Let’s Play, Indonesia!
Video gaming & esports 2022
April 2023
The survey population consists of a larger proportion Millennials. When looking at the breakdown of video gamers and esports viewers by age group, a larger proportion of Gen Z and Millennials are esports viewers compared to Gen X and boomers. Income distribution of the respondent pool is proportionately represented. Comparing the income distribution, esports viewers and video gamers have a higher percentage of individuals in the 11-25% income group and a lower percentage in the bottom 50% income group compared to all respondents.
Half of the individuals surveyed are from a small town or rural area, however esports viewers and video gamers tend to be from large or very large cities. Half of the respondents hold a full-time job, with esports viewers and video gamers being more likely to have full-time jobs when compared to the population. Two thirds of those surveyed have employment in the "others" category, there is no significant difference between the population and both esports viewers and video gamers in terms of employment.
Of the 15 specific characteristics surveyed in this study, esports viewers resonate and identify with all but 5 characteristics more frequently than the overall population. The 5 characteristics where esports viewers are comparatively reflect the overall population relate to free subscriptions, social media, employment, social topics, and advertising preferences.

### Distribution of selected characteristics among the target group

Esports viewers vs. Video gamers vs. Overall sample

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Esports viewers</th>
<th>Video gamers</th>
<th>Overall sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Am a heavy user of paid subscription services.</td>
<td>76%</td>
<td>69%</td>
<td>62%</td>
</tr>
<tr>
<td>Am a heavy user of free subscription services.</td>
<td>78%</td>
<td>80%</td>
<td>81%</td>
</tr>
<tr>
<td>Am a heavy social media user.</td>
<td>98%</td>
<td>99%</td>
<td>97%</td>
</tr>
<tr>
<td>Have a lot of hobbies.</td>
<td>86%</td>
<td>83%</td>
<td>79%</td>
</tr>
<tr>
<td>Attend a lot of live events.</td>
<td>68%</td>
<td>60%</td>
<td>54%</td>
</tr>
<tr>
<td>Actively looking for a job at the moment.</td>
<td>75%</td>
<td>76%</td>
<td>78%</td>
</tr>
<tr>
<td>Highly knowledgeable in financial topics.</td>
<td>87%</td>
<td>86%</td>
<td>82%</td>
</tr>
<tr>
<td>Highly knowledgeable in technological topics.</td>
<td>91%</td>
<td>89%</td>
<td>83%</td>
</tr>
<tr>
<td>Highly concerned with social topics.</td>
<td>96%</td>
<td>94%</td>
<td>93%</td>
</tr>
<tr>
<td>Consider advertising useful and informative.</td>
<td>93%</td>
<td>92%</td>
<td>90%</td>
</tr>
<tr>
<td>Watch professional football regularly.</td>
<td>55%</td>
<td>54%</td>
<td>48%</td>
</tr>
<tr>
<td>Watch other professional sports regularly.</td>
<td>55%</td>
<td>55%</td>
<td>46%</td>
</tr>
<tr>
<td>Practice fitness regularly.</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>Ride a bike regularly.</td>
<td>49%</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Ride an E-bike regularly.</td>
<td>9%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
01 | Popular games among esports viewers and video gamers in the Indonesia respondent group

Battle Royale is the esports genre with the highest reach among both esports viewers and gamers in Indonesia specifically and Asia-Pacific overall, followed by MOBA and FPS.

Relative and overall reach of selected esports and gaming genres

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

Source: Deloitte analysis
While 91% of Indonesians are aware of video games, only 57% are commercially engaged. The monthly video gaming-related spending numbers is 91,362 IDR per video gamer on average.
Among Indonesian video gamers, 25% bought a product they first saw while playing a video game or watching a stream. The most common game medium in terms of reach and playing time is the mobile phone.

**Engagement habits with video gaming content**
- Played single player mode: 70%
- Watched gaming streams: 65%
- Played online with friends: 55%
- Played locally with friends: 35%
- Bought a product they first saw in a gaming stream: 25%
- Bought a product they first saw while playing: 25%
- Used a service they first saw in a gaming stream: 24%
- Livestreamed their own play: 22%
- Used a service they first saw while playing: 19%

**Usage of selected video gaming media by consumer type**

**Reach per video game media in %**
- Mobile: 100%
- PC: 90%
- Console: 80%
- VR: 70%

**Weekly playing time per video gaming media in minutes**
- Mobile: 700
- PC: 600
- Console: 500
- VR: 400

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**Top 9 video gaming engagement habits ranked from the highest to the lowest**
1. Played single player mode
2. Watched gaming streams
3. Played online with friends
4. Played locally with friends
5. Bought a product they first saw in a gaming stream
6. Bought a product they first saw while playing
7. Used a service they first saw in a gaming stream
8. Livestreamed their own play
9. Used a service they first saw while playing
96% of Indonesians are familiar with the term “esports”, 43% are aware of the definition. An esports viewer spends a monthly average of 131,374 IDR on esports-related items, mainly on attending events, merchandise and accessing content.

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**Esports engagement maturity in 2022**

- Term awareness: 96%
- Overall reach: 77%
- Definition awareness: 43%
- Regular reach: 31%

**Esports reach and weekly consumption times**

- % of Indonesians to whom below categories apply
  - Ø min./week: 464
  - watched ≥1 hour/day: 677
  - watched ≥1 hour/week: 647

**Monthly esports-related spending (distribution)**

- Event tickets, travel, accommodation, food & drinks: 39%
- Physical and digital merchandise: 28%
- Access to paywalled content: 22%
- Betting: 15%
- Other: 5%

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*50%, 40% and 27% of the Singapore, AP and Global respondent group have watched professional e-sports competitions at least once during the past six months, respectively.*

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1) Asia-Pacific (AP) includes data from China, India, Japan, South Korea, Indonesia, Malaysia and Singapore; 2) "Global" refers to all countries included in the consumer survey.
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.
**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-to-hand 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-subdivisible 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
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

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
- 1 | Economic situation of teams and event hosts
- 2 | Assessment of current **market trends**
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