



Opinium

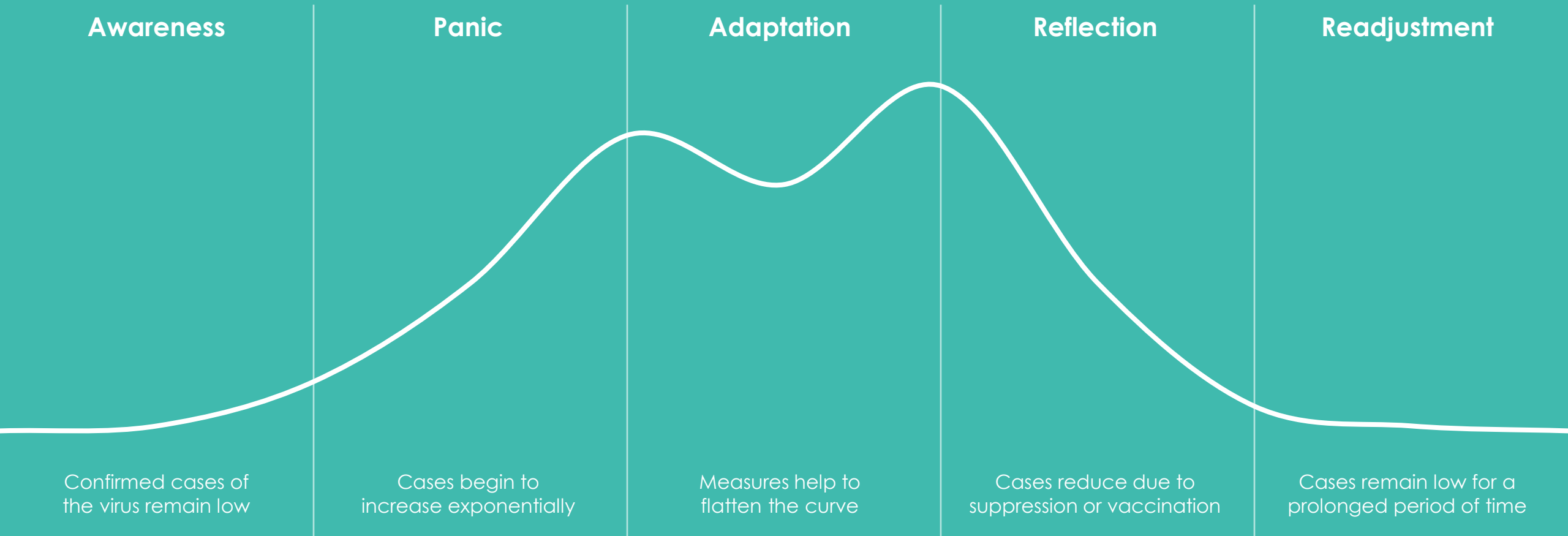
Understanding the impact of Coronavirus
on the Video & Mobile Gaming industry

September 2020



What people think,
feel and do

Context: Understanding how society responds to a pandemic



Awareness: Coronavirus begins to creep into common culture but gaming events continue as scheduled

Awareness

Super League Gaming partners with Wanda Cinemas to host esports events in China

YouTube Gaming To Exclusively Livestream Overwatch, Call Of Duty Leagues As Part Of Multiyear Activision Blizzard/Google Partnership

Int'l gaming expo GIST 2020 kicks off in Istanbul

Four-day event gathers tens of thousands of gamers from all around world

Gokhan Ergocun | 30.01.2020

Stunning eSports centre and gaming arcade set to open in Lincolnshire

Readjustment



Panic: The threat begins to manifest itself and pressure is placed on events and players

Awareness

Panic

Adaptation

Reflection

Readjustment

Microsoft withdraws from GDC gaming conference over coronavirus concerns

Lucas Matney @lucasmtny / 6:40 pm GMT • February 27, 2020

Comment

E3 gaming show cancelled over coronavirus concerns

The annual trade show becomes the latest tech event to be called off over concerns about the spread of Covid-19.

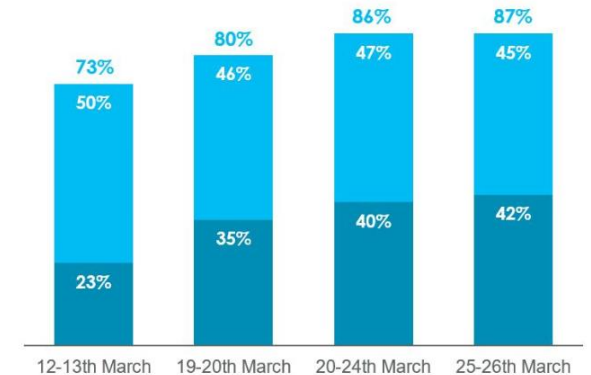
Video game players are urged to play at 'reasonable times' to avoid putting an extra strain on internet networks during the coronavirus outbreak

Two-fifths of UK adults now feel very worried about coronavirus

Op
Opinium

How do you feel about coronavirus?

Very worried Worried



How do you feel about Coronavirus? 12 March: 2,005 UK adults; 19 March: 2,005 UK adults; 20th March: 2,005 UK adults; 25-26 March: 2,006 UK adults

Adaptation: Lockdown measures re-organise the gaming industry

Awareness

Panic

Adaptation

Reflection

Readjustment

**Gaming Usage Up 75 Percent
Amid Coronavirus Outbreak.**

Formula 1 launches Virtual
Grand Prix Series to
replace postponed races

Riot will host a 48-hour League of Legends
stream for COVID-19 relief

**'League Of Legends' releases medical-themed
skins for COVID-19 relief**

Reflection: Gaming becomes a promoted lockdown activity

Awareness

Panic

Adaptation

Reflection

Readjustment

Video games can be a healthy social pastime during coronavirus pandemic

WHO highlights how gaming can help fight coronavirus and 'save lives'

Coronavirus Pandemic Puts Video Game Privileges in Perspective



Readjustment: Gaming post-lockdown will see a shift in activities and an increase in prices



Lockdown video gaming helps fuel rise in UK inflation

Nintendo shares surge in anticipation of continued Covid-19 gaming boom

Riot Games says it'll accelerate during Covid-19 to bring joy through gaming

Readjustment



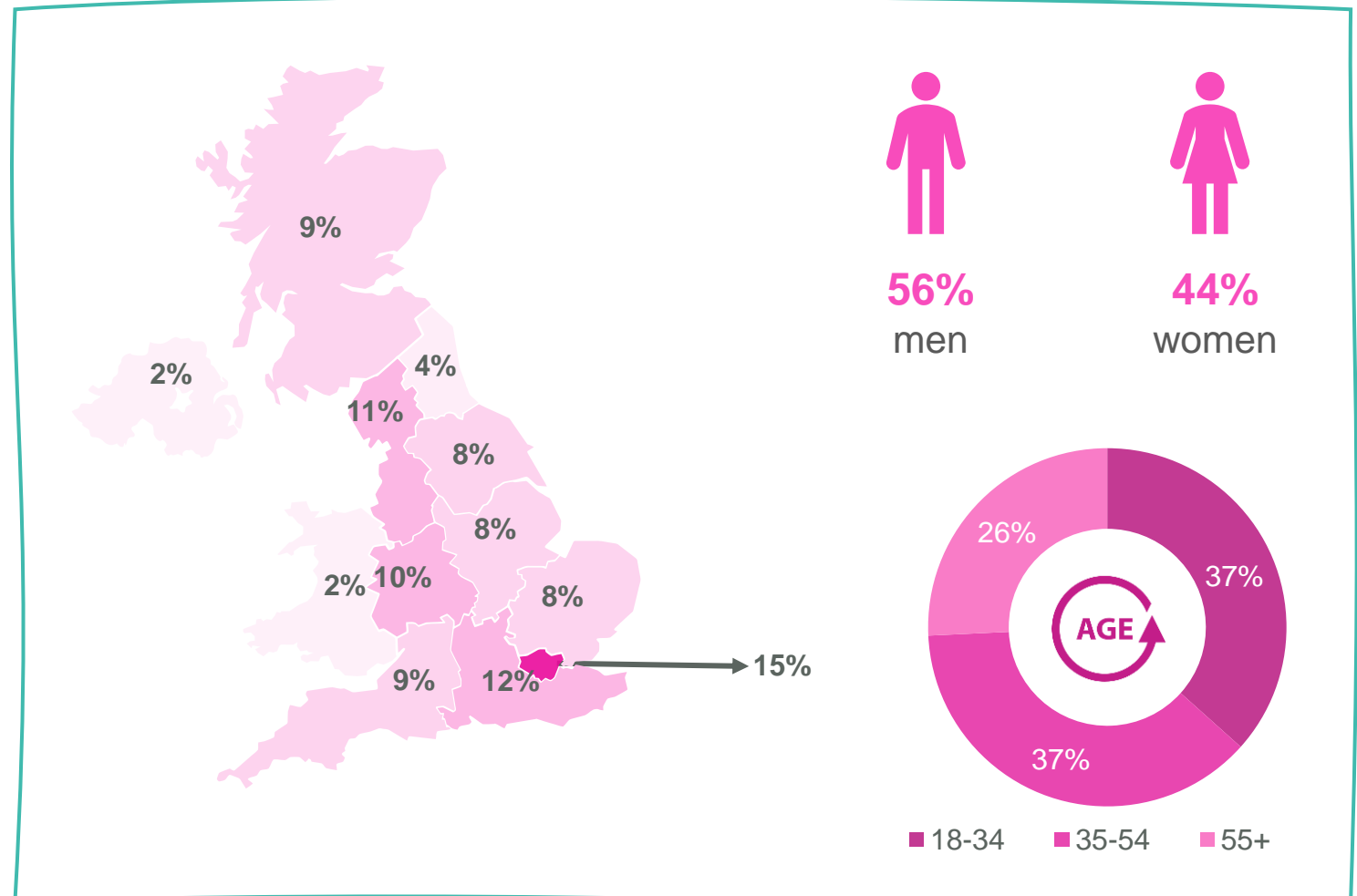
**How did this impact video & mobile gaming
behaviour?**

We spoke to a nationally representative sample of 2,000 UK adults and 196 children gamers from all over the UK

52% of the UK population are gamers

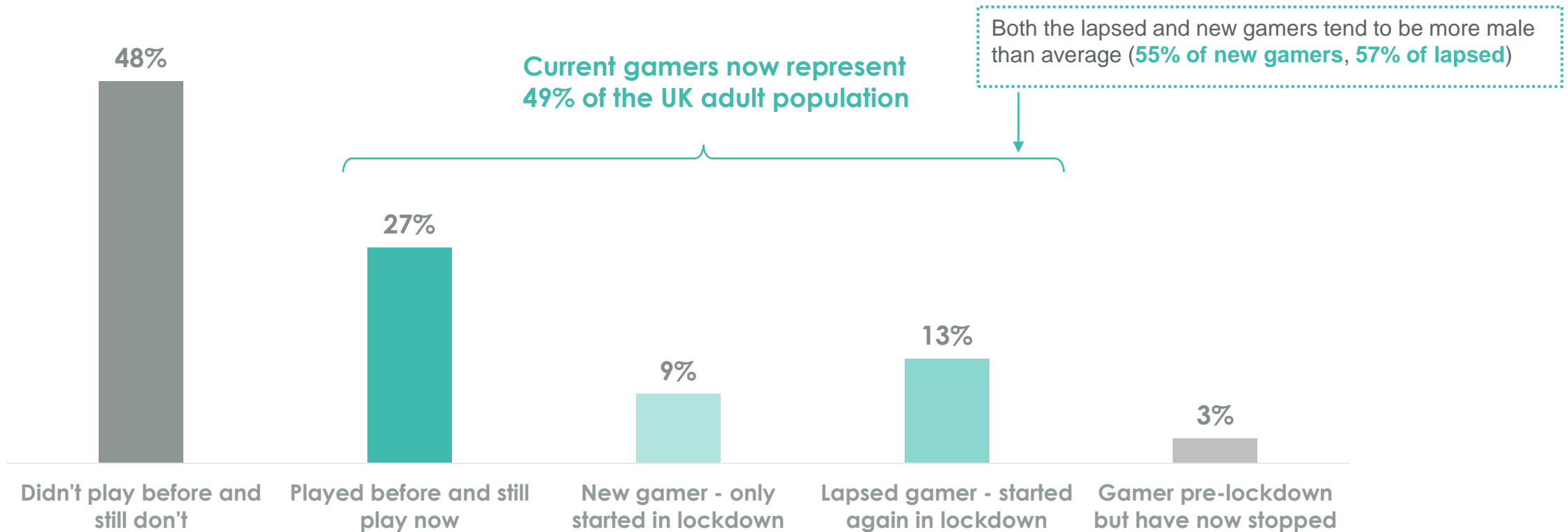
94% of them are current gamers

NB Gamers are defined as those who play mobile or video games on mobile phones, personal computers or consoles



The overall “gaming population” has increased by 63% during lockdown

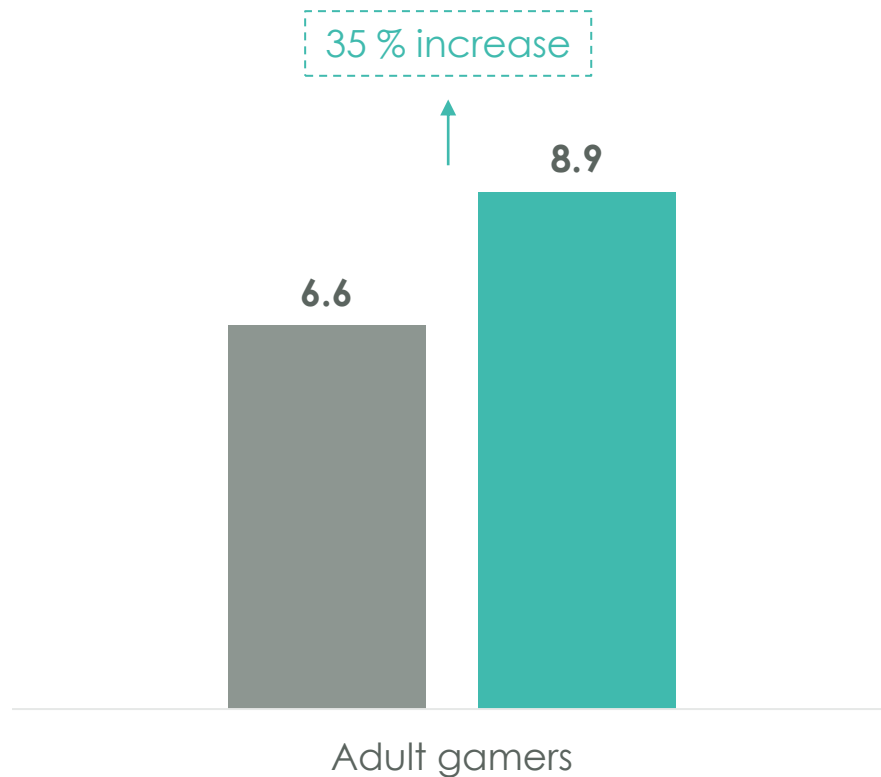
How have gaming habits changed during lockdown?



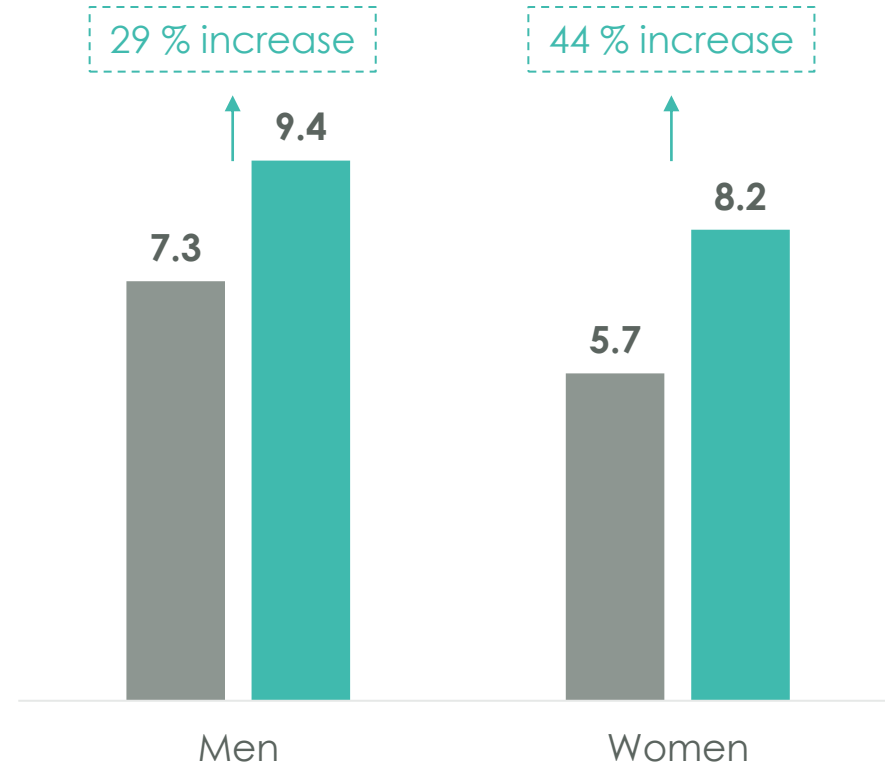
A0: Which one of the following best applies to you when it comes to PC, mobile and video games? Please think about any games you might play on your personal computer, mobile phone, tablet or console. Base: all respondents (2,001)

Gamers are spending more time on it, average playtime per week rose by two hours in lockdown

Hours per week spent gaming
pre-lockdown vs. **now**



Hours per week spent gaming pre-lockdown vs. **now**, by gender



Gamers' spending has also increased by a third overall during lockdown

Monthly amount spent on gaming pre-lockdown vs. **now**

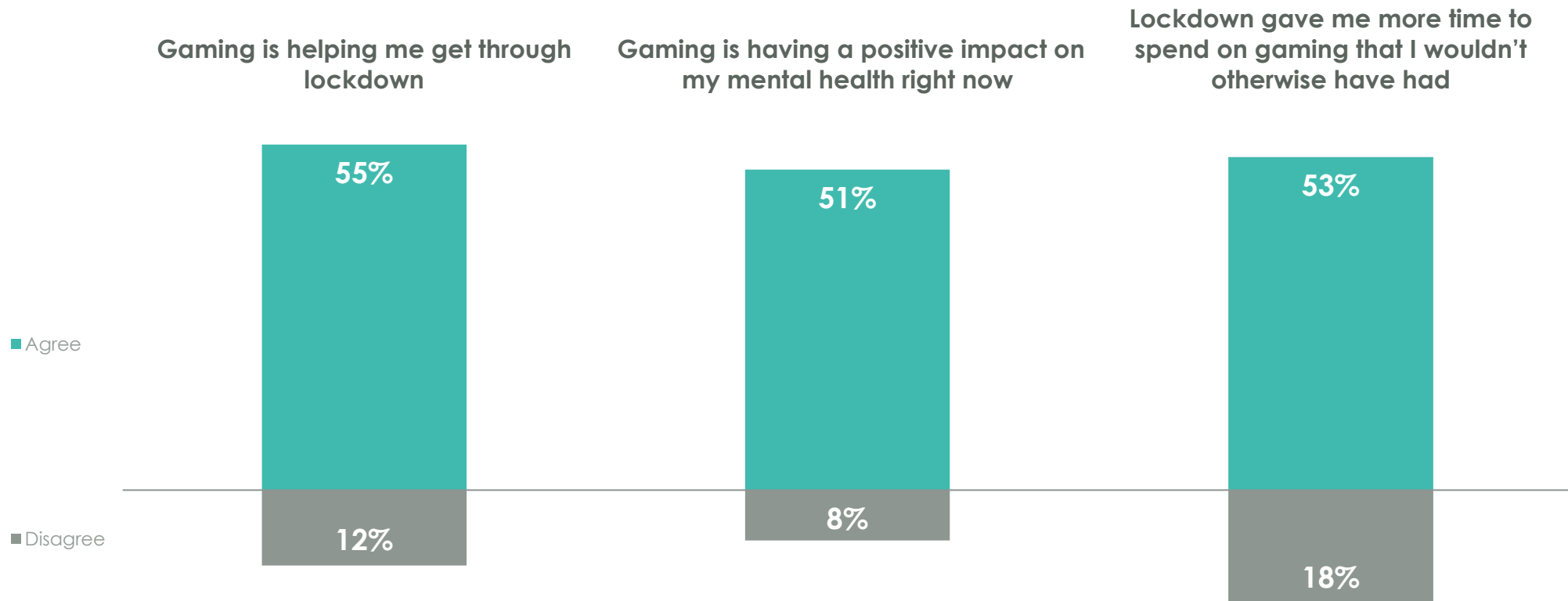


Monthly amount spent on gaming pre-lockdown vs. **now**, by gender



Over half of gamers agree that gaming is helping them get through lockdown

Gamers' attitudes to lockdown gaming

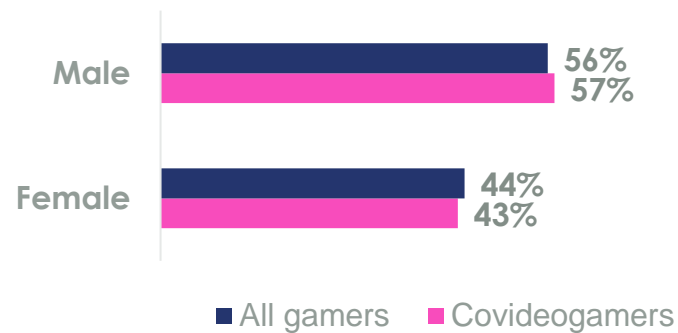




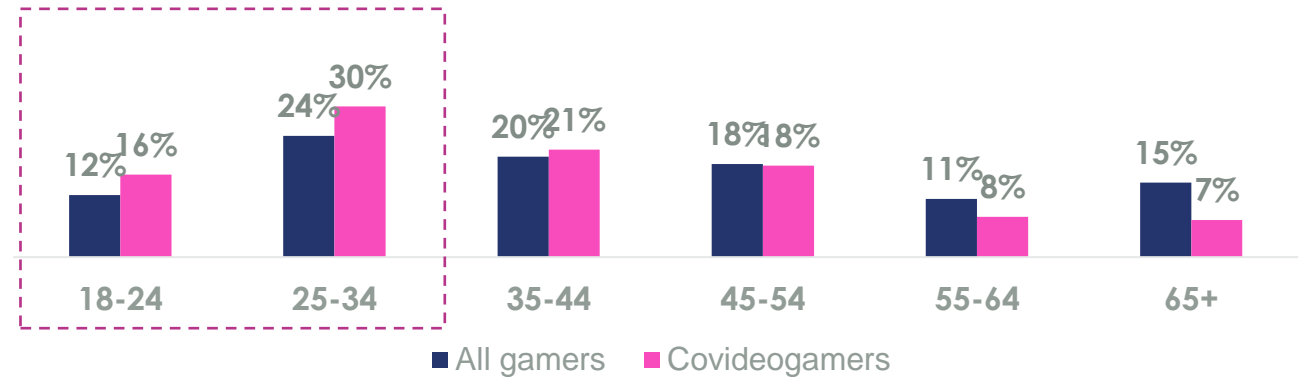
**Who are the 'new lockdown gamers' and how
can you retain them?**

Covideogamers are more likely to be under 34, from London and have kids under 18

Gender
Among **all gamers** vs.
Covideogamers



Age
Among **all gamers** vs. **Covideogamers**



Gamers from London

All gamers: 14%

Covideogamers: 19%



Have kids under 18

All gamers: 40%

Covideogamers: 48%



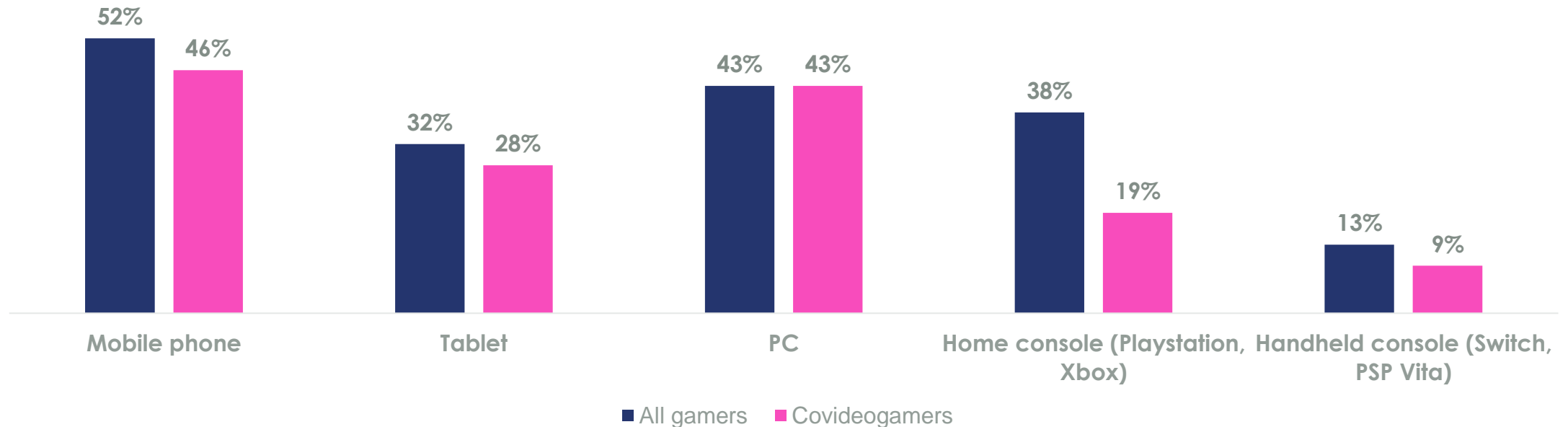
Have kids over 18

All gamers: 26%

Covideogamers: 17%

Covideogamers have found it easy to start gaming as they already own the necessary devices

Which devices do you use? Among **all gamers** vs. **Covideogamers**

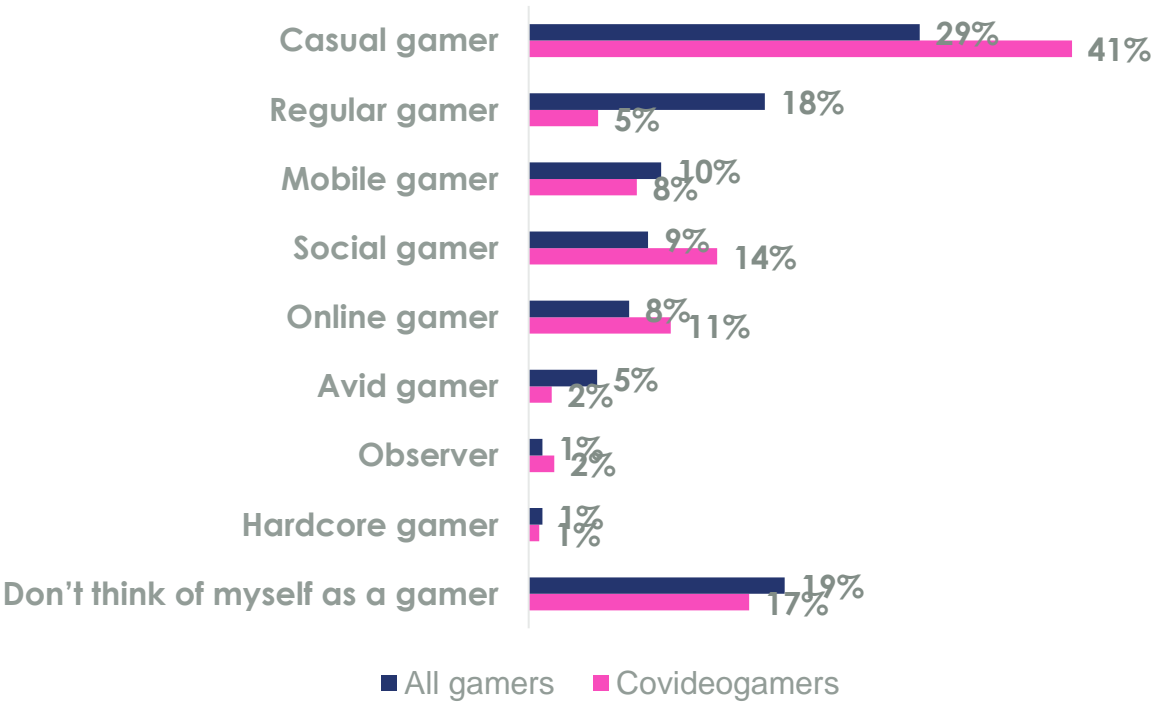


A2: And which of the following devices do you use to play games on?
Base: All gamers (979), Covideogamers (437)

They see themselves as casual gamers – but, being new, they’ve had to spend more money over lockdown

Which of the following best describes what type of gamer you are?

Among **all gamers** vs. **Covideogamers**



Average time spent playing a week
All gamers: 9 hours
Covideogamers: 6.5 hours

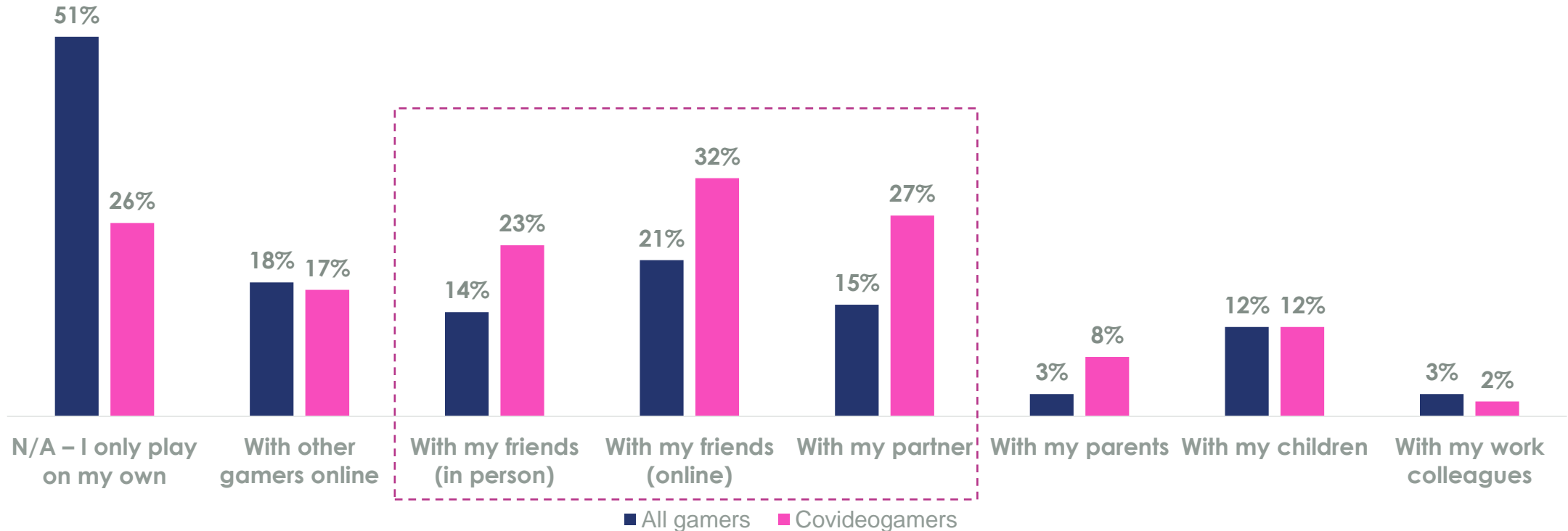


Average amount of money spent on games and gaming content a month
All gamers: £15
Covideogamers: £17

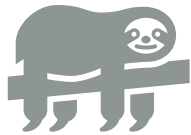
A7. Which of the following best describes what type of gamer you are? A1. How many hours a week do you spend playing mobile or video games? A4. How much money a month do you spend on mobile or video games (physical and digital copies) and any associated content (e.g. in-app purchases, DLCs)?
Base: All gamers (979), Covideogamers (437)

Covideogamers have come into the gaming world through friends and family...

Who do you play with? Among **all gamers** vs. **Covideogamers**



...but ultimately, it's all about keeping boredom at bay



Out of boredom

All gamers: 35%

Covideogamers: 37%



It keeps my mind active

All gamers: 47%

Covideogamers: 36%



I like the sense of achievement in games

All gamers: 30%

Covideogamers: 28%



Helps me get away from everyday worries

All gamers: 30%

Covideogamers: 27%



It's my way of having some alone time

All gamers: 28%

Covideogamers: 26%

Top 3 emotions gamers feel:

1. Amusement
2. Happiness
3. Comfort

Covideogamers prefer Arcade games to Shooters, and a third enjoy a Puzzle game like CCS

All gamers



44% Puzzle (e.g. Angry Birds, Candy Crush Saga)



25% Action (e.g. Grand Theft Auto, God of War, Batman)



21% Adventure (e.g. Tomb Raider, Uncharted)



19% Shooter (e.g. Call of Duty, Doom, Portal, Apex Legends, Fortnite)



19% Sports (e.g. FIFA, NBA 2K)

Covideogamers



33% Puzzle (e.g. Angry Birds, Candy Crush Saga)



20% Adventure (e.g. Tomb Raider, Uncharted)



19% Action (e.g. Grand Theft Auto, God of War, Batman)



19% Sports (e.g. FIFA, NBA 2K)



18% Arcade (e.g. Pacman, Donkey Kong)

After lockdown, a significant proportion of new gamers expect to continue or play more

Plans for after lockdown? Among **all gamers** vs. **Covideogamers**

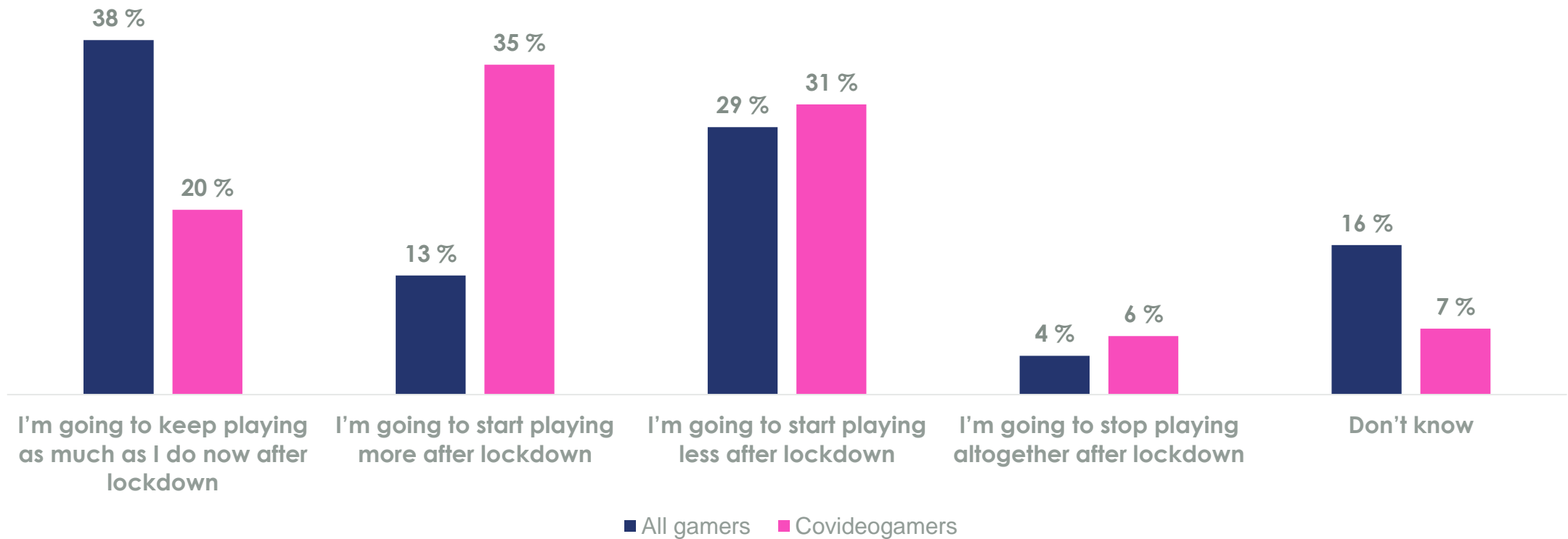


Figure 1



***‘Greater representation of
and for women in gaming’***

*Female, 27, South East, new
lockdown gamer*

***‘Greater representation of
and for women in gaming’***

*Female, 27, South East, new
lockdown gamer*

***'More control over children
(up to 18) playing violent
games'***

*Male, 51, South East, existing
gamer*

***'More control over children
(up to 18) playing violent
games'***

*Male, 51, South East, existing
gamer*

***‘Make gaming more simple,
remove customisation and
millions of side missions.
Make DLC free after
purchasing the game’***

*Male, 28, South East, new
lockdown gamer*

***‘Make gaming more simple,
remove customisation and
millions of side missions.
Make DLC free after
purchasing the game’***

*Male, 28, South East, new
lockdown gamer*

‘Prices - games are way too expensive and I don't tend to buy them because of this. In addition to being too expensive, there is the fear that I won't like the game after purchasing it and so it will just be a waste of money’

Male, 74, South East, existing gamer

‘Prices - games are way too expensive and I don't tend to buy them because of this. In addition to being too expensive, there is the fear that I won't like the game after purchasing it and so it will just be a waste of money’

Male, 74, South East, existing gamer

'Treat development staff more fair, e.g. not overworking them'

Male, 19, North West, existing gamer

'Treat development staff more fair, e.g. not overworking them'

Male, 19, North West, existing gamer



93% of children in the UK play video games*

-

How do they differ from adult gamers and how can publishers and developers best cater to them?

***data from Children's Commissioner**

Young gamers aged 11-17 have increased their gaming time each week by almost 50%

Gaming hours per week for **young gamers (aged 11-17)**
and **adult gamers**

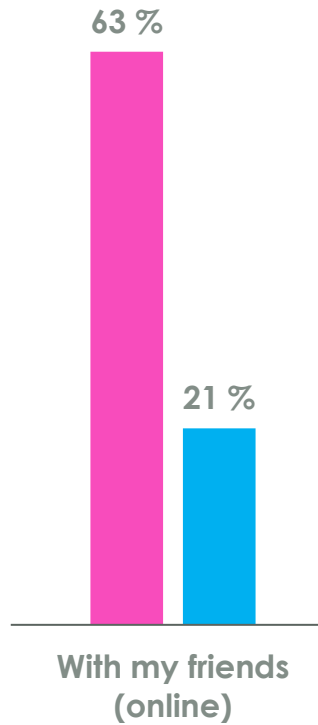


A1. How many hours a week do you spend playing mobile or video games now compared to pre-lockdown? Base: all gamers (1,041)

B2. How many hours a week does your child spend playing mobile or video games now compared to pre-lockdown? Base: parents of children aged 11-17 who game (223)

Young gamers tend to play with friends...

Who do **young gamers** and **adult gamers** game with?

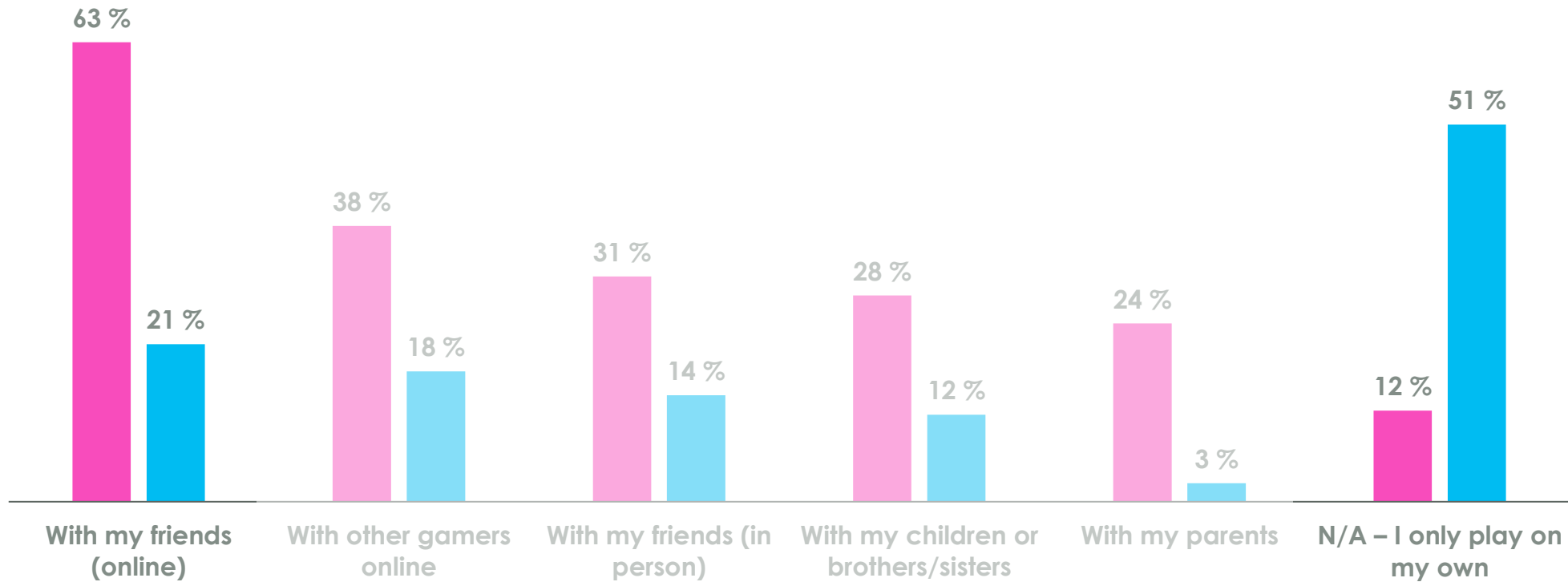


A0: Which one of the following best applies to you when it comes to PC, mobile and video games? Base: all gamers (1,041)

B6: Who do you usually play games with? Base: children aged 11-17 (196)

...while adult gamers tend to play on their own

Who do **young gamers** and **adult gamers** game with?



A0: Which one of the following best applies to you when it comes to PC, mobile and video games? Base: all gamers (1,041)

B6: Who do you usually play games with? Base: children aged 11-17 (196)

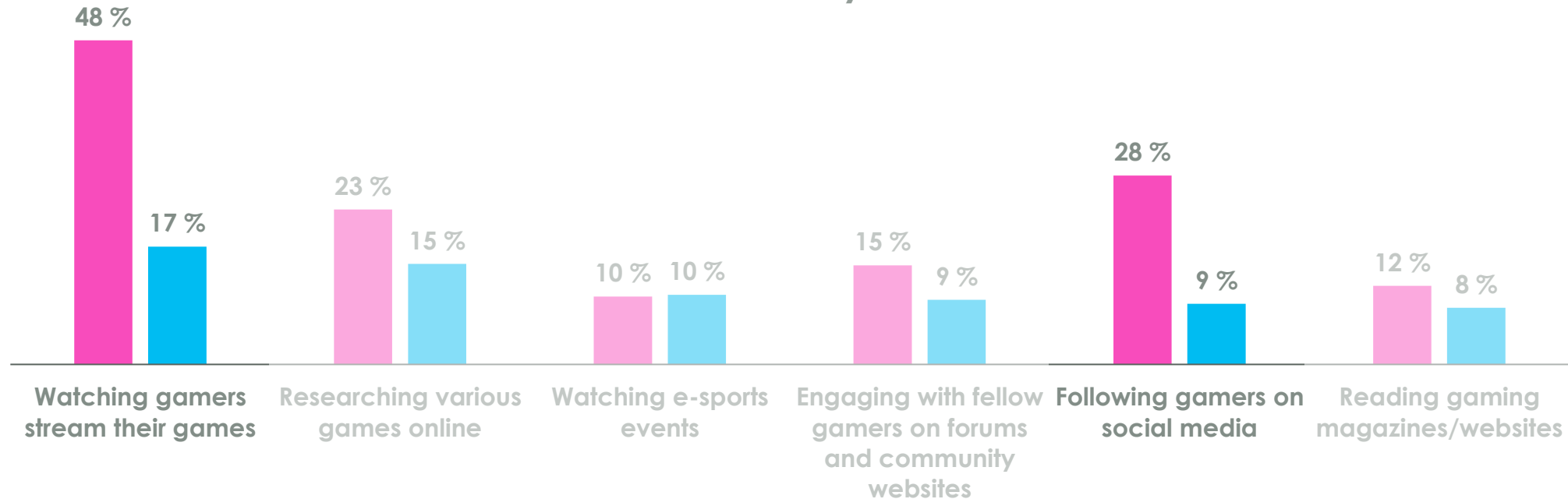
Young gamers
are demanding
more than just
games from the
gaming industry.
They want to
engage more...

twitch



Young gamers have more engagement with the industry than their older counterparts

Young gamers' and adult gamers' engagement with the gaming industry



A10. What other gaming content do you like to engage with? Base: all gamers (1,041)

B9. What other gaming content do you like to engage with? Base: children aged 11-17 (196)



Key Themes

In lockdown, gamers are **playing more** and **spending more** with many saying that it's having a **positive impact on their mental health** during this difficult time. Younger gamers especially have been kept going by the social element of gaming as a way of keeping in touch with friends.

A significant number of people are **rediscovering gaming** or **taking it up for the first time**.

New gamers are **disproportionately drawn in by the social elements**, playing local or online multiplayer with their friends, partners and housemates.

Many who are new to gaming as a hobby are liking what they've found and **plan to keep it up after normality returns**. In order to keep them though, the industry needs to address their concerns such as on price, content and representation.

Younger gamers in particular engage with the industry much more than just by playing and **keeping them engaged once life returns to normal will be crucial**.



Thank you
For any queries contact:

research@opinium.com