

Habo

LA GUILDE DU JEU VIDÉO

Study Exploring Key Differentiators
in Quebec's Video Game Industry

This study was made possible
thanks to the financial support of Behaviour Interactive

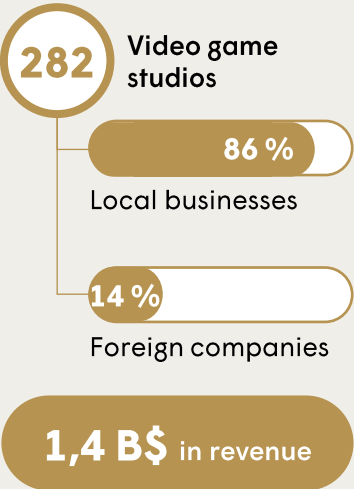
2023

QUEBEC IS A GLOBAL LEADER IN THE VIDEOGAME INDUSTRY.

With a rich pool of talent from the artistic and cultural sectors, Quebec, a geographical and cultural bridge between Europe and the United States, has positioned itself as a leader in the video game industry over the last three decades. There has been considerable growth there since the 1990's.

Today, Quebec represents one of the 5 major worldwide hubs for the production and development of video games.

Led by Montreal, other Quebec cities are also showing strong growth with 30% of the province's studios and over 1,600 direct jobs.



8 of the 10 global leaders in the video game industry have studios in Quebec

In the last 15 years, over twenty titles that have sold 5+ million copies worldwide were designed and developed in Quebec, including:

- Prince of Persia : The Sands of Time (2003)
- Outlast (2013)
- Batman: Arkham Origins (2013)
- Dead by Daylight (2016)
- Deus Ex: Mankind Divided (2016)
- Mass Effect: Andromeda (2017)
- Assassin's Creed Valhalla (2020)

A large pool of talented students enrolled in programs dedicated to digital creativity.

A complete ecosystem made up of market leaders in tools development and service providers in key sectors like audio, publishing, and visual effects.

The 5 largest independent studios in Quebec by revenue employ more than 1,500 people and have released over 80 titles for which they hold the intellectual properties.

WHAT DIFFERENTIATES QUEBEC ON THE INTERNATIONAL SCENE?

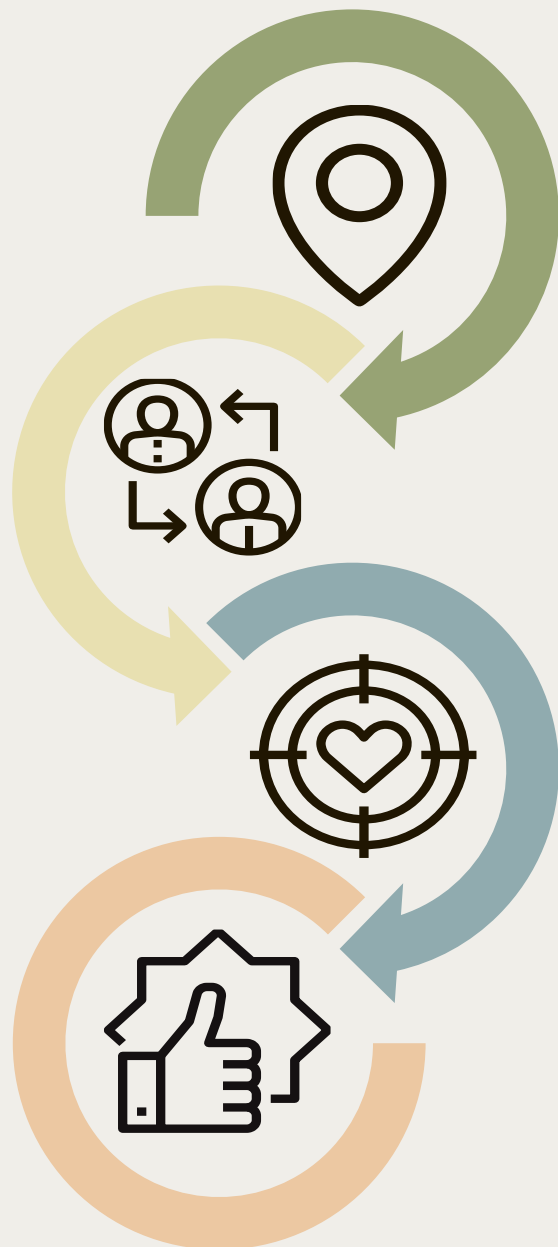
* This study was carried out by Habo in 2023 based on quantitative analysis of 520 Quebec employees in the video game development and production sector, as well as 20 interviews with local and international industry experts.

QUEBEC OFFERS A COMPLETE ECOSYSTEM THAT INVIGORATES THE CREATION AND PRODUCTION OF VIDEO GAMES.

This study was conducted by Habo in order to identify the key factors and conditions for success that make Quebec a global leader in the development and production of video games. A methodology was deployed to analyze and cross-reference the perspectives of Quebec employees working in creation and production with those of local and global industry experts.

The results rely on this generated data in order to answer the specific needs of this study:

- Quantitative analysis (2023) conducted with 520 Quebec employees working in production and development within the industry;
- 20 semi-structured interviews (2023) with local and global industry experts.



QUEBEC: A GREAT REGION FOR THE VIDEO GAME INDUSTRY, THAT HAS BEEN GROWING FOR OVER 30 YEARS...

... COMPOSED OF A COMPLETE ECOSYSTEM, ATTRACTIVE FOR BOTH EMPLOYEES AND STAKEHOLDERS...

...FORMING A GENUINE COMMUNITY THAT FOSTERS PASSION AND COLLABORATION...

...SERVICING THE SECTOR'S GROWING, UNIQUE EXPERTISE.

QUEBEC: A GREAT REGION FOR THE VIDEO GAME INDUSTRY, THAT HAS BEEN GROWING FOR OVER 30 YEARS.

A FERTILE GROUND FOR SECTOR GROWTH



1

UNIQUE LOCATION BETWEEN EUROPE AND THE U.S.

- Business development facilitated by the proximity to the different markets and by bilingualism.
- Cultural bridge allowing the creation of games suited for different markets.

2

CREATIVE FIBER ANCHORED IN QUEBEC CULTURE AND SENSIBILITIES

- Historic and internationally recognized creative force.
- Skillful at combining technology with creativity.
- Spirit of collaboration and entrepreneurship.

3

ATTRACTIVE TO TALENT DUE TO ITS DIFFERENTIATORS

- Economic center,
- Quality of life,
- Social benefits,
- Multiculturalism.



«Quebec combines American entrepreneurship with European creative sensibilities.»

Industry expert who has worked both internationally and in Quebec



INDUSTRY'S STRUCTURE OF SEVERAL DECADES

- In this favorable economic and creative context, the **arrival of big international studios in Quebec** at the end of the 90's has contributed to the density of the industry's network.
- Development of specialized schools with dedicated education programs:
 - Over 43 education programs dedicated to video games;
 - 80% of employees in the sector have a diploma in digital creativity or in the video game field.
- Structuring of the cluster around key organisations and associations.

PUBLIC POLICIES THAT SUPPORT THE SECTOR

- **Financial support and incentives** through subsidies and tax credits that encourage video game development.
- Professional environment favorable to **entrepreneurs** with few entry barriers.
- Foreign workforce policies that welcome diverse profiles, contributing to the sector's maturity.

Top 3 advantages of industry-specific education:

- 1 Specialization of knowledge and expertise.
- 2 Opportunity to collaborate and exchange with other students highly motivated to work in the industry.
- 3 Recognition on the job market.

→ The ecosystem's density and structure were reinforced for over 30 years, resulting from the region's favorable layout and a genuine political will.

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A COMPLETE ECOSYSTEM, ATTRACTIVE FOR BOTH EMPLOYEES AND STAKEHOLDERS.



14,487

direct jobs in the industry



AN ATTRACTIVE JOB POOL

The video game sector is now considered an industry in its own right. The job density and working conditions it offers attract many workers.

- **87 %** of employees are satisfied with their current job in the industry and feel fulfilled.
- The industry manages to attract a lot of creative talent from other sectors. On average, among workers with less than 5 years of experience in the industry, 20% have worked full-time **for over 10 years**.

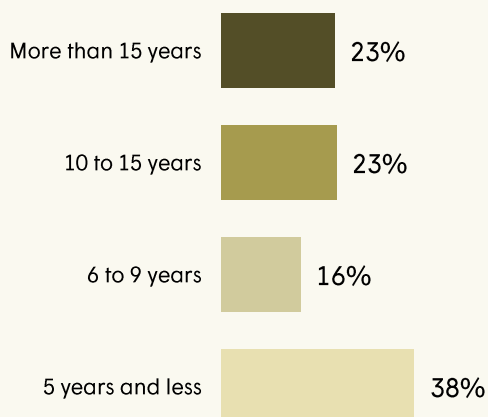
AN INDUSTRY WITH DEDICATED CAREER PLANS

- **97 %** of workers in the industry see themselves pursuing their careers there.
- On average, employees worked in **2.6** different studios.
- **46 %** of workers have been in the industry for at least 10 years.

« I'm proud of the industry's constant renewal and amazing creativity. »

Employee of a Quebec studio involved in creation and production

Number of years worked in the industry among sector employees



PRIDE AND COMMITMENT TO THE INDUSTRY

- **96 %** of employees consider themselves lucky to work in the industry.
- **95 %** are proud to be a part of the industry.
- **95 %** would recommend their company to others.

→ The industry is highly attractive for workers and is now the subject of long-term career plans. The pride and commitment of its members contribute to the development of a strong community.

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QUEBEC WORKERS FORM A GENUINE COMMUNITY THAT FOSTERS PASSION AND COLLABORATION

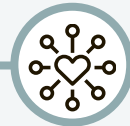


A FEELING OF BELONGING TO A REAL COMMUNITY

- **91 %** of employees feel included in the industry.
- **75 %** of employees say they feel connected to other industry professionals.

«The Quebec community is an inspiring model: many countries try to replicate it in their own market.»

Industry expert who has worked both internationally and in Quebec



AN AFFINITY BUILT AROUND A PASSION THAT GOES BEYOND THE JOB

- **97 %** of employees identify as gamers.
- **71 %** of employees stay up to date with new game releases.

3 main sources of pride for sector employees

- 1 Working in a field they are passionate about.
- 2 Evolving in an environment of strong collaboration and teamwork.
- 3 Having an impact and recognition amongst gamers by releasing quality products.



A DESIRE TO SHARE, COLLABORATE AND BUILD TOGETHER

- **33 %** of employees have participated in peer learning sessions within their company in the past year.
- **96 %** of employees are happy to contribute to the development and innovation of the industry.
- **Nearly 40 %** of employees consider themselves active within the industry and **63 %** stay up to date with sector events.

«I'm proud to mix my passion with my professional life.»

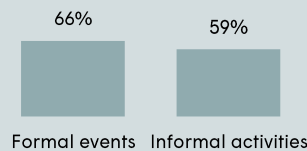
Employee of a Quebec studio involved in creation and production



A DYNAMIC AND EXCITING ECOSYSTEM

The community is shaped through participation in various formal activities such as Guild events, trainings and conferences; and informal activities like networking events and public playtests.

Share of employees who participate in activities



Nearly **1 out of 5 employees** participates in collaborative projects with other studios.

→ More than an industry, Quebec's video game sector constitutes a community of workers who share a passion. Their involvement creates a dynamic ecosystem.

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THIS COMMUNITY SERVICES THE SECTOR'S GROWING, UNIQUE EXPERTISE



A UNIQUE EXPERTISE AND KNOW-HOW

Main skills in Quebec according to industry employees



Employees in video game production and development highlight varied skills within their teams and workplaces. Experts say that these skills constitute an important element in making Quebec a unique region for the video game industry.

«The industry's great strengths are its adaptability, its versatility and its passion.»

Employee of a Quebec studio involved in creation and production

«One of the industry's greatest asset is its weaker hierarchy and the room it leaves for creativity and initiative.»

Industry expert who has worked both internationally and in Quebec



REMARKABLE AGILITY AND INITIATIVE

- **75 %** of sector employees consider being agile one of the industry's most deeply-rooted values.
- **53 %** of employees have completed an online course within their company in the last year.



POSITIONING AS A LEADER ON AN INTERNATIONAL SCALE

- **85 %** of employees feel that Quebec excels in the creation of complex games.
- **85 %** of employees feel that Quebec stands out for its unique ability to combine creative activities with production pipelines.

Quebec, in combining expertise with creativity, excels in the sector. Its productions have enjoyed major international success. In a rapidly growing global industry, the province thus occupies a privileged spot. It is well positioned to benefit from the sector's future growth.

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