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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 ad 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:  

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

46% Female
54% Male

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
- 33% on a game console (such as an Xbox 360, Wii or PlayStation 3)
- 6% on a handheld game system (such as a Nintendo 3DS or PlayStation Vita)
- 36% on 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
- 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

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

Boys
- 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

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

42% PLAY MOST OFTEN ON A CELL PHONE OR MOBILE DEVICE

49% PLAY VIDEO GAMES A FEW DAYS PER WEEK AND 20% PLAY EVERY DAY

27% ARCADE GAMES
26% MUSIC-BASED GAMES
26% EDUCATIONAL GAMES, PUZZLE, WORD GAMES OR ANY GAMES THAT CHALLENGE HER MENTAL ABILITIES

TEEN BOYS

64% OF TEEN BOYS PLAY MOST OFTEN ON A GAME CONSOLE

35% PLAY VIDEO GAMES A FEW DAYS PER WEEK AND 54% PLAY EVERY DAY

53% SHOOTER GAMES
44% ACTION AND ADVENTURE GAMES
29% SPORTS GAMES

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

MOST PLAY ONLINE AND PREFER TO PLAY ONLINE TO SOCIALIZE WITH OTHERS AND TO COMPETE WITH OTHERS
**Adults 18-34**

**Women**
- 38% play most often on a cell phone, tablet, computer or other mobile device.
- 31% play most often on a computer.
- 30% play most often on a game console.

**Men**
- 51% play most often on a game console.
- 33% play most often on a computer.

**She Plays**
- 40% educational games, puzzle, word games or any games that challenge her mental abilities.
- 33% role-playing games (RPG).
- 29% play strategy or role playing games (in real-time or not in a continuous world).

**He Plays**
- 42% role-playing games (RPG).
- 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

46% play most often on a computer and 32% on a cell phone, tablet computer or other 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).

She plays:
- 56% educational games, puzzle, word games or any games that challenge her mental abilities
- 34% card games
- 23% arcade games

Men

39% play most often on a computer, 33% on a game console and 25% on a mobile device.

46% play a few days per week.

He plays:
- 26% shooter games
- 26% card games
- 24% role-playing games
- 24% action/adventure games
MATURE GAMERS (55+)

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:
- 56% Card games
- 53% Educational games, puzzle, word games or any games that challenge her mental abilities

He plays:
- 41% Card games
- 23% Educational games, puzzle, word games or any games that challenge his 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

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

TEEN BOYS

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

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

MEN

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**

**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+)**

**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 a 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?

- 9% MATURE
- 26% TEEN
- 20% EVERYONE 10+
- 45% EVERYONE

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
TOP SELLING COMPUTER AND VIDEO GAMES

12 MONTHS ENDING AUGUST 2012

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

Source: NPD GROUP
Behind Every Business Decision
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 **3rd** 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.

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