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://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)**

<table>
<thead>
<tr>
<th></th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>10.8</td>
<td>11.2</td>
<td>11.7</td>
<td>11.7</td>
<td>11.6</td>
<td>12.5</td>
<td>13.6</td>
</tr>
<tr>
<td>France</td>
<td>7.7</td>
<td>8.2</td>
<td><strong>8.8</strong></td>
<td>9.0</td>
<td>8.6</td>
<td>9.5</td>
<td>9.2</td>
</tr>
<tr>
<td>Germany</td>
<td>8.8</td>
<td>8.5</td>
<td>8.4</td>
<td>7.8</td>
<td>8.3</td>
<td>9.6</td>
<td>9.5</td>
</tr>
<tr>
<td>Spain</td>
<td>7.3</td>
<td>6.7</td>
<td>7.1</td>
<td>7.6</td>
<td>6.7</td>
<td>7.9</td>
<td>9.2</td>
</tr>
<tr>
<td>Italy</td>
<td>6.7</td>
<td>7.1</td>
<td>6.5</td>
<td>7.6</td>
<td>7.4</td>
<td>8.2</td>
<td>8.5</td>
</tr>
</tbody>
</table>

*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.

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 following best describes your behaviour for the following activities?

Base Apr 2020: All 11-64 players. Total (3,628), UK (738), FR (701), GE (695), SP (767), IT (718)
Base May 2020: All 11-64 players. Total (3,608), UK (767), FR (698), GE (668), SP (744), IT (731)
Base Jun 2020: All 11-64 players. Total (3,694), UK (737), FR (702), GE (688), SP (750), IT (712)
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.

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**.”

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

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

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

“**Covid-19 Quarantine.**”

“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.

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

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

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

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

**Summary: Education**
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.

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) vs. Gamers (overall and by market)

- For all parents, 18% agree, with 19% for 0-5 yrs, 20% for 6-10 yrs, and 14% for 11-15 yrs.
- UK Parents: 28%
- France Parents: 15%
- Germany Parents: 13%
- Spain Parents: 12%
- Italy Parents: 17%

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)

Q2 2020
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.

Activities doing more of since lockdown

**Behaviour change**
NET: Doing this a lot more / doing this a bit more

<table>
<thead>
<tr>
<th>Activity</th>
<th>ALL PARENTS</th>
<th>PARENT OF CHILD 0-5</th>
<th>PARENT OF CHILD 6-10</th>
<th>PARENT OF CHILD 11-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playing videogames with my children</td>
<td>20%</td>
<td>22%</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Playing educational videogames with my children</td>
<td>18%</td>
<td>21%</td>
<td>22%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Significant difference of 95% vs. all

COVID-1. Within the past month, which of the follow best describes your behaviour for the following activities?

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)
• 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.

Attitudes to playing video games in lockdown

NET: Strongly agree / agree

Playing videogames has made me feel less isolated

- TOTAL: 39%
- UK: 26%
- FRANCE: 25%
- GERMANY: 25%
- SPAIN: 18%
- ITALY: 25%

Playing videogames makes me feel less anxious

- TOTAL: 39%
- UK: 29%
- FRANCE: 28%
- GERMANY: 24%
- SPAIN: 27%
- ITALY: 27%

Playing videogames helped me feel happier

- TOTAL: 50%
- UK: 32%
- FRANCE: 28%
- GERMANY: 29%
- SPAIN: 29%
- ITALY: 25%

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

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)
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.

Playing Video games and Mental Health

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

<table>
<thead>
<tr>
<th>Total (Players &amp; Non-Players)</th>
<th>Players</th>
<th>Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>All 17% 17% 16%</td>
<td>25% 24% 22%</td>
<td>14% 14% 14%</td>
</tr>
<tr>
<td>UK 14% 14% 13%</td>
<td>14% 11% 12%</td>
<td>20% 24% 16%</td>
</tr>
<tr>
<td>France 13%</td>
<td>11% 12%</td>
<td>17% 17%</td>
</tr>
<tr>
<td>Germany 14%</td>
<td>12%</td>
<td>16% 15%</td>
</tr>
<tr>
<td>Spain 17%</td>
<td>19%</td>
<td>29% 31%</td>
</tr>
<tr>
<td>Italy</td>
<td>24% 35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

APRIL 2020 MAY 2020 JUNE 2020

Significant difference of 95% vs. April 2020

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

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)
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.

Playing Video games and Mental Health

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Total (Players &amp; Non-Players)</th>
<th>Players</th>
<th>Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Players</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parents</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Significant difference of 95% vs. all

Base: Total 11-64 sample (13,192), UK (2,671), FR (2,644), GE (2,674), SP (2,584), IT (2,619), Players (10,830), Parents (4,886)
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.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.

Activities doing more of since lockdown

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>TOTAL</th>
<th>UK</th>
<th>FRANCE</th>
<th>GERMANY</th>
<th>SPAIN</th>
<th>ITALY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playing videogames online with friends, family or other gamers</td>
<td></td>
<td>18%</td>
<td>26%</td>
<td>15%</td>
<td>13%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Significant difference of 95% vs. all

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

© Ipsos | ISFE Gaming in Lockdown | September 2020 |
How did parents play during lockdown?
Parents played more during the lockdown in April – when lockdown eased, this dropped slightly to previous levels.

Reach of playing video games among parents

<table>
<thead>
<tr>
<th>ANY DEVICE</th>
<th>CONSOLE</th>
<th>PC</th>
<th>SMART DEVICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 2020</td>
<td>April 2020</td>
<td>April 2020</td>
<td>April 2020</td>
</tr>
<tr>
<td>61%</td>
<td>43%</td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>May 2020</td>
<td>May 2020</td>
<td>May 2020</td>
<td>May 2020</td>
</tr>
<tr>
<td>61%</td>
<td>44%</td>
<td>26%</td>
<td>41%</td>
</tr>
<tr>
<td>June 2020</td>
<td>June 2020</td>
<td>June 2020</td>
<td>June 2020</td>
</tr>
<tr>
<td>58%</td>
<td>41%</td>
<td>25%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Significant difference of 95% vs. April 2020

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.

Base: All parents. April 2020 (1,601), May 2020 (1,626), June 2020 (1,659)
Playing multiplayer online games appears to have played a supportive role during lockdown.

Playing videogames… (% NET agree)

- ... has helped me to feel happier: 32%, 49%
- ... makes me feel less anxious: 29%, 42%
- ... has helped me to feel less isolated: 26%, 46%
- ... has helped me to stay connected with friends: 25%, 49%

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)
How did people play?
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.

Reach of playing video games among all players

<table>
<thead>
<tr>
<th>Device</th>
<th>April 2020</th>
<th>May 2020</th>
<th>June 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY DEVICE</td>
<td>52%</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>CONSOLE</td>
<td>28%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>PC</td>
<td>28%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>SMART DEVICE</td>
<td>32%</td>
<td>31%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Significant difference of 95% vs. April 2020

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.

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

Reach Q2 2019

<table>
<thead>
<tr>
<th>Device</th>
<th>Q2 2020</th>
<th>Change vs. Q2 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY DEVICE</td>
<td>51%</td>
<td>+2pts vs. 49%</td>
</tr>
<tr>
<td>CONSOLE</td>
<td>29%</td>
<td>+3pts vs. 26%</td>
</tr>
<tr>
<td>PC</td>
<td>27%</td>
<td>+1pts vs. 26%</td>
</tr>
<tr>
<td>SMART DEVICE</td>
<td>31%</td>
<td>+3pts vs. 28%</td>
</tr>
</tbody>
</table>

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.

Reach of playing video games among parents

Reach Q2 2019

<table>
<thead>
<tr>
<th>Device</th>
<th>Q2 2020 %</th>
<th>Q2 2019 %</th>
<th>Change Q2 2020 vs Q2 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY DEVICE</td>
<td>60%</td>
<td>43%</td>
<td>+2pts vs. 58% (Q2 2019)</td>
</tr>
<tr>
<td>Consoles</td>
<td>41%</td>
<td>27%</td>
<td>-3pts vs. 37% (Q2 2019)</td>
</tr>
<tr>
<td>Smart devices</td>
<td>41%</td>
<td>30%</td>
<td>+4pts vs. 37% (Q2 2019)</td>
</tr>
</tbody>
</table>

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.

Base: All parents (4,886)
Lockdown has encouraged players to expand their experience across a range of devices.

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

<table>
<thead>
<tr>
<th>NET: Started videogaming in past 3 months</th>
<th>24%</th>
<th>12%</th>
<th>10%</th>
<th>14%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Started videogaming in past 1-3 months</td>
<td>8%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Started videogaming in past month</td>
<td>16%</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Any device</th>
<th>Console</th>
<th>PC</th>
<th>Smart Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>14%</td>
<td>5%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>15%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>14%</td>
<td>5%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>19%</td>
<td>8%</td>
<td>6%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

Base: All 11-64 players. Total (10,830), UK (2,242), FR (2,111), GE (2,055), SP (2,261), IT (2,161)
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
Appendix 1.
ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

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.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

***

"Game Changers" – our tagline – summarises our ambition to help our clients to navigate more easily our deeply changing world.
Ipsos MORI’s Standards & Accreditations (for reports)

Ipsos MORI's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252 – is the international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.

MRS Company Partnership – By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self regulation of the MRS Code; more than 350 companies have followed our lead.

ISO 9001 – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001 – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

The (EU) 2016/679 General Data Protection Regulation (GDPR) & the UK Data Protection Act 2018 (DPA) – Ipsos MORI is required to comply with the General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.

Ipsos MORI is an active member of EphMRA and BHBIA.

HMG Cyber Essentials – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos MORI was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.

Fair Data – Ipsos MORI is signed up as a ‘Fair Data’ Company by agreeing to adhere to ten core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos MORI Terms and Conditions (please remove if the work was under a MSA or client contract).
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 answered 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)

<table>
<thead>
<tr>
<th>MARKET</th>
<th>NATIONAL LOCKDOWN IMPOSED</th>
<th>BEGINNING OF LIFTING OF RESTRICTIONS</th>
<th>SHOPS &amp; RETAIL BEGIN TO OPEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>23rd March</td>
<td>10th May</td>
<td>15th June</td>
</tr>
<tr>
<td>France</td>
<td>17th March</td>
<td>11th May</td>
<td>11th May</td>
</tr>
<tr>
<td>Germany</td>
<td>23rd March</td>
<td>15th April</td>
<td>20th April</td>
</tr>
<tr>
<td>Spain</td>
<td>14th March</td>
<td>28th April</td>
<td>11th May</td>
</tr>
<tr>
<td>Italy</td>
<td>12th March</td>
<td>4th May</td>
<td>16th May</td>
</tr>
</tbody>
</table>