

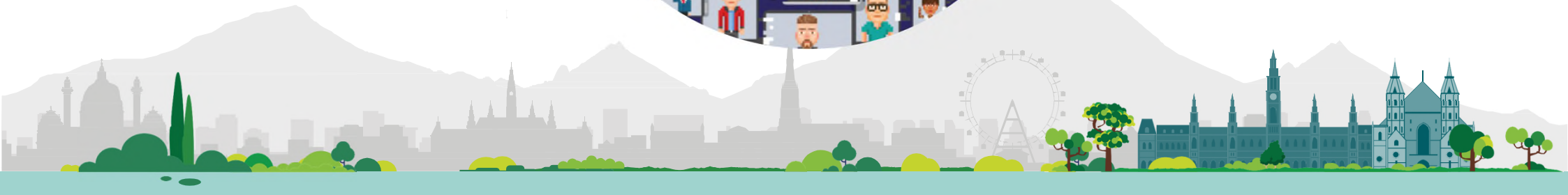
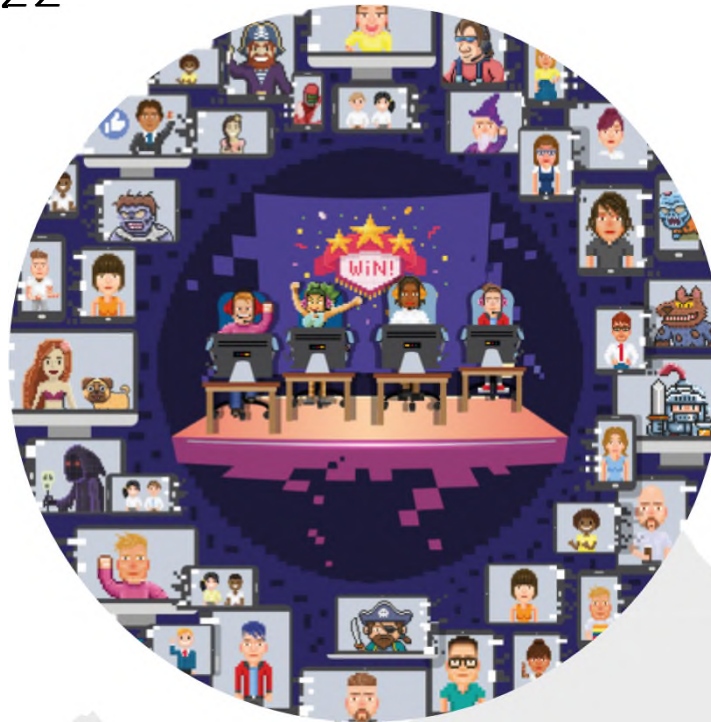


Let's Play, Austria!

Video gaming & esports 2022



November 2022



01 | The Austrian Target Group (1/5)

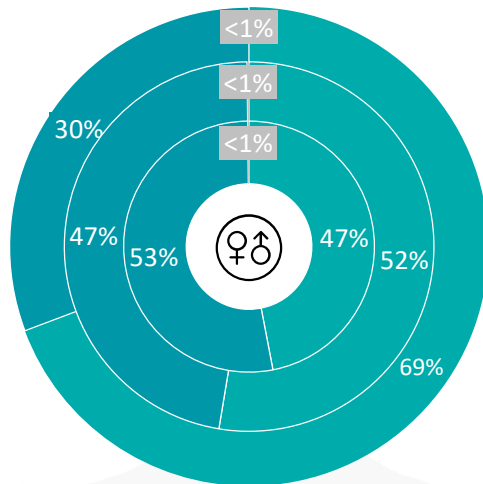
Esports viewers are predominantly male and comparatively young in comparison to esports gamers. Both esports viewers and video gamers belong to rather high income groups in relation to the overall population



Gender distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

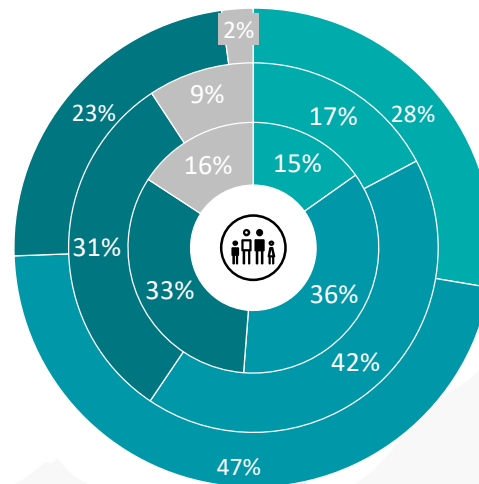
Male Female Other



Age distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

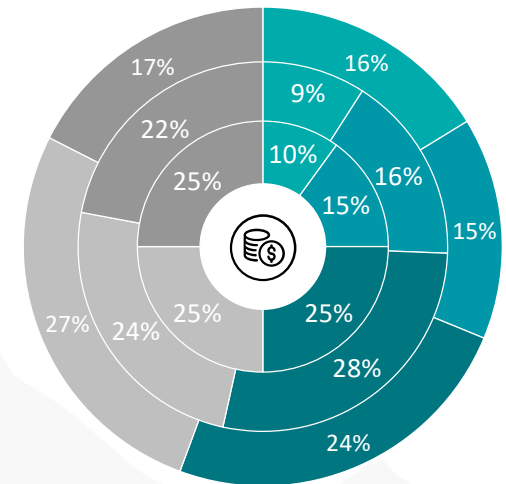
16-24 (Generation Z) 25-41 (Millennials) 42-56 (Generation X) 57+ (Baby Boomers)



Income distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

Top-10% Top-11-25% 26-50% 51-75% Lowest 25%



01 | The Austrian Target Group (2/5)

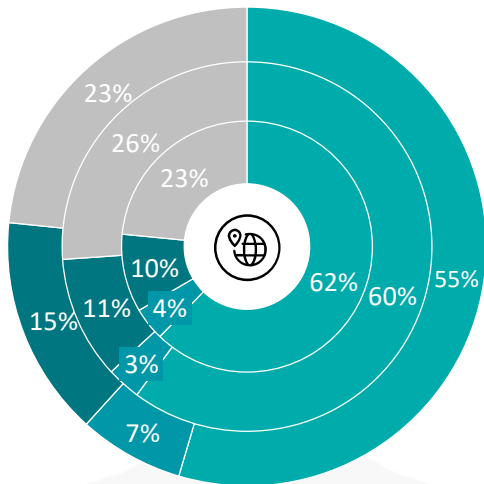
Esports viewers tend to be from larger cities and more frequently full-time employed than video gamers. Esports viewers have a background in business/economics and STEM comparatively often



Hometown size

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

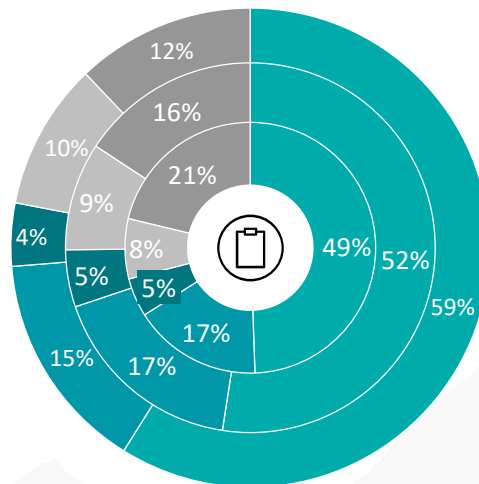
- Small town or rural area
- Large city
- Medium-sized town
- Very large city



Employment status

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

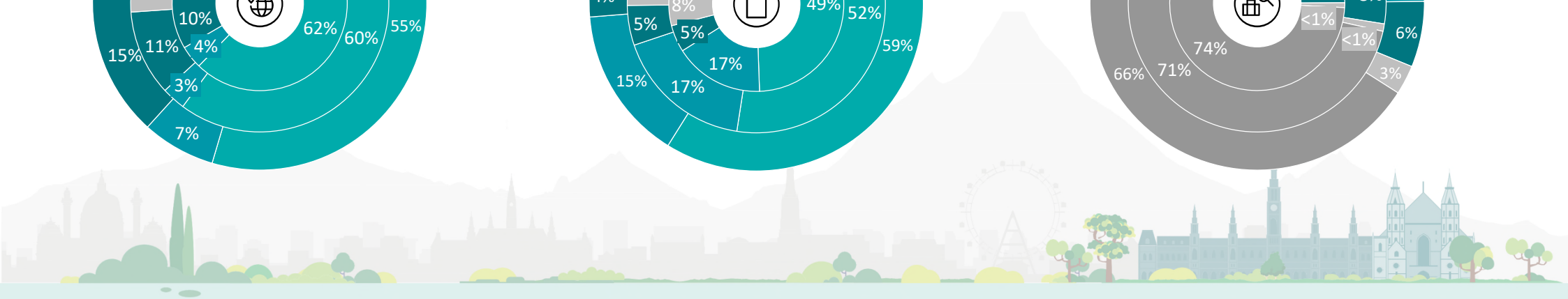
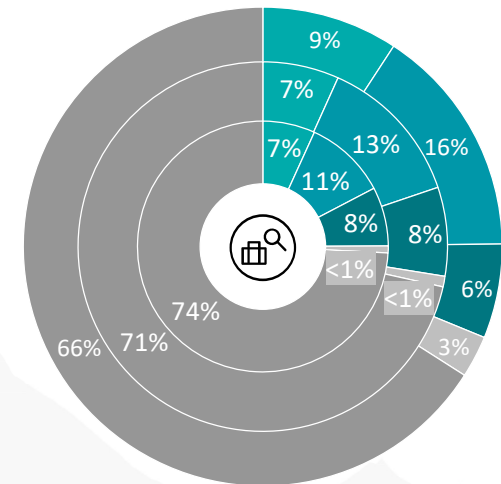
- Full-time
- Part-time
- Self-employed
- School / university student
- Other



Professional background

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

- Business/ economics
- STEM
- Healthcare sector
- Sports/ fitness coaches
- Other



01 | The Austrian Target Group (3/5)

Esports viewers tend to 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

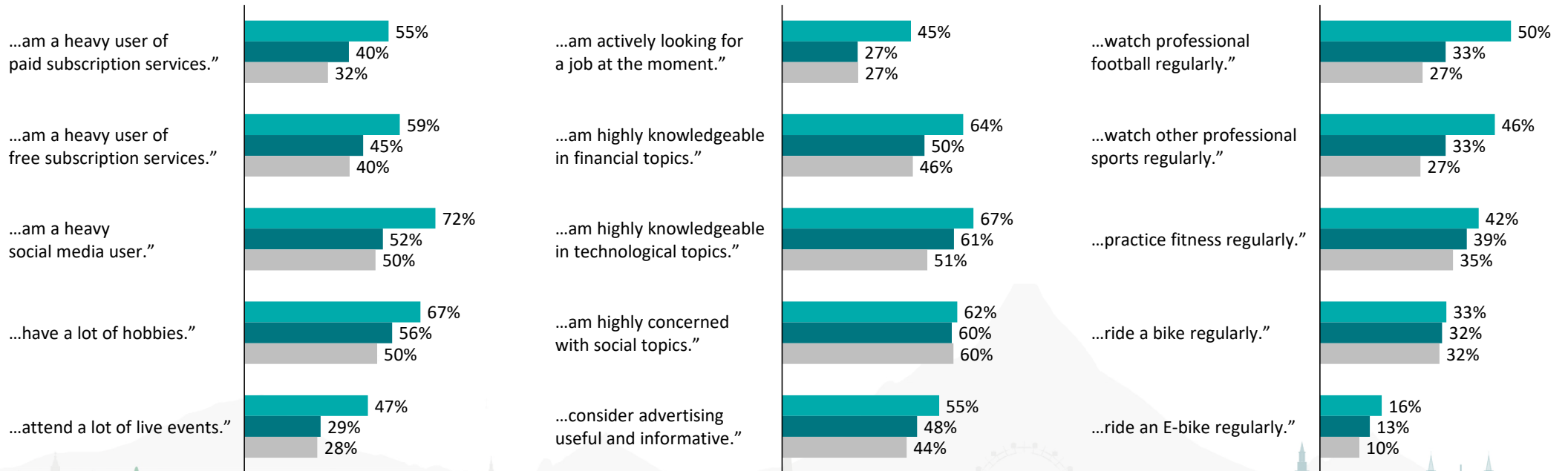


Distribution of selected characteristics among the target group

Esports viewers vs. Video gamers vs. Overall sample

Esports viewers Video gamers Overall sample

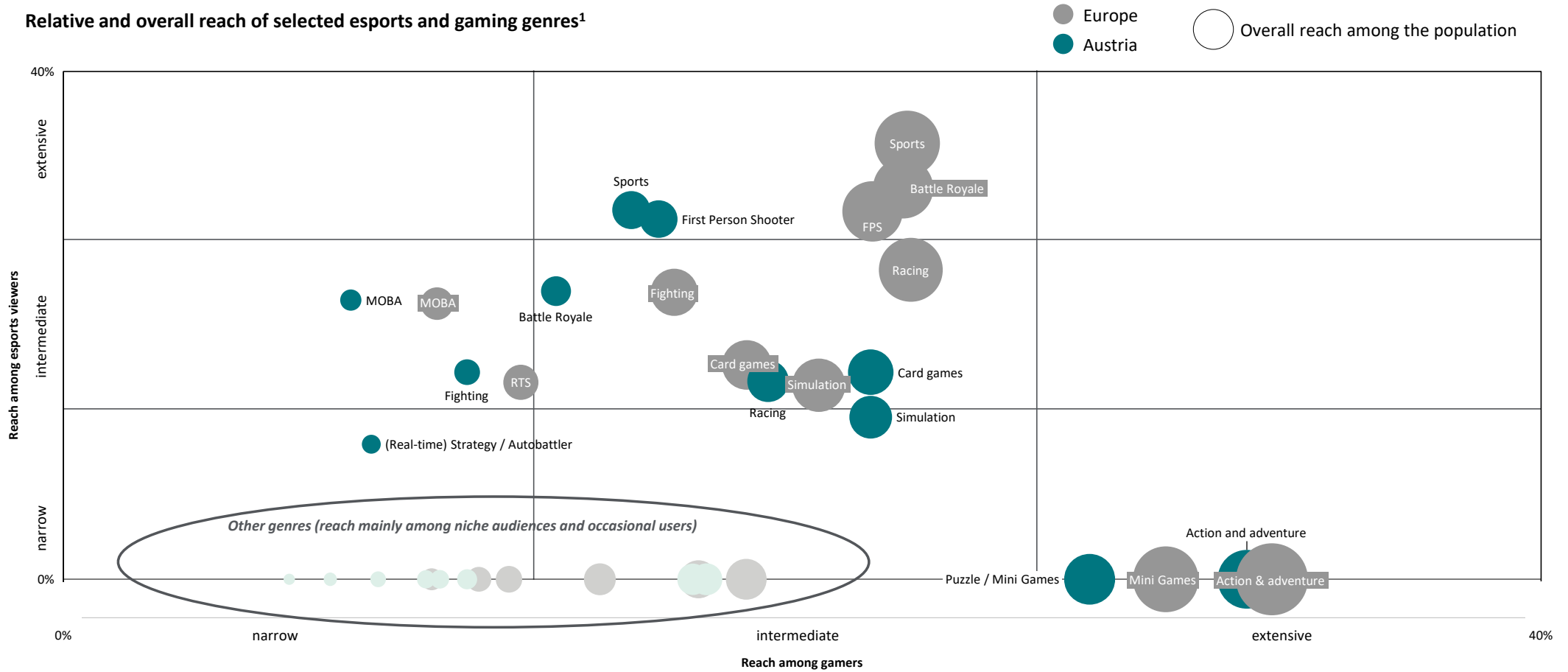
“I... ”



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

Battle Royale, Sports and FPS belong to the esports genres that have a high reach among both esports viewers in both Austria and Europe. Among video gamers in Austria, the genres card games and simulation have a particular high reach


Relative and overall reach of selected esports and gaming genres¹

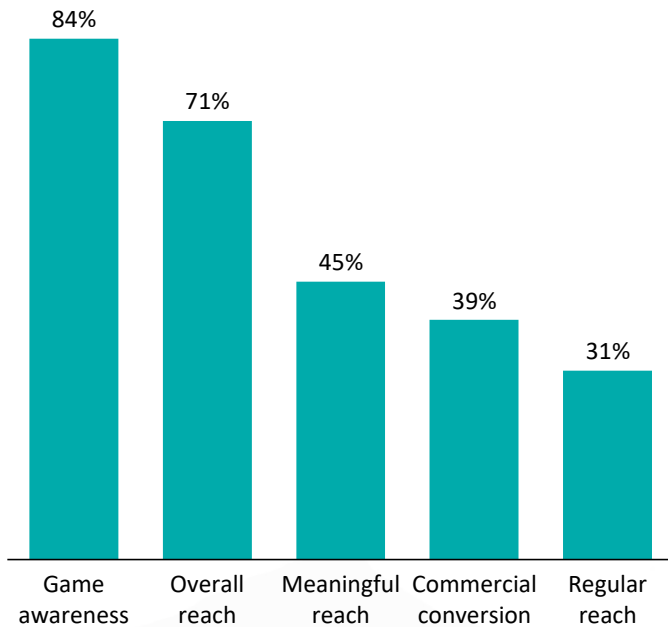


1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%
Source: Deloitte analysis

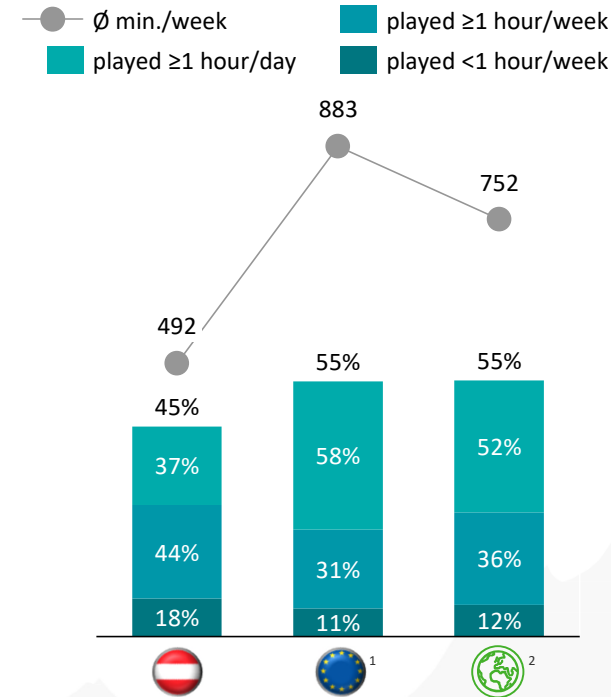
02 | Video Gaming in Austria (1/2)

While 84% of Austrians are aware of video games, 39% are commercially engaged. The monthly video gaming-related spending numbers to 19€ per person on average

 **Video gaming engagement maturity in 2022**
% of Austrian to whom below categories apply

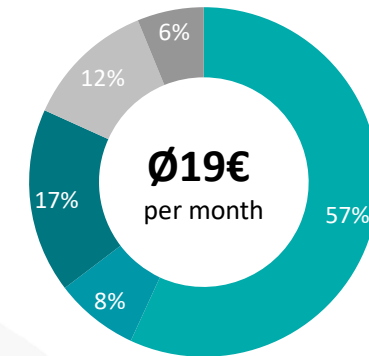


Weekly video gaming consumption times
among Austrians in the last 6 months



Monthly video gaming-related spending (distribution)
among Austrian video gamers over the last 6 months


- Full game copies (for console, PC or mobile)
- In-game content
- Essential video gaming hardware
- Peripheral video gaming hardware
- Video gaming subscription services



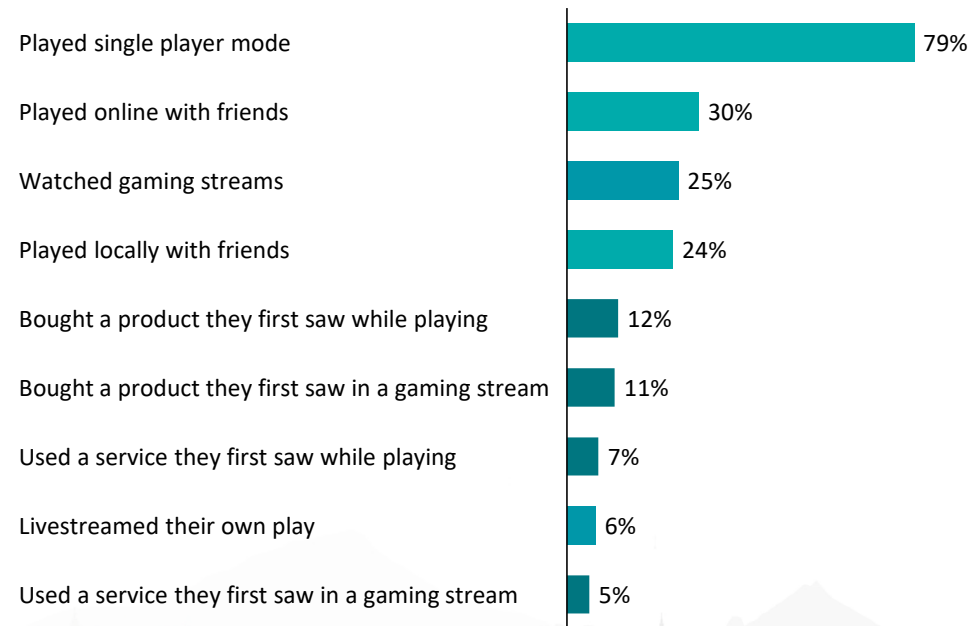
1) "Europe" refers to the European countries included in the consumer survey; 2) "Global" refers to all countries included in the consumer survey


02 | Video Gaming in Austria (2/2)

Among Austrian video gamers, about 12% bought a product they first saw while playing or watching a stream. The mobile phone and the PC are the most used game mediums

 **Engagement habits with video gaming content**
among Austrian video gamers over the last 6 months

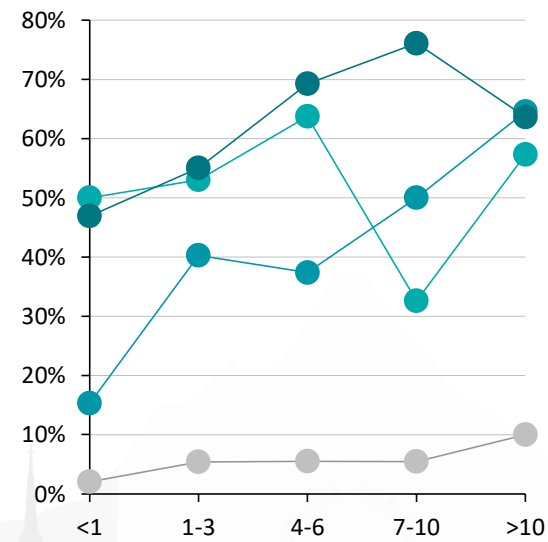
■ Playing behaviour ■ Video game streaming ■ Purchases driven by video gaming



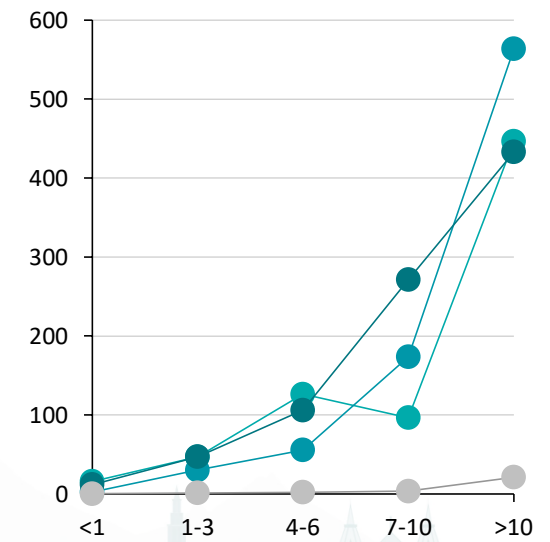
 **Usage of selected video gaming media by consumer type**
among Austrian video gamers over the last 6 months

● Console ● PC ● Mobile ● VR

Reach per video game media
in %




Weekly playing time per video gaming media
in minutes

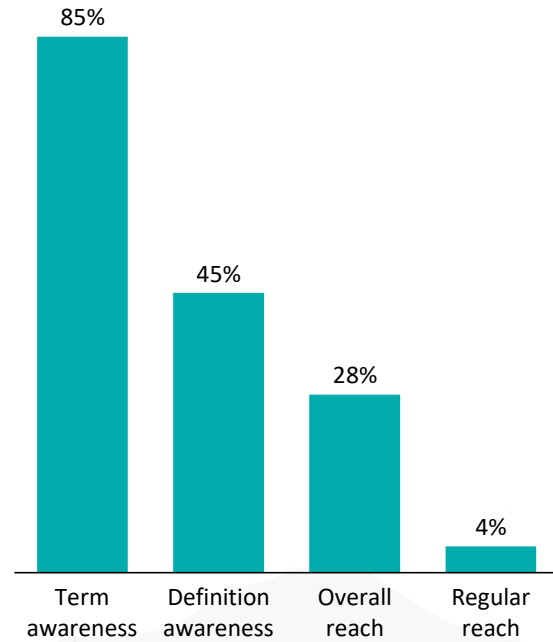


Gamer groups with different weekly playing time, in hours

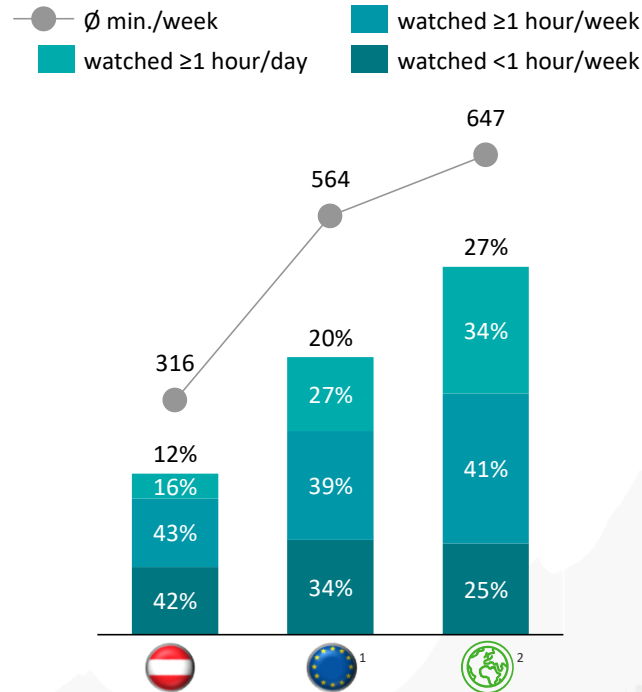
03 | Esports in Austria (1/2)

85% of Austrians are familiar with the term “esports”, 45% are aware of the definition. An esports viewer spends monthly about 16€ on esports-related items on average, mainly on attending events and merchandise

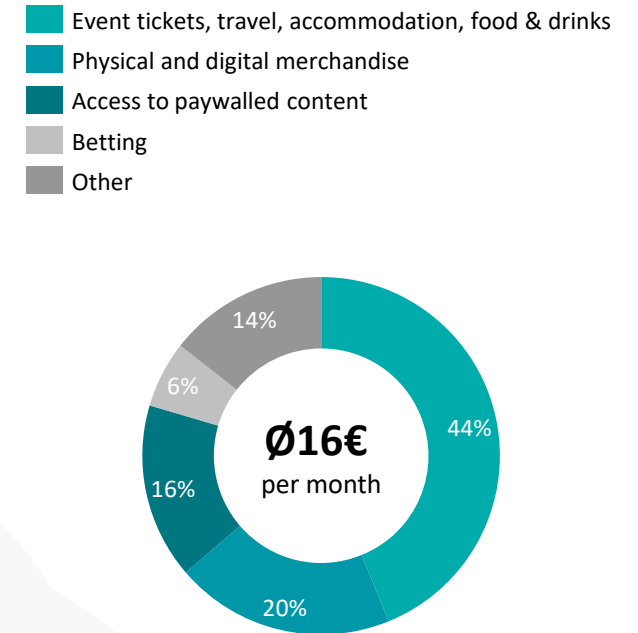
 **Esports engagement maturity in 2022**
% of Austrians to whom below categories apply



Esports reach and weekly consumption times
among Austrians in the last 6 months




Monthly esports-related spending (distribution)
among Austrian esports viewers over the last 6 months

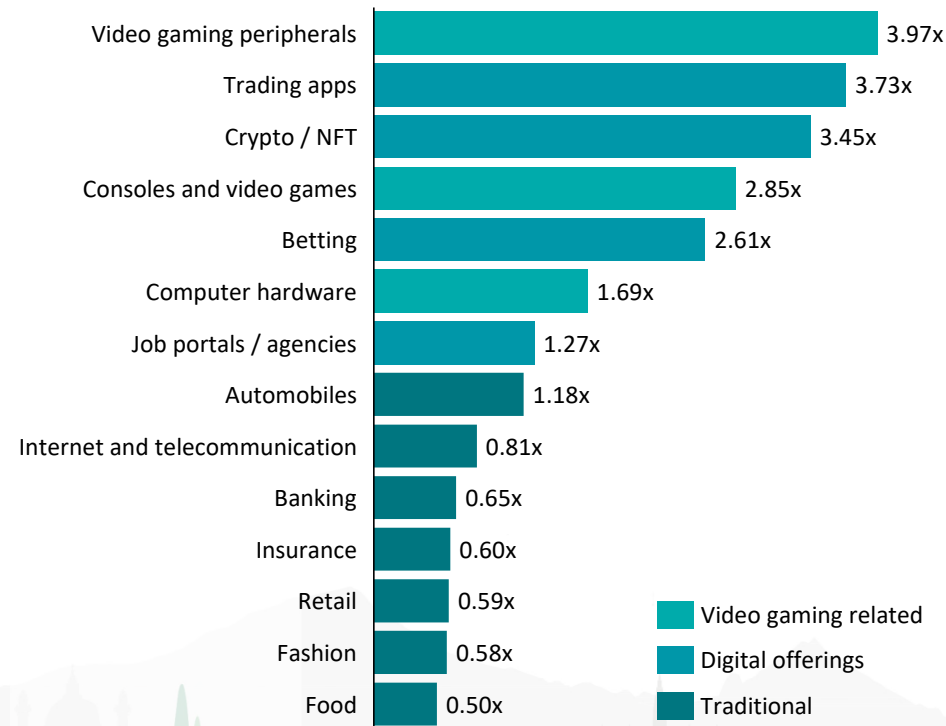



1) “Europe” refers to the European countries included in the consumer survey; 2) “Global” refers to all countries included in the consumer survey

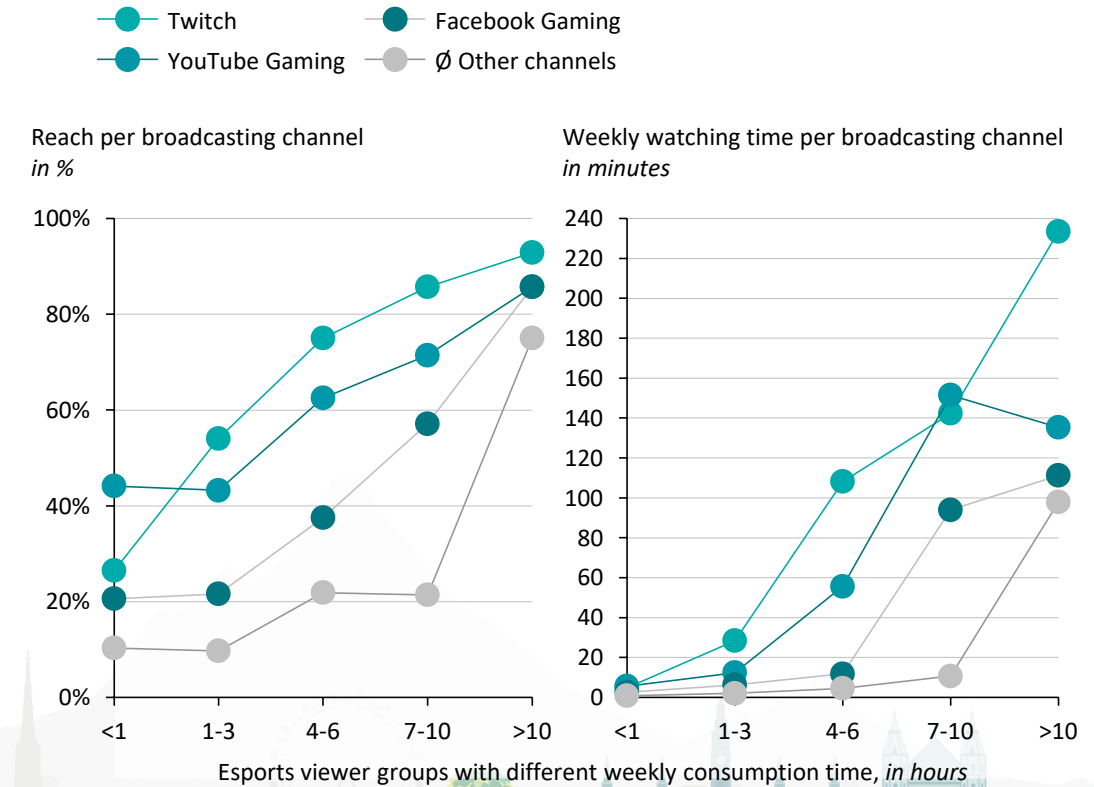
03 | Esports in Austria (2/2)

Crypto/NFT, trading apps and betting are more relevant for Austrian esports viewers in comparison to non-viewers. In terms of esports broadcasting channels, Twitch dominates the market in terms of both reach and watch time

 **Relevance of selected product categories** among Austrian esports viewers vs. Non-viewers¹



 **Usage of selected esports broadcasting channels by consumer type** among Austrian esports viewers over the last 6 months



1) Figures indicate the factor by which the relevance of the respective product categories is higher among esports viewers than non-viewers (values <1 indicate a higher importance among non-viewers)
Source: Deloitte analysis

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

Consumer survey:



Representative survey among ~**25,000** participants globally



22 global markets



Asia-Pacific

Europe

Middle East

North America



1 | Video **gaming**, **esports** and game **streaming** consumption

Expert survey:



Online interviews w/ **53 market experts**

- Teams
- League & Event Hosts
- Further stakeholders

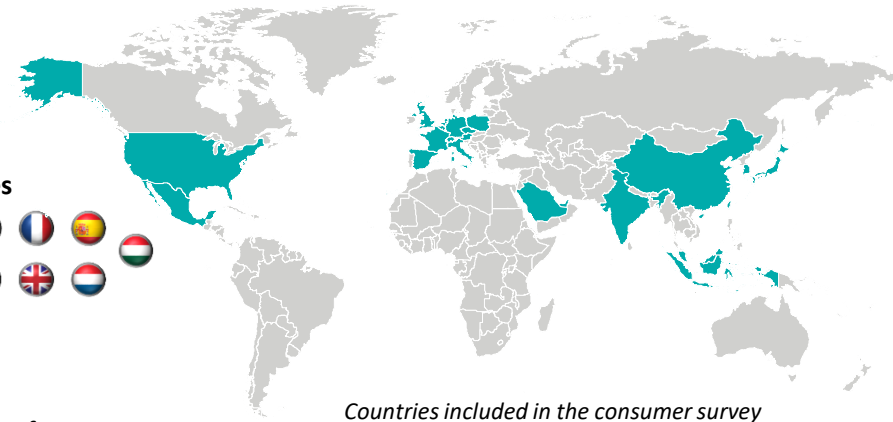


15 European countries



1 | **Economic situation** of teams and event hosts

2 | Assessment of current **market trends**



Countries included in the consumer survey

06 | Authors of the study



Stefan Ludwig
Partner
Head of Sports Business Group
+49 211 8772 4701
sludwig@deloitte.de



Kim Lachmann
Senior Manager
Sports Business Group
+49 211 8772 3565
klachmann@deloitte.de



Jakob Papenbrock
Senior Consultant
Sports Business Group
+49 211 8772 4054
jpapenbrock@deloitte.de





Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms, and their related entities (collectively, the “Deloitte organization”). DTTL (also referred to as “Deloitte Global”) and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/de/UeberUns to learn more.

Deloitte provides industry-leading audit and assurance, tax and legal, consulting, financial advisory, and risk advisory services to nearly 90% of the Fortune Global 500® and thousands of private companies; legal advisory services in Germany are provided by Deloitte Legal. Our professionals deliver measurable and lasting results that help reinforce public trust in capital markets, enable clients to transform and thrive, and lead the way toward a stronger economy, a more equitable society and a sustainable world. Building on its 175-plus year history, Deloitte spans more than 150 countries and territories. Learn how Deloitte’s more than 345,000 people worldwide make an impact that matters at www.deloitte.com/de.

This communication contains general information only, and none of Deloitte GmbH Wirtschaftsprüfungsgesellschaft or Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms or their related entities (collectively, the “Deloitte organization”) is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.

11/2022

