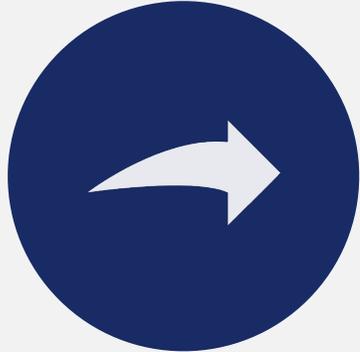


A New Generation of Sports Fans

Understanding esports fandom in Ontario

Key Insights



01 Esports is bringing sport fandom to a new generation of Ontarians

Gen Z & Millennials see esports as a "sport for my generation" – allowing them to watch the games that they love played at the highest level of performance and also watch online where they spend the bulk of their time, since these generations are less likely to subscribe to traditional TV service

Furthermore, esports is bringing in new fans who never really followed sports before



02 Ontarians are video gamers

And in fact are more likely to be gamers than sports fans among younger generations

Gaming lets Ontarians connect with their friends and family as well as the wider world, and also experience things that would be impossible in real life



03 Call of Duty is the #1 game in Ontario

Gamers play Call of Duty to have fun, relax & unwind, and to spend time with friends

There is anticipation for Toronto's upcoming Call of Duty team, as interest in Call of Duty World League is ahead of MLS among younger generations

Generation Z & Millennials (13-37 year olds)

- Gaming is a huge part of daily life among these generations: they are significantly more likely to be gamers than traditional sports fans, and **gaming ranks 3rd overall for unaided mentions of "preferred leisure activity"**. There is also significant interest in esports, which is seen as growing and a "sport for my generation" – providing a way to watch games that they love played at the highest levels of performance



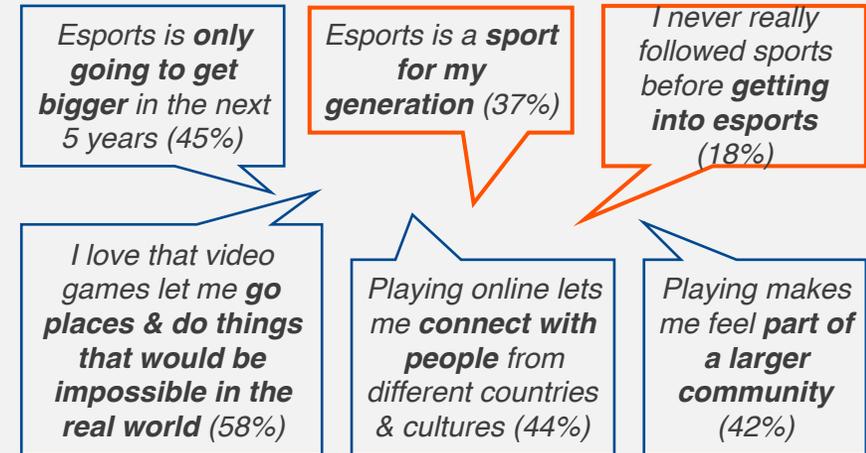
Top Games (% played in the past month)



Top Leagues (% very interested)



Perceptions of Gaming & Esports (% strongly/somewhat agree)



Reasons for Playing Call of Duty (among those who have played in the past month)



Generation X (38-49 year olds)

- The majority of Gen X are gamers; **Call of Duty is the most popular game by a wide margin**, which they play to have fun, relax & unwind, and to connect with friends. Gaming is a powerful source of nostalgia, bringing this generation back to a simpler time of their youth. There is also definite interest in esports, and in fact more than one in ten say they never followed sports before getting into esports



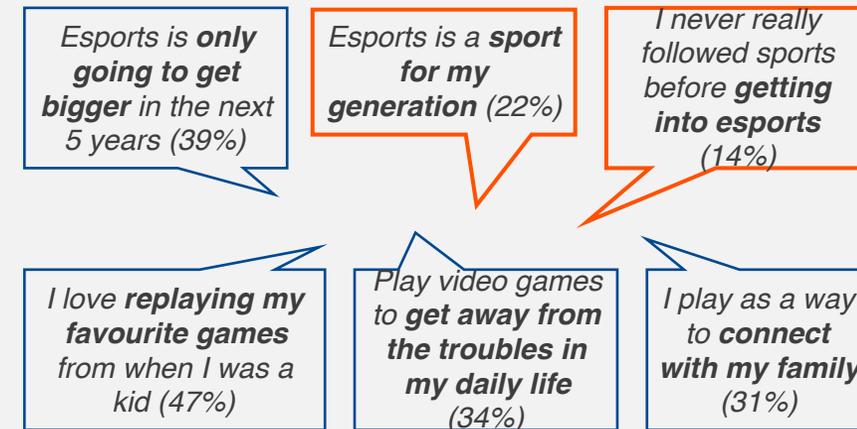
Top Games (% played in the past month)



Top Leagues (% very interested)



Perceptions of Gaming & Esports (% strongly/somewhat agree)



Reasons for Playing Call of Duty (among those who have played in the past month)



1st Generation Canadians (born outside of Canada)

- The majority of 1st generation Canadians can be considered gamers, **on par with being traditional sport fans**. Gaming also helps 1st generation Canadians develop a social community, in that it helps them connect with friends and gives them a safe place to be social with new people. There is clear interest in esports, with more than two in ten saying they never followed sports before getting into esports



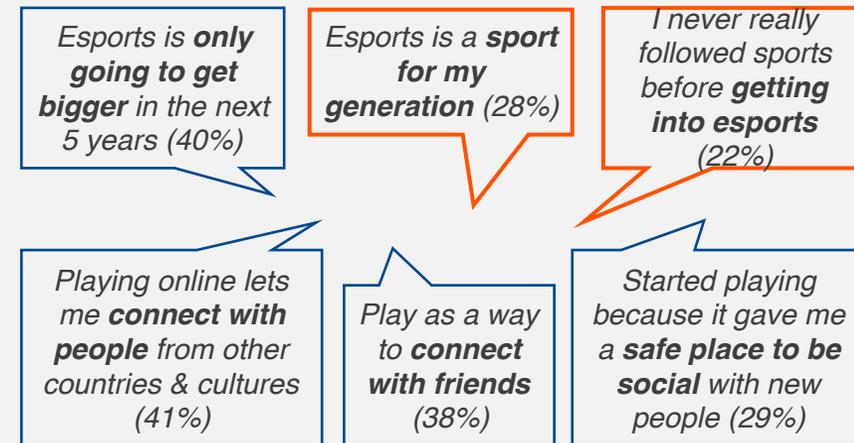
Top Games (% played in the past month)



Top Leagues (% very interested)



Perceptions of Gaming & Esports (% strongly/somewhat agree)



Reasons for Playing Call of Duty (among those who have played in the past month)



Study Overview

- A total of 1,457 Ontarians aged 13-49 completed an online questionnaire between June 10 and July 2, 2019
 - Results have been weighted by age and region to be representative of the population aged 13-49
- Research was conducted using a nationally established panel
- The survey was offered in English only
- Statistical testing was conducted at a 95% confidence interval
 - Margin of error $\pm 2.6\%$, 19 times out of 20

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