Essential Facts 2014 contains original information from various sources including:

1. NPD Group’s Understanding the Canadian Gamer 2014 custom research. The survey was commissioned by ESAC and gathered data from 3,359 adults and 526 teens (13-17) between April 24 and May 19, 2014. The margin of error associated with the total sample is +/- 2.19 times out of 20.

2. Nordicity’s Canada’s Video Game Industry in 2013. This report was commissioned by ESAC and gathered quantitative and qualitative data from 90 computer and video game companies in Canada.

3. NPD Group’s Understanding the Canadian Gamer 2012 custom research. The survey was commissioned by 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.


theESA.Ca
Canada’s video game industry is one of the world’s largest. Each year, it produces hundreds of the world’s biggest, most popular and most innovative games. It’s a leading industry in Canada’s growing digital economy and Canadians are taking notice.
Canada’s Video Game Industry

16,500 People directly employed by the Canadian video game industry

Largest producer of video games in the world per capita (# of employees)

27,000 Full time equivalent jobs created by the Canadian video game industry

329 Video game companies operating in Canada

53% Self-identify as independent developers

910 Video game projects completed in 2012

5% Growth in # of employees between 2011 & 2013

2 out of 5 companies predicted they’d grow by 25% in two years

$2.3 billion contributed to Canada’s GDP annually

$1.6 billion directly spent by Canadian video game companies, up 12.5% from 2011
CANADIAN PUBLIC OPINION ABOUT THE VIDEO GAME INDUSTRY IN 2014

62% OF CANADIANS BELIEVE THE VIDEO GAME INDUSTRY IS AN INNOVATIVE SECTOR WHICH IS HELPING TO SHAPE THE CANADIAN ECONOMY OF THE FUTURE

55% OF CANADIANS BELIEVE THE VIDEO GAME INDUSTRY HAS AN OVERALL POSITIVE IMPACT ON THE CANADIAN ECONOMY

67% OF CANADIANS BELIEVE THAT THE VIDEO GAME INDUSTRY PROVIDES GOOD OPPORTUNITIES FOR YOUNG PEOPLE CURRENTLY PLANNING THEIR CAREERS

71% OF CANADIANS SAY THAT GOVERNMENTS HAVE A ROLE TO PLAY IN CHOOSING WHICH INDUSTRIES WILL DRIVE OUR ECONOMY IN THE FUTURE
Workers in the Canadian video game industry are dynamic. They are young, well paid and highly educated. With some of the best post-secondary institutions in the country, the industry is helping to train the next generation of creative and technical workers.

Canadian Employment Profile
31 YEARS OLD - AVERAGE AGE OF EMPLOYEES IN THE VIDEO GAME INDUSTRY
$72,500 PER ANNUM AVERAGE SALARY IN 2012

Education
65 VIDEO GAME AND COMPUTER SCIENCE PROGRAMS AT THE COLLEGE AND UNIVERSITY LEVEL IN CANADA

Hiring
2,184 POSITIONS ARE EXPECTED TO BE FILLED BETWEEN 2013-2015, MOSTLY AT THE INTERMEDIATE LEVEL

97% OF NEW GRADUATE HIRES ARE MADE FROM WITHIN CANADA

Training
67% OF CANADIANS BELIEVE THAT ON-THE-JOB MENTORSHIP IS CRITICAL FOR ADVANCEMENT IN THE VIDEO GAME INDUSTRY

IN FACT, ESAC MEMBERS PROVIDE SEVERAL ON-THE-JOB TRAINING PROGRAMS SUCH AS DEVELOPMENT CONFERENCES, TRAINING COURSES AND CONTINUING EDUCATION THROUGH PROGRAMS
Canadian industry output snapshot

Console games vs. mobile games

- 48% working on titles for consoles
- 88.6% of overall industry budgets dedicated to creation of console games
- 66.5% of overall industry revenues
- $8,728,125 – average development budget for console
- 65 – average team size for console project
- 583 days – average time for console project development
- 16% of total completed projects

- 84% developing games for mobile
- 2.3% of overall industry budgets dedicated to mobile games
- 11% of overall industry revenues
- $303,500 – average development budget for mobile
- 7 – average team size for mobile project
- 156 days – average time for mobile project development

OVERALL AVERAGE SALARY BY SIZE OF COMPANY

- LARGE (500+) - 4% - $71,900
- MEDIUM (100-499) - 9% - $81,900
- SMALL (5-99) - 34% - $60,500
- MICRO (LESS THAN 5) - 54% - $28,900

AVERAGE SALARY BY TYPE OF POSITION AND LEVEL OF SENIORITY

- Creative: average $86,500, senior $72,100, intermediate $60,300, junior $40,800
- Technical: average $84,800, senior $68,600, intermediate $50,800, junior $47,000
- Business/Administrative: average $60,500, senior $54,600, intermediate $52,300, junior $40,300
Starting in Vancouver over 20 years ago, the industry now has major hubs across the country. Healthy ecosystems made up of large, small, mobile and console studios are positioning Canada as one of the best places to make video games now and in the future.
• The province is home to some of the largest studios in Canada
• 70% of Quebec residents believe that the Canadian video game industry has an overall positive impact on the Canadian economy
• 69% of Quebec residents believe that the Canadian video game industry is an innovative sector which is helping to shape the Canadian economy of the future
### BRITISH COLUMBIA’S VIDEO GAMES INDUSTRY

<table>
<thead>
<tr>
<th>Category</th>
<th>Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employees</td>
<td>5140</td>
</tr>
<tr>
<td>Estimate Spending in BC</td>
<td>$548m</td>
</tr>
<tr>
<td>Total Number of Companies</td>
<td>67</td>
</tr>
<tr>
<td>Average Salary</td>
<td>$80,100</td>
</tr>
<tr>
<td>Number of College and University Programs</td>
<td>15</td>
</tr>
</tbody>
</table>

**British Columbia is one of the oldest video game clusters in North America and home to major players in the video game industry. Many start-ups capitalize on expertise and talent in this sector.**

- 68% of BC residents believe that the Canadian video game industry has an overall positive impact on the Canadian economy.
- 64% of BC residents believe that the Canadian video game industry is an innovative sector which is helping to shape the Canadian economy of the future.

**Company Size Distribution:**
- Micro - 37%
- Small - 44%
- Medium - 13%
- Large - 6%
ONTARIO’S VIDEO GAMES INDUSTRY

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Total Employees</td>
<td>1821</td>
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<tr>
<td>Estimate Spending in Ontario</td>
<td>$134m</td>
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<tr>
<td>Total Number of Companies</td>
<td>96</td>
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<tr>
<td>Average Salary</td>
<td>$76,400</td>
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<tr>
<td>Number of College and University Programs</td>
<td>38</td>
</tr>
</tbody>
</table>

ONTARIO’S INDUSTRY IS MAINLY COMPOSED OF SMALL AND MICRO-SIZED FIRMS

- The introduction of provincial tax credits is attracting larger studios; a few medium and large studios now call Ontario home.
- 65% of Ontario-based companies say they’ve been in business for more than seven years.
- 63% of Ontario residents believe that the Canadian video game industry has an overall positive impact on the Canadian economy.
- 60% of Ontario residents believe that the Canadian video game industry is an innovative sector which is helping to shape the Canadian economy of the future.
More than half of Canadians have played a video game in the past 4 weeks. And it’s not just boys playing games – most are adults and nearly half are women. With so many games on so many devices, games are now ubiquitous entertainment around the world.
**Canadian Gamers**

54% of Canadians are gamers – as defined by someone who has played a computer or video game in the past 4 weeks.

- **52%** male
- **48%** female

**33 years old**

Average age of a Canadian gamer

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**The Global Video Game Industry**

- **$102,900,000,000**
  - Total value of global video game market by 2017

- **$35,000,000,000**
  - Of global game revenues will be generated through smartphones and tablets by 2017. Equal to **34% of total revenue**.
Canadians, by age, who have played a video game in the past 4 weeks:

- 55+: 34%
- 35-54: 51%
- 18-34: 64%
- 13-17: 81%

Device ownership:

- 85%
- 62%
- 35%

Platform on which Canadians play video games most frequently:

- 36%
- 33%
- 21%
- 44%
<table>
<thead>
<tr>
<th>Age Group</th>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Children</strong> (6-12 years)</td>
<td>Play kid role-playing games</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>Play action and adventure games</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Teens</strong>   (13-17 years)</td>
<td>Play arcade games</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Play shooter games</td>
<td>53%</td>
</tr>
<tr>
<td><strong>Adults</strong>  (18-34 years)</td>
<td>Play education games, puzzle or word games and games that challenge mental ability</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Play role-playing games</td>
<td>42%</td>
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<tr>
<td><strong>Adults</strong>  (35-54)</td>
<td>Play educational games, puzzles or word games and games that challenge mental ability</td>
<td>56%</td>
</tr>
<tr>
<td></td>
<td>Play shooter games</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Mature Gamers</strong> (55+)</td>
<td>Play card games</td>
<td>56%</td>
</tr>
<tr>
<td></td>
<td>Play card games</td>
<td>41%</td>
</tr>
</tbody>
</table>
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.

85% 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.

1118 ratings assigned in 2013
ABOUT ESAC

The Entertainment Software Association of Canada (ESAC) is the voice of the Canadian video game industry. It 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 include: