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MESSAGE FROM PRESIDENT & CEO

Even before the internet, video games have played a role in entertaining people, connecting family and friends and introducing us to fantastic worlds transporting us beyond reality. COVID-19 has forced a global shift in how we connect, build community and stay healthy. Canadians are turning to video games even more now as a way to safely connect with their friends and family and escape what can seem like a neverending cycle of bad news.

This year, we at Entertainment Software Association of Canada are releasing our Real Canadian Gamer – Essential Facts 2020 data during unprecedented times -Canadians are spending more time at home for leisure, remote work and for their health as they support physical distancing health measures to stem the spread of COVID-19.

Video games have always played an important role in our society and with the pandemic, we are learning that gaming can be so much more than an entertaining form of play; it is a key nexus point for social interaction, creativity and mental health. From business executives to service employees, from students to retirees, Canadians of all ages and professional backgrounds enjoy the power of video games. Twenty-three million Canadians play video games and during the pandemic, fifty-eight percent of adult gamers and eighty percent of teen gamers are playing more, with sixty-five percent of adult gamers and seventy-eight percent of teen gamers finding that gaming while home makes them feel better.

More than forty percent of parent gamers are spending more time playing video games with their children during the pandemic; sixty-nine percent of parents with kids (6 to 12) played video games with their children; sixty percent of parent gamers with teens (13 to 17) played video games with their teens. Ninety-six percent of parents of gamers (ages 6 to 12) find the ESRB rating system especially helpful in choosing video games that are appropriate for their children.

Purchasing behaviour of gamers also continues to evolve. Canadians are increasingly turning toward digital download with thirty-three percent of adult gamers and forty-two percent of teen gamers downloading full games. These numbers are up three percentage points and seven percentage points respectively over 2018 and continue a trend of growing digital game acquisition by players.

Mobile devices continue to be the primary device of play among adults while kids and teens prefer to play using consoles. Our Real Canadian Gamer data supports that Canadians view gaming as an important mainstream form of entertainment that supports social connectivity, a sense of wellbeing and mental health. Now more than ever, video games are a meaningful and powerful outlet for Canadians and the world.

As we all do our best to navigate these difficult times, we can all continue to enjoy the many positive benefits available to us through the power of play.

Jayson Hilchie

President & CEO Entertainment Software Association of Canada





15-minute surveys fielded to a representative sample of both Canadian adults and children who played any video games in the past 4 weeks.

- 1. Canadians adults 18 to 64 years of age
- 2. Kids and teens 6 to 17 years of age through representative surrogate samples (mothers of the children)

Qualified ending sample:

- Adults n= 2633
- Kids (6 to 12) n= 305
- Teens (13 to 17) n= 257

Surveys were in field from May 18, 2020 to May 27, 2020 Data are weighted to Canada census targets on gender, age, income, region, and household size.

*This study was conducted by The NPD Group.

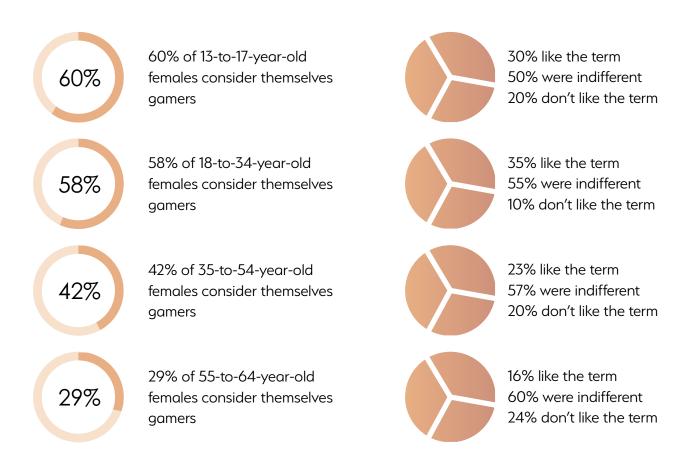


Real Canadian Gamer

The term gamer usually sparks conversations in the gaming community. We wanted to hear from gamers to find out what they thought of the term and if they had to describe themselves if they would use the term. Here's what we learned.

There is high acceptance of the term gamer among 13-to-17-year-old Canadians and the least acceptance among Canadians between the ages 55 to 65. Note, in our study, the term gamer refers to females or males who have played video games within the last four weeks (at the time of our survey). Throughout our report, we will use the terms kids or kid gamers (6-12), teens or teen gamers (13-17), and adults or adult gamers (18-34, 35-54 and 55-64) interchangeably when referring to specific age groups of gamers.

Females





Males



90% of 13-to-17-year-old males consider themselves gamers



52% like the term 41% were indifferent 6% don't like the term



82% of 18-to-34-year-old males consider themselves gamers



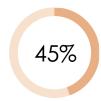
57% like the term 36% were indifferent 7% don't like the term



64% of 35-to-54-year-old males consider themselves gamers



29% like the term 61% were indifferent 10% don't like the term



45% of 55-to-64-year-old males consider themselves gamers



15% like the term 77% were indifferent 8% don't like the term

Total Number of Canadians Playing Video Games









Age Breakdown of Canadian Gamers

Ages 18 to 64



89% of Canadian kids and teens play video games



61% of Canadian adults under the age of 65 play video games

Average Age of Canadian Gamer

34 years

Across All Canadian Gamers

Ages 6 to 17



50% are female 50% are male



Gaming During the Pandemic

During the pandemic, gamers have boosted their levels of play; however, less than two percent of Canadians decided to try playing video games for the first-time during lockdown. The majority of Canadians playing video games during the pandemic believe that gaming has helped them emotionally and mentally, especially teens. Gaming has also helped family, and friends, bond and stay connected.



of adults are playing more



of teens are playing more



of adults find that gaming while supporting stay-athome health measures makes them feel better



of teens find that gaming while supporting stay-athome health measures makes them feel better

Kids and teens are more involved in esports and video game streaming during the pandemic. Streaming includes viewing and playing video games.

Esports streaming



of adults are streaming more during the pandemic



of kids and teens are streaming more during the pandemic

Video game streaming



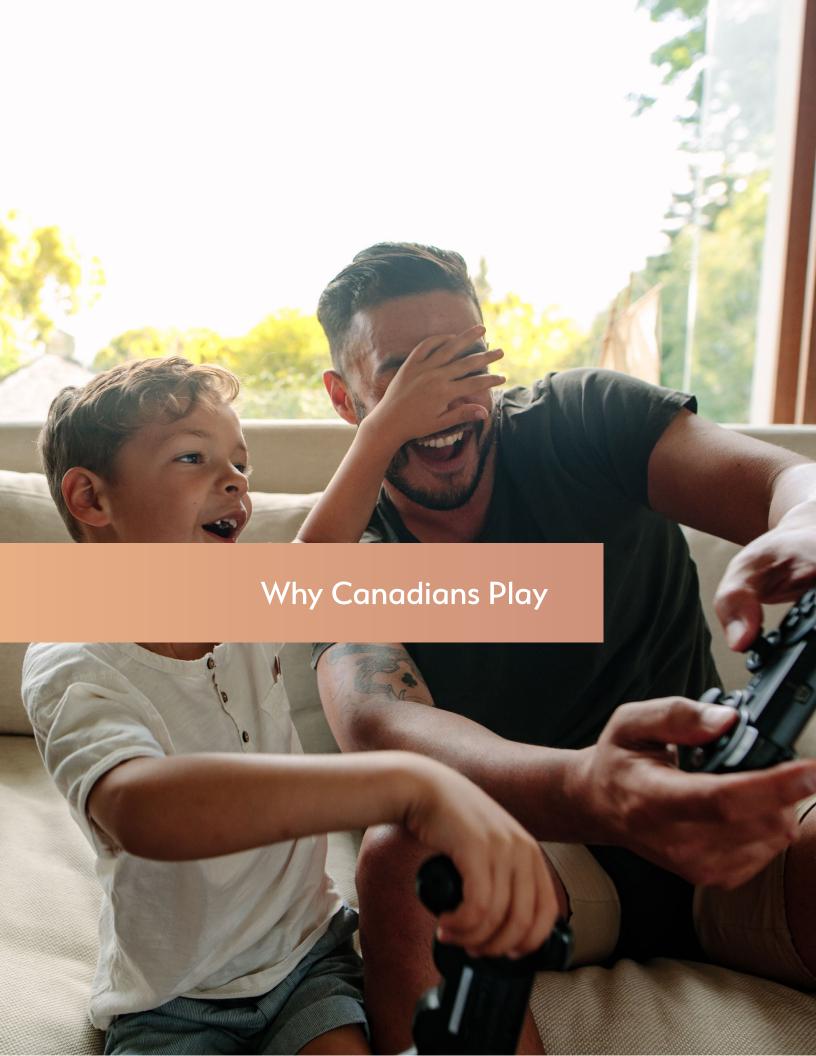
of adults are streaming more video games during the pandemic



of kids and teens are streaming more video games during the pandemic

Sixty-nine percent of parent gamers with kids (ages 6 to 12) played video games with their children and 60 percent of parent gamers with teens (ages 13 to 17) played video games with their children. Forty-four percent of parent gamers with kids (6 to 17) reported spending more time playing video games with their kids during the pandemic.





Why Canadians Play

When asked how gaming helped during the pandemic, Canadians shared their personal experiences providing insight into how gaming is an important source of joy and entertainment during these difficult times. Canadians find that gaming helps them relax and stay busy during quarantine.

Fifty-seven percent of Adult gamers said that playing video games while required to remain at home improved their mental health. This was even higher in Teen gamers which 65% reporting improved mental health from playing games.

Forty-three percent of Adult gamers said that video games helped them stay connected to their friends while required to isolate at home. This increased to 70% in Teen gamers who were surveyed.

Parents are finding that gaming is helping them spend more time with their children. Families and partners are enjoying gaming together and find that it helps them stay connected if they are located in different parts of a city or the country.

Canadian Video Game Market

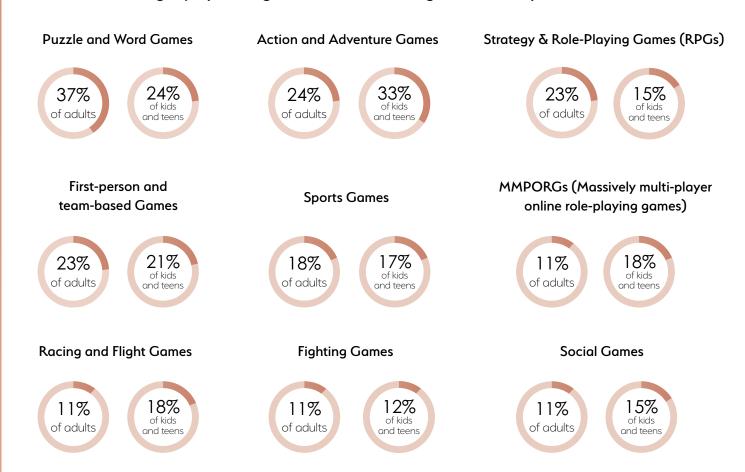
Sales for video game console hardware is up 58% year-over-year, and contributes 43% of all dollar gains. Almost 250k more units of hardware have been sold this year vs last year. Every category has grown, software, hardware, and gamer cards; software, includes physical software plus digital full game software, contributes 40% of all gains.



What Canadians Play

Canadian are more likely to play first-person, sports, and card games online; 40% of adult gamers play games online solo, 40% play with others online, 20% play online with other players in the room and 30% of Canadian adult gamers play online with players they've never met. Canadian adults most commonly play puzzle games while kids and teens prefer action and adventure games.

Canadians of all ages play video games – and there are games for everyone.



Demographic Highlights

Devices most often played varies; we have highlighted the devices, hours played per week (including the percentage of hours played online), as well as the top three most often played game titles by Canadians by age group. The overall percentage of play by gamers applies cross all devices.

Mobile gaming remains popular with females across all demographics while console gaming is popular among male gamers with the exception of males ages 35 to 54.

Female Gamers (6-12)

- 88% of females (6-12) play video games
- Average hours of play per week: 9 hours
- 49% of females (6-12) play on mobile devices
- 31% of females (6-12) play on consoles
- 56% of play is online

Male Gamers (6-12)

- 95% of males (6-12) play video games
- Average hours of play per week: 12 hours
- 31% of males (6-12) play on mobile devices
- 53% of males (6-12) play on consoles
- 60% of play is online

Female Gamers (13-17)

- 79% of females (13-17) play video games
- Average hours of play per week: 9.5 hours
- 47% of females (13-17) play on mobile devices
- 37% of females (13-17) play on consoles
- 48% of play is online

Male Gamers (13-17)

- 95% of males (13-17) play video games
- Average hours of play per week: 21 hours
- 13% of males (13-17) play on mobile devices
- 57% of females (13-17) play on consoles
- 78% of play is online

Female Gamers (18-34)

- 68% of females (18-34) play video games
- Average hours of play per week: 8.5 hours
- 82% of females (18-34) play on mobile devices
- 63% of females (18-34) play on consoles
- 50% of play is online

Male Gamers (18-34)

- 89% of males (18-34) play video games
- Average hours of play per week: 12 hours
- 71% of males (18-34) play on mobile devices
- 72% of males (18-34) play on consoles
- 63% of play is online

Top three most played titles by female gamers (6-12):

- Roblox
- Minecraft
- Mario Kart

Top three most played titles by male gamers (6-12):

- Minecraft
- Fortnite
- Mario Kart

Top three most played titles by females (13-17):

- Mario Kart
- **Fortnite**
- Sims 4

Top three most played titles by males (13-17):

- Fortnite
- Call of Duty
- Minecraft / Grand Theft Auto

Top three most played titles by females (18-34):

- Mario Kart
- Call of Duty
- Sims 4

Top three most played title by males (18-34):

- Call of Duty
- FIFA20 / Grand Theft Auto
- NBA 2K20



Female Gamers (35-54)

- 52% of females (35-54) play video games
- Average hours of play per week: 8 hours
- 81% of females (35-54) play on mobile devices
- 42% of females (35-54) play on consoles
- 53% of play is online

Male Gamers (35-54)

- 68% of males (35-54) play video games
- Average hours of play per week: 8.5 hours
- 68% of males (35-54) play on mobile devices
- 62% of males (35-54) play on consoles
- 53% of play is online

Female Gamers (55-64)

- 36% of female gamers (55-64) play video games
- Average hours of play per week: 8 hours
- 69% of females (55-64) play on mobile devices
- 20% of females (55-64) play on consoles
- 57% of play is online

Male Gamers (55-64)

- 41% of male gamers (55-64) play video games
- Average hours of play per week: 9 hours
- 64% of males (55-64) play on mobile devices
- 36% of males (55-64) play on consoles
- 51% of play is online

Top three most played titles by females (35-54):

- Solitaire
- Candy Crush
- Sudoku/ Scrabble

Top three most played titles by males (35-54):

- Call of Duty
- NHL20
- Madden20 / Mario Kart
- •

Top three most played titles by females (55-64):

- Solitaire
- Candy Crush
- Scrabble

Top three most played titles by females (55-64):

- Solitaire
- Video Poker
- Sudoku





Where Canadians Play

Canadians across the country enjoy the power of play. The average age of adult gamers (18-64) in Canada is 38. According to our research, Saskatchewanites play the most and average 10 hours of play among those who play.

British Columbia



64% of adult gamers in British Columbia play video games



Average age of adult gamers in BC is 38



Gamers in British Columbia play an average of 9 hours per week

Alberta



61% of adult gamers in Alberta play video games



Average age of adult gamers in Alberta is 39



Gamers in Alberta play an average of 9 hours per week

Saskatchewan



68% of adult gamers in Saskatchewan play video games



Average age of adult gamers in SK is 36



Gamers in Saskatchewan play an average of 10 hours per week



Saskatchewan has the highest rate of play in Canada

Manitoba



58% of adult gamers in Manitoba play video games



Average age of adult gamers in Manitoba is 38



Gamers in Manitoba play an average of 9 hours per week

Ontario



63% of adult gamers in Ontario play video games



Average age of adult gamers in Ontario is 37



Gamers in Ontario play an average of 9 hours per week

Quebec



57% of adult gamers in Quebec play video games



Average age of adult gamers in Quebec is 37



Gamers in Quebec play an average of 8 hours per week

Atlantic Canada



60% of adult gamers in Atlantic Canada play video games



Average age of adult gamers in Atlantic Canada is 40



Gamers in Atlantic Canada play an average of 9 hours per week



Kids and Teens

Kids and teens across Canada are playing video games. Due to a small sample size, our data for this section was calculated by region; average age, percentage of play and average hours played by kids and teens is shared for the following regions: Ontario, Quebec, and Western Canada.

Ontario



90% of kids and teens in Ontario play video games



Average age of kid-andteen gamers in Ontario is 12



Kids and teens in Ontario play video games for an average of 13.5 hours per week.

Quebec



85% of kids and teens in Quebec play video games



Average age of kid-andteen gamers in Quebec is 12



Kids and teens in Quebec play video games for an average of 14.5 hours per week.

Western Canada



89% of kids and teens in Western Canada play video games



Average age of kid-andteen gamers in Western Canada is 12



Kids and teens in Western Canada play video games for an average of 12 hours per week.

What Canadians Play by Region

The most popular genre across Canada are puzzle and word games. The types of games which are the most played by Canadians are similar across the country. The average age of adult gamers (18-64) in Canada is 38.

British Columbia

- 35% of gamers in British Columbia play Puzzle and Word Games
- 28% of gamers in British Columbia play Action and Adventure Games
- 26% of gamers in British Columbia play Strategy and Role-Playing Games

Alberta

- 40% of gamers in Alberta play Puzzle and Word Games
- 25% of gamers in Alberta play First-person and Team-based Games
- 24% of gamers in Alberta play Action and Adventure Games





Saskatchewan and Manitoba

- 37% of gamers in Saskatchewan and gamers in Manitoba play Puzzle and Word Games
- 25% of gamers in Saskatchewan and gamers in Manitoba play Action and Adventure Games
- 24% of gamers in Saskatchewan and gamers in Manitoba play First-person and team-based Games

Ontario

- 41% of gamers in Ontario play Puzzle and Word Games
- 25% of gamers in Ontario Gamers play First-person and Team-based Games
- 24% of gamers in Ontario play Action and Adventure Games

Quebec

- 30% of gamers in Quebec play Puzzle and Word Games
- 25% of gamers in Quebec play Strategy and Role-Playing Games
- 22% of gamers in Quebec play Action and Adventure Games

Atlantic Canada

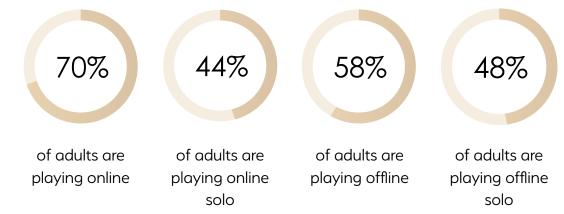
- 28% of gamers in Atlantic Canada play Puzzle and Word Games
- 25% of gamers in Atlantic Canada play Action and Adventure Games
- 21% of gamers in Atlantic Canada play First-person and Team-based Games

Data note: The NPD Group analyzes Atlantic provinces as a whole (New Brunswick, Prince Edward Island, Nova Scotia and Newfoundland and Labrador) given population size (less than 7% percent of Canada). The NPD Group surveys 10 provinces and uses Statistics Canada data to weight the results by age, gender, region, and household size. The three territories (Yukon, Northwest Territories, Nunavut) are not currently included as the cost is prohibitive to obtain a meaningful sample size.



How Canadians Play

While the overall incidence of gaming decreased from 64% in 2018 to 61% in 2020, the incidence of game play has increased for Canadians ages 18 to 34. Canadian gamers are playing more.



First-person and Team-based games, action games, and sport games are more likely to played with others.

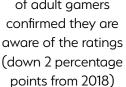
More Canadians are downloading digital copies of games instead of purchasing physical copies. This is a trend which aligns with what is happening globally, we are living in a digital world which means increased communication through digital means for everyday activities including play.

ESRB Video Game Ratings

As more families are playing together, we asked parents about whether or not they are using the ESRB ratings. We found that awareness of ESRB rating is trending downward; this may mean that parents are selecting games they are familiar with for their children. In any case, the rating system is a powerful tool for parents to stay engaged and aware of the type of content their children are consuming in video games. Parents of younger gamers continue to find the rating system most helpful.

ESRB ratings include six categories which are represented on the front of each game box or digitally by the following symbols: EC for Early Childhood, E for Everyone, E10+ for everyone 10 and older, T for Teen, M for Mature, and AO for Adults Only. The ratings recommend a particular age group for whom a game is most appropriate.







of parents of gamers find the rating system very helpful in buying and renting appropriate games for their children



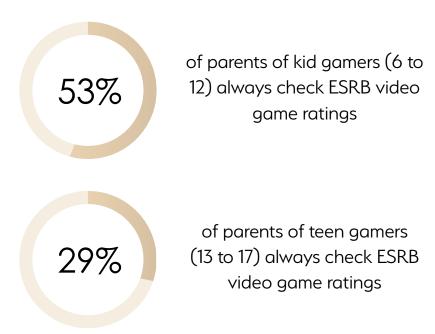
of parents of gamers, ages 6 to 17, believe the ratings accurately describe the rated game's content



of parents of gamers, ages 6 to 17, feel the rating on a game accurately reflects their views about the appropriateness of content for their child

We also learned that the sharing of personal information and user location in-game is the top concern, particularly parents of younger children; Canadians are concerned about their privacy and there are tools available to help them protect their information in-game.

On average, 78% of parents of gamers (ages 6 to 17) check the rating on a game Always or Sometimes, with 42% reporting that they always check and 36% reporting that they sometimes check. Parents of kid gamers aged 6 to 12 check the ratings most often.



Devices

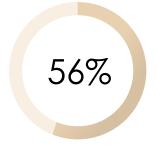
Overall console ownership declined over the past two years; however, we found that console gaming became more popular among younger males despite this decline in ownership. Mobile device ownership appears to have peaked. We saw a slight decrease in computer and gamer console ownership among females and Canadians ages 35 and up.



of Canadian adult gamers report owning and using mobile devices for video game play (remains the same as 2018)



of Canadian adult gamers report owning and using computers for video game play (1% less than in 2018)



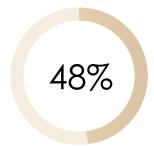
of Canadian adult gamers report owning and using consoles for video game play (4% less than in 2018)

22

Note, our research found that device usage differs between adults, kids and teens. Kids and teens are evaluated as one cohort for this analysis.

Adults

Mobile devices continue to be the most popular gaming device used among adults.



of adult gamers most often use mobile devices to play video games (1 percentage over 2018)



of adult gamers most often use computers to play video games (2 percentage points less than in 2018)



of adult gamers most often use consoles to play video games (4 percentage points more than in 2018)

Kids and Teens



of kids and teens most often use mobile devices to play video games (6 percentage points less than in 2018)



of kids and teens most often use computers to play video games (3 percentage points more than in 2018)



of kids and teens most often use consoles to play video games (11 percentage points more than in 2018)

Cross-platform Play

Kids and teens are more likely to play using multiple devices while adults are more likely to only play on mobile devices. (Devices: Virtual Reality, Console, Mobile, Computer).



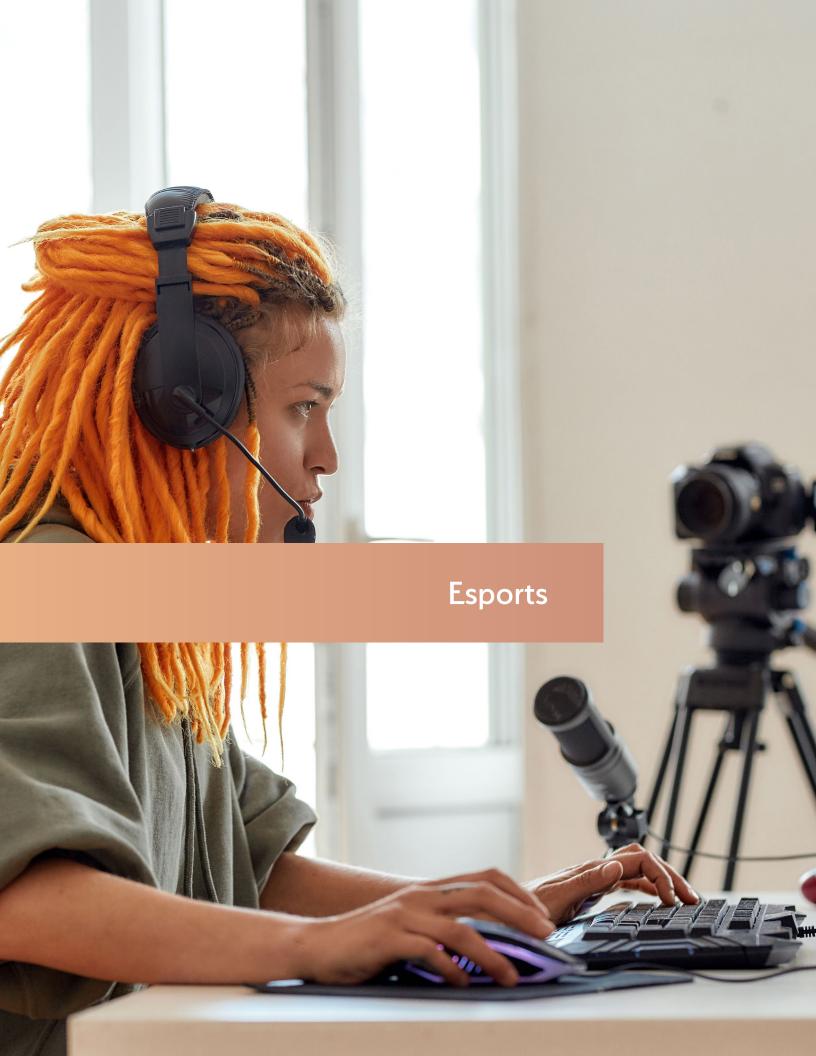
of Canadians play on multiple devices

Adults

- 9% of adults play on computer only
- 11% of adults play on console only
- 20% of adults play on mobile only
- 34% of adults play on any two devices
- 21% of adults play on any three devices
- 4% of adults play on all four devices

Kids & Teens

- 6% of kids and teens play on computer only
- 17% of kids and teens play on console only
- 12% of kids and teens play on mobile only
- 39% of kids and tens play on any two devices
- 22% of kids and teens play on any three devices
- 4% of kids and teens play on all four devices

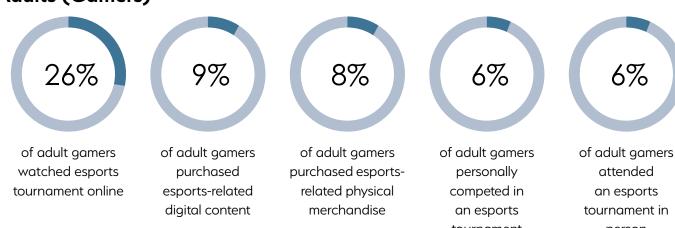


Esports

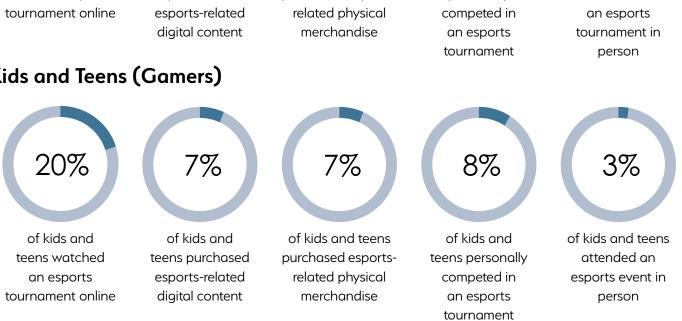
Esports in Canada, and globally, is growing exponentially, with hundreds of millions of esports enthusiasts playing or watching esports worldwide each year. ESAC members include the owners and publishers of the intellectual property which underly esports. This year, we explored how Canadians are engaging in the esports space.

We found that 35% of adults and 29% of kids and teens engaged in esports in 2019/2020 (the past twelve months at the time our study went to field in May 2020).

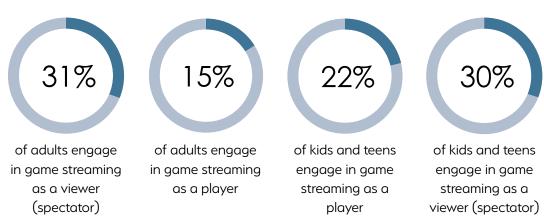
Adults (Gamers)



Kids and Teens (Gamers)



More Canadians are participating in esports as viewers (spectators); 40% of gamers participate in game streaming, specifically 41% of adults and 46% of kids and teens.



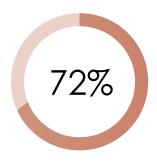




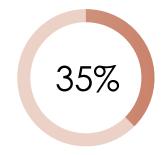
Who Are Canadians Playing Video Games With?

Canadians are playing video games to socialize, entertain and stay connected. Our study found that more Canadian gamers play solo (74%) while 55% of gamers play with others.

Adult Gamers (who play with others)



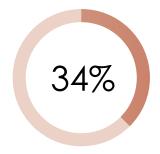
of adult gamers play video games with their friends



of adult gamers play video games with their siblings and cousins



of adult gamers play video games with their parents



of adult gamers play video games with their spouses/ partners



Conclusion

Although the pandemic has not resulted in substantial new video game consumers - with less than 2% of Adult Canadians (18 to 64) deciding to take up a controller for the first time during the pandemic - it has significantly boosted the amount that existing video game consumers played in Canada.

Not only are Canadians playing more video games, but a majority of them say it is helping them feel better emotionally and mentally while following stay-at-home measures. Games are also helping parents find common ground with their kids while helping them spend time connecting.

Many also identified video games as a means of helping family and friends stay bonded and connected throughout the pandemic.

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Entertainment Software Association (United States)

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ESA offers a wide range of services to interactive entertainment software companies in the US, including: conducting business and consumer research; providing legal and policy analysis and advocacy on US First Amendment, intellectual property, and technology/e-commerce issues; managing a global content protection program; owning and operating E3; and representing video

Entertainment Software Ratings Board

ESRB.ORG • @ESRBRATINGS

The ESRB is a non-profit, self-regulatory body that assigns age and content ratings for video games and mobile apps so parents can make informed choices. It also enforces advertising guidelines

The NPD Group

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predict, and improve performance across all channels, including brick-and-mortar, e-commerce, and B2B. We have services in 19 countries worldwide, with operations spanning the Americas, Europe, and APAC. Practice areas include apparel, appliances, automotive, beauty, books, B2B technology, consumer technology, e-commerce, fashion accessories, food consumption, foodservice, footwear,

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