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All data in this document is from Secor Consulting Group’s Canada’s Entertainment Software Industry in 2011 unless otherwise noted. 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 Montréal, New York, Paris, Québec, Toronto and Vancouver. For more information visit www.secorgroup.com

This document also contains data from NPD Group’s 2010 Understanding the Canadian Gamer. The survey was commissioned by ESAC and gathered data from 2,579 Canadian adults, 398 Canadian teens (13-17) and 547 kids (6-12). The margin of error associated with the total samples is +/- 1.6, 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 our 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, software, sports, toys, and wireless. For more information, please visit: www.npd.com
DID YOU KNOW?

16,000
Approximate number of people directly employed in the Canadian video game industry
Compared to approximately 32,000 employees in the United States

3rd
Canada’s video game industry’s ranking 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

11%
Industry growth over the past two years

348
Number of companies operating in Canada

17%
Projected growth over the next two years

16,000
Approximate number of people directly employed in the Canadian video game industry
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Canada’s video game industry’s ranking in the world based on number of employees

$1.7 billion
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11%
Industry growth over the past two years

348
Number of companies operating in Canada

17%
Projected growth over the next two years
WHAT ARE SOME OF THE DRIVERS OF CANADA’S SUCCESS?

A MADE-IN-CANADA INDUSTRY
The Canadian video game industry is responsible for creating some of the most recognizable game franchises in the world. Many of the most successful video games and video game companies were started in Canada by Canadians.

LIVEABILITY OF CANADIAN CITIES
Operating costs in Canada’s major development clusters are significantly lower than the US, Europe and Japan. Canada’s major cities offer desirable places for talent to live with culturally diverse populations, thriving downtowns, and generally affordable condominium and rental markets.

GOVERNMENT POLICIES AT BOTH THE FEDERAL AND PROVINCIAL LEVELS
Canada offers generally competitive corporate tax rates, and many provinces have introduced refundable tax credits for production of interactive digital media to encourage growth of the sector. Scientific Research and Experimental Development (SR&ED) tax credits also play a critical role in fostering technology-based innovation and advancements in the video game industry. Federal and provincial funding programs for digital media offer support for projects that might not otherwise obtain funding.

CANADA IS KNOWN INTERNATIONALLY FOR ITS STRONG BASE OF DIVERSE, CREATIVE AND WELL-TRAINED TALENT
As a multicultural country, there are significant language and cultural overlaps with the United States, Europe, and Asia, which enables the Canadian developers to produce content for the global market. Canadian educational programs, particularly at the college and university levels, produce well-trained graduates. However, as our industry grows, we face an increasing shortage of experienced talent across all job categories.
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.

![Industry Structure and Size Diagram]

### CANADIAN QUICK FACTS BY COMPANY SIZE

<table>
<thead>
<tr>
<th></th>
<th>Average No. of Employees</th>
<th>Total Employees</th>
<th>Total No. of Companies</th>
<th>Percent of Total Employment</th>
<th>Percent of Total Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro</td>
<td>3</td>
<td>292</td>
<td>101</td>
<td>1.9%</td>
<td>28.8%</td>
</tr>
<tr>
<td>Small</td>
<td>16</td>
<td>2312</td>
<td>149</td>
<td>14.7%</td>
<td>42.7%</td>
</tr>
<tr>
<td>Medium</td>
<td>67</td>
<td>3842</td>
<td>57</td>
<td>24.4%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Large</td>
<td>221</td>
<td>9272</td>
<td>41</td>
<td>59.0%</td>
<td>12.1%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>15,718</strong></td>
<td><strong>348</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

» The share of overall 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.

AVERAGE COST AND TIME OF DEVELOPMENT BY PLATFORM

Thousands of CDN$

<table>
<thead>
<tr>
<th>Platform</th>
<th>Cost range</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N Minimum</td>
<td>Maximum</td>
</tr>
<tr>
<td>Traditional console</td>
<td>15 150,000</td>
<td>30,000,000</td>
</tr>
<tr>
<td>MMO</td>
<td>4* 50,000</td>
<td>3,000,000</td>
</tr>
<tr>
<td>PC</td>
<td>23 15,000</td>
<td>15,000,000</td>
</tr>
<tr>
<td>Downloadable console</td>
<td>17 20,000</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Casual</td>
<td>22 2,000</td>
<td>8,000,000</td>
</tr>
<tr>
<td>Handheld</td>
<td>12 32,000</td>
<td>2,300,000</td>
</tr>
<tr>
<td>Social</td>
<td>17 6,000</td>
<td>1,400,000</td>
</tr>
<tr>
<td>Mobile</td>
<td>33 2,000</td>
<td>3,200,000</td>
</tr>
</tbody>
</table>

*Note small sample size, results should be interpreted with caution.
SELECTED PROVINCIAL PROFILES

QUEBEC

The province of Quebec has grown to be the dominant player in the Canadian video game industry

Almost one quarter of video game companies in Canada call Quebec home

Almost 70% of large video game companies in Canada are located in Quebec

Over half of the industry’s jobs are located there, as is over half of estimated industry spending

The average number of employees per company is twice that of the Canadian average, reflecting the predominance of large companies in the province

Quebec in 2011

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employees</td>
<td>8,236</td>
</tr>
<tr>
<td>Estimate spending in Quebec</td>
<td>$733m</td>
</tr>
<tr>
<td>Total Number of companies</td>
<td>86</td>
</tr>
<tr>
<td>Average number of employees / company</td>
<td>95</td>
</tr>
<tr>
<td>Historical growth</td>
<td>13%</td>
</tr>
<tr>
<td>Expected growth</td>
<td>16%</td>
</tr>
</tbody>
</table>

Quebec’s industry growth rate is 13% per annum, slightly above the Canadian industry’s average

Quebec’s video game industry is primarily concentrated around traditional console games, which are the focus of an estimated 72% of the resources in the local industry. This percentage share, however, is dropping rapidly

ONTARIO

The structure of the industry in Ontario is a stark contrast to that of Quebec with significantly smaller employee numbers and economic activity

Ontario in 2011

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employees</td>
<td>2,600</td>
</tr>
<tr>
<td>Estimate spending in Ontario</td>
<td>$238m</td>
</tr>
<tr>
<td>Total Number of companies</td>
<td>96</td>
</tr>
<tr>
<td>Average number of employees / company</td>
<td>27</td>
</tr>
<tr>
<td>Historical growth</td>
<td>20%</td>
</tr>
<tr>
<td>Expected growth</td>
<td>21%</td>
</tr>
</tbody>
</table>
SELECTED PROVINCIAL PROFILES

ONTARIO (CONT’D)

» 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

» Ontario has more companies than Quebec and is seeing more rapid growth rates. This is likely a function of the smaller average size of Ontario video game companies, as entrepreneurial companies tend to exhibit faster growth than more established companies

» Ontario’s industry is less centred on traditional console games, though they still command a slight majority share of the resources

BRITISH COLUMBIA

» In British Columbia, the number of employees and estimated spending are closer to those in Ontario than in Quebec

» There is a strong compliment of small and medium-sized companies, with a few large companies as well

» Average employees per company are also mid-range

» BC’s recent industry growth has been flat, although BC video game companies have some expectation of growth in the next couple of years (when compared with expectations for the broader economy)

» Expectations of better days ahead seem to be underlined by the fact that many skilled former studio employees have elected to start game companies of their own

<table>
<thead>
<tr>
<th>British Columbia in 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employees</td>
</tr>
<tr>
<td>Estimate spending in BC</td>
</tr>
<tr>
<td>Total Number of companies</td>
</tr>
<tr>
<td>Average number of employees / company</td>
</tr>
<tr>
<td>Historical growth</td>
</tr>
<tr>
<td>Expected growth</td>
</tr>
</tbody>
</table>

In British Columbia, total employees and estimated spending are closer to those in Ontario than in Quebec. There is a strong compliment of small and medium-sized companies, with a few large companies as well. Average employees per company are also mid-range. BC’s recent industry growth has been flat, although BC video game companies have some expectation of growth in the next couple of years (when compared with expectations for the broader economy). Expectations of better days ahead seem to be underlined by the fact that many skilled former studio employees have elected to start game companies of their own.
COMPANIES BY SIZE AND PROVINCE

<table>
<thead>
<tr>
<th>Size</th>
<th>Ontario</th>
<th>Quebec</th>
<th>BC</th>
<th>Alberta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro</td>
<td>34</td>
<td>9</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Small</td>
<td>45</td>
<td>30</td>
<td>42</td>
<td>10</td>
</tr>
<tr>
<td>Medium</td>
<td>14</td>
<td>22</td>
<td>18</td>
<td>3</td>
</tr>
<tr>
<td>Large</td>
<td>3</td>
<td>26</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>TOTAL</td>
<td>96</td>
<td>87</td>
<td>83</td>
<td>30</td>
</tr>
</tbody>
</table>
### COMPANIES BY SIZE AND PROVINCE

<table>
<thead>
<tr>
<th>Province</th>
<th>Micro</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manitoba</td>
<td>8</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>19</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>6</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>PEI</td>
<td>10</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>NL</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>NB</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Total</td>
<td>348</td>
<td>101</td>
<td>149</td>
<td>57</td>
<td>348</td>
</tr>
</tbody>
</table>

### Map of Companies by Province

- **QC**: Quebec
- **NB**: New Brunswick
- **NL**: Newfoundland and Labrador
- **NS**: Nova Scotia
- **PEI**: Prince Edward Island
- **ON**: Ontario
- **AB**: Alberta
- **MB**: Manitoba
- **BC**: British Columbia
- **NS**: Nova Scotia
- **PEI**: Prince Edward Island
- **NL**: Newfoundland and Labrador
The unique nature of video games as creative-technical productions means the industry cultivates and develops a wide range of skills in technology, creative arts, and management which have applications in architecture, medicine, and simulation subsequently driving ancillary economic activity.

$62,000 vs. $29,000

Average annual salary for employees at Canadian video game companies versus the average salary of workers in the broader economy.

Careers in Canada’s video game industry include:

- **Art Director**
- **Graphics/Special Effects Programmer**
- **Art Technician**
- **motion-capture technicians**
- **arts and animation specialists**
- **Level Designer**
- **GAME DESIGNER**
- **quality assurance personnel**
- **game designers**
- **3D Character Animator**
- **Sound Engineer/Designer**
- **Audio Programmer/Engineer**
- **Intern Artist**
- **game production experts**
- **Level Builder**
- **Lead Tester**
- **audio specialists**
- **3D Cutscene Artist**
- **Composer**
- **GAME TESTER**
- **Associate Producer**
- **3D CHARACTER BUILDER**
- **2D Texture Artist**
- **Engine/Tools Programmer**
- **Junior Programmer**
- **business and marketing personnel**
- **Lead Programmer**
- **3D Model Builder (objects)**
- **Project Manager**
- **2D Conceptual Artist**
- **legal staff members**
- **Lead Designer**
- **Producer**
- **Associate Producer**
- **Programmers**
- **Audio Programmer/Engineer**
- **Art Director**
- **Art Technician**
- **motion-capture technicians**
- **arts and animation specialists**
- **Level Designer**
- **GAME DESIGNER**
- **quality assurance personnel**
- **game designers**
- **3D Character Animator**
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- **Lead Designer**
- **Producer**
- **Associate Producer**
- **Programmers**
- **Audio Programmer/Engineer**
**WHO IS PLAYING COMPUTER AND VIDEO GAMES?**

59% of Canadians are gamers

33 YEARS OLD
Average age of a Canadian gamer

gamer: a person who has played computer or video games in the past four weeks

### CANADIANS, BY AGE, WHO HAVE PLAYED A VIDEO GAME IN THE PAST 4 WEEKS

<table>
<thead>
<tr>
<th>Ages</th>
<th>6-12</th>
<th>13-17</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
<td>34%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: NPD Group’s 2010 Understanding the Canadian Gamer
### Who is playing computer and video games?

**What types of games do adults (18+ years) like to play?**

<table>
<thead>
<tr>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>39% card, puzzle, arcade or word games</td>
<td>57% card, puzzle, arcade or word games</td>
</tr>
<tr>
<td>37% shooter games</td>
<td>41% games that challenge mental abilities</td>
</tr>
<tr>
<td>35% action/adventure</td>
<td>22% family oriented</td>
</tr>
<tr>
<td>30% sports games</td>
<td>18% strategy or role-playing games</td>
</tr>
</tbody>
</table>

**What types of games do teenagers (13-17 years) like to play?**

<table>
<thead>
<tr>
<th>Teen Boys</th>
<th>Teen Girls</th>
</tr>
</thead>
<tbody>
<tr>
<td>59% shooter games</td>
<td>43% music-based games</td>
</tr>
<tr>
<td>50% action/adventure</td>
<td>35% strategy or role-playing games</td>
</tr>
<tr>
<td>43% sports games</td>
<td>30% card, puzzle, arcade or word games</td>
</tr>
<tr>
<td>38% fighting</td>
<td>26% racing games</td>
</tr>
</tbody>
</table>

**What types of games do children (6-12 years) like to play?**

<table>
<thead>
<tr>
<th>Boys</th>
<th>Girls</th>
</tr>
</thead>
<tbody>
<tr>
<td>53% racing games</td>
<td>58% kid-oriented online role-playing games</td>
</tr>
<tr>
<td>41% action adventure games</td>
<td>34% games that challenge your mental abilities</td>
</tr>
<tr>
<td>34% sports games</td>
<td>29% racing games</td>
</tr>
<tr>
<td>30% strategy or role playing games</td>
<td>27% music-based games</td>
</tr>
</tbody>
</table>

Source: NPD Group’s 2010 Understanding the Canadian Gamer
HOW OFTEN DO CANADIANS PLAY?

- Everyday: 30%
- A few days per week: 45%
- Once a week: 15%
- Once every 2 weeks: 5%
- Once in the past 4 weeks: 6%

96% of Canadian households own a computer

47% of Canadian households have at least one video game console such as an Xbox 360, Wii or PlayStation 3

ON WHAT PLATFORM DO GAMERS PLAY MOST FREQUENTLY?

- 49%: A computer
- 34%: A game console, such as an Xbox 360, Wii or PlayStation hooked up to a television
- 10%: A handheld game system, such as Nintendo DS or Sony PSP
- 7%: A cell phone or other mobile device such as a Blackberry, PalmPilot, iPhone or iTouch

Source: NPD Group’s 2010 Understanding the Canadian Gamer
THE BOTTOM LINE

1.7 billion\(^1\) - Canadian retail sales of entertainment software and hardware in 2010

- $886 million\(^1\) - console/handheld games
- $79 million\(^1\) – PC games
- $513 million\(^1\) – hardware
- $279 million\(^1\) – Peripherals

DIGITAL SALES

- The video game industry has developed online networks accessible through consoles (Xbox LIVE, Sony PSN) and PCs (Steam, Origin) which provide gamers with the ability to directly purchase and download stand-alone games as well as other add-on downloadable content, bypassing physical retailers. Games can also be accessed through web-based portals and social networking sites, and new “cloud gaming” services that “stream” gameplay through the Internet are emerging. Digital sales can include game subscriptions, mobile apps, social network games and full games available for download.

- Digital sales comprise an increasing proportion of the revenues of game publishers.

\(^1\)Source: NPD Group’s Monthly Games Report
\(^2\)Source: NPD Group’s Video Game Acquisition in Canada

*Between September 2010 and February 2011
# TOP SELLING COMPUTER AND VIDEO GAMES FROM JULY 2010 – JUNE 2011

<table>
<thead>
<tr>
<th>RANK</th>
<th>TITLE</th>
<th>PLATFORM</th>
<th>ESRB RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CALL OF DUTY: BLACK OPS</td>
<td>360</td>
<td>MATURE</td>
</tr>
<tr>
<td>2</td>
<td>CALL OF DUTY: BLACK OPS</td>
<td>PS3</td>
<td>MATURE</td>
</tr>
<tr>
<td>3</td>
<td>HALO: REACH</td>
<td>360</td>
<td>MATURE</td>
</tr>
<tr>
<td>4</td>
<td>STARCAST II: WINGS OF LIBERTY</td>
<td>PC</td>
<td>TEEN</td>
</tr>
<tr>
<td>5</td>
<td>JUST DANCE 2</td>
<td>WII</td>
<td>EVERYONE 10+</td>
</tr>
<tr>
<td>6</td>
<td>DONKEY KONG COUNTRY RETURNS</td>
<td>WII</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>7</td>
<td>GRAN TURISMO 5</td>
<td>PS3</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>8</td>
<td>NHL 11</td>
<td>360</td>
<td>EVERYONE 10+</td>
</tr>
<tr>
<td>9</td>
<td>NHL 11</td>
<td>PS3</td>
<td>EVERYONE 10+</td>
</tr>
<tr>
<td>10</td>
<td>POKEMON WHITE VERSION</td>
<td>NDS</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>11</td>
<td>ASSASSIN’S CREED: BROTHERHOOD</td>
<td>360</td>
<td>MATURE</td>
</tr>
<tr>
<td>12</td>
<td>FIT PLUS W/BALANCE BOARD</td>
<td>WII</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>13</td>
<td>NHL SLAPSHOT W/ HOCKEY STICK</td>
<td>WII</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>14</td>
<td>POKEMON BLACK VERSION</td>
<td>NDS</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>15</td>
<td>NEW SUPER MARIO BROS. WII</td>
<td>WII</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>16</td>
<td>WORLD OF WARCRAFT: CATACLYSM EXPANSION PACK</td>
<td>PC</td>
<td>TEEN</td>
</tr>
<tr>
<td>17</td>
<td>NEW SUPER MARIO BROS. DS</td>
<td>NDS</td>
<td>EVERYONE</td>
</tr>
<tr>
<td>18</td>
<td>KINECT SPORTS</td>
<td>360</td>
<td>EVERYONE 10+</td>
</tr>
<tr>
<td>19</td>
<td>ASSASSIN’S CREED: BROTHERHOOD</td>
<td>PS3</td>
<td>MATURE</td>
</tr>
<tr>
<td>20</td>
<td>SUPER MARIO GALAXY 2</td>
<td>WII</td>
<td>EVERYONE</td>
</tr>
</tbody>
</table>
**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.

83% of parent gamers sometimes or always check the ESRB rating symbol on the game box when purchasing or renting video games for their children.

88% 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 2010?**

Note: The ESRB assigned 1,638 ratings in 2010. These figures include instances where a publisher revised and resubmitted a game with the intention of receiving a different rating.

For more information visit the ESRB website at www.esrb.org
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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