

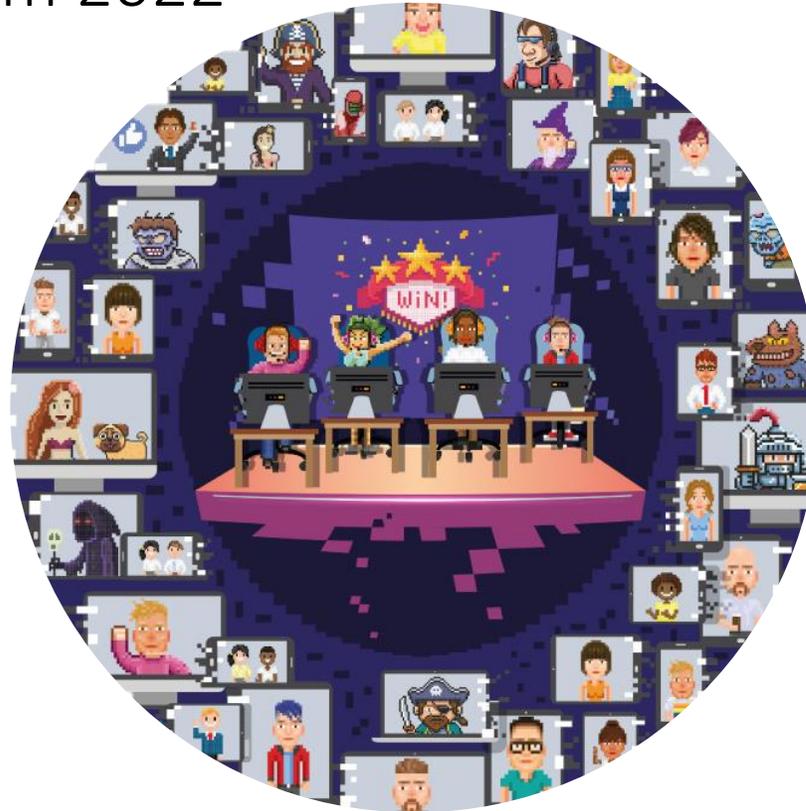


Let's Play, Belgium!

Esports & Gaming in Belgium 2022



December 2022





Esports accelerates its development in Belgium, with 81% of consumers aware of the term and 37% viewing Esports

81%

4 out of 5 people are aware of the **Esports term**, although only **37%** can correctly define it. This is still **slightly** lower than EU average (86% term awareness and 41% definition awareness)

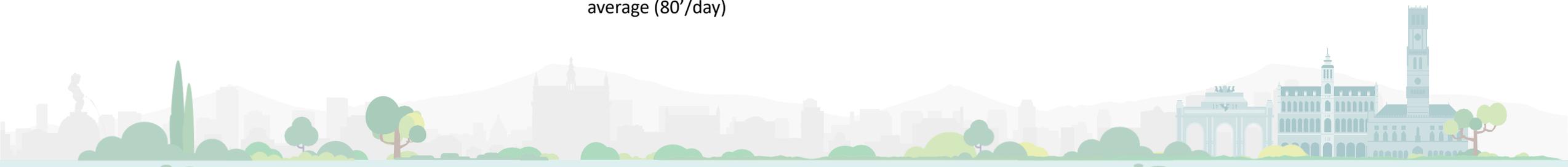
473

minutes

20% of Belgian consumers have watched Esports in the last 6 months, with an average consumption of **473 minutes** per week, or **68'/day** – almost as much as time spend on social networks (105'/day) – but still lower than EU average (80'/day)

37%

Reach has massively increased in Belgium (**+10 pp**) to reach **37% of the population**. Nonetheless, regular engagement decreased (-2 pp) but less than in other European markets to reach **8%** (=EU average)





This consumption comes from a young and diverse audience – finding advertising useful, attending to a lot of live events, consuming many digital services and watching professional sports regularly

55%

55% of Belgian viewers are **Millennials** (25 – 41), **31%** are from the **Generation Z** (16 – 24). **64%** of them are **male viewers** (36% are female viewers). Commercially-engaged and regular viewers tend to have higher education levels, with more business/economics and STEM in comparison to the rest of the population. **However, overall viewer base has very diverse education levels, highlighting the accessibility of Esports for all**

x1.7

Belgian Esports viewers tend to attend to **live events** more frequently than the rest of the population, with **60%** of viewers attending live events compared to **36%** of the general population – 1.7x more!

x2

Belgian Esports viewers tend to use **free and paid subscription services** more frequently than the rest of the population, with **63%** of viewers using paid digital services a lot compared to **33%** of the general population – 2x more!

X1.9

Belgian Esports viewers tend to watch other professional sports more frequently than the rest of the population, with **54%** of viewers watching other professional sports regularly compared to **29%** of the general population – 1.9x more!





Despite effort of traditional media, Belgian Esports viewers increasingly use streaming platforms which become gatekeepers of Esports content – Nonetheless, TV broadcasters reach occasional viewers

58%

Twitch and **YouTube Gaming** are the most used platforms in Belgium, with reach of **58%** – nevertheless Twitch is the most used (3x more than YouTube Gaming in terms of usage time)

x9

On the other hand, **TV broadcast** (e.g., Proximus, RTBF iXPé, etc.) remains a channel for **occasional viewers** with an **average consumption** duration 9x lower than Twitch

24%

24% of European Esports viewers have used TV channels to consume Esports at least once in the last 6 months. Despite this low rate compared to other streaming platforms, TV enjoys the highest relative popularity among **occasional European viewers** who watch less than one hour of Esports per week





Belgian Esports viewers spend 17€ per month on average for Esports-related activities...

10 – 25€

Belgian Esports viewers spend between **10€** (viewers consuming >1h /week) and **25€** (viewers consuming >10h / week) per month on Esports-related content, in line with European average (7€-29€)

47%

Almost half of Belgian Esports viewers spend is on **live events** (incl ticketing), while **~20%** is spend on merchandising and **15%** on paywalled content





... Although European Esports leagues and organizations estimate that the audience remain under-monetized, preventing them from reaching profitability

66%

66% of European Esports organizations are not expecting to be profitable in 2022 – this number grows to 72% for Esports leagues. However, both leagues and organizations expect that profitability will improve compared to 2021

#1

Achieving revenue growth is the primary business priority of both Esports leagues and organizations

34%

34% of Esports organisations revenues come from expanding business areas, compared to 15% in 2021. These new business activities include content creation, influencer marketing, consulting services, business activities directly related to video gaming, etc.





Similarly to other European countries, monetization in Belgium will grow with Esports penetration and consumer engagement – this invites Belgian Esports companies to act together for a more structured and fast-growing ecosystem

31%

As such, Spain, which has the highest overall Esports penetration rate, is also the country with the highest share of paying consumers (34%)

51

Esports organisations are increasingly professionalising themselves, with lots of investments made in the sector. From 2019 to Q3 2022, 51 organisations worldwide changed majority ownership (M&A deals)





Although Esports captures an increasing share of attention in Belgium, gaming is not left out with **1 out of 3** Belgian consumers regularly playing video games and spending **18€** on gaming-related purchases each month

79%

79% of Belgians are aware of video games, **46%** of the population plays video games and **33%** does that on a regular basis (more than 1h / week)

648

minutes

Belgian consumers play video games on average **648 minutes** per week, or **92'/day** – almost as much as time spent on social networks (105'/day) – but still lower than EU average (126' / day)

18€

Half of Belgian gamers spend is on **full games copies**, while **~30%** is spent on gaming hardware and **10%** on video games subscription services





Similarly to Esports viewership, this consumption comes from a young and diverse audience, consuming many paid digital services – However this audience only partially overlaps with the Esports audience

46%

46% of Belgian gamers are **Millennials** (25 – 41), **23%** are from the **Generation Z** (16 – 24), showing a more diverse penetration of gaming in terms of age groups compared to Esports.
42% of Belgian gamers are women, being a more balanced gender distribution compared to Esports

x1.3

Belgian gamers tend to use **paid digital services** more frequently than the rest of the population, with **42%** of gamers heavily using them compared to **36%** of general population – 30% more!

46%

Only half of the video gamers watch Esports (46%) while only **63%** of Esports viewers also practice gaming, highlighting the differences between these 2 sectors





Beyond growing gaming population, Tax shelter extension to investments in video games, entering into force as from January 2023, will further fuel the industry development in Belgium

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Belgian government introducing tax shelter for games by 2023

Long-awaited tax incentive offers returns to investors and make it easier for studios to fund their games



News by James Batchelor | Editor-in-Chief

Published on May 26, 2022



L'extension du tax shelter au jeu vidéo entrera en vigueur le 1er janvier 2023



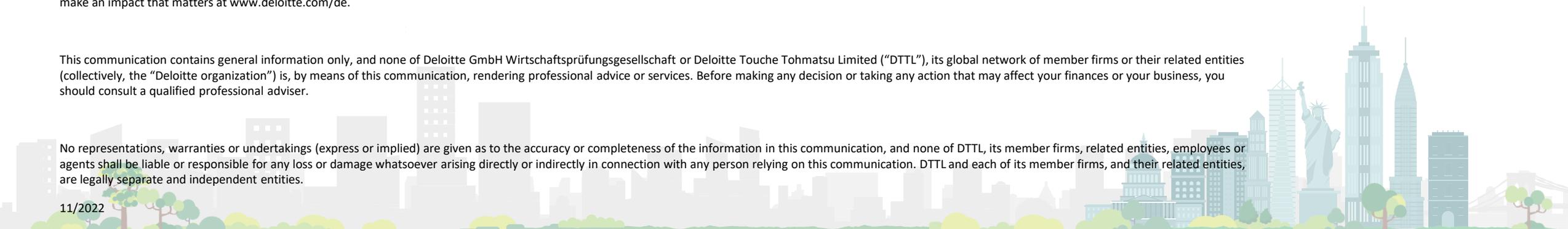
Le montois Fishing Cactus est le premier studio wallon de jeux vidéo. ©Kristof Vadino

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01 | The Belgian Target Group (1/5)

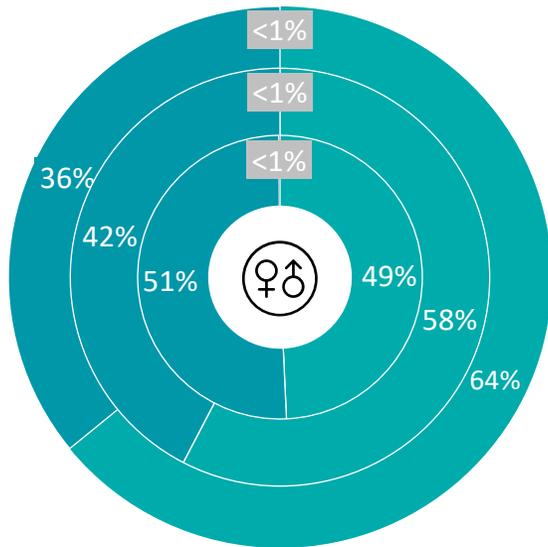
Esports viewers are predominantly male, comparatively young and belong to rather higher income groups in comparison to esports gamers and the overall population



Gender distribution

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

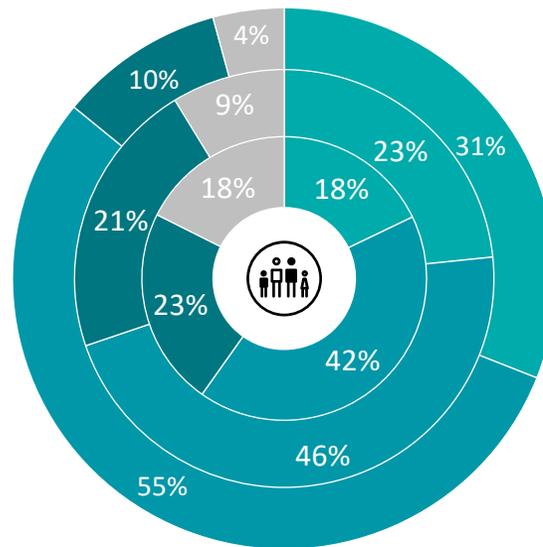
Male Female Other



Age distribution

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

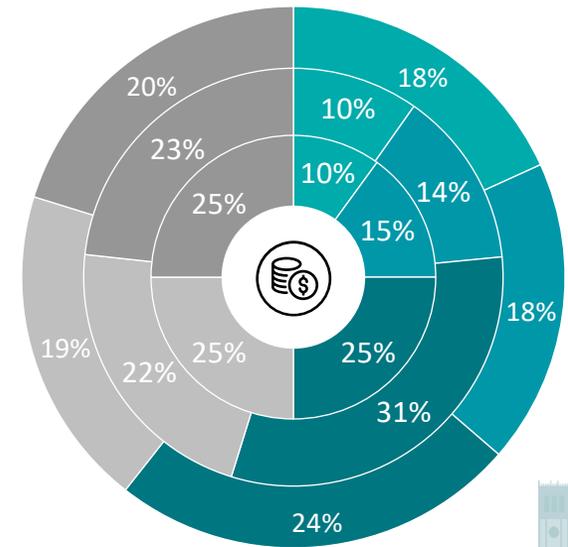
16-24 (Generation Z) 25-41 (Millennials) 42-56 (Generation X) 57+ (Baby Boomers)



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%



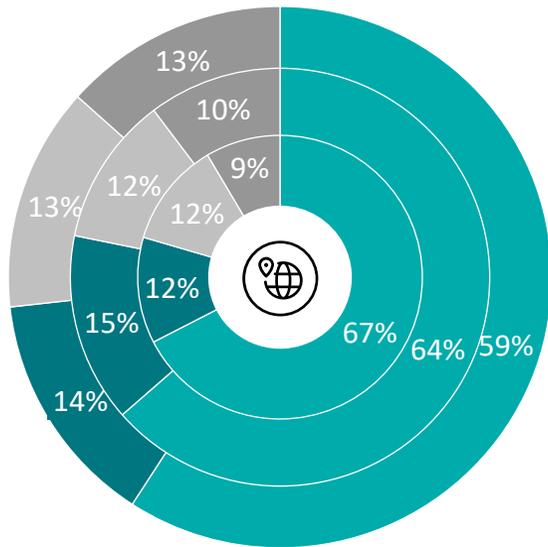
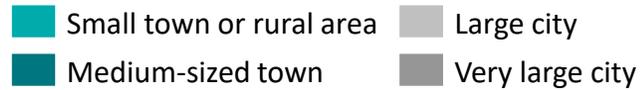
01 | The Belgian Target Group (2/5)

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



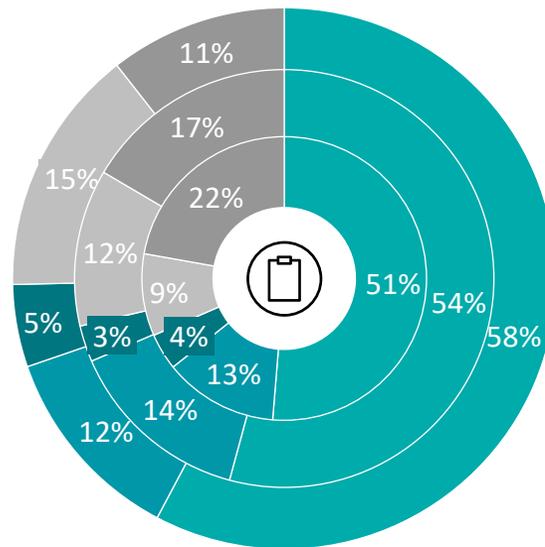
Hometown size

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



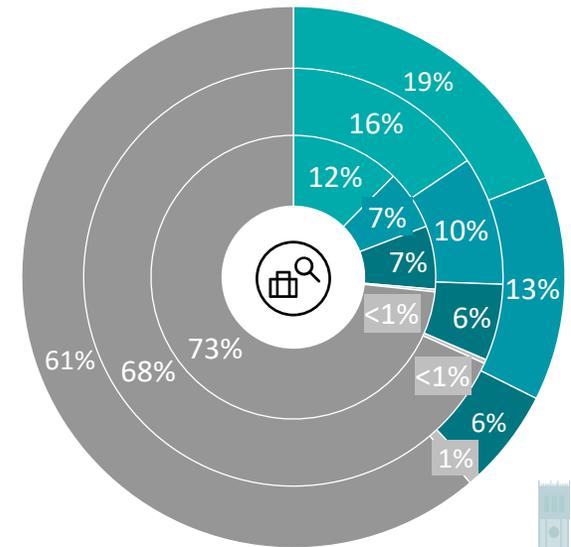
Employment status

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



Professional background

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



01 | The Belgian Target Group (3/5)

Esports viewers tend use free and paid subscription services relatively frequently. They watch professional sports and attend live events 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...

