



# ESSENTIAL FACTS 2012



**entertainment  
software**

association of canada



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All data in this document is from **NPD Group's** Understanding the Canadian Gamer 2012 custom research, unless otherwise noted. The survey was commissioned by the **Entertainment Software Association of Canada (ESAC)** and gathered data from 2,969 adults, 527 teens (13-17) and 687 kids (6-12) between April 13 and April 30, 2012. The margin of error associated with the total sample is +/- 1.5, 19 times out of 20.

The **NPD Group** is the leading provider of reliable and comprehensive consumer and retail information for a wide range of industries. Today, more than 1,700 manufacturers, retailers, and service companies rely on NPD to help them drive critical business decisions at the global, national, and local market levels. NPD helps clients to identify new business opportunities and guide product development, marketing, sales, merchandising, and other functions. Information is available for the following industry sectors: automotive, beauty, commercial technology, consumer technology, entertainment, fashion, food and beverage, foodservice, home, office supplies, sports, toys, and wireless. For more information, please visit: [www.npdgroup.com](http://www.npdgroup.com)

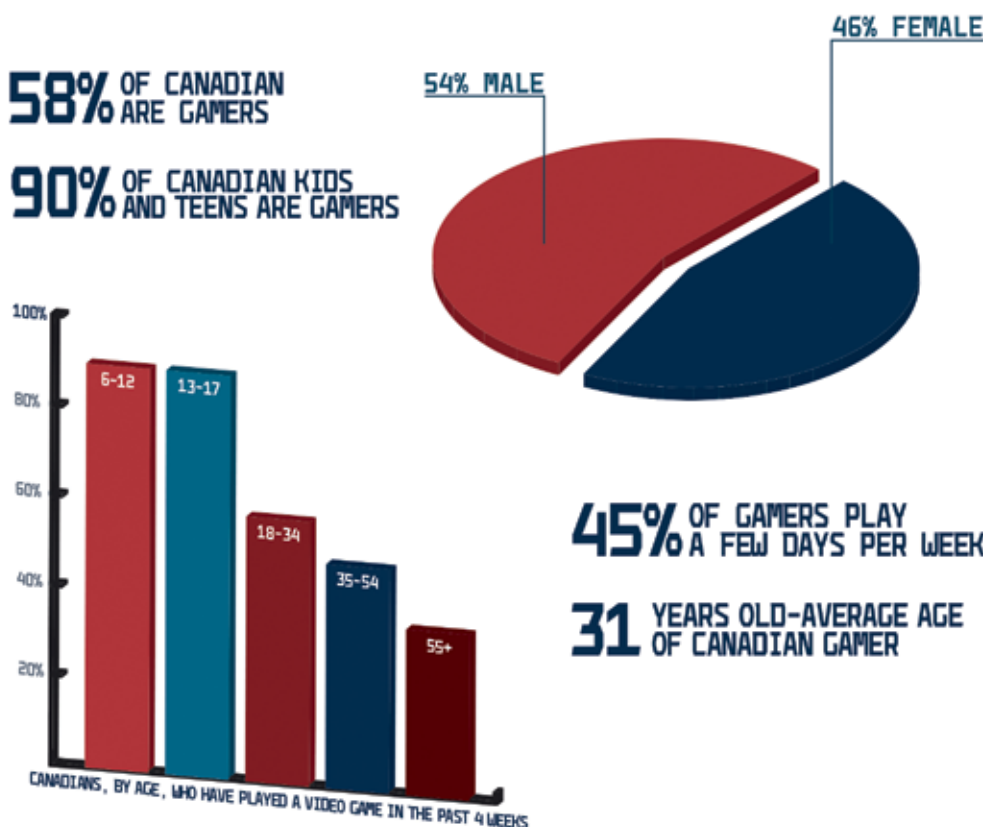
This document also contains data from **Secor Consulting Group's** Canada's Entertainment Software Industry in 2011. This report was commissioned by the **Entertainment Software Association of Canada (ESAC)** and gathered quantitative and qualitative data from computer and video game companies across Canada, including, developers, publishers and other key industry players. Saskatchewan does not appear in this report because although a few companies from the province were identified as industry participants, no responses to the survey were received. Accordingly, those companies, and the province were removed from the data analysis to avoid giving analytical results without any actual data.

SECOR is Canada's leading independent strategy and organizational consulting firm. For the last 35 years, SECOR has helped senior executives to develop and implement their organizational strategies. SECOR has offices in Montreal, New York, Paris, Quebec, Toronto and Vancouver.

# WHO IS PLAYING COMPUTER AND VIDEO GAMES?

**58%** OF CANADIAN  
ARE GAMERS

**90%** OF CANADIAN KIDS  
AND TEENS ARE GAMERS



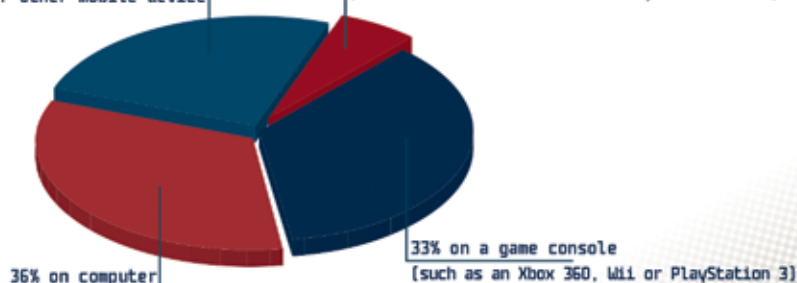
**45%** OF GAMERS PLAY  
A FEW DAYS PER WEEK

**31** YEARS OLD-AVERAGE AGE  
OF CANADIAN GAMER

On what platform do Canadian's play video games most frequently?

25% on a cell phone, tablet computer  
or other mobile device

6% on a handheld game system  
(such as a Nintendo 3DS or PlayStation Vita)





61% of Canadian households own a game console  
(Wii, Xbox 360 or Playstation 3)



80% own a cell phone, tablet computer or  
other mobile device



95% own a computer



The number of game devices in Canadian households has significantly increased since 2010, except for computers. Most (80%) have at least one cell phone or other mobile device. About 3 in 5 have at least one video game console (61%) and nearly 1 in 3 (31%) have a handheld device.

There has been a significant shift in general game device usage with 58% of gamers reporting use of computers (decrease of 12% from 2010) and 44% of gamers reporting use of handheld gaming systems (an increase of 18% from 2010).



# PROFILES OF CANADIAN GAMERS

## CHILDREN (6-12 YEARS)

GIRLS

BOYS

**35%** PLAY MOST OFTEN ON A COMPUTER

**30%** PLAY MOST OFTEN ON A CELL PHONE OR MOBILE DEVICE

**58%** PLAY A FEW DAYS PER WEEK

**17%** PLAY EVERY DAY

**41%** PLAY MOST OFTEN ON A GAME CONSOLE

**24%** PLAY MOST OFTEN ON A HANDHELD GAME SYSTEM

**48%** PLAY VIDEO GAMES A FEW DAYS PER WEEK

**41%** PLAY EVERY DAY

SHE  PLAYS

**45%** KID ROLE-PLAYING GAMES

MOST PLAY KID-RPGS ONLINE AND THEY PLAY ONLINE TO COLLECT TROPHIES AND ACHIEVEMENTS, AND UNLOCK OPTIONS OR CHARACTERS

**28%** ARCADE GAMES

HE  PLAYS

**56%** ACTION AND ADVENTURE GAMES

**32%**  RACING AND FLIGHT

## PARENT GAMERS AND THEIR CHILDREN

**80%** OF PARENT GAMERS PLAY VIDEO GAMES WITH THEIR CHILD

**52%** OF PARENT GAMERS REPORT FAMILY GAME PLAY ONCE A WEEK OR MORE

# TEENS (13-17 YEARS)

TEEN GIRLS

TEEN BOYS

 **42%**

PLAY MOST OFTEN ON A CELL  
PHONE OR MOBILE DEVICE

 **64%**

OF TEEN BOYS PLAY MOST  
OFTEN ON A GAME CONSOLE

**49%**

PLAY VIDEO GAMES A FEW  
DAYS PER WEEK  
AND

**20%**

PLAY EVERY DAY

**35%**

PLAY VIDEO GAMES A  
FEW DAYS PER WEEK  
AND

**54%**

PLAY EVERY DAY

SHE  PLAYS

**27%**

ARCADE GAMES

 **26%**

MUSIC-BASED GAMES

 **26%**

EDUCATIONAL GAMES, PUZZLE, WORD  
GAMES OR ANY GAMES THAT CHALLENGE  
HER MENTAL ABILITIES

HE  PLAYS

**53%**

SHOOTER GAMES

A MAJORITY (74%) PLAY SHOOTER GAMES ONLINE. THEY PLAY  
ONLINE TO PLAY COMPETE WITH AND PLAY AGAINST OTHERS

**44%**

ACTION AND ADVENTURE GAMES

MOST PLAY ONLINE AND PREFER TO PLAY ONLINE TO SOCIALLY  
INTERACT WITH OTHERS AND TO COMPETE WITH OTHERS

 **29%**

SPORTS GAMES

WOMEN

ADULTS 18-34

MEN



38%

PLAY MOST OFTEN ON A CELL PHONE, TABLET  
COMPUTER OR OTHER MOBILE DEVICE,

31%

PLAY MOST OFTEN ON A  
COMPUTER  
AND

30%

PLAY MOST OFTEN  
ON A GAME CONSOLE



51%

PLAY MOST OFTEN ON A  
GAME CONSOLE

33%

PLAY MOST OFTEN ON A  
COMPUTER

45%

PLAY VIDEO A FEW  
DAYS PER WEEK

49%

PLAY A FEW DAYS  
PER WEEK

SHE  PLAYS

HE  PLAYS



40%

EDUCATIONAL GAMES, PUZZLE, WORD  
GAMES OR ANY GAMES THAT CHALLENGE  
HER MENTAL ABILITIES

33%

ROLE-PLAYING GAMES (RPG)  
MOST PLAY ONLINE SO THEY CAN COMPETE OR PLAY AGAINST  
OTHERS, PLAY TEAM GAMES AND COOPERATE WITH OTHERS

29%

PLAY STRATEGY OR ROLE  
PLAYING GAMES  
(IN REAL-TIME OR NOT IN A CONTINUOUS WORLD)

42%

ROLE-PLAYING GAMES (RPG)  
MOST PLAY ONLINE SO THEY CAN COMPETE OR PLAY AGAINST  
OTHERS, PLAY TEAM GAMES AND COOPERATE WITH OTHERS

41%

ACTION / ADVENTURE  
GAMES

40%

SHOOTER GAMES  
69% OF SHOOTER GAMERS PLAY ONLINE. MOST PLAY ONLINE TO COMPETE OR  
PLAY AGAINST OTHERS, COOPERATE OR PLAY TEAM GAMES WITH OTHERS AND  
TO COLLECT TROPHIES AND ACHIEVEMENTS

WOMEN

ADULTS 35-54

MEN



46%

PLAY MOST OFTEN ON A  
COMPUTER  
AND

32%

PLAY MOST OFTEN ON A CELL PHONE,  
TABLET COMPUTER OR OTHER MOBILE DEVICE



39%

PLAY MOST OFTEN ON A  
COMPUTER,

33%

PLAY MOST OFTEN ON A GAME  
CONSOLE  
AND

25%

PLAY MOST OFTEN ON A  
MOBILE DEVICE

A MAJORITY

PLAY AT LEAST ONCE PER WEEK

(38% PLAY A FEW DAYS PER WEEK, 32% PLAY EVERY DAY AND  
13% PLAY ONCE A WEEK)

46%

PLAY A FEW DAYS  
PER WEEK

SHE



PLAYS

HE



PLAYS



56%

EDUCATIONAL GAMES, PUZZLE, WORD GAMES OR ANY  
GAMES THAT CHALLENGE HER MENTAL ABILITIES

26%

SHOOTER GAMES



34%

CARD GAMES

26%

CARD GAMES

23%

ARCADE GAMES



24%

ROLE-PLAYING GAMES

MOST PLAY ONLINE TO SOCIALLY INTERACT AND PLAY  
WITH OTHERS AND TO COLLECT TROPHIES AND OTHER  
ACHIEVEMENTS

24%

ACTION / ADVENTURE GAMES



# MATURE GAMERS (55+)

WOMEN

MEN

**68%** OF MATURE GAMERS (55+) PLAY GAMES  
MOST OFTEN ON A COMPUTER

HOW OFTEN DO THEY PLAY?

**41%** PLAY A FEW DAYS PER WEEK **AND 32%** PLAY EVERYDAY

SHE  PLAYS HE  PLAYS

 **56%**  
CARD GAMES

 **41%**  
CARD GAMES

 **53%**  
EDUCATIONAL GAMES, PUZZLE, WORD GAMES  
OR ANY GAMES THAT CHALLENGE HER MENTAL  
ABILITIES

 **23%**  
EDUCATIONAL GAMES, PUZZLE, WORD GAMES  
OR ANY GAMES THAT CHALLENGE HER MENTAL  
ABILITIES

## ONLINE PLAY

**30%** OF MATURE GAMERS ARE SPENDING MORE TIME [A LOT  
OR A LITTLE MORE] PLAYING VIDEO GAMES ONLINE

## TEENS (13-17 YEARS)

TEEN GIRLS

TEEN BOYS

HOW DOES SHE  
ACQUIRE GAMES?

**33%** SHE DOWNLOADS FREE  
FULL GAME OR FREE  
GAME APPLICATION

**28%** SHE DOWNLOADS A FREE  
DEMO OF A GAME

**27%** SHE RECEIVES A PHYSICAL  
COPY OF A NEW GAME  
AS A GIFT

HOW DOES HE  
ACQUIRE GAMES?

**58%** HE PURCHASES A PHYSICAL COPY  
OF A NEW GAME FROM A STORE  
OR A WEBSITE

**44%** HE RECEIVES A PHYSICAL  
COPY OF A NEW GAME AS  
A GIFT

**26%** HE DOWNLOADS  
FREE GAME DEMOS

## ADULTS 18-34

WOMEN

MEN

HOW DOES SHE  
ACQUIRE GAMES?

**38%** SHE PURCHASES A PHYSICAL  
COPY OF A NEW GAME FROM  
A STORE OR WEBSITE

**31%** SHE DOWNLOADS FREE FULL  
GAMES OR FREE GAME  
APPLICATIONS

**30%** SHE ACCESSES FREE GAMES FROM A  
GAMING WEBSITE, PORTAL OR  
SOCIAL NETWORK SITE

HOW DOES HE  
ACQUIRE GAMES?

**53%** HE PURCHASES A PHYSICAL COPY  
OF A NEW GAME FROM A STORE  
OR WEBSITE

**35%** HE DOWNLOADS FREE FULL  
GAMES OR FREE GAME  
APPLICATIONS

**26%** HE PURCHASES A DIGITAL  
DOWNLOAD OF FULL GAMES

## ADULTS 35-54

WOMEN

MEN

HOW DOES SHE  
ACQUIRE GAMES?

**37%** SHE PURCHASES A PHYSICAL COPY OF A NEW GAME FROM A STORE OR A WEBSITE

**33%** SHE DOWNLOADS A FREE DEMO OF A GAME

**33%** SHE DOWNLOADS FREE FULL GAME OR FREE GAME APPLICATION

HOW DOES HE  
ACQUIRE GAMES?

**50%** HE PURCHASES A PHYSICAL COPY OF A NEW GAME FROM A STORE OR A WEBSITE

**29%** SHE DOWNLOADS FREE FULL GAME OR FREE GAME APPLICATION

**27%** HE DOWNLOADS FREE GAME DEMOS

## MATURE GAMERS (55+)

WOMEN

MEN

HOW DOES SHE  
ACQUIRE GAMES?

**35%** SHE DOWNLOADS FREE GAME DEMOS

**24%** SHE DOWNLOADS FREE FULL GAMES OR FREE GAME APPLICATIONS

**19%** SHE ACCESSES FREE GAMES FROM A GAMING WEBSITE, PORTAL OR SOCIAL NETWORK SITE

HOW DOES HE  
ACQUIRE GAMES?

**33%** HE PURCHASES A PHYSICAL COPY OF A NEW GAME FROM A STORE OR WEBSITE

**21%** HE DOWNLOADS FREE FULL GAMES OR FREE GAME APPLICATIONS

**20%** HE DOWNLOADS FREE GAME DEMOS

# WHAT ARE ESRB RATINGS?

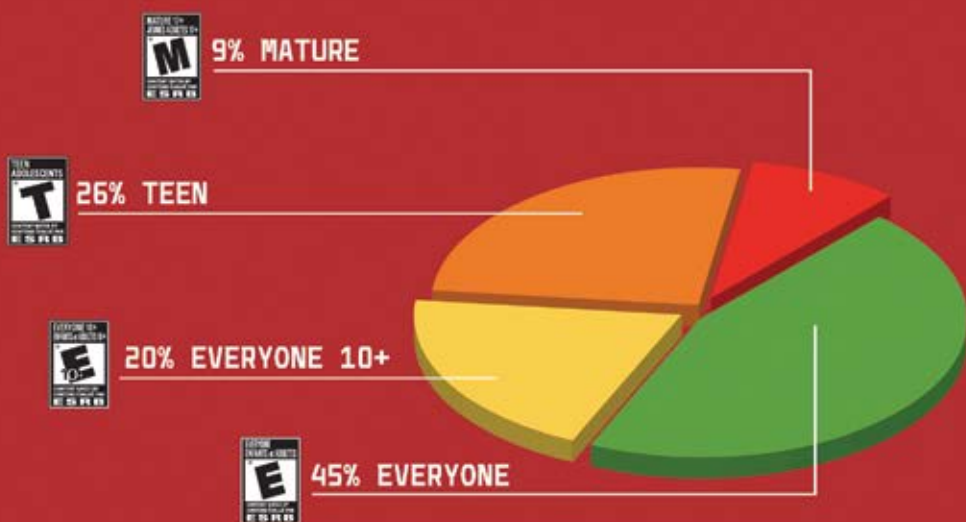
The **Entertainment Software Rating Board** (ESRB) is a non-profit, self-regulatory body that assigns computer and video game content ratings. The ESRB ratings are designed to provide consumers, especially parents, with concise, impartial guidance about the age-appropriateness and content of computer and video games so that they can make informed purchasing decisions about the games they deem suitable for their children and families.

**87%** OF PARENT GAMERS SOMETIMES OR ALWAYS CHECK THE ESRB RATING SYMBOL ON THE GAME BOX WHEN PURCHASING OR RENTING VIDEO GAMES FOR THEIR CHILDREN

**87%** OF PARENT GAMERS SOMETIMES OR ALWAYS USE THE CONTENT DESCRIPTORS WHEN PURCHASING GAMES FOR THEIR CHILD

**93%** OF ADULT GAMERS AGREE THAT THE ESRB RATING SYSTEM IS VERY USEFUL TO HELP PARENTS BUY AND RENT AGE-APPROPRIATE GAMES FOR THEIR CHILDREN

## How many ESRB ratings were assigned in 2011?



NOTE: The ESRB assigned 1,332 ratings in 2011. These figures include instances where a publisher revised and resubmitted a game for rating as well as console downloadable titles via the expedited short form rating process

For more information visit the ESRB website at [www.esrb.org](http://www.esrb.org)





# TOP SELLING COMPUTER AND VIDEO GAMES

12 MONTHS ENDING AUGUST 2012

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- |    |                                   |    |                                       |
|----|-----------------------------------|----|---------------------------------------|
| 01 | CALL OF DUTY:<br>MODERN WARFARE 3 | 11 | SKYLANDERS:<br>SPYRO'S ADVENTURE      |
| 02 | ELDER SCROLLS V:<br>SKYRIM        | 12 | THE LEGEND OF ZELDA:<br>SKYWARD SWORD |
| 03 | NHL 12                            | 13 | SUPER MARIO<br>3D LAND                |
| 04 | BATTLEFIELD 3                     | 14 | UNCHARTED 3:<br>DRAKE'S DECEPTION     |
| 05 | JUST DANCE 3                      | 15 | FIFA SOCCER 12                        |
| 06 | ASSASSIN'S CREED:<br>REVELATIONS  | 16 | MARIO KART 7                          |
| 07 | BATMAN:<br>ARKHAM CITY            | 17 | MASS EFFECT 3                         |
| 08 | GEARS OF WAR 3                    | 18 | MADDEN NFL 12                         |
| 09 | DEAD ISLAND                       | 19 | CALL OF DUTY:<br>BLACK OPS            |
| 10 | SAINTS ROW:<br>THE THIRD          | 20 | FORZA<br>MOTORSPORT 4                 |

# ABOUT THE CANADIAN COMPUTER AND VIDEO GAME INDUSTRY

- **16,000** APPROXIMATE NUMBER OF PEOPLE DIRECTLY EMPLOYED IN THE CANADIAN VIDEO GAME INDUSTRY
- CANADA'S VIDEO GAME INDUSTRY RANKS **3<sup>RD</sup>** IN THE WORLD BASED ON NUMBER OF EMPLOYEES
- **\$1.7 BILLION** ESTIMATED DIRECT ECONOMIC IMPACT ON THE CANADIAN ECONOMY BY THE CANADIAN VIDEO GAME INDUSTRY
- **348** NUMBER OF COMPANIES OPERATING IN CANADA
- **11%** INDUSTRY GROWTH 2009 TO 2010
- **17%** PROJECTED GROWTH 2011 TO 2012
- **77%** OF CANADIAN GAMING COMPANIES EXPECT TO HIRE NEW GRADUATES BY 2013
- AVERAGE ANNUAL SALARY FOR EMPLOYEES AT CANADIAN VIDEO GAME COMPANIES IS **\$62,000**  
(AS COMPARED TO AVERAGE SALARY OF \$29,000 FOR WORKERS IN THE BROADER ECONOMY)

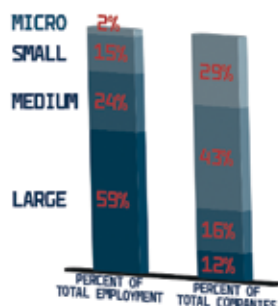
Source: Secor Consulting Group's Canada's Entertainment Software Industry in 2011

# INDUSTRY STRUCTURE AND SIZE

- CANADA'S VIDEO GAME INDUSTRY IS COMPRISED OF A HEALTHY MIX OF COMPANIES OF DIFFERENT SIZES AND WITH DIFFERING CONCENTRATIONS ON PARTICULAR PLATFORMS INCLUDING TRADITIONAL CONSOLE GAMES AND NEWER PLATFORMS SUCH AS SOCIAL GAMES OR GAMES FOR MOBILE DEVICES
- MOST EMPLOYEES IN CANADA'S VIDEO GAME INDUSTRY WORK AT LARGE COMPANIES (MORE THAN 150 EMPLOYEES), BUT THERE'S MANY SMALL AND MEDIUM COMPANIES AS WELL, WITH 148 OF THEM AVERAGING ONLY 16 EMPLOYEES EACH

## TOTAL COMPANIES AND EMPLOYEES IN CANADA

- MICRO: 1-5
- SMALL: 6-50
- MEDIUM: 51-150
- LARGE: 151+
- % OF TOTAL



# INDUSTRY STRUCTURE BY PLATFORM

- THE CANADIAN INDUSTRY REMAINS CONCENTRATED AROUND TRADITIONAL CONSOLE GAME DEVELOPMENT AND PUBLISHING WITH 68% OF ALL EMPLOYEES WORK ON GAMES FOR THIS PLATFORM. THIS, HOWEVER, IS CHANGING RAPIDLY
- RESOURCES DEDICATED TO TRADITIONAL CONSOLE HAVE BEEN DECLINING IN RESPONSE TO RAPID GROWTH IN RESOURCES DEDICATED TO OTHER PLATFORM TYPES. CURRENTLY 2% OF RESOURCES ARE DEDICATED TO SOCIAL GAMING, 2% ARE DEDICATED TO CASUAL GAMING, AND 7% OF RESOURCES ARE DEDICATED TO MOBILE GAMING
- THE CONTINUING DOMINANCE OF TRADITIONAL CONSOLE GAMES IN COMPARISON WITH OTHER PLATFORMS, IS THE RESULT OF THE VERY HIGH AMOUNT OF RESOURCES DEDICATED TO THIS PLATFORM BY A COMPARATIVELY SMALL NUMBER OF COMPANIES
- THE LARGEST CATEGORY IS COMPRISED OF FIRMS THAT FOCUS ON A NUMBER OF PLATFORMS SIMULTANEOUSLY—A FACT THAT SEEMS REFLECTIVE OF A TIME OF INDUSTRY EVOLUTION

# SELECTED PROVINCIAL PROFILES

## QUÉBEC

- THE PROVINCE OF QUEBEC HAS GROWN TO BE THE DOMINANT PLAYER IN THE CANADIAN VIDEO GAME INDUSTRY
- **86** VIDEO GAME COMPANIES CALL QUEBEC HOME
- **8,236** INDUSTRY JOBS ARE LOCATED THERE
- QUEBEC'S INDUSTRY GROWTH RATE IS **16%** PER ANNUM, SLIGHTLY ABOVE THE INDUSTRY'S AVERAGE
- QUEBEC'S INDUSTRY IS EXPECTED TO GROW BY **16%**

## ONTARIO

- ONTARIO IS HOME TO THE GREATEST NUMBER OF MICRO AND SMALL COMPANIES, HOUSING APPROXIMATELY 30% OF ALL COMPANIES IN EACH CATEGORY. SHARES OF TOTAL INDUSTRY RESOURCES ARE GOING TO GAMES ON MOBILE, SOCIAL, AND CASUAL PLATFORMS MORE RAPIDLY THAN IN QUEBEC
- **96** COMPANIES ARE LOCATED HERE
- TOTAL NUMBER OF EMPLOYEES IS **2,600**
- HISTORICAL GROWTH WAS **20%**
- ONTARIO'S INDUSTRY IS EXPECTED TO GROW BY **21%**

## BRITISH COLUMBIA

- IN BRITISH COLUMBIA THERE IS A STRONG COMPLIMENT OF SMALL AND MEDIUM-SIZED COMPANIES
- TOTAL NUMBER OF COMPANIES IS **83**
- TOTAL NUMBER OF EMPLOYEES IS **3,882**
- HISTORICAL GROWTH HAS BEEN FLAT (**0%**)
- BC'S INDUSTRY IS EXPECTED GROW BY **10%**

Source: Secor Consulting Group's Canada's Entertainment Software Industry in 2011



# WHO WE ARE



The **Entertainment Software Association of Canada (ESAC)** is the voice of the Canadian computer and video game industry that employs approximately 16,000 people at nearly 350 companies across the country. By contributing \$1.7 billion in economic activity and cultivating workers with a combination of creative, technological and management skills, the video game industry is supporting Canada's position in the changing global economy. This dynamic and growing industry is currently the world's third largest and holds first place on a per capita basis based on employment levels in other countries. ESAC works on behalf of its members to ensure the legal and regulatory environment is favourable for the long-term development of Canada's video game industry.

## ESAC MEMBERS

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