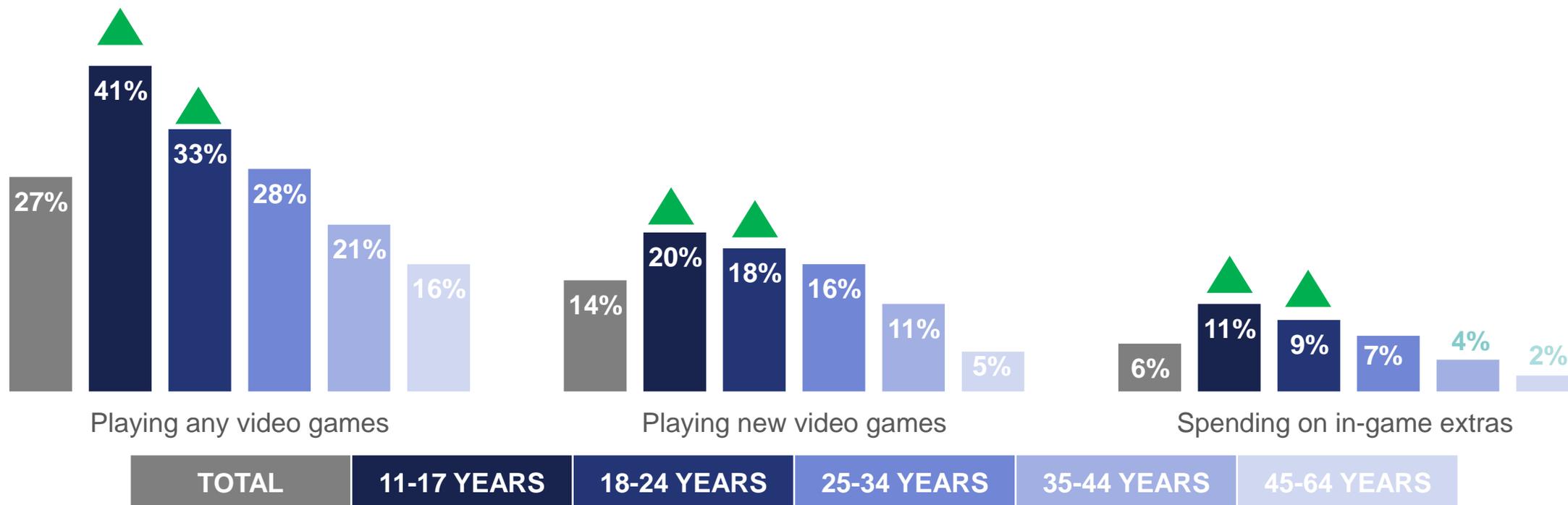
11 to 24 year olds have been playing more although spending level has not increased significantly; only one in ten 11-17 are spending more on in-game extras.



Q2 2020

Activities doing more of since lockdown (amongst players – by age)

NET: Doing this a lot more / doing this a bit more



Significant difference of 95% vs. all

Base: All 11-64 players. Total (10,830), 11-17 (1,292), 18-24 (1,774), 25-34 (2,311), 35-44 (2,414), 45-64 (3,039)

COVID1. Within the **past month**, which of the follow best describes your behaviour for the following activities?





Summary: Education

- As with players overall, Coronavirus appears to have impacted how parents also play video games. **One in five parents claim to be playing more video games with their children** (0-15 years old).
- **A similar proportion claim to agree that video games have helped with their children's education.** This is notably amongst parents of younger children. And in the UK again, a significantly higher proportion of parents are likely to agree about the role of video game play in education vs. the other European markets.
- When it comes to in-game Covid-19-related messaging, a higher proportion of parents who play video games in the UK have seen such messaging compared to the other markets. However, the number claiming to have viewed these messages is low, with around one in ten players claiming to have seen them.

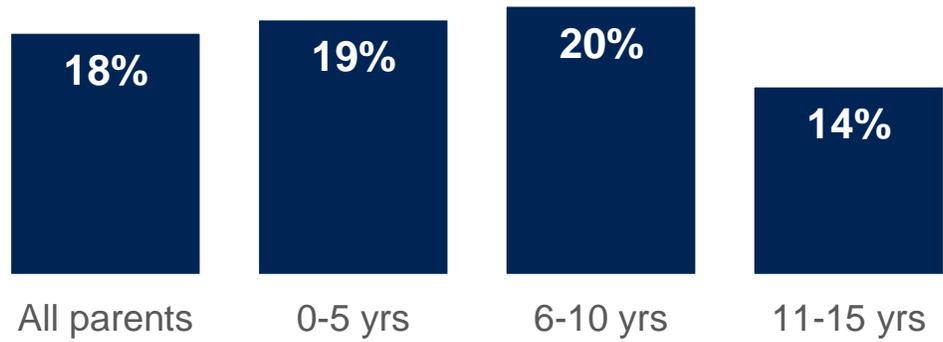
1 in 5 parents agree that video games have helped with their child’s education and schooling. This is higher amongst parents of younger kids and for those in the UK.

Q2 2020

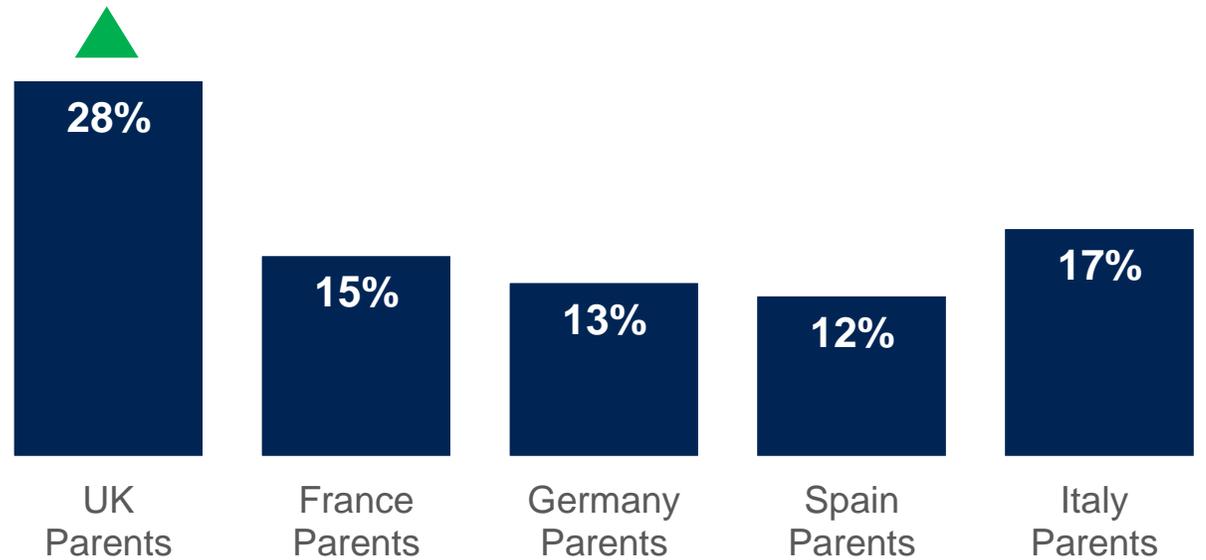
Video game play and education / schooling

NET Agree: “Playing video games has helped with my children's education/schooling”

Parents (overall and of each age group)



Gamers (overall and by market)



Significant difference of 95% vs. all

Base: All parents who play videogames on at least 1 device. All parents (1,416), Parents 0-5 (478), Parents 6-10 (233), Parents 11-15 (804)

Base: UK (289), FR (286), GE (240), SP (312), IT (289)

COVID3. Thinking again about the **past month**, to what extent do you agree or disagree with the following statements?

Almost 1 in 5 parents are playing more video games with their children during lockdown as well as educational video games. This is notable amongst parents of younger children.

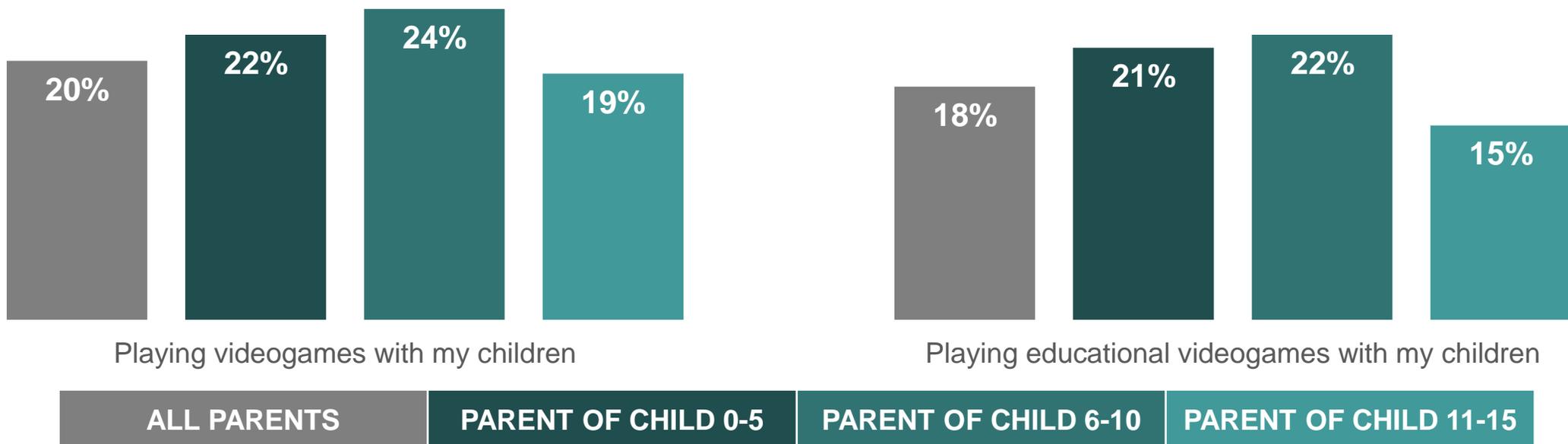


Q2 2020

Activities doing more of since lockdown

Behaviour change

NET: Doing this a lot more / doing this a bit more



 Significant difference of 95% vs. all

Base: All parents who play videogames on at least 1 device. All parents (1,416), Parents 0-5 (478), Parents 6-10 (233), Parents 11-15 (804)

COVID1. Within the **past month**, which of the follow best describes your behaviour for the following activities?



Summary: Mental Health

- **Around one in five think that playing video games has a positive effect on mental health.** This is notably higher amongst players, with just over a quarter of players thinking it has a positive impact.
- Similarly, **a higher proportion of parents agree that playing video games has a positive impact on mental health.**
- **A quarter of all players** claim to have a more favourable view of playing video games and mental health.

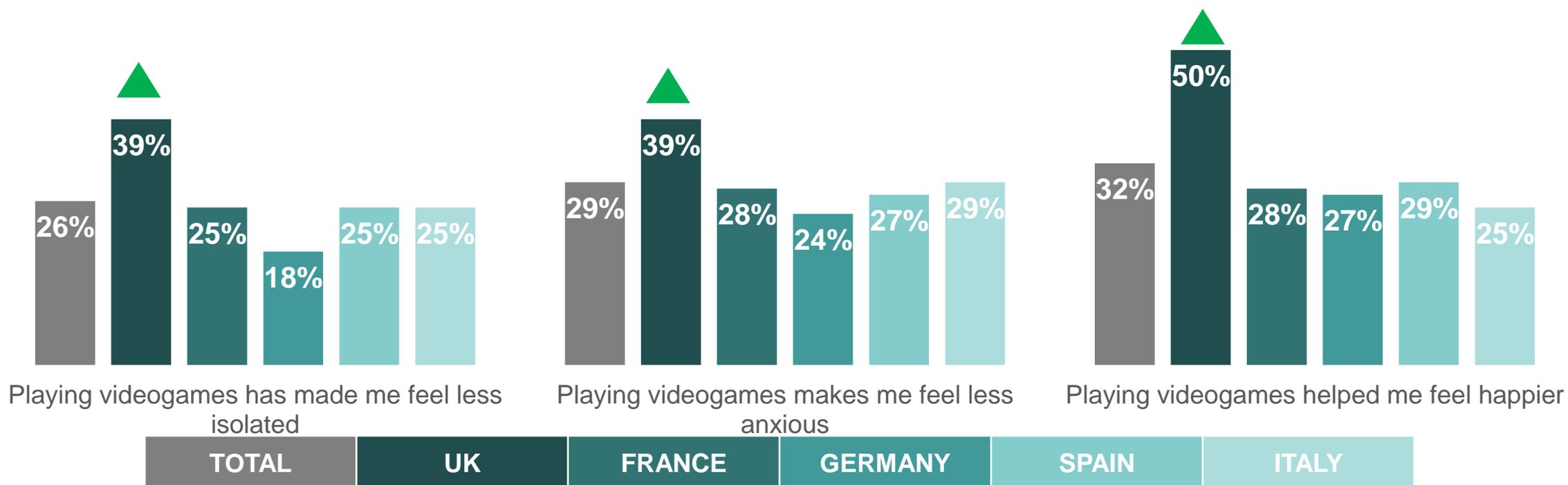
Around 30% of players say video games have helped them to feel happier, less anxious and isolated. This is particularly notable in the UK where half of players claim it has helped them feel happier.



Q2 2020

Attitudes to playing video games in lockdown

NET: Strongly agree / agree



Significant difference of 95% vs. all

Base: All 11-64 players: Total (10,830), UK (2,242), FR (2,111), GE (2,055), SP (2,261), IT (2,161)

COVID3. Thinking again about the past month, to what extent do you agree or disagree with the following statements?

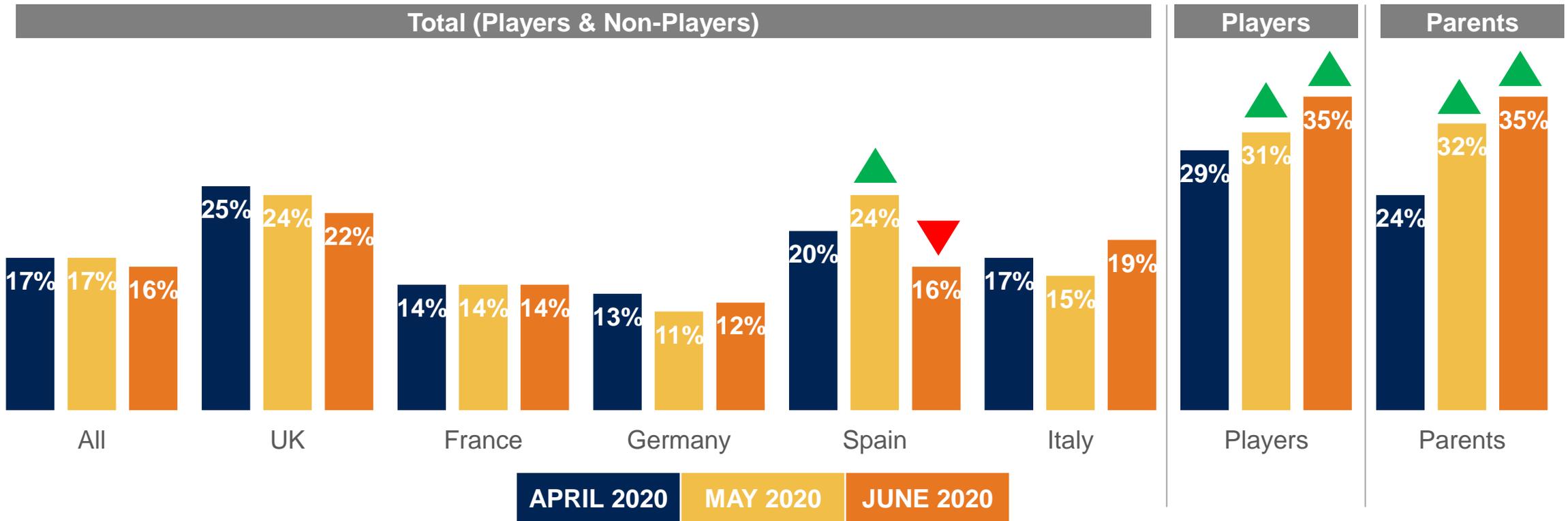
Mental health:

During the full lockdown (April), the proportion of people who agree that playing video games has a positive impact on mental health was slightly higher overall.

Q2 2020

Playing Video games and Mental Health

NET: Strongly Agree / Agree “Playing video games has positive mental health effects”



Significant difference of 95% vs. April 2020

Base (Monthly): Total 11-64 sample (4,405), UK (c.880), FR (c.880), GE (c.890), SP (c.860), IT (c.870), Gamers (c.4,600), Parents (c.2,100)

COVID3. Thinking again about the **past month**, to what extent do you agree or disagree with the following statements?

Mental health:

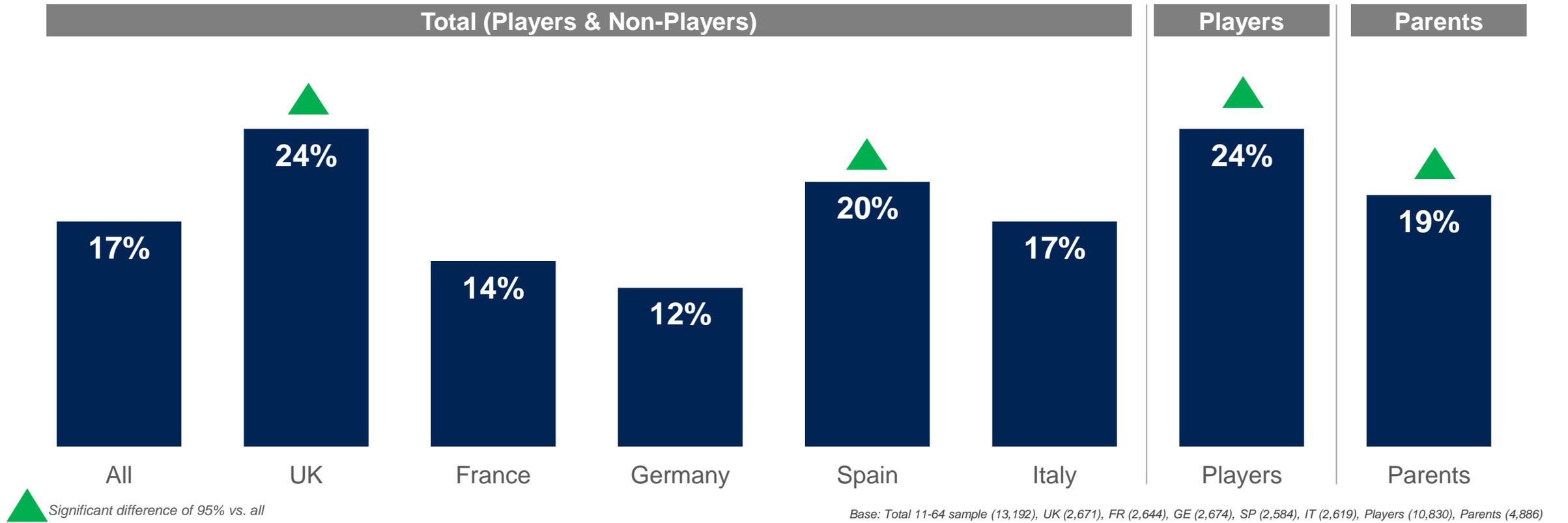
Nearly 1 in 5 agree that playing video games has a positive impact on mental health. This is higher in the UK and unsurprisingly also amongst players.



Q2 2020

Playing Video games and Mental Health

NET: Strongly Agree / Agree “Playing video games has positive mental health effects”



QGAMESTAT. To what extent to do agree or disagree with the following statements?

UK Market Context: Mental Health & Video Game Play

We have seen how that in the UK, players are more likely compared to the other European markets to see the benefits of playing video games on mental health and as an aide during lockdown and separation. Over half have claimed that playing video games has made them feel happier during lockdown (vs. 35% across all the other markets).

There have been many conversations around playing video games and mental health, particularly since the WHO ruling in 2019 on 'gaming disorder'. But as the Covid-19 pandemic developed, video game playing is increasingly considered as a tool to help maintain social distancing whilst maintaining social bonds (see the **#playaparttogether** campaign).

We can see in the UK how there are more positive associations between playing video games and mental health. At the start of lockdown, UKIE announced the '**Games for Carers**' programme

which worked with publishers to bring thousands of free games to frontline staff to help alleviate stress.

In the UK in particular, there is broad, institutional support of the video games industry and its role when it comes to combating mental health issues. Recently, EA partnered with the Department of Media, Culture and Sport and the charity CALM (Campaign Against Living Miserably) to raise awareness of and combat loneliness.

Signals like this suggest how video games are playing a larger role in UK society particularly around issues such as mental health, in ways that may not be being adopted in other markets. Whilst perceptions of mental health and playing video games haven't shifted significantly during lockdown, video game play has played an immediate role that may help in the long term to help shift these perceptions.

<https://www.businessinsider.com/who-video-games-coronavirus-pandemic-mental-health-disorder-2020-4?r=US&IR=T>

<https://www.mcvuk.com/business-news/ea-partners-with-uk-government-and-calm-to-support-letstalkloneliness/>

<https://www.bbc.co.uk/news/newsbeat-52470542>

VIDEO GAME PLAY LOCKDOWN

Playing together

Q2 2020

Playing together:

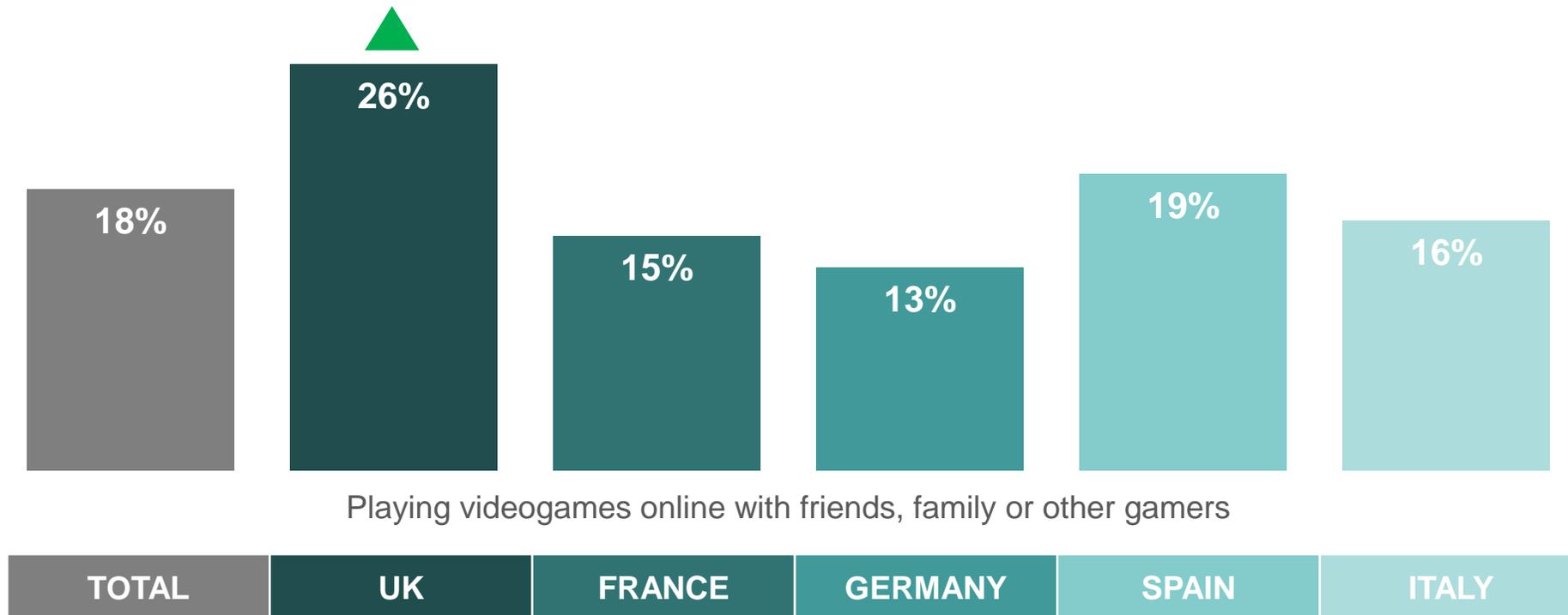
Almost 1 in 5 players claim to have played more video games with friends, family or other video game players during lockdown.



Q2 2020

Activities doing more of since lockdown

NET: Doing this a lot more / doing this a bit more



Significant difference of 95% vs. all

Base: All 11-64 players. Total (10,830), UK (2,242), FR (2,111), GE (2,055), SP (2,261), IT (2,161)

COVID1. Within the **past month**, which of the follow best describes your behaviour for the following activities?



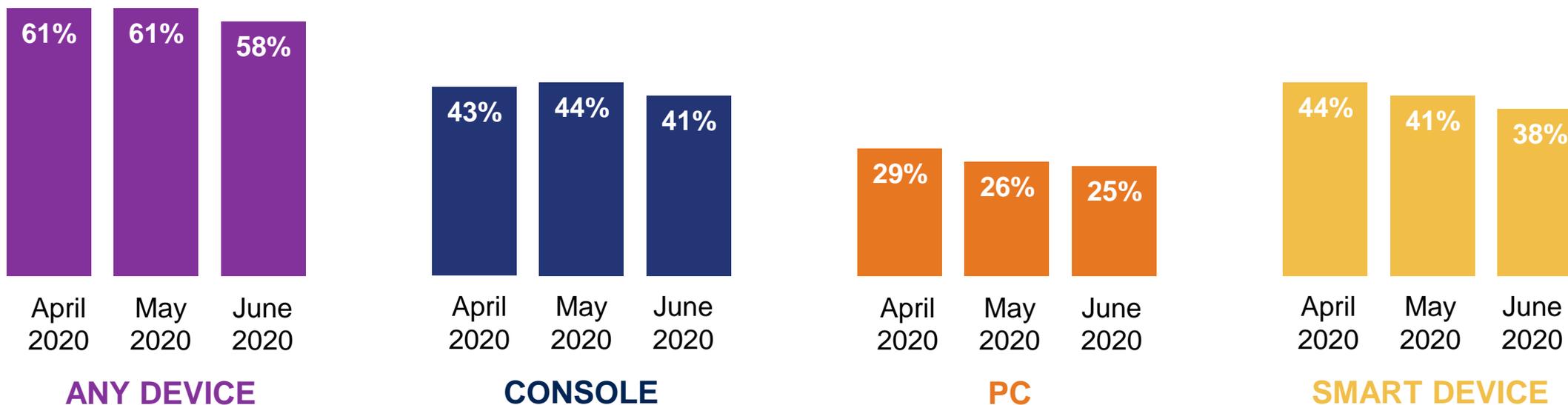
How did parents play during lockdown?

Parents played more during the lockdown in April – when lockdown eased, this dropped slightly to previous levels.



Q2 2020

Reach of playing video games among parents



Significant difference of 95% vs. April 2020

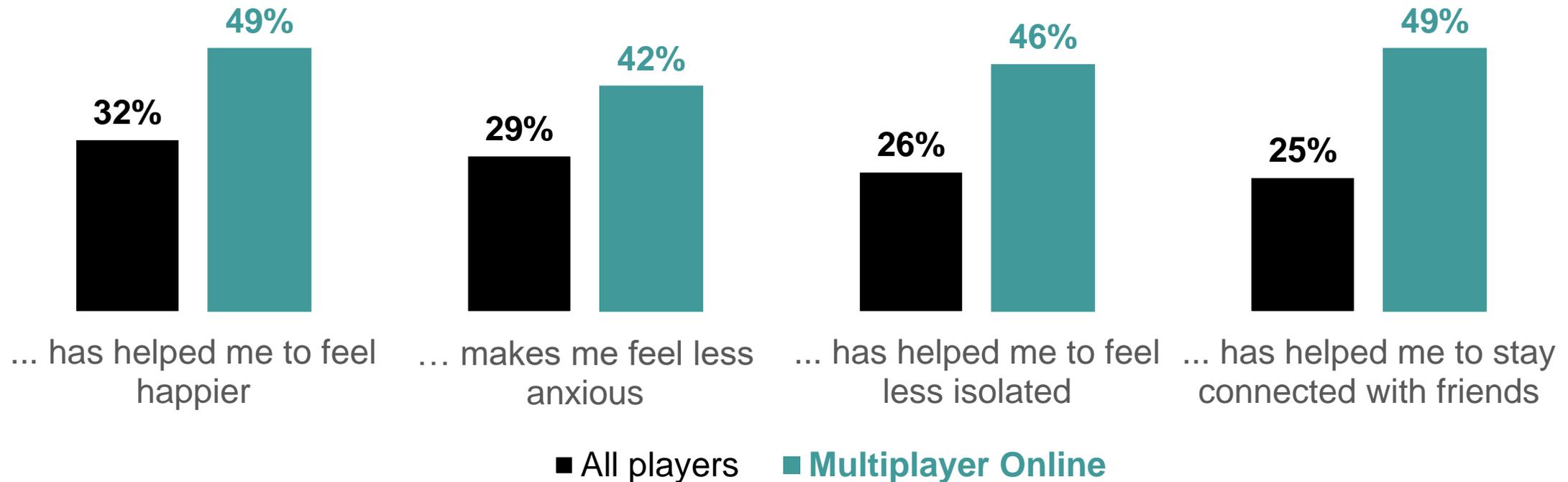
Base: All parents. April 2020 (1,601), May 2020 (1,626), June 2020 (1,659)

B1b. Again, please EXCLUDE any pirated games and EXCLUDE online gambling. Which, if any, of the following devices do you play OFFICIAL games on, even if just occasionally? Please select all that apply.

Playing multiplayer online games appears to have played a supportive role during lockdown.



Playing videogames... (% NET agree)



QGAMEPLAY. Thinking a bit more about your gameplay, which of the following gameplay modes do you play?
COVID3. Thinking again about the past month, to what extent do you agree or disagree with the following statements?

Base: All 11-64 players across the UK, FR, GE, SP & IT (10,830) / All players who have played multiplayer online (3,926)

VIDEO GAME PLAY LOCKDOWN

How did people play?

Q2 2020

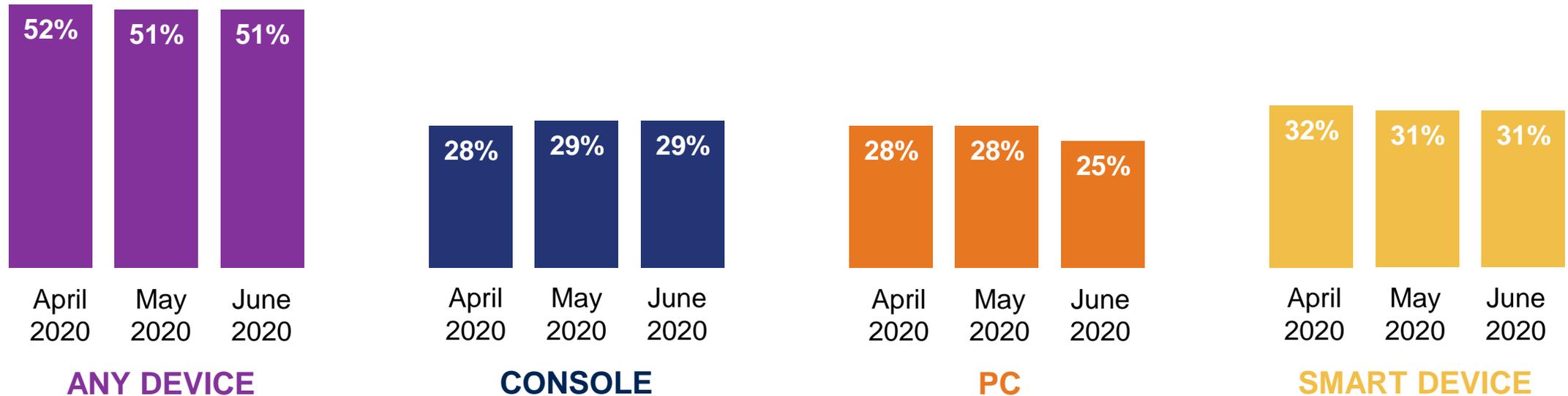
How did people play during lockdown?

The reach of playing video games across the five EU market remains consistent during lockdown. There is a slight drop in the number of players playing on PC, however.



Q2 2020

Reach of playing video games among all players



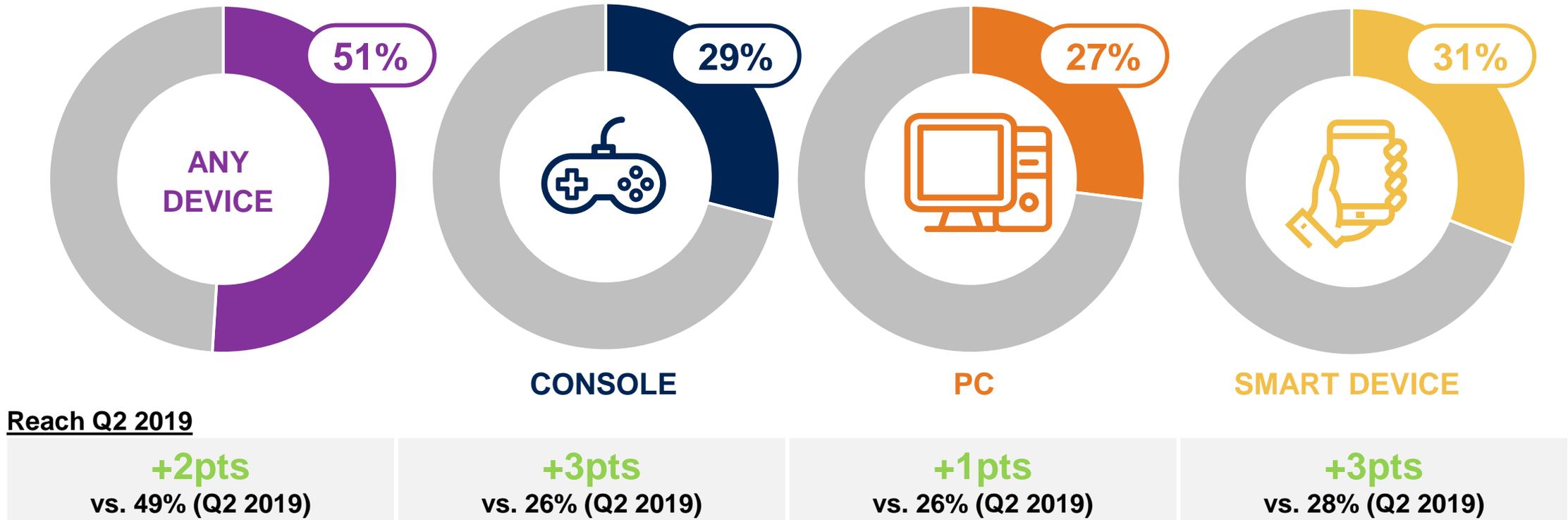
Significant difference of 95% vs. April 2020

Base: All 6 – 64 population. April 2020 (5,077), May 2020 (5,073), June 2020 (5,083)

B1b. Again, please EXCLUDE any pirated games and EXCLUDE online gambling. Which, if any, of the following devices do you play OFFICIAL games on, even if just occasionally? Please select all that apply.

Smart devices are now the most popular way to play video games for all markets except the UK where console playing edges ahead.

Reach of playing video games by device type (Q2 2020)



Base: All 6-64 respondents (based on GameTrack results)

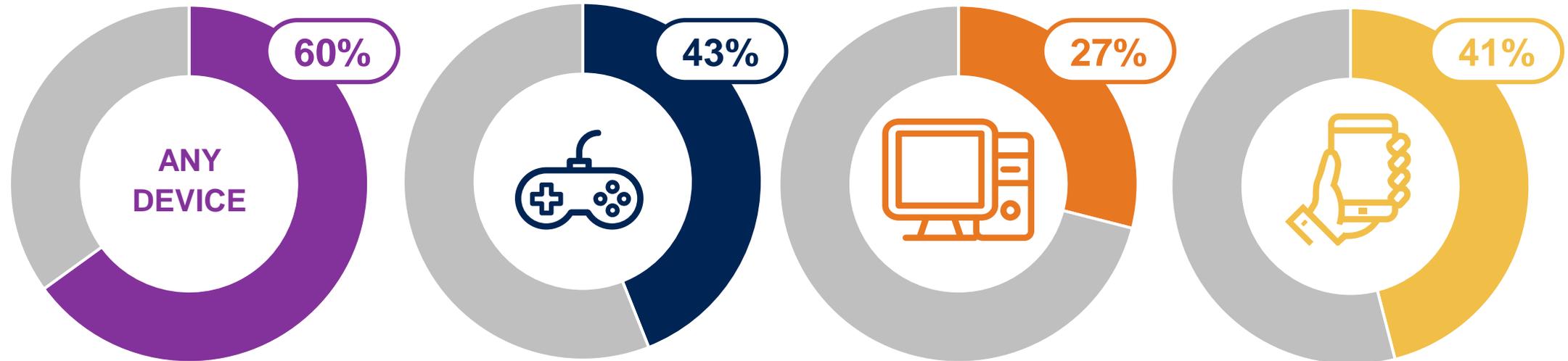
B1b. Again, please EXCLUDE any pirated games and EXCLUDE online gambling. Which, if any, of the following devices do you play OFFICIAL games on, even if just occasionally? Please select all that apply.

Consoles and smart devices are the most popular video game devices amongst parents and the reach of parents playing video games has increased year-on-year.

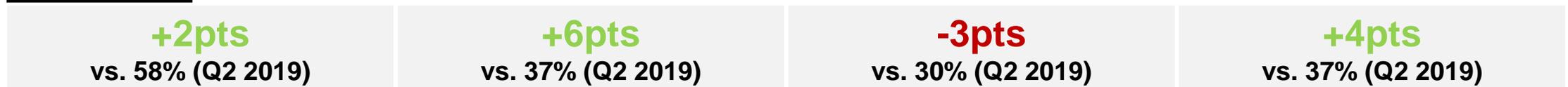


Q2 2020

Reach of playing video games among parents



Reach Q2 2019



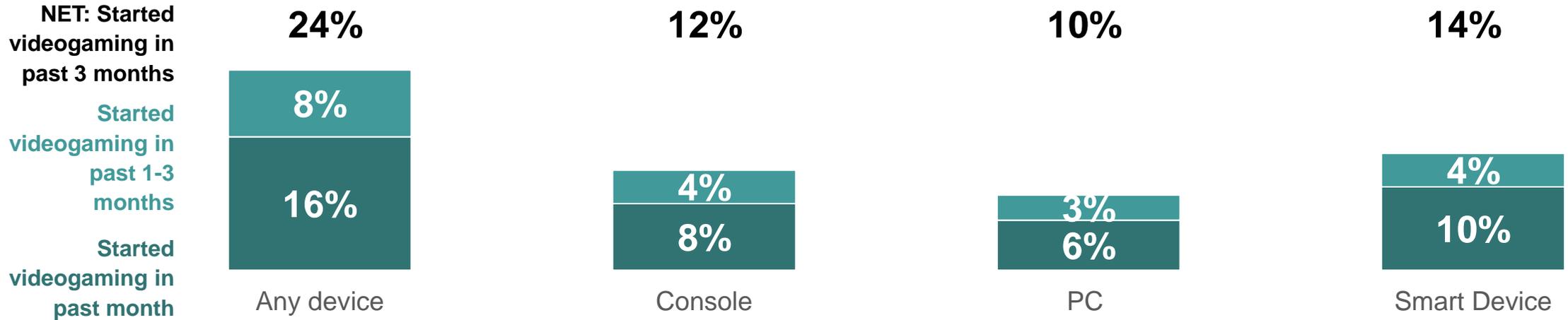
Base: All parents (4,886)

B1b. Again, please EXCLUDE any pirated games and EXCLUDE online gambling. Which, if any, of the following devices do you play OFFICIAL games on, even if just occasionally? Please select all that apply.

Lockdown has encouraged players to expand their experience across a range of devices.

Q2 2020

% of players who have started playing video games in the past 1 and 3 months



Started videogaming in past month by market

	20%	12%	7%	12%
	14%	5%	6%	10%
	15%	8%	7%	8%
	14%	5%	5%	9%
	19%	8%	6%	11%

Base: All 11-64 players. Total (10,830), UK (2,242), FR (2,111), GE (2,055), SP (2,261), IT (2,161)

QSTARTGAMING. Of those devices that you said you play games on, when did you start playing videogames on each of these devices?

Thank you.

EDUARDO MENA
Eduardo.Mena@Ipsos.com
020 8861 8096

NICK COOK
Nick.Cook@Ipsos.com
020 8861 5175

JESS DAVIES
Jess.Davies@Ipsos.com
020 3059 4891

Ipsos MORI



Appendix 1.

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Research Methodology & Timeline

Research was conducted from **Q2 2020** (with fieldwork being conducted in April, May and June) across the UK, France, Germany, Spain and Italy. Questions were asked as part of the GameTrack study; a global market sizing study run for the Interactive Software Federation of Europe by Ipsos MORI. Research was conducted via an **online survey**, interviewing a nationally representative sample of 3,000 respondents per quarter per market (1,000 respondents per month), including players and non-players.

Questions asked included:

- Understanding adoption of video game playing.
- Understanding broad perceptions of video game playing.
- Understanding changes of behaviour when it comes to video game playing, purchasing behaviour and reasons for playing.
- Understanding the relationship between mental health and video game play in lockdown.

For this research, specific questions were asked to better understand video game playing behaviours and attitudes considering the COVID-19 pandemic amongst **respondents aged 11 to 64** (children aged 6-10 did not answer any of this module specific question).

The dates below give an indication of the various stages of the lockdowns across the markets this research was conducted in (though limitations on movement and reopening do vary by market) and when the research was conducted.

GAMETRACK MONTHLY FIELDWORK: Q2 2020 (asking about gaming behaviour during Q2 2020)			
MARKET	NATIONAL LOCKDOWN IMPOSED	BEGINNING OF LIFTING OF RESTRICTIONS	SHOPS & RETAIL BEGIN TO OPEN
	23 rd March	10 th May	15 th June
	17 th March	11 th May	11 th May
	23 rd March	15 th April	20 th April
	14 th March	28 th April	11 th May
	12 th March	4 th May	16 th May

Lockdown dates sourced from: <https://www.bbc.co.uk/news/world-52103747>