

ESSENTIAL FACTS 2016



ENTERTAINMENT
SOFTWARE
ASSOCIATION OF CANADA

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The information in Essential Facts 2016 contains original information from:

Understanding The Canadian Gamer 2016 prepared for ESAC by NPDP. The report gathered data from 2467 adults (18-64), 270 teens (13-17), and 261 children (6-12) between April 29 - May 20, 2016. The margin of error associated with the total sample is 5% or 19 times out of 20

Canada's Video Game Industry 2015 prepared for ESAC by Nordicity. The report gathered quantitative and qualitative data from 123 video game companies in Canada for 2014.

BEGIN GAME

▶ 1 PLAYER GAME
2 PLAYER GAME
PTS - 000000

ARE YOU A GAMER?

 **37%** OF CANADIANS DEFINE THEMSELVES AS A "GAMER"

FEMALES



29% Define themselves as a "gamer"

MALES



47% Define themselves as a "gamer"

HOWEVER

52% OF CANADIANS ARE "GAMERS", AS THEY HAVE PLAYED IN THE PAST 4 WEEKS

18,868,917 CANADIANS ARE GAMERS



51%

of gamers are male



49%

of gamers are female



36 YEARS

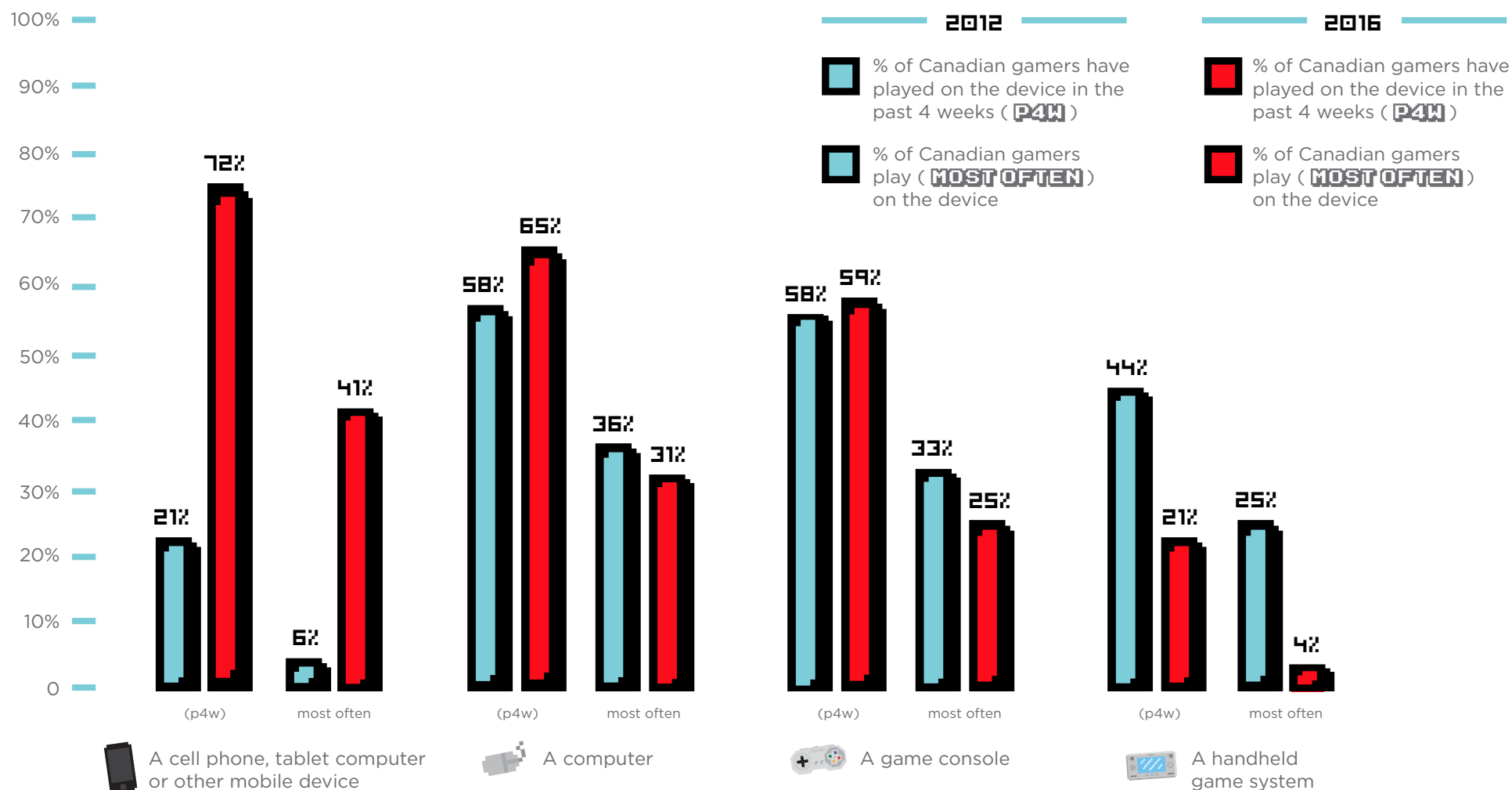
average age of a Canadian gamer



11 HOURS

average time gamers spend playing per week

WHAT ARE GAMERS PLAYING ON?



WHAT ARE GAMERS PLAYING ON?

MOBILE (CELL PHONE, TABLET COMPUTER OR OTHER MOBILE DEVICE)

89% of Canadian adults own a mobile device



90% of **WOMEN** own a mobile device



87% of **MEN** own a mobile device

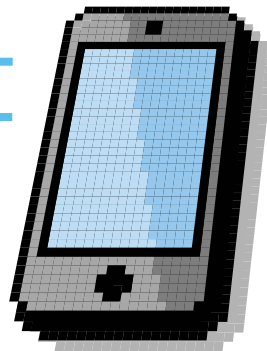
Among those who do not consider themselves gamers, **79%** report playing games on mobile devices **IN THE PAST 4 WEEKS**



41% of gamers play most often on their **MOBILE DEVICE**



PAST 4 WEEK USAGE of mobile devices is driven by millennials and gen-exers



COMPUTER

90% of Canadian adults own a computer

BOOMERS

(55-64) lead the way in computer ownership at **94%**



31% of gamers play most often on their **COMPUTERS**



PAST 4 WEEK USAGE of computers is driven by boomers



WHAT ARE GAMERS PLAYING ON?

CONSOLE



57% of Canadian adults own a console

59% of adult males own a console; remaining consistent since 2014

MILLENNIAL GAMERS

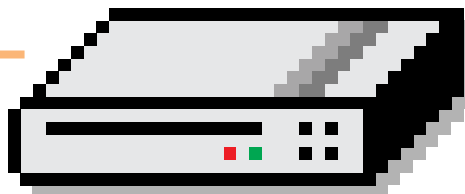
(18-34) lead console ownership at **70%**



25% of gamers play most often on a **CONSOLE**



PAST 4 WEEK USAGE of consoles is driven by boys (6-12) and male teens (13-17)



HANDHELD GAME SYSTEM

27% of Canadian adults own a handheld device



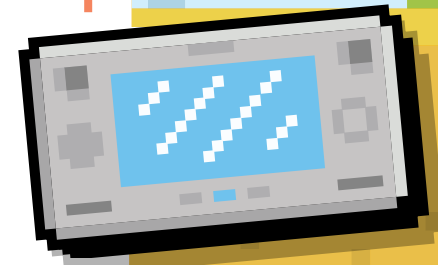
Ownership of **HANDHELD DEVICES** among gamers has dropped across all age groups and genders since 2014



4% of gamers play most often on a **HANDHELD DEVICE**



PAST 4 WEEK USAGE of handheld devices is driven by millennials and kids



WHAT IS YOUR GAME GENRE?

TEEN GAMERS AGES 13-17

FEMALE



42% PUZZLE GAMES



29% ACTION/ADVENTURE



28% SOCIAL GAMES

49% of female teen gamers age 13-17 most often play games on their **MOBILE DEVICE**

MALE



48% SHOOTING GAMES



44% ACTION/ADVENTURE



30% FIGHTING

38% of male teen gamers age 13-17 most often play games on their **MOBILE DEVICE**

KID GAMERS AGES 6-12

FEMALE



48% PUZZLE GAMES



34% KIDS ORIENTED ONLINE ROLE PLAYING



30% FAMILY ORIENTED

50% of girl gamers age 6-12 most often play games on their **MOBILE DEVICE**

MALE



45% ACTION/ADVENTURE



30% SPORTS GAMES



30% RACING/FLIGHT

41% of boy gamers age 6-12 most often play games on their **MOBILE DEVICE**

WHAT IS YOUR GAME GENRE?

MILLENNIAL GAMERS AGES 18-34



92% of female millennial gamers age 18-34 most often play games on their **MOBILE DEVICE**

Usage of **MOBILE DEVICES** among female millennial gamers is higher than usage on the console, computer and handheld devices



93% of male millennial gamers age 18-34 most often play games on their **CONSOLE DEVICE**

Usage of **CONSOLES** is significantly higher among millennial male gamers. Usage of mobile devices and computers is just as high as their female counterparts, but ticks lower on handheld devices

GEN X GAMERS AGES 35-54

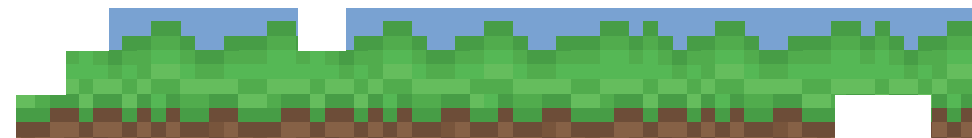


85% of female gen x gamers age 35-54 most often play games on their **MOBILE DEVICE**



87% male gen x gamers age 35-54 most often play games on their **CONSOLE DEVICE**

Usage of **CONSOLES** among male gen x gamers is higher than mobile, computer and handheld devices



WHAT IS YOUR GAME GENRE?

BOOMER GAMERS AGES 55-64

FEMALE



73% PUZZLE GAMES



44% CARD GAMES



16% CASINO GAMES

86% of female boomer gamers age 55-64 most often play games on their **COMPUTERS**

MALE



36% PUZZLE GAMES



30% SPORTS GAMES



28% SHOOTING GAMES

84% of male boomer gamers age 55-64 most often play games on their **COMPUTERS**

WHERE DO YOU ACQUIRE YOUR GAMES?

PAID DIGITAL CONTENT & ADD-ON CONTENT ACCOUNTED FOR **20%** OF GAME ACQUISITIONS

IN THE PAST 6 MONTHS

12%

of gamers purchased a physical copy of a new game

12%

of gamers purchased a digital download

21%

of gamers downloaded a free game/application

12%

of gamers downloaded a free demo

13%

of gamers accessed a free game from web/social network

UNDERSTANDING VIDEO GAME RATINGS



ENTERTAINMENT SOFTWARE RATING BOARD



THE ENTERTAINMENT SOFTWARE RATING BOARD

(ESRB) is the non-profit, self-regulatory body that assigns suitable ratings for video games and apps for consumers. ESRB ratings are commonly used by parents in order to make informed decisions about video games that are appropriate for their children and family.

ESRB ratings have three parts:

- 1 RATING CATEGORIES** suggest as appropriateness
- 2 CONTENT DESCRIPTORS** indicate content that may have triggered a particular rating and/or may be of interest or concern
- 3 INTERACTIVE ELEMENTS** inform about interactive aspects of a product, including the users' ability to interact, the sharing of users' location with others, if personal information may be shared with third parties, if in-app purchases of digital goods are completed, and/or if unrestricted internet access is provided.



84%

OF PARENTS ARE
AWARE OF THE ESRB
RATING SYSTEM



85%

OF PARENTS CHECK
ESRB RATINGS



95%

OF PARENTS STRONGLY,
OR SOMEWHAT AGREE
THAT THE RATING
SYSTEM IS USEFUL



68%

OF PARENTS PLAY
VIDEO GAMES WITH
THEIR CHILDREN AT
LEAST ONCE A WEEK



Administered by many of the world's game rating authorities, **THE INTERNATIONAL AGE RATING COALITION** (IARC) provides a globally streamlined age classification process for digitally delivered games and mobile apps, helping to ensure the consistent cross-platform accessibility of established, trusted age ratings by today's digital consumers. The initial five rating authority participants, which collectively represents regions serving approximately 1.5 billion people, include:

- **CLASSIFICAÇÃO INDICATIVA** (ClassInd) Brazil
- **CLASSIFICATION BOARD** Australia
- **ENTERTAINMENT SOFTWARE RATING BOARD** (ESRB) North America
- **PAN EUROPEAN GAME INFORMATION** (PEGI) Europe
- **UNTERHALTUNGS SOFTWARE SELBSTKONTROLLE** (USK) Germany

IARC expects to add more rating authorities in the future and assigns generic IARC ratings in territories without a participating rating authority.

This represents the first time international ratings organizations have joined forces to agree on a unified process enabling developers to simultaneously obtain appropriate age ratings from various territories throughout the world while preserving their nuanced local standards. Each participating rating authority monitors to ensure accurate ratings and the system enables the prompt correction of ratings when necessary.

SIZE



472 active studios in Canada



\$3.0 BILLION added by the industry to Canada's GDP each year

EMPLOYMENT



20,400 directly employed



\$71,300 / YEAR average salary of full time workers



31 YEARS average age of employees



That's 10 years younger than the average Canadian worker

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, regulatory, and public affairs environment is favourable for the long-term development of Canada's video game industry.



ROADHOUSE

THE END

POINTS 1200

WORLDS 9

BONUS 500

LIVES X5

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Entertainment Software
Association of Canada

