



**Ukie response to
the Lords Select
Committee on
Covid-19 inquiry
on Living Online:
the long-term
impact on
wellbeing**

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ukie

ukie.org.uk | hello@ukie.org.uk
@ukie | +44207 5334 0680

COVID-19 Committee's inquiry 'Living online: the long-term impact on wellbeing'
Contact: Tim@ukie.org.uk, Tim Scott, Head of Policy and Public Affairs

Written evidence submitted by Ukie to the COVID-19 Committee's inquiry 'Living online: the long-term impact on wellbeing'

About Ukie

1. Ukie is the trade body for the UK's games and interactive entertainment industry. A not-for-profit, it represents more than 480 games businesses of all sizes from start-ups to multinational developers, publishers and service companies, working across online, mobile, console, PC, esports, virtual reality and augmented reality.
2. Ukie welcomes the opportunity to respond to this inquiry.

About the UK games industry

3. The games industry is a key driver in the Fourth Industrial Revolution. Whether it is in AI, data analytics or virtual reality, we put into practice and develop some of the innovations that can and will be increasingly applied elsewhere in the economy. On top of this, it is a sector strongly export-driven, with 90% of the UK games industry exporting their products.
4. The UK is home to nearly 2,300 games companies, including a high number of international and European HQs. Though large organisations are a significant contributor to the UK economy, it is also equally important to note that the UK is host to a vibrant scaling and start up environment with 99.5% of the sector consisting of SMEs.
5. These businesses are spread across the entirety of the UK in high productivity, highly skilled and jobs creating clusters. The sector, as a result, can act as a strong vehicle for regional development by bringing investment to all four nations of the UK. 55% of games development roles are based outside of London and the South East, with over £60m in GVA being generated in local economies in eight games hubs such as Newcastle and Edinburgh in 2016. The regional economic impact is further outlined in our 'Think Global, Create Local' report.
6. The industry supports nearly 50,000 FTE and contributes over £2.8bn in GVA to the UK economy

Different digital technologies

7. It is important to consider the uses and applications of individual digital technologies. A piece of task assignment software that is replacing the daily stand up will have a

different impact than a video game. We will seek to answer the Committee's questions with particular regard to video games.

Mental health

Social interaction

8. For tens of millions of people in the UK, and billions of people around the world, games are a pastime that brings joy. Research by the Creative Industries Policy and Evidence Centre, led by NESTA, shows that over 70% of people agree with the statement "Video games help me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"¹.
9. Games have had an increasingly important role throughout this year, especially during times in which the public is asked to stay indoors. Michelle Colder Carras, a public health researcher at Johns Hopkins University has said that games can help with mental recovery and Mark Griffiths, Professor of Behavioural Addiction, Nottingham Trent University said that "Friendship, social support, and being in a like-minded community are just some of the reasons that online gaming is going to be so popular at a time when we are being asked to stay indoors as much as possible"².
10. Video games have been a space where friends, families and colleagues have interacted safely throughout lockdowns. University students have graduated³, teachers have taken their classes to ancient Greece and Egypt via Ubisoft's Discovery Tour⁴, and old friends have connected while new friends have been made⁵. Indeed, a recent survey by Opinium found that over half of gamers agreed that games helped them get through lockdown⁶. Games have helped to combat the lack of social interaction caused by lockdowns and battled loneliness.

¹ <https://www.pec.ac.uk/assets/publications/PEC-and-IPO-cultural-consumption-study-week-1.pdf>

¹ ² <https://www.vgr.com/gaming-helping-people-cope-covid-19-lockdown/> [[vgr.com](https://www.vgr.com/)]; <https://theconversation.com/coronavirus-making-friends-through-online-video-games-134459> [theconversation.com]

³ <https://wonkhe.com/blogs/the-new-approach-to-graduation-in-the-time-of-coronavirus/>

⁴ <https://www.ubisoft.com/en-us/game/assassins-creed/discovery-tour>

⁵ <https://theconversation.com/social-video-games-to-play-during-the-coronavirus-quarantine-134880>

⁶ https://www.opinium.com/wp-content/uploads/2020/09/Opinium_Coronavirus-and-the-Video-Mobile-Gaming-Industry-September-20.pdf

11. Games do not replace other social interactions. Indeed, research suggests that playing games can improve social skills generally⁷. They provide common ground that can be conducive to relationship building. This is not new: video games have a long history of building broad communities and deep friendships⁸.
12. We believe that this period has highlighted the potential of games to foster these relationships, in good times and in bad, and often regardless of personal circumstances.
13. With an increase of play time during the coronavirus outbreak, there understandably may be concerns over the impact this may have on players. What is clear is that the playing of video games, whether alone or with friends and family, does not have a general negative effect on mental health. Indeed, the evidence suggests it has a general net positive effect.
14. A recent study by the Oxford Internet Institute⁹ demonstrated that the amount of time spent playing video games is positively correlated with player well-being. The study was the first of its kind in that it used objective industry data on play time as opposed to self-reported, subjective data alone. It was found that the experiences of competence and social connections with others through play may positively contribute to people's wellbeing. Interestingly, it also found that self-reported play time, the usual metric used in previous studies, was higher than the reality. This was a good example of academia working with industry in order to create the first steps in establishing an objective evidence base.
15. With people using video games as an avenue for keeping socially connected, it is important to stress that the games sector is passionate about ensuring its players have a positive and enjoyable experience. It has led the way in developing technologically safety features, parental controls, and robust moderating mechanisms to ensure player safety and welfare.
16. Safety features that are currently deployed in games and at platform level make the experience one of the safest and most sophisticated online environments. They include:
 - Parental control over sharing a child's personal information.
 - Pre-emptive prevention of personal information being posted.

⁷ [reference](#)

⁸ <https://www.bbc.co.uk/news/disability-47064773>

⁹ <https://www.oii.ox.ac.uk/news/releases/groundbreaking-new-study-says-time-spent-playing-video-games-can-be-good-for-your-wellbeing/> ;
<https://psyarxiv.com/qrjza/>

- Community codes of conduct (often incorporated into terms of service and user agreements) (e.g. <https://www.playstation.com/en-gb/get-help/help-library/my-account/grief-reporting/community-code-of-conduct/>).
- Chat filters restricting profanity, abuse and other harms.
- Providing educational automated feedback after a player tries to use profane language.
- URL blocking based on lists compiled by third parties (e.g. Symantec's Rulespace) with the ability to add and remove websites to the list as they are reported by users.
- The ability to mute and block other players in a game or to block friend requests (e.g. <https://support.xbox.com/en-GB/help/friends-social-activity/friends-groups/block-or-mute-other-player>).
- Ability to turn off graphic content.
- Ability for players to report in game behaviour or content shared in game, content created or shared outside of a game or something in a user's profile (e.g. <https://www.playstation.com/en-gb/get-help/help-library/my-account/parental-controls/how-to-file-a-complaint-against-another-playstation-network-user/>).
- Review of reported content and conduct by trained moderators, in some cases, with the ability to quarantine illegal content for review by specially-trained staff to determine if the content needs to be reported to the police.
- Enforcement of Terms & Conditions and community standards including the suspension or banning of users (e.g. <https://www.playstation.com/en-gb/get-help/help-library/my-account/grief-reporting/banned-and-suspended-consoles-and-accounts/>).
- Removal of content found to be in breach of Terms & Conditions and codes of conduct.
- Endorsement systems to encourage positive and discourage negative player behaviour.
- Incognito and offline modes to enable people to play games in complete privacy.
- Pre-screening software to prevent sharing of abusive content.

17. We will continue to work with academia, regulators and governments to identify and mitigate any potential negative consequences.

Mental health more broadly

18. With 2.5 billion players globally, video games are central to modern culture. In the UK alone, there are an estimated 37 million players¹⁰ playing games across mobile, PC and console. Video games are enjoyed by people of all ages and backgrounds thanks to the

¹⁰ <https://newzoo.com/insights/infographics/uk-games-market-2018/>

incredible diversity of content available in the medium of games¹¹. It is an entertainment and art form that is holding increasing resonance for society.

19. The games industry has positively used this audience reach by raising awareness of mental health issues and supporting those with mental health issues.
20. During the first lockdown, Ukie partnered with the Campaign Against Living Miserably (CALM) to provide tips and advice on how games could help people to feel as normal as possible¹². Games themselves are also a powerful tool for exploring mental health. For instance, Ninja Theory's *Hellblade: Senua's Sacrifice* explored mental health in depth following a grant from the Wellcome Trust and the Royal College of Psychiatrists. There are reports of this game providing the push for people to seek help¹³.
21. Games generally have proven an effective way of raising issues and communicating with a broad audience. The UK games industry worked with the Government at the start of lockdown to get critical public health messaging into more UK households by placing them in their games, reaching the million who play them in the UK¹⁴. Indeed, the reach of the games industry has been a useful vehicle for sharing key messaging during this time as outlined in our report, 'Playing its Part: the response of the UK video games and esports industries to the Covid-19 pandemic'¹⁵.
22. The potential for the medium of games to be utilised for public and mental health information has also been further demonstrated by the Government. The Government has also recently used a purposefully developed game as a public education tool with regard to anti-vaccination disinformation¹⁶.
23. The Government could certainly consider working more with industry to use its significant reach to communicate important messages - whether it is public health more broadly, or mental health.

¹¹ <https://www.nesta.org.uk/press-release/new-research-proves-cultural-value-of-video-gaming/>

¹² <https://www.thecalmzone.net/2020/03/when-the-world-is-on-pause-games-can-help-keep-you-connected/>

¹³ <https://venturebeat.com/2019/10/26/how-hellblade-senuas-sacrifice-changed-lives-with-its-thoughtful-portrayal-of-mental-illness/>

¹⁴ <https://www.gov.uk/government/news/government-and-video-games-industry-join-forces-in-fight-against-coronavirus>

¹⁵ <https://ukie.org.uk/resources/playing-its-part-the-response-of-the-uk-video-games-and-esports-industries-to-the-covid-19-pandemic>

¹⁶

<https://www.cam.ac.uk/stories/goviral>

Work

24. This period has sped up the digitalisation of the economy. We expect that some of this progress will slide back, other parts will stay where they are and others will continue to accelerate. This shift in the economy will certainly have an impact on the job market, the way in which we work and the skills that are required.
25. Technology allows for people to work remotely and in different parts of the UK. This will have potentially significant impacts for places, particularly those that have not historically benefitted from being home to many large businesses. The pandemic has sped up the move to fully or partly remote working.
26. The games industry has been incredibly agile and resilient during this time. The industry has broadly embraced remote working for over a decade, and some studios have been almost fully remote since long before lockdown. On average, at the height of the lockdown restrictions, our members told us that they remained operating at 80% productivity, with over 20% stating they still planned to expand in terms of head count¹⁷.
27. Of course, that is not to say that the industry has suffered no setbacks. As a creative industry, some have found that the lack of in person collaboration has had a negative impact on the creativity required to create truly brilliant games. Indeed, there is not yet a digital solution that replicates that in person “spark”¹⁸.
28. However, it demonstrates that the games industry, thanks to being built on digital, can adapt and respond quickly to crises such as the pandemic whilst continuing to support its workers. The games industry is one worth supporting in order to future-proof our economy.
29. This being said, it is certainly the case that as people are increasingly working from home there is an even stronger case for increased investment in and accelerated roll out of fibre broadband. It is central to effective remote working, and its availability will be a boost for both wellbeing and productivity.

¹⁷ For further information on how games businesses have been affected by, and adapted to, the coronavirus pandemic, see our report 'Playing On' which reflected the UK games sector during the initial lockdown period <https://ukie.org.uk/resources/playing-on-how-the-uk-games-sector-reacted-to-the-challenges-presented-by-covid-19>

¹⁸ Playing On

30. We know that the right digital skills are crucial to being able to succeed in large parts of the job market today. This will only be more important in the future as an increasing number of jobs are replaced or displaced. In addition to this, the technologies and skills developed in the games industry have broader applications across wider industries and society.
31. Games can also be a powerful tool to inspire people, particularly young people, to learn the crucial technical and digital skills of tomorrow. The founders of some of the world's largest technology businesses cite games as the catalyst for their interest in technology. That is why Ukie set up, with industry partners, [Digital Schoolhouse](#). Digital Schoolhouse is helping to fix the widening digital skills gap in the UK while inspiring and equipping the next generation with the foundational creative and technical skills of the future. The programme uses a 'hub and spokes' model whereby a secondary school becomes a 'Digital Schoolhouse' which reaches local primary schools. In this way Digital Schoolhouse has reached nearly 60,000 students in the UK.
32. Additional industry initiatives on skills across the UK include the National Video Games Museum's ('NVM') [Pixelheads](#) and 'Pathways' programmes, as well as King's support for Ada.
33. Pixelheads provides a learning community for young people to develop their own video games, teaching them crucial STEM skills. Programmes such as Digital Schoolhouse and Pixelheads are building long term skills bases across the UK, while also supporting future growth, productivity and innovation.
34. The Pathways programme is a public education campaign which encourages diverse young people from all backgrounds to take up STEM through a range of conferences, exhibitions, development camps, ambassadors, awards and industry engagement events, backed by a national PR campaign about diversity in games. It brings schools, universities, industry and the third sector together to tackle poor diversity in education and creative tech careers, using our sector as poster child. Support for programmes such as Pathways will promote the engagement in digital innovation across the UK that we need.
35. King - the makers of hit games including Candy Crush - are a founding partner of [Ada](#), the National College for Digital Skills. Ada offers career-focussed education for young people interested in applications for digital technology, including games. This fosters the skills needed to drive digital innovation. While Ada is based in London, the model is replicable and Government, from local authorities and combined authorities through to the Department for Education should consider how Ada and similar models can be scaled for the national benefit.

36. We believe that games can serve as a promoter of digital innovation across the United Kingdom, as a creator of jobs and as a tool to encourage acquisition of digital skills.
37. We would be happy to provide any further information to the Committee that would be helpful, either in writing, in person or via video conference.