

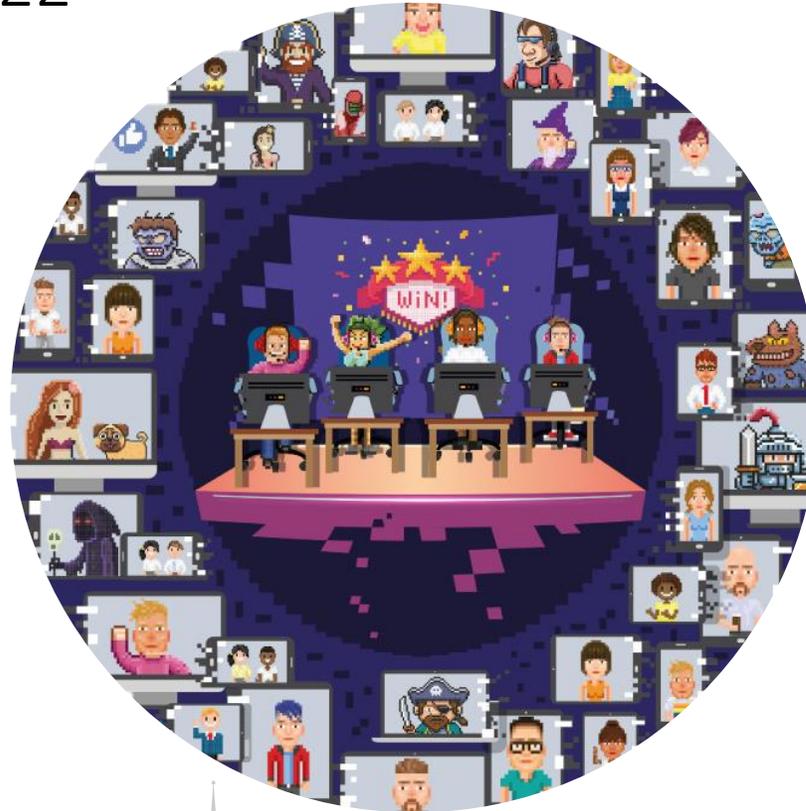


Let's Play, Czech Republic!

Video gaming & esports 2022



November 2022



01 | The Czech Target Group (1/5)

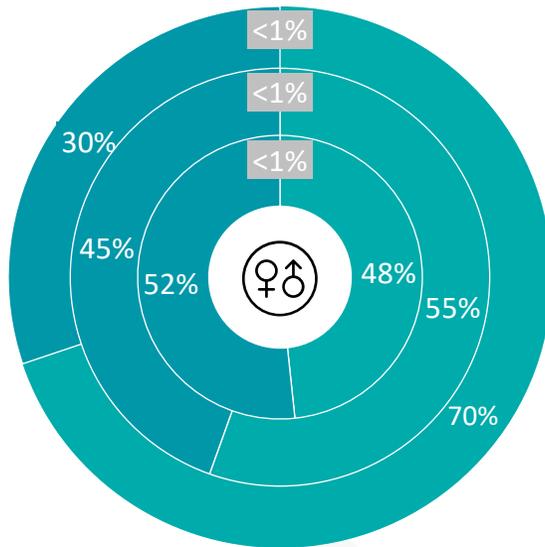
Esports viewers are predominantly male and comparatively young in comparison to video gamers. While video gamers represent the population in terms of income groups, esports viewers tend to belong to rather high income groups



Gender distribution

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

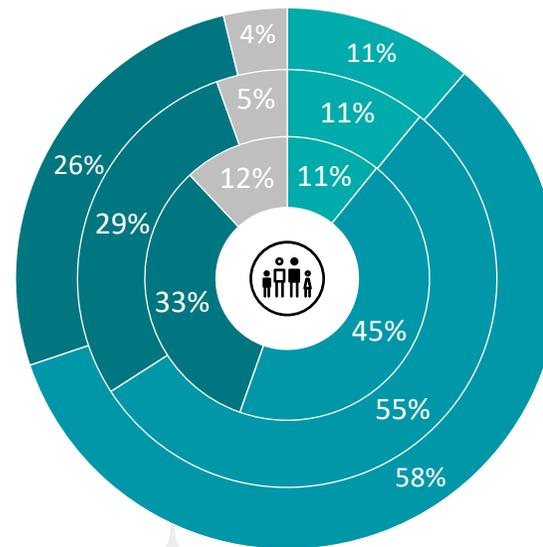
Male Female Other



Age distribution

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

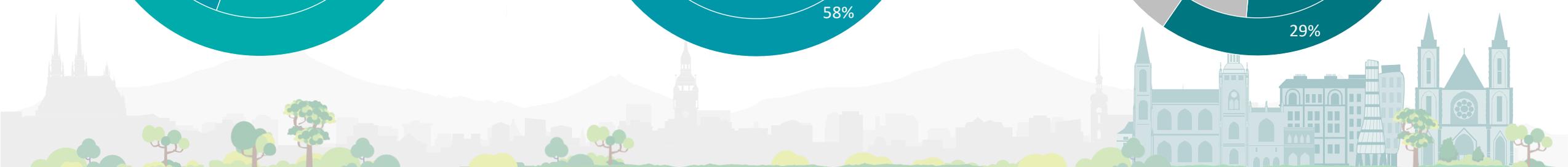
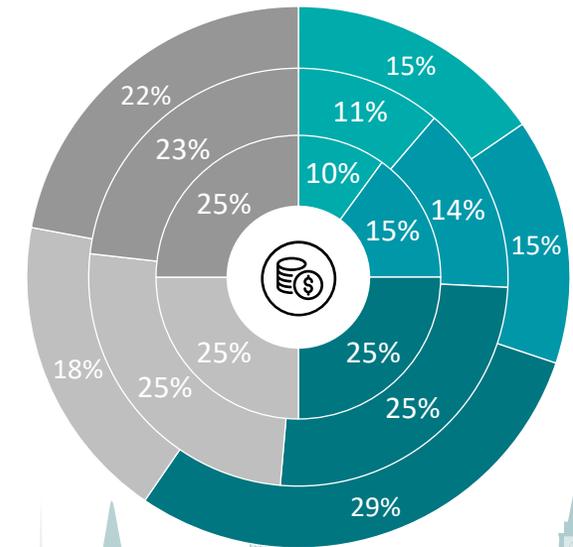
16-24 (Generation Z) 25-41 (Millennials) 42-56 (Generation X) 57+ (Baby Boomers)



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 Czech Target Group (2/5)

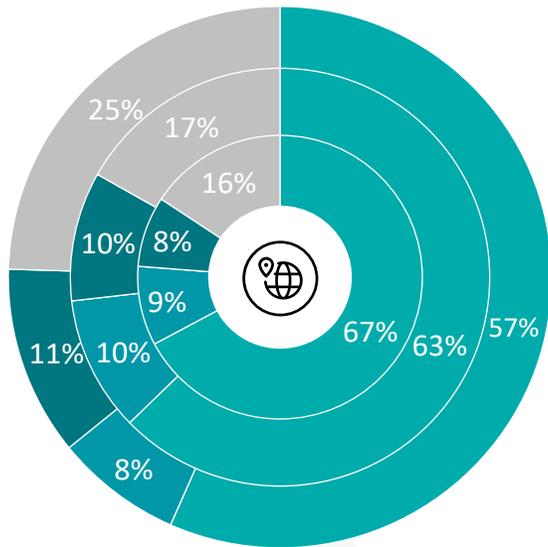
Esports viewers tend to be from larger cities and more frequently full-time employed than video gamers. Comparatively often esports viewers have a background in business/economics



Hometown size

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

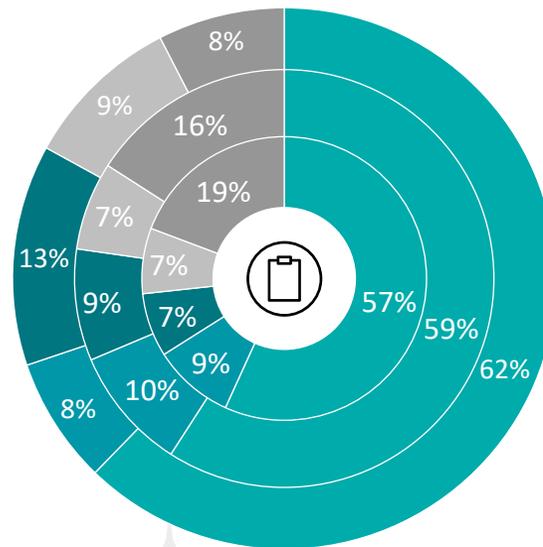
- Small town or rural area
- Large city
- Medium-sized town
- Very large city



Employment status

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

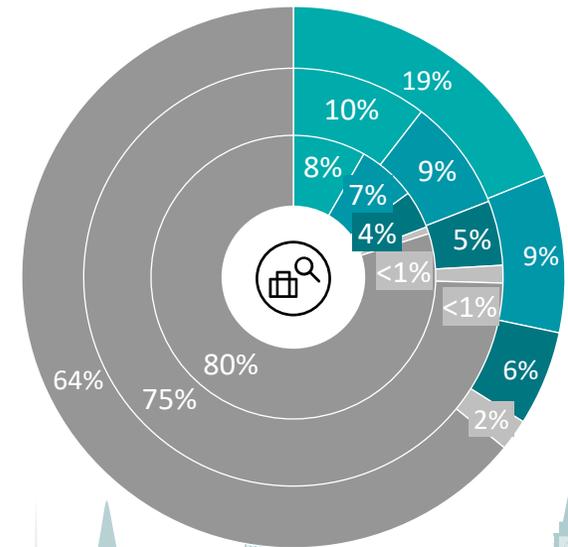
- Full-time
- Part-time
- Self-employed
- School / university student
- Other



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 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

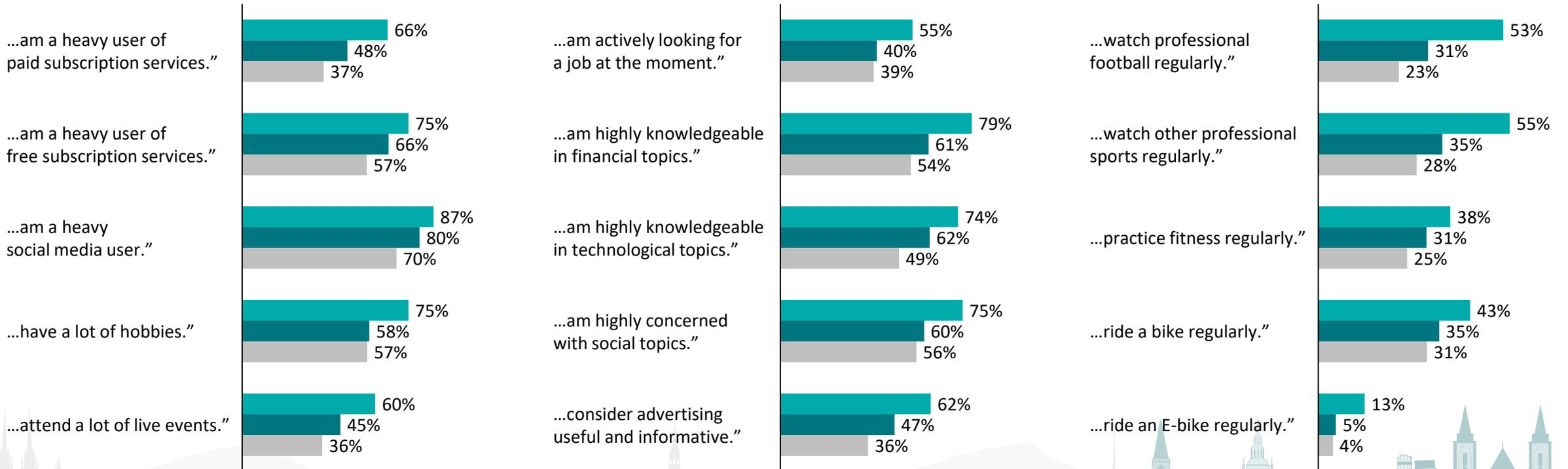


Distribution of selected characteristics among the target group

Esports viewers vs. Video gamers vs. Overall sample

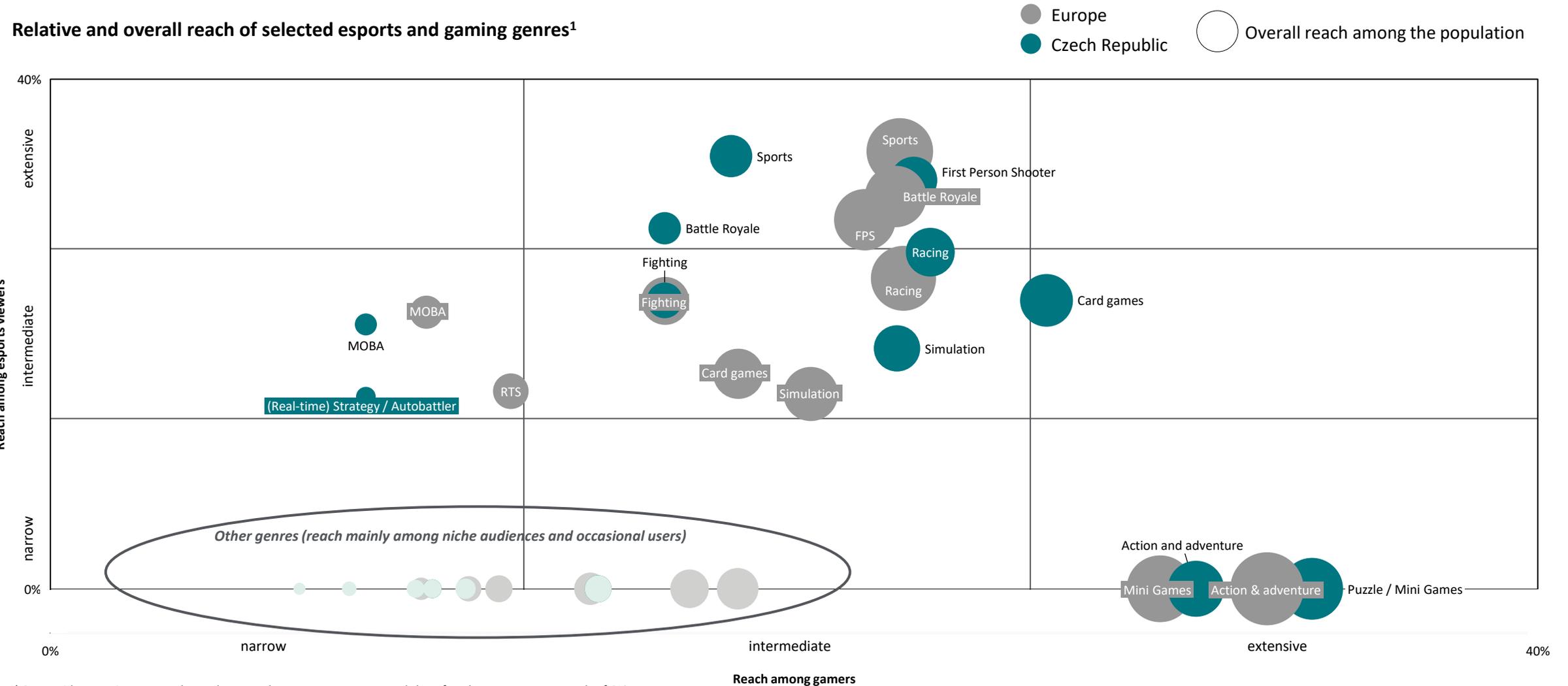
Esports viewers Video gamers Overall sample

“I...



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

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

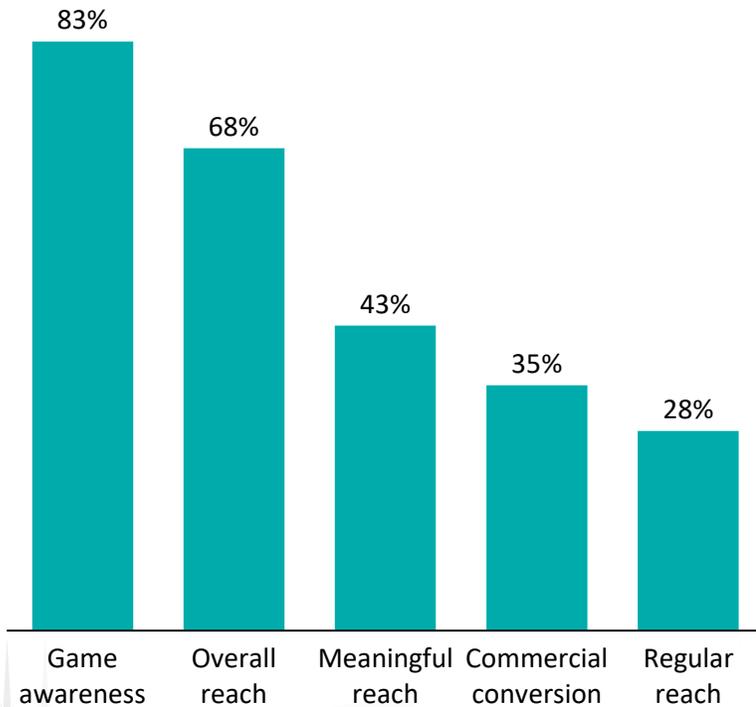


1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%
Source: Deloitte analysis

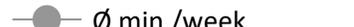
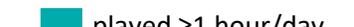
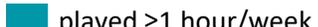
02 | Video Gaming in Czech Republic (1/2)

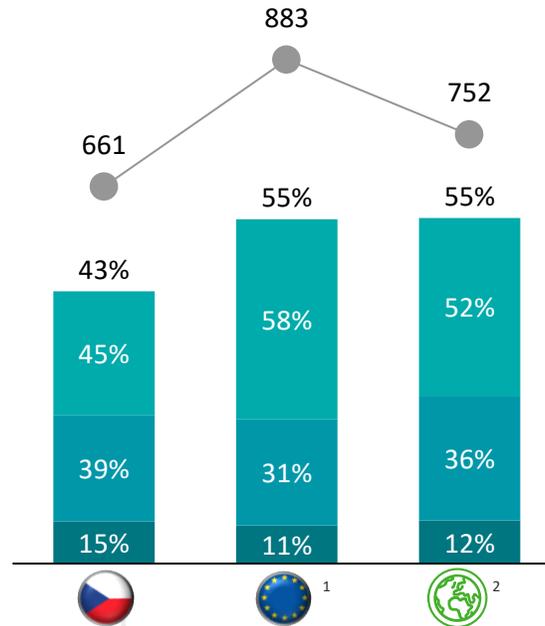
While 83% of Czech are aware of video games, 35% are commercially engaged. The monthly video gaming-related spending numbers to 282CZK per person on average

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



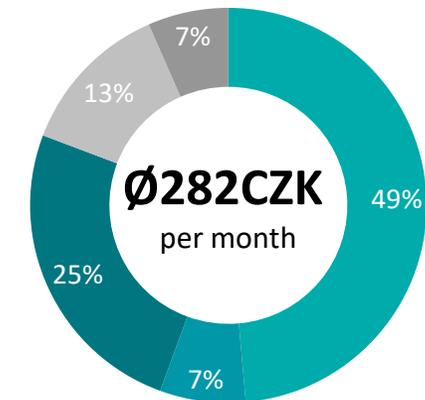
Weekly video gaming consumption times
among Czech in the last 6 months

 ∅ min./week
 played ≥1 hour/day
 played <1 hour/week
 played ≥1 hour/week



Monthly video gaming-related spending (distribution)
among Czech 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



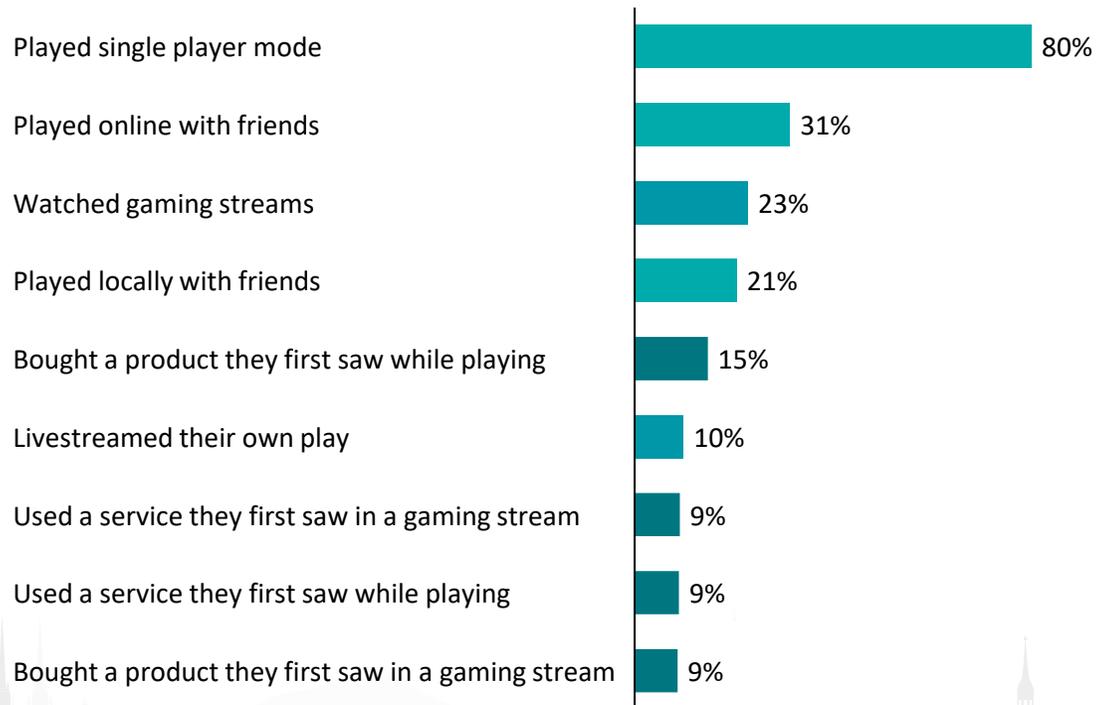
1) "Europe" refers to the European countries included in the consumer survey; 2) "Global" refers to all countries included in the consumer survey

02 | Video Gaming in 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

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

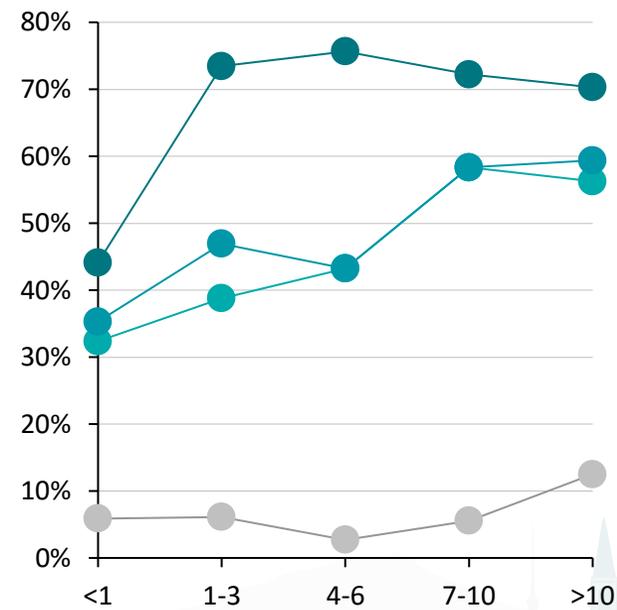
■ Playing behaviour
 ■ Video game streaming
 ■ Purchases driven by video gaming



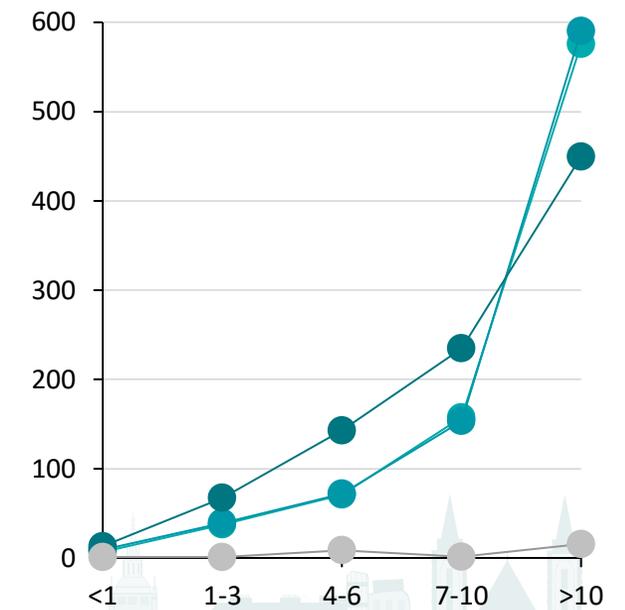
Usage of selected video gaming media by consumer type among Czech video gamers over the last 6 months

● Console
 ● PC
 ● Mobile
 ● VR

Reach per video game media in %



Weekly playing time per video gaming media in minutes



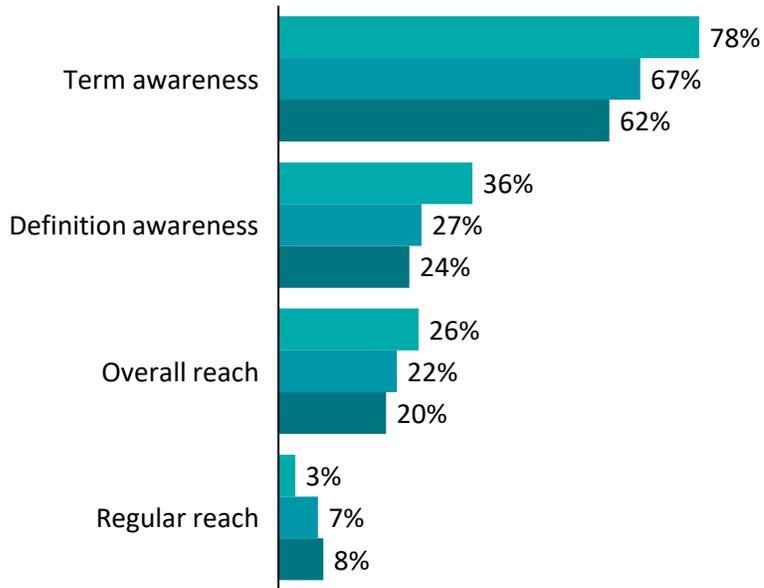
Gamer groups with different weekly playing time, in hours

03 | Esports in Czech Republic (1/2)

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

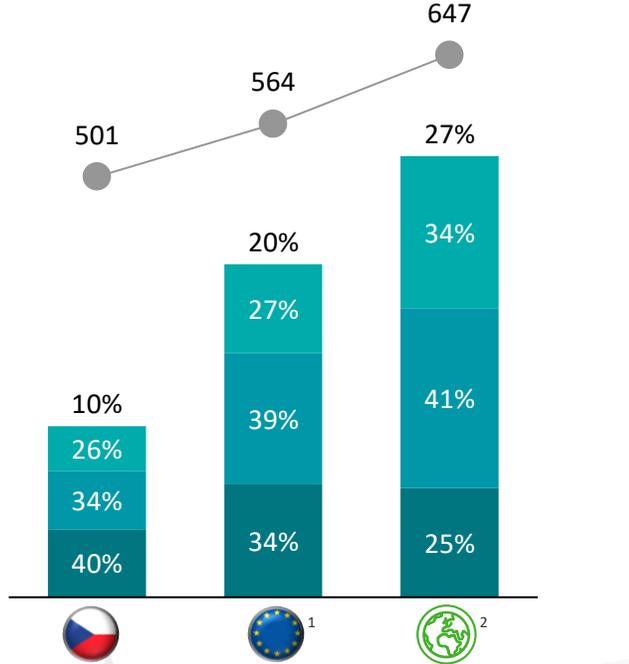
Development of esports engagement maturity

% of Czech to whom below categories apply



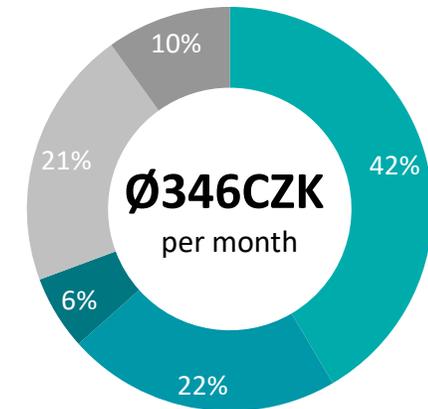
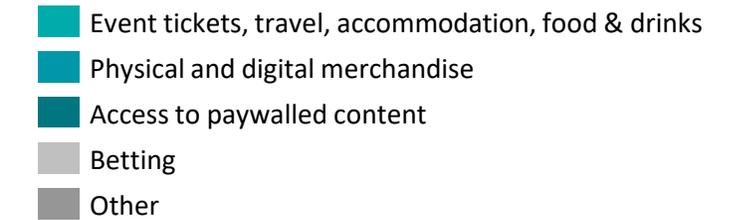
Esports reach and weekly consumption times

among Czech in the last 6 months



Monthly esports-related spending (distribution)

among Czech esports viewers over the last 6 months

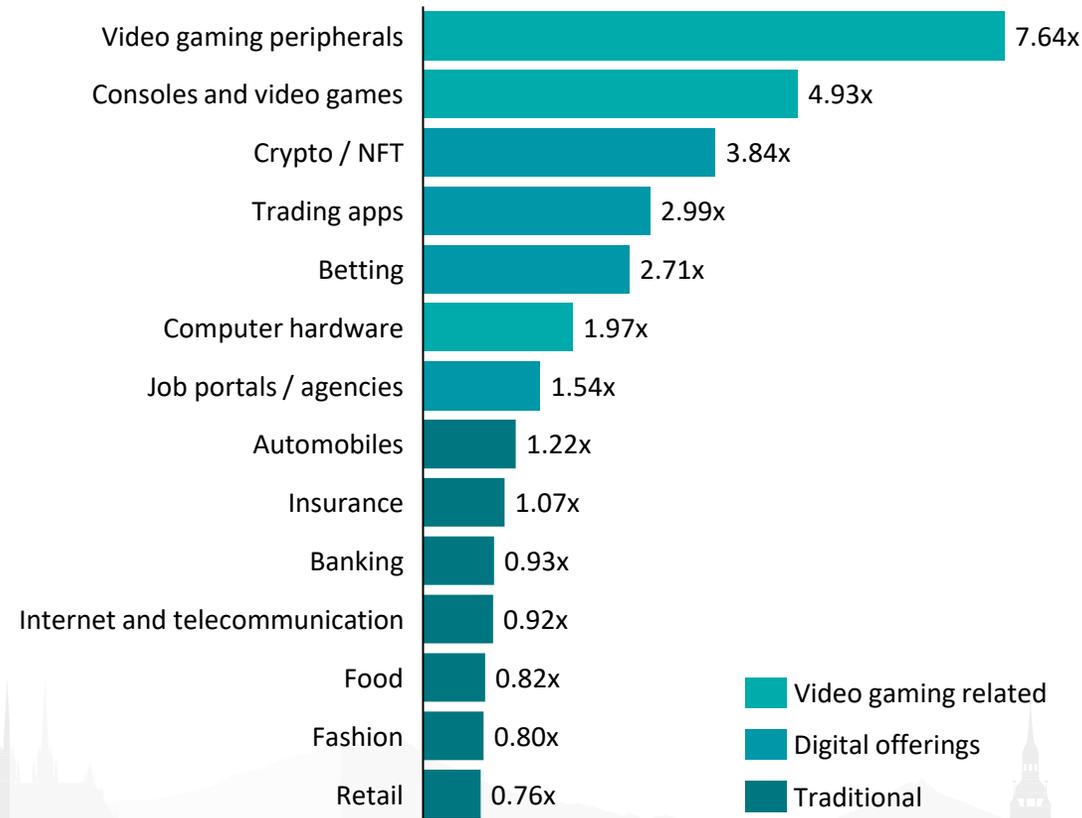


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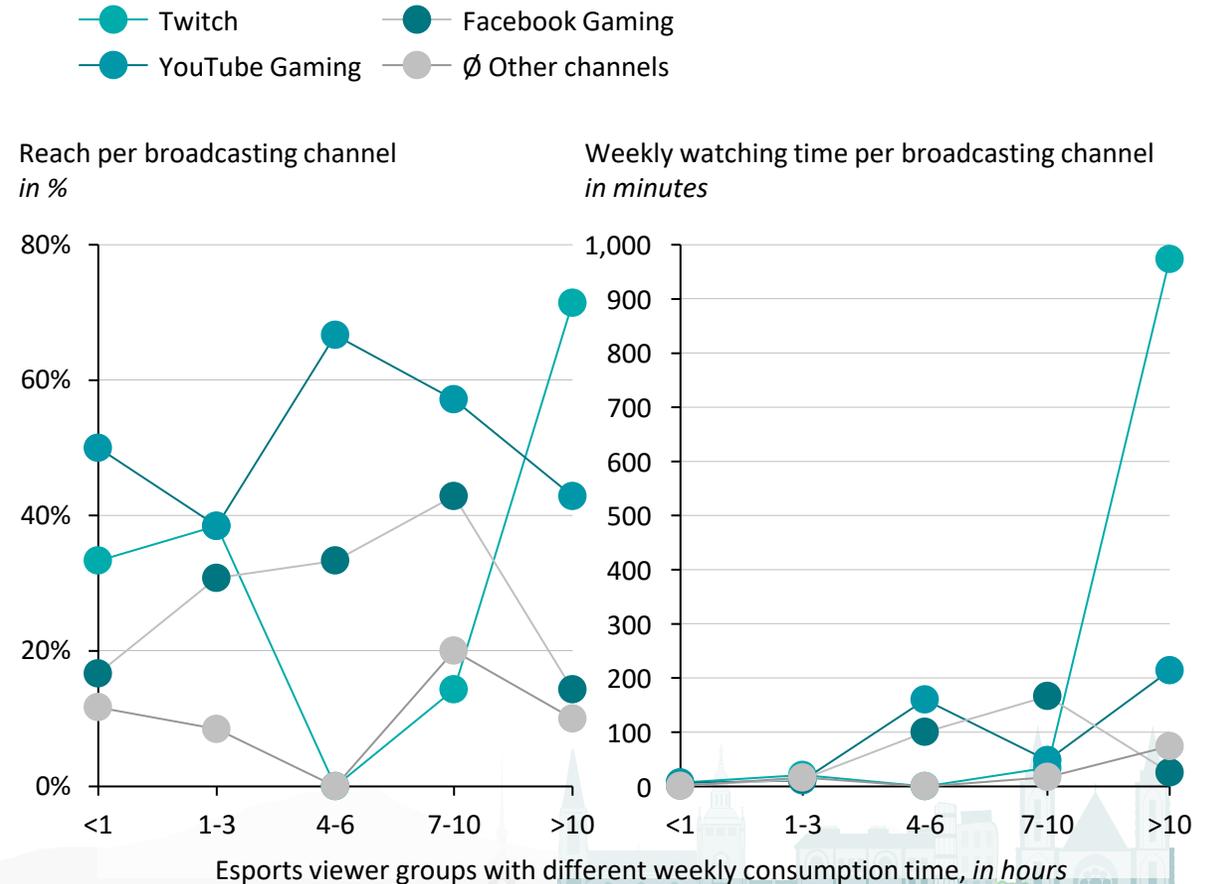
03 | Esports in Czech Republic (2/2)

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

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



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



Notes: 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

06 | Authors of the study



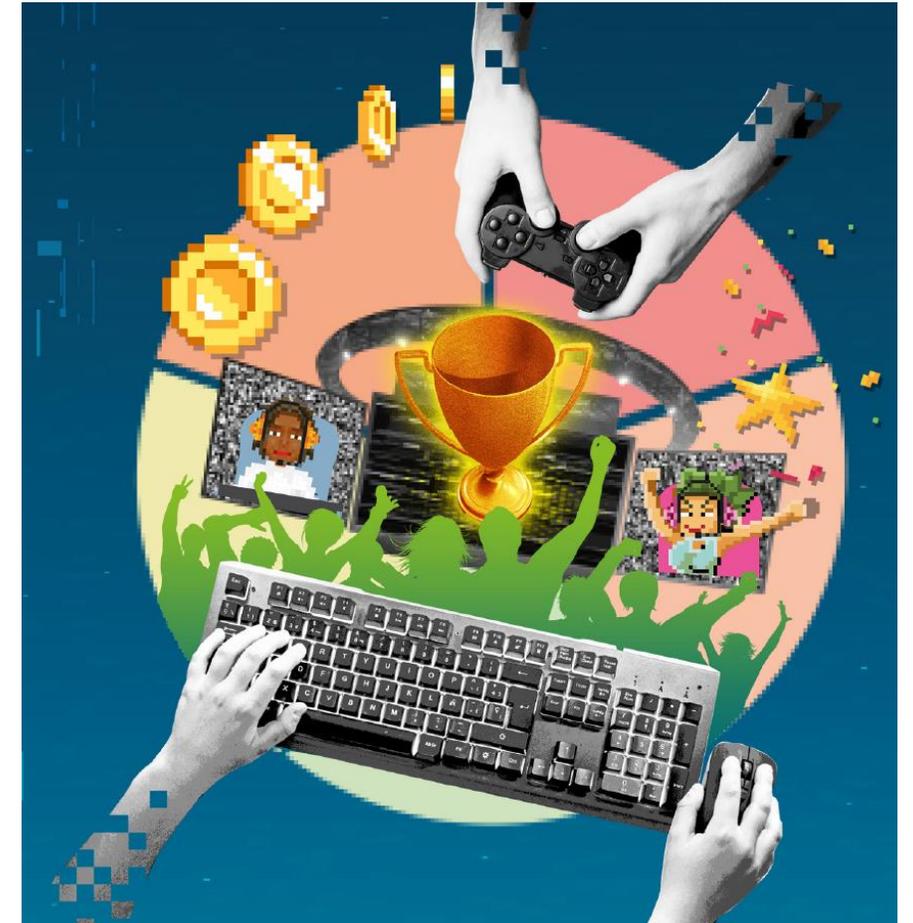
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