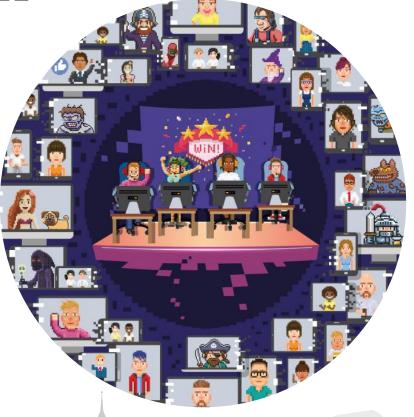
Deloitte.

Let's Play, Czech Republic!

Video gaming & esports 2022

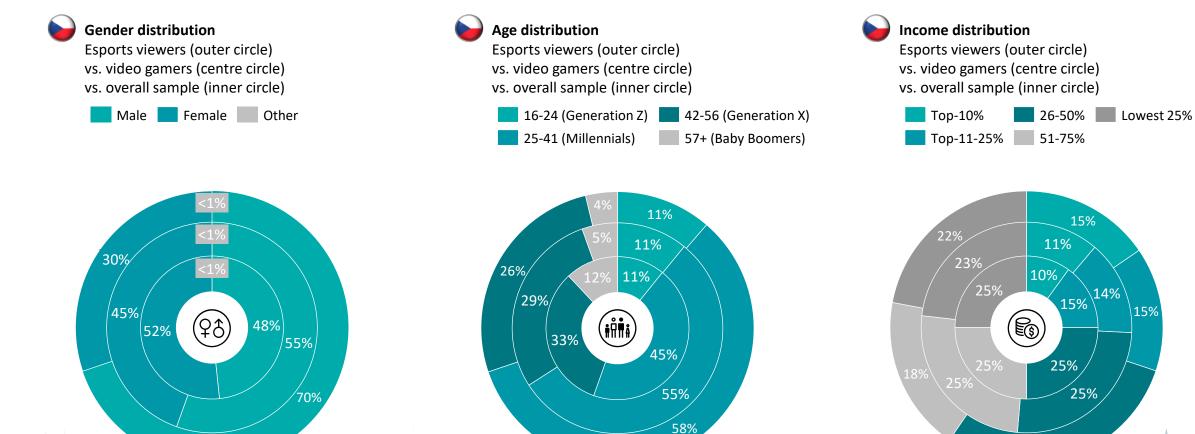




01 | The Czech Target Group (1/5)

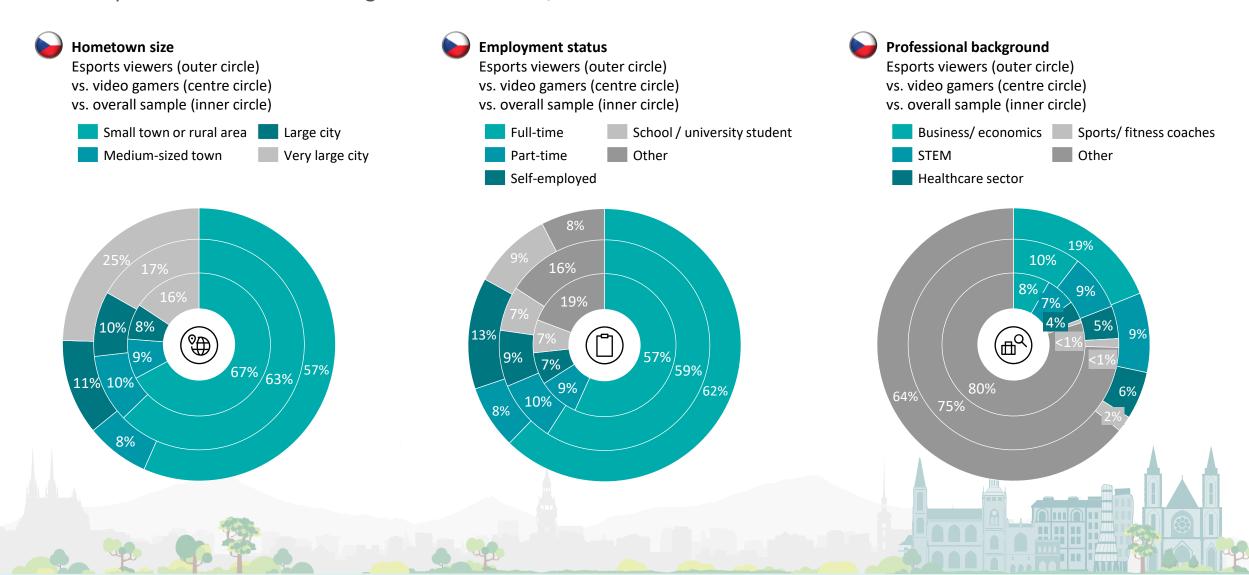
Esports viewers are predominantly male and comparatively young in comparison to video gamers. While video gamers represent the population in terms of income groups, esports viewers tend to belong to rather high income groups

29%



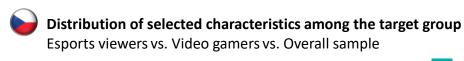
01 | The Czech Target Group (2/5)

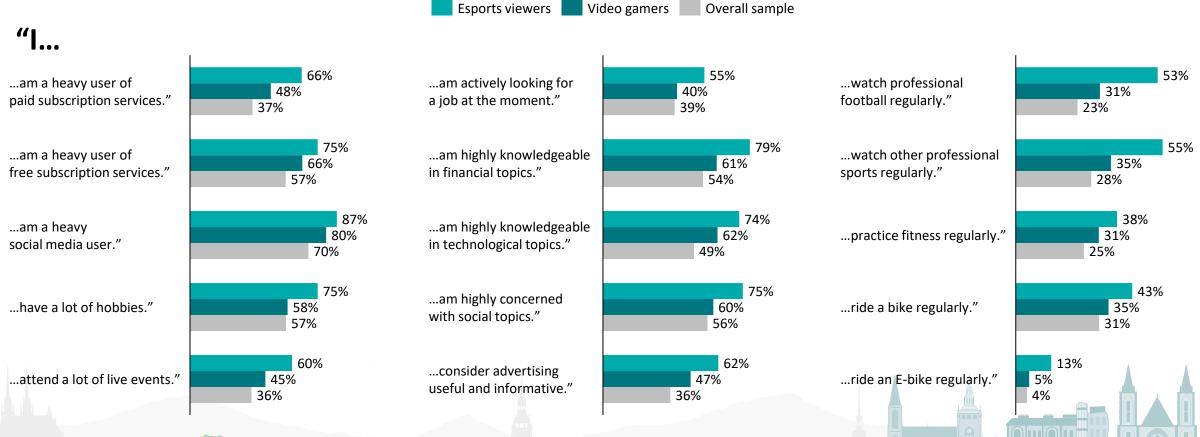
Esports viewers tend to be from larger cities and more frequently full-time employed than video gamers. Comparatively often esports viewers have a background in business/economics



01 | The Czech Target Group (3/5)

Esports viewers tend use free and paid subscription services relatively frequently. They watch professional sports and attend live events relatively often in comparison to both video gamers and the wider population

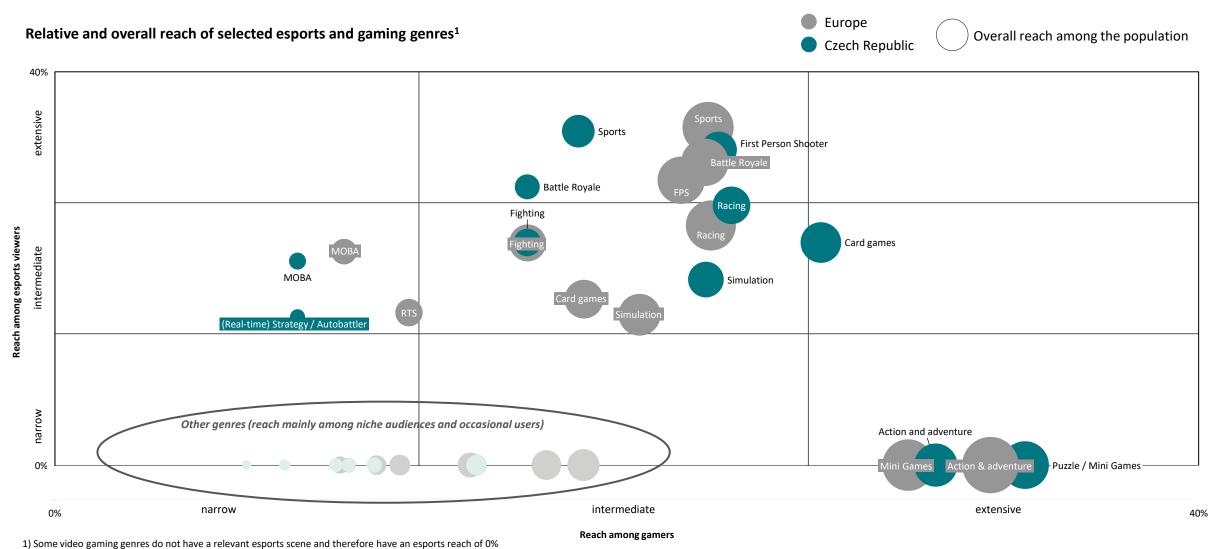




01 | The Czech Target Group: Business Opportunities in Video Gaming and esports (4/5)

Source: Deloitte analysis

Battle Royale and Sports and FPS belong to the esports genres that have the highest reach among esports viewers in both Czech Republic and Europe. The genre Card games has the highest reach among video gamers

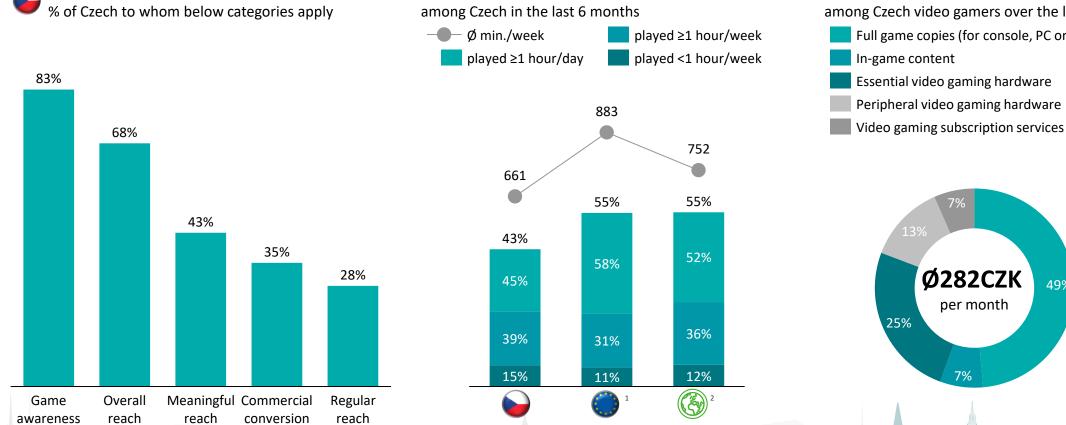


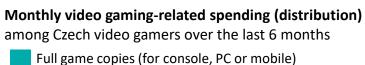
02 | Video Gaming in Czech Republic (1/2)

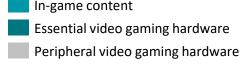
Video gaming engagement maturity in 2022

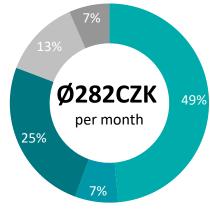
While 83% of Czech are aware of video games, 35% are commercially engaged. The monthly video gaming-related spending numbers to 282CZK per person on average

Weekly video gaming consumption times



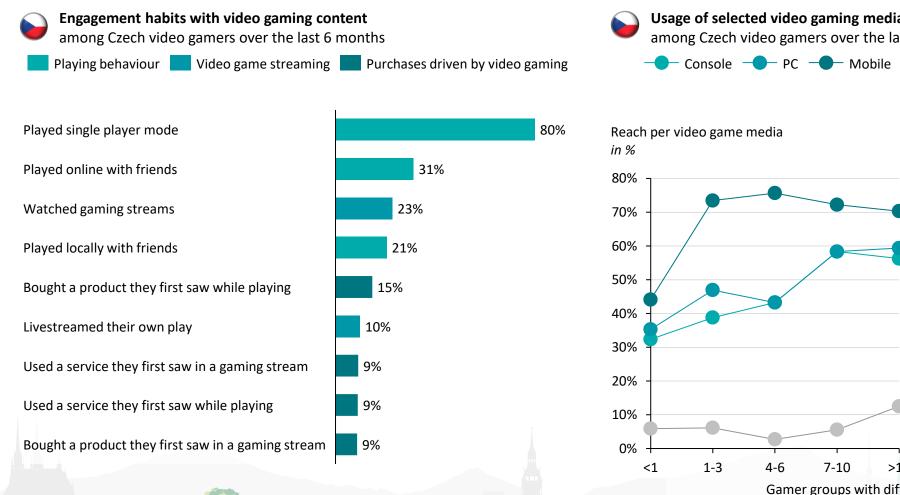




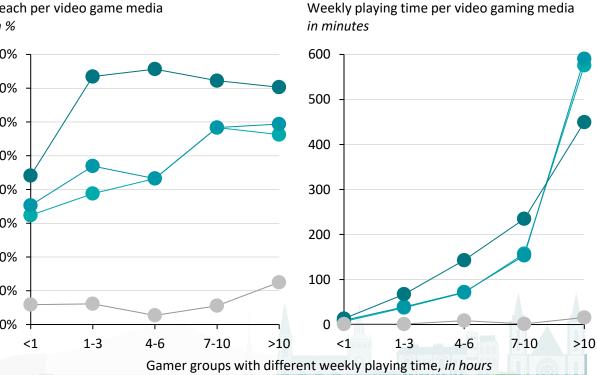


02 | Video Gaming in Czech Republic (2/2)

Among Czech video gamers, 15% bought a product they first saw while playing a video game. The mobile phone has the widest reach as game medium





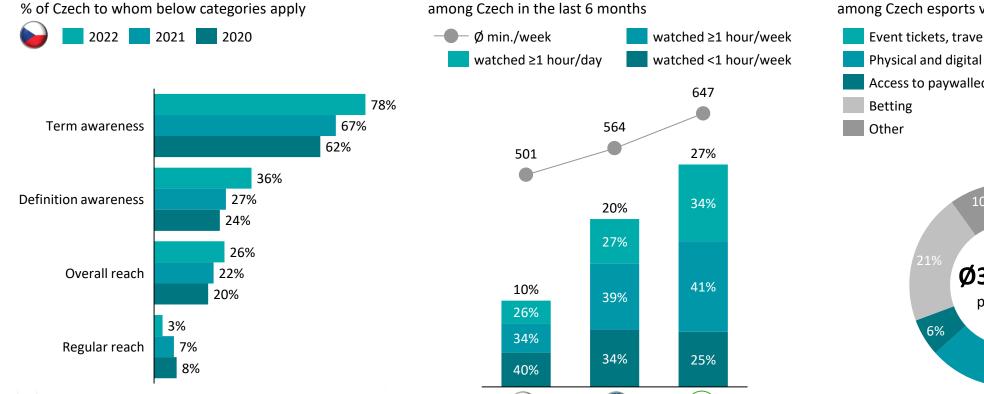


03 | Esports in Czech Republic (1/2)

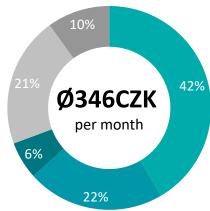
Development of esports engagement maturity

78% of Czech are familiar with the term "esports", 36% are aware of the definition. An esports viewer spends monthly about 346CZK on esports-related items on average, mainly on attending events and for merchandise

Esports reach and weekly consumption times

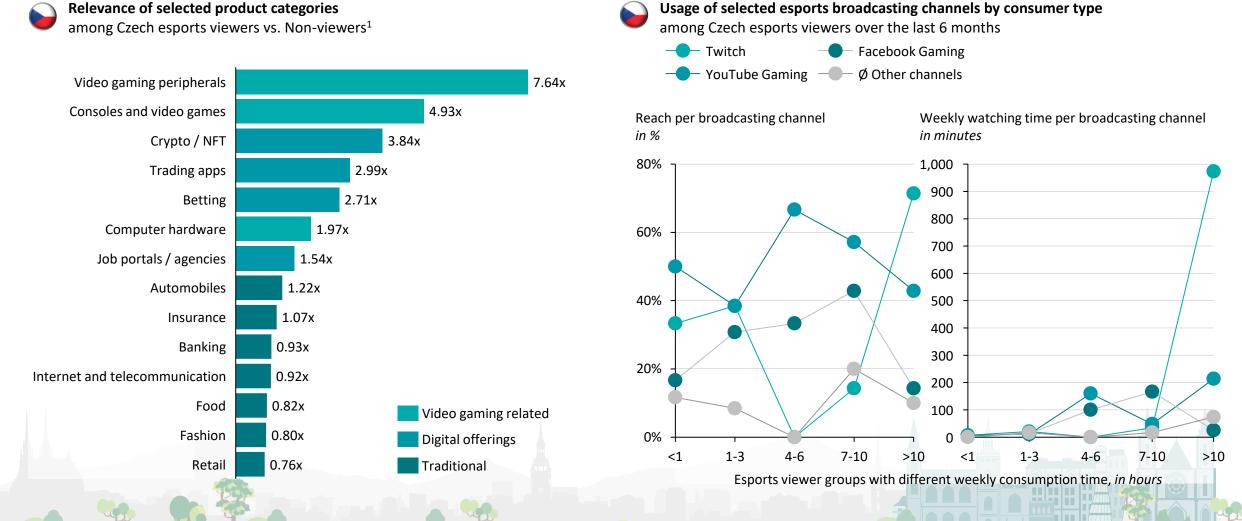






03 | Esports in Czech Republic (2/2)

Crypto/NFT, trading apps and betting are more relevant for Czech esports viewers in comparison to non-viewers. In terms of esports broadcasting channels, Twitch and YouTube gaming are particularly relevant in terms of reach and watch time



04 | Glossary (1/4)

Action & Adventure

Action & Adventure games feature a mix of elements that challenge the player to solve problems and react to real-time events and occurrences. The games may comprise storylines and combat situations which, however, is not prevalent in all titles of the genre

Baby Boomers

Respondents age 57+

Battle Royale

In a Battle Royale match, multiple players compete on the same map, starting with minimal equipment. The object is to be the last remaining player on the map after all other players have been eliminated either by combat or by being 'trapped' outside a shrinking 'safe zone' on the map

Card Games

Collectible Card Games bring classic trading card games into the digital world, often based on the same rules as the analogue games

Commercial Conversion

Share of respondents who have paid money for esports-related content, products or services in the last six months, either for themselves or for someone else (for example, as a gift or paying a fee for friends and family)

Esports Engagement Maturity

Developmental stage of individual esports markets regarding term and definition awareness, overall reach, meaningful reach, regular reach and commercial conversion

Endemic companies

Companies whose core products and services are related to video gaming and/or esports

Esports

This study defines esports as playing computer, mobile and console video games on a professional competitive level, with teams or individuals playing each other within leagues or tournaments. Aside from the competitions, esports is primarily a spectator product and is watched by audiences on the internet, on TV and on-site at live events. Esports are a subcategory of the overall gaming industry, which includes the active and leisure playing of video games

Esports Ecosystem / Sector (Stakeholders)

The esports ecosystem revolves around key value drivers and orchestrators of esports competitions, products, services and content. Besides the core value-creating stakeholders (league organisers, event hosts and esports teams and players), it includes stakeholders from the publisher segment, traditional media and online platforms, and strategic partners. Also, the esports audience is a key stakeholder in the esports ecosystem

Esports Term Awareness

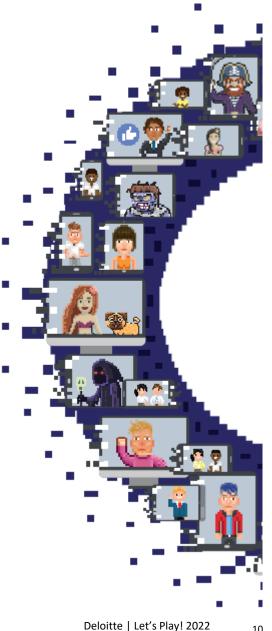
Share of respondents who know the term 'esports,' independent of the ability to define the term correctly

Esports Genres

Category of games classified by structure, design and goals of the specific games

Esports Term Awareness

Share of respondents who are aware of the term 'esports', independent of the ability to define the term correctly



04 | Glossary (2/4)

Esports Titles

Individual game titles in which the competitions are held. Therefore, in the esports context, they are comparable to 'disciplines' in traditional sports.

Esports viewers

Respondents who have watched professional esports in the last six months on the internet, on TV or at a live event

Essential video gaming hardware

Video gaming consoles and Gaming PCs

Fighting

In fighting games, two or more players engage in battle, mainly featuring hand-tohand combat elements

FPS / First-Person Shooter

FPS games focus on weapon-based combat between teams or individuals from a first-person perspective. There are different matches with distinct goals, for example, occupying the home base of the opponent

Game awareness

Share of respondents who know at least one video game

Game streaming viewer

Respondents who have watched game-related streaming content in the last six months

Generation X

Respondents aged 42-56

Gen Z

Respondents aged 16-24

Hardcore User

Esports viewers who watched esports content at least one hour per day in the last six months

Heavy User

Esports viewers who watched esports content between 4-6 hours per week in the last six months

Large city

100,000 to 499,999 inhabitants

Meaningful Esports Reach

Share of respondents who have watched professional esports content at least once in the last six months

Medium-sized town

50,000 to 99,999 inhabitants

Millennials

Respondents aged 25-41

Mini Games

Mini Games are small, often simplistic games for casual usage, featuring different gameplay elements

MOBA / Multiplayer Online Battle Arena

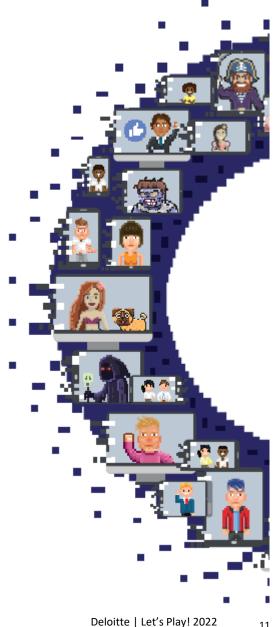
In MOBA, two teams compete against each other from a home base on different maps with distinct features. The players, who each control a character with specific strengths and weaknesses, collaborate as a team to execute their overall strategy. The objective is to destroy the opposing team's home base

NFT / Non-Fungible Token

A non-copyable, non-changeable, and non-subdividable digital identification stored on a blockchain, used to verify ownership

Non-endemic companies

Companies whose core products and services are unrelated to video gaming and/or esports



04 | Glossary (3/4)

Non-viewers

Respondents who have never watched professional esports

Occasional User

Esports viewers who watched esports content less than once per week in the last six months

Overall Esports Reach

Share of respondents who have watched professional esports content at least once in the past

Penetration rate

Reach of a content, product or service within a predefined market

Racing

Racing games simulate racing competitions based on a wide variety of vehicles

Regular Esports Engagement

Share of respondents who have watched professional esports content at least once per week in the last six months

Regular User

Esports viewers who watched esports content between 1-3 hours per week in the last six months

RTS / Real-Time Strategy

In RTS games, players develop assets such as infrastructure, resources or troops in an attempt to outmanoeuvre their opponents

Simulation

The Simulation genre aims to closely simulate/copy real-world activities

Small town or rural area

less than 50,000 inhabitants

Sports

Sports simulations bring sports into the video gaming world by either adapting real-world sports in their original game environment or adapting specific elements of sports in a more abstract setting

STEM

Science, Technology, Engineering and Mathematics

Very large city

more than 499,999 inhabitants

Video gamers

Respondents who have played video games in the last six months on console, PC, mobile devices or virtual reality devices

Video gaming

Active playing of video games as a leisure activity

Video gaming peripherals

Add-on video gaming products such as controllers, gaming chairs and headsets

Video gaming streamer

Respondents who create an online stream of their own video game play

Video gaming subscription services

Subscription-based offering of video game titles



04 | Glossary (4/4)

Video game-related streaming / Game-related streaming

Transmission of video game content within an online network. Streamed content relates to free time / leisure video gaming and often contains entertainment elements. Therefore, it is distinct from esports. People can participate actively (streaming their own play) or passively (watching content generated by other people) and participation is open to every interested person

VR

Virtual Reality Device



05 | Methodology

25,000 people from 22 global markets were surveyed in August and September 2022 regarding their video gaming and esports consumption. In addition, 53 European market experts were interviewed

Expert survey: Consumer survey: Representative survey among ~25,000 Online interviews w/ participants globally 53 market experts - League & Event Hosts - Further stakeholders 22 global markets 15 European countries Asia-Pacific Europe Middle East North America Countries included in the consumer survey 1 | Economic situation of teams and event hosts 1 | Video gaming, esports and game streaming consumption 2 | Assessment of current market trends

06 | Authors of the study



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