

JUNE 2020

PLAYING ITS PART

THE RESPONSE OF THE UK VIDEO GAMES AND ESPORTS INDUSTRIES TO THE COVID-19 PANDEMIC.

A report by the All Party Parliamentary Group for
Video Games and Esports.



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THE ALL-PARTY PARLIAMENTARY GROUP
for video games
& esports

FOREWORD



These have been unprecedented times for every person, every family, and every business in the United Kingdom.

The pandemic has taken a great deal from us and, as we come through to the other side, we have much to rebuild.

As the Chair of the All Party Parliamentary Group for Video Games and Esports I have been impressed by the efforts these industries have made in response to the global crisis.

From providing tens of thousands of free games to frontline NHS heroes, through to ensuring that parents, carers and players have the resources they need to enjoy a safe online experience, it has had an important and positive impact.

And as we begin to look to our national recovery, the video games and esports industries will play an important role. These are high productivity, job creating businesses spread around the UK that are natural exporters. Their resilience throughout this crisis means they are well placed to maintain the momentum that made the Creative Industries the fastest growing part of the economy prior to the pandemic.

The Government should back these winning sectors as we look to our future.

Alex Sobel MP
Chair of the APPG for Video Games and Esports

THE UK VIDEO GAMES INDUSTRY IN NUMBERS



2,000+ GAMES COMPANIES

FROM MULTINATIONALS THROUGH TO WORLD-LEADING INDEPENDENT STUDIOS.

SOURCE: '[THINK GLOBAL, CREATE LOCAL](#)' - UKIE



SUPPORTING 47,620 FTE JOBS

FROM DEVELOPERS TO DESIGNERS, AND FROM WRITERS TO RESEARCHERS.

SOURCE: '[SCREEN BUSINESS](#)', BFI



EXPORTING GAMES GLOBALLY

OVER 90% OF THE UK GAMES INDUSTRY EXPORT PRODUCTS AND SERVICES.

SOURCE: '[THINK GLOBAL, CREATE LOCAL](#)' - UKIE



WITH A STRONG TRADE PROGRAMME

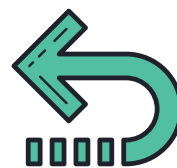
GENERATING £80 MILLION OF BUSINESS WINS FOR SMES IN 2019 WITH £140,000 OF GOVERNMENT SUPPORT.



ADDING £2.87BN OF GROSS VALUE

A HIGH PRODUCTIVITY SECTOR, WITH £83,800 AVERAGE PRODUCTIVITY - 35% HIGHER THAN THE UK INDUSTRIAL AVERAGE.

SOURCE: '[SCREEN BUSINESS](#)', BFI



RETURNING 400% OF RELIEF GRANTED

FOR EVERY £1 OF VIDEO GAMES TAX RELIEF, AN ADDITIONAL £4 IS GENERATED FOR THE UK ECONOMY.

SOURCE: '[SCREEN BUSINESS](#)', BFI



DELIGHTING 37.3 MILLION PLAYERS

50% OF PEOPLE IN THE UK WHO PLAY GAMES ON MOST DAYS ARE FEMALE AND 50% MALE. 46% ARE AGED OVER 40.

SOURCE: [GLOBAL GAMES MARKET REPORT 2018](#), NEWZOO & [GAME ON](#), SAVANTA.



LEVELLING UP LOCAL ECONOMIES

OVER 55% OF GAMES DEVELOPMENT JOBS IN THE UK ARE OUTSIDE OF LONDON AND THE SOUTH EAST.

SOURCE: '[THINK GLOBAL, CREATE LOCAL](#)' - UKIE

GAMES FOR CARERS

GAMES FOR CARERS

The UK games industry came together to thank our frontline NHS heroes for their inspirational work during the COVID-19 crisis.



**86 GAMES
COMPANIES**



**DONATED OVER
100,000 GAMES**



**TO OUR
NHS HEROES**

I just wanted to express my gratitude for the free game. It really means a lot!

I'm currently working as a nurse in ICU and am on call for the local Nightingale. My little boy is 6 and he has had to put up with a lot. No school or friends. He's also had to get his head round the fact I may be sleeping over in the hospital for quite a while if our Nightingale opens.

Having a new game to play, will I hope, give him a little more of an escape than he had, which in turn makes me a little happier and will ultimately help these poor people needing our care.



NHS Clinical Nurse

SUPPORTING PUBLIC HEALTH MESSAGING

The UK games industry teamed up with the Government to get critical public health messaging into more UK households by placing them in their games, reaching the millions who play them in the UK.

Everyone at Activision Blizzard, and the King team I lead, are delighted that we were able to play a small part and help with the delivery of vital public health information. Through our millions of players we were able to assist Public Health England and the NHS spread their life saving message: stay at home, protect our NHS, and save lives.



Humam Sakhnini
President
King

At Codemasters, we came to realise that technology within our games could be repurposed to assist with the Coronavirus communication effort. During the critical phase one of the UK’s lockdown we began delivering a version of Public Health England’s “Stay At Home, Save Lives” message into DiRT Rally 2.0. This initiative helped reinforce the Government’s message to a younger demographic, who spend less time watching television, in a manner which was natural, credible and avoided intruding upon the player’s gaming experience.



Toby Evan-Jones
VP Business Development
Codemasters



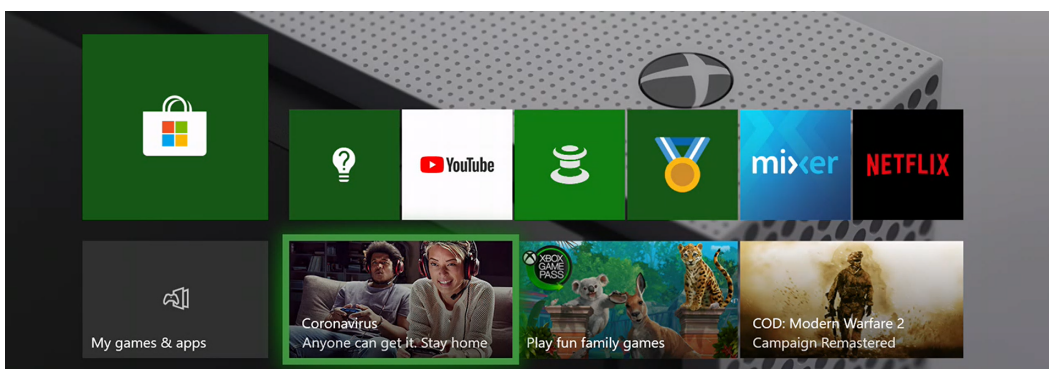
SUPPORTING PUBLIC HEALTH MESSAGING CASE STUDY - XBOX UK

Platform holders are in a unique position in the games industry; with millions of people logging on to play games every day, the console dashboard (or homepage) is a highly visible resource to reach gamers across the country.

With this in mind, Xbox UK was happy to support the government's COVID-19 response by working directly with the NHS communications team to make one of the advertising panels on the dashboard available for free for the public service announcement "Stay Home, Save Lives" messaging.

The static image, an Xbox owned asset of two young people enjoying a game, which was overlaid with NHS messaging ("Coronavirus. Anyone can get it. Stay home") and clicked through to a video asset provided by the NHS for further information.

The campaign was highly successful in reaching a wide audience base, with millions of impressions recorded on the dashboard message, and over 110,000 click-throughs to the video asset to learn more.



PLAY A PART TOGETHER

#PLAYAPARTTOGETHER

The global games industry also supported COVID-19 health guidance from the World Health Organisation by promoting awareness measures and practices, including healthy social distancing.

“At Jagex we understand the comfort that online gaming communities can offer to those physically separated from their families and friends during these times. Everyone at Jagex has been working together from home to ensure that our games - RuneScape and Old School RuneScape – and their online worlds, remain positive spaces for players to virtually socialise together.

We've also held additional in-game tournaments, in-game meet ups and activities, and increased the number of live streamed broadcasts to entertain and connect with our players. During this time, we have joined forces with our players to support our three mental health charity partners – CPSL Mind, the Prince's Trust, and You Are RAD. Jagex has donated £100,000 to support their work and RuneScape players matched that by fundraising a further £104,000 through in-game activities held during Mental Health Awareness Week.



Phil Mansell
 Chief Executive Officer
 Jagex



GET SMART ABOUT P.L.A.Y.

The games industry adapted its campaign to encourage parents and carers to use family controls to manage spend, screen time and age appropriate content during the lockdown period.

The campaign, which launched in January and reached 14 million people on social media, encouraged parents to activate family controls with the help of a simple four step process.

Since the COVID-19 crisis started, the Get Smart About P.L.A.Y. campaign has continued to advocate the use of family controls through the industry's responsible play resource www.askaboutgames.com, social media and digital advertising.

It has also provided detailed advice to parents and carers on how to play safely online while staying safe at home during the lockdown period on BBC Breakfast, BBC Click and www.parentinfo.org.





FAMILY GAME DATABASE

www.askaboutgames.com launched the Family Game Database to help parents and carers discover games that are suitable for children.

The resource includes detailed support on over 400 games, such as descriptions, information on PEGI age ratings and in game purchases.

It also featured curated lists of games ideal for families, such as great games to exercise with and fun educational titles.

☞☞ The Family Video Game Database provides non-gaming parents and caregivers with jargon-free advice on specific games about age ratings, in-game purchases and online play. It presents games in Netflix -style lists that encourage engagement with children’s gaming, understanding timely benefits like connection, calm, education and hope, as well as discovering a wide range of experiences to enjoy together as a family. ☞☞



Andy Robertson
Editor
AskAboutGames



SUPPORTING GOOD MENTAL HEALTH

The games industry partnered with leading suicide prevention charity The Campaign Against Living Miserably (CALM) to promote the power of games to reduce the challenges of social distancing.

At Electronic Arts we are proud of our work with CALM in raising awareness of mental health issues. As part of this commitment, and in partnership with DCMS, we are supporting the Government's Loneliness Week with a week-long campaign on one of the UK's most iconic advertising locations; the Piccadilly Circus video wall.

In addition to the \$2 million raised via our employee donation-match scheme, we amplified government messages via social media, in-game and mobile advertising channels. We also contributed to Game for Carers and created health messaging videos with Ian Wright, Rio Ferdinand and members of the Criterion development team.



Samantha Ebelethite
Country Manager UK&I
Electronic Arts



SUPPORTING GOOD CAUSES

The games and esports have industries have stepped up throughout the crisis to raise and donate millions of pounds to good causes.

This money will help brilliant organisations continue to do work that makes a crucial difference.



ELECTRONIC ARTS

HAVE MATCH FUNDED \$2 MILLION OF EMPLOYEE DONATIONS.

SONY

SONY

HAVE ESTABLISHED A \$100MILLION COVID-19 RELIEF FUND TO SUPPORT CHARITIES, EDUCATORS AND CREATORS.



JAGEX

DONATED £100,000 TO MENTAL HEALTH CHARITIES, SUPPORTING THEIR WORKING DURING THE PANDEMIC.



GFINITY

OPERATED THE EPREMIER LEAGUE INVITATIONAL TOURNAMENT, RAISING FUNDS FOR THE NHS.



TAKE TWO INTERACTIVE

DONATED 5% OF ONLINE GAMES SALES REVENUES TO COVID-19 RELIEF EFFORTS.



ACTIVISION BLIZZARD

DONATED AN ADDITIONAL \$2 MILLION TO ITS CALL OF DUTY ENDOWMENT HELPING VETERANS RE-ENTER THE JOB MARKET.



AND MUCH MORE


FROM COMMUNITY FUNDRAISERS, TO CHARITY STREAMS AND MAJOR DONATIONS FROM GAMES AND ESPORTS BUSINESSES.

#COMPUTINGATHOME


Digital Schoolhouse, together with Nintendo UK and support from Sega, Playstation, Ubisoft, Outright Games and Warwickshire County Council, have been providing creative computing lessons for homeschoolers.

Parents up and down the country have been juggling the demands of work, parenting and teaching. The #ComputingAtHome series provided parents and carers with remotely led sessions for children to develop their creative computing skills through practical work, such as creating applications and games from scratch.

These courses feature 'unplugged' parts which don't require technology, allowing children to learn regardless of what they have at home.

 Digital Schoolhouse's emphasis on play based learning and use of everyday household objects to teach computing concepts put us in the perfect place to support teachers and families in these difficult circumstances.



We're pleased that we've been able to support teachers and families in this way, and look forward to continue to do so as we continue to adapt to these unprecedented circumstances. 



Shahneila Saeed
Director
Digital Schoolhouse



About

The All Party Parliamentary Group for Video Games and Esports exists to promote the industry's economic, technological and cultural contributions within Parliament.

Acknowledgements

The APPG would like to thank Ukie for its support in the running of the Group and in preparing this report.

Ukie is the trade body for the UK's games, esports and interactive entertainment industries.

www.ukie.org.uk

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