Deloitte.

Let’s Play, Indonesia!

Video gaming & esports 2022

April 2023

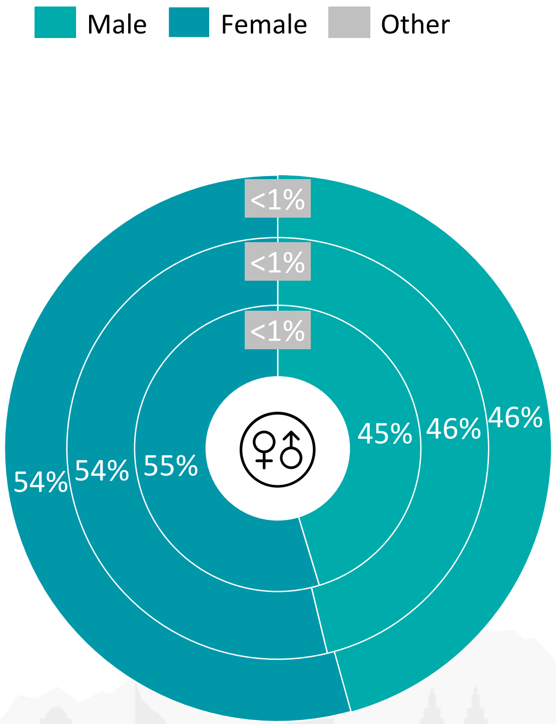
MAKING AN IMPACT THAT MATTERS since 1845

01 | Profile of the Indonesia respondents (1/3)

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.

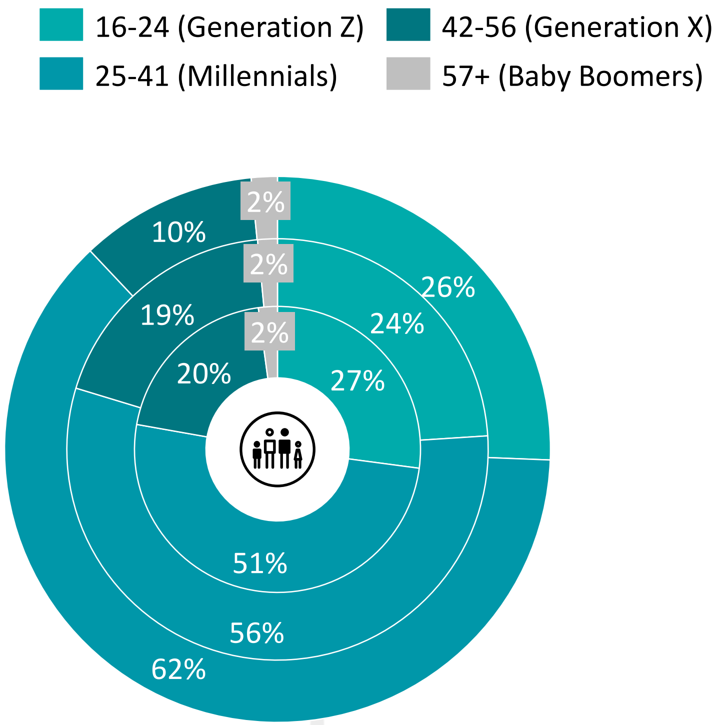
Gender distribution

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



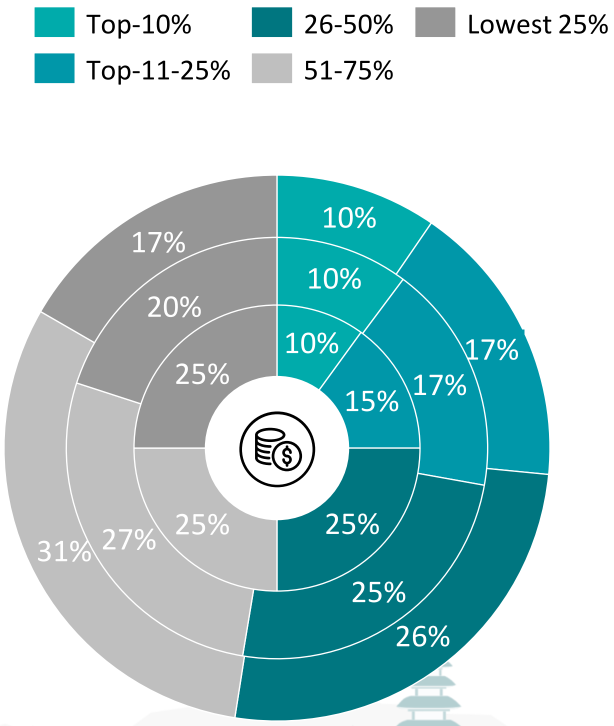
Age distribution

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



Income distribution

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



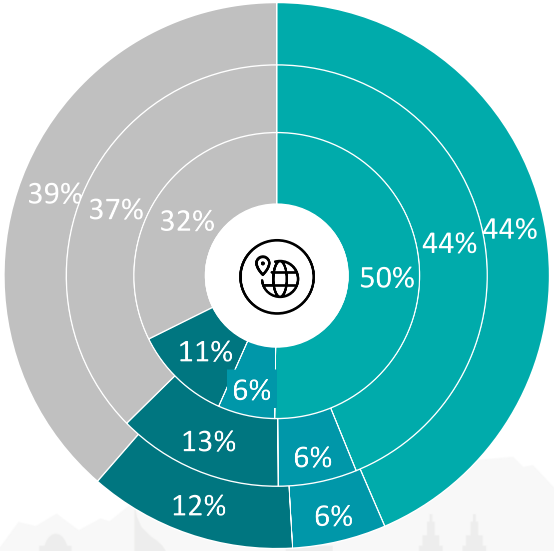
01 | Profile of the Indonesia respondents (2/3)

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.

Hometown size

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

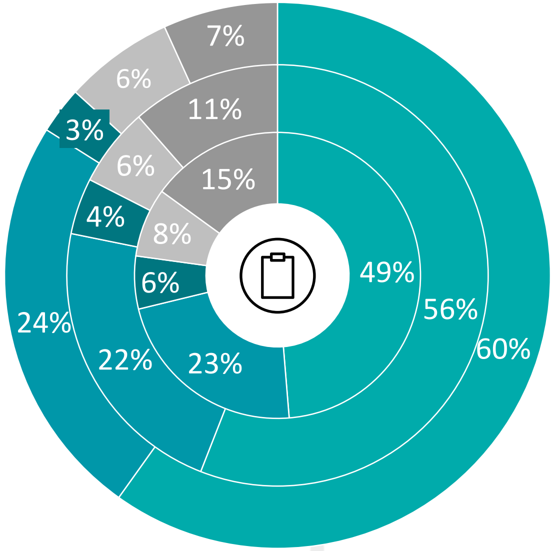
- Small town or rural area
- Medium-sized town
- Large city
- Very large city



Employment status

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

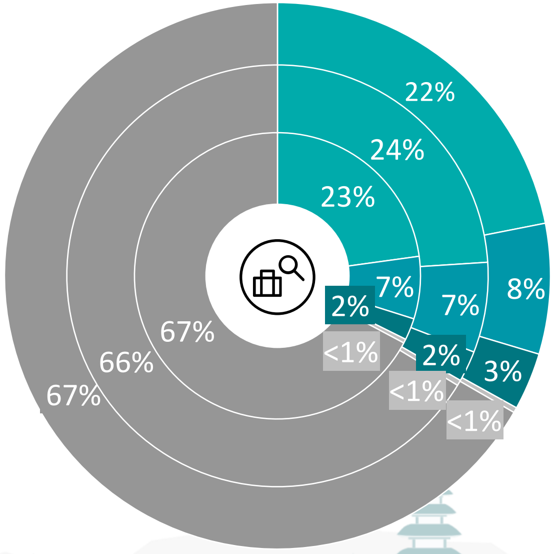
- Full-time
- Part-time
- Self-employed
- School / university student
- Other



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

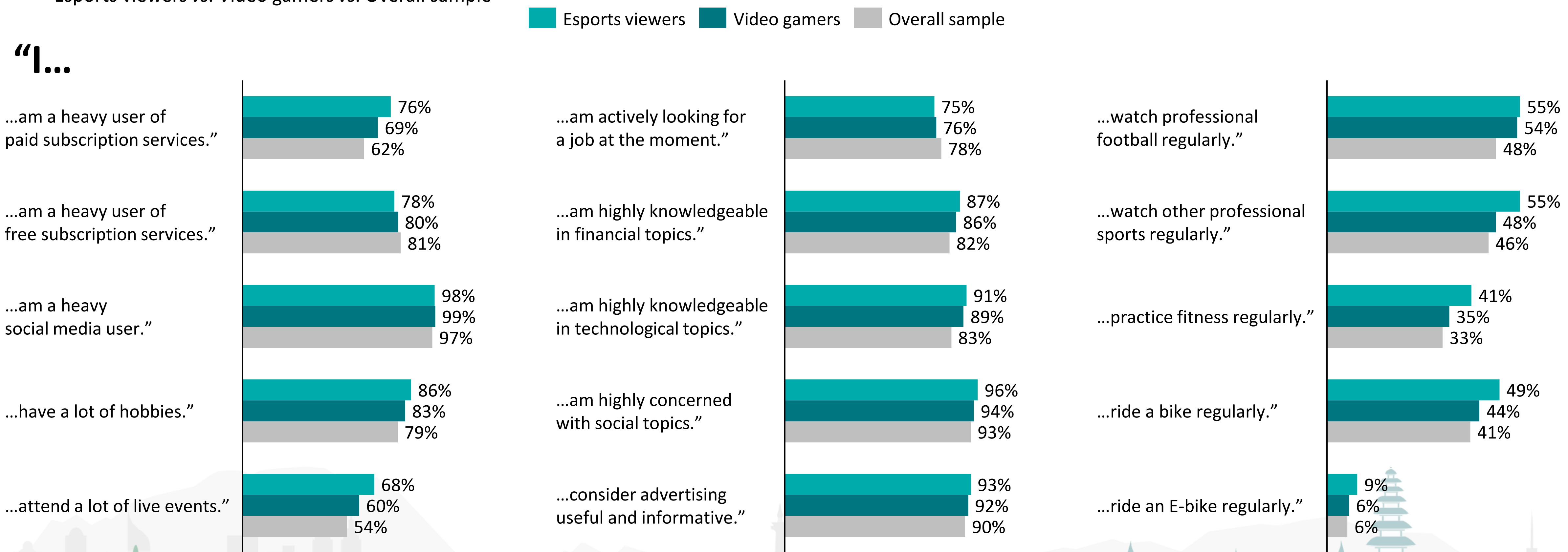


01 | Profile of the Indonesia respondents (3/3)

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

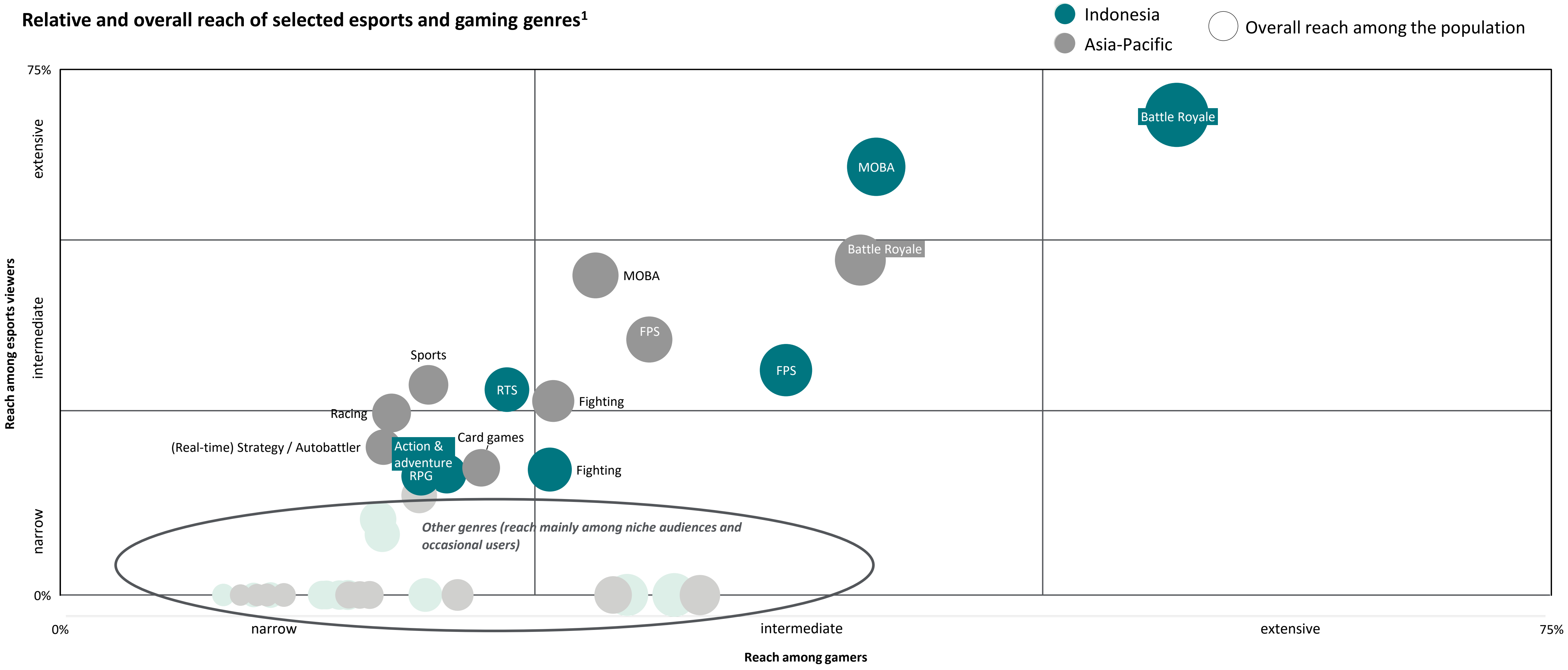
Esports viewers vs. Video gamers vs. Overall sample



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]



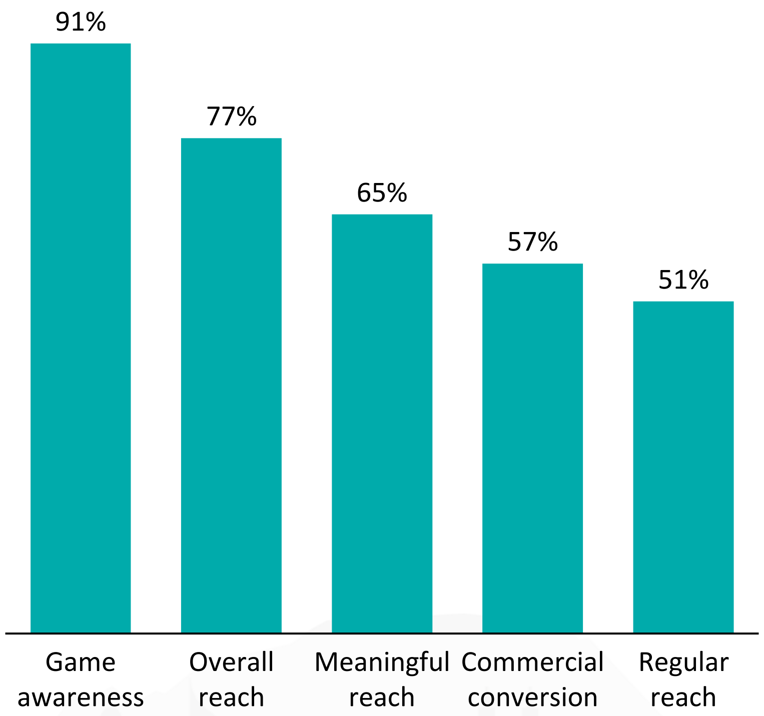
1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%

Source: Deloitte analysis

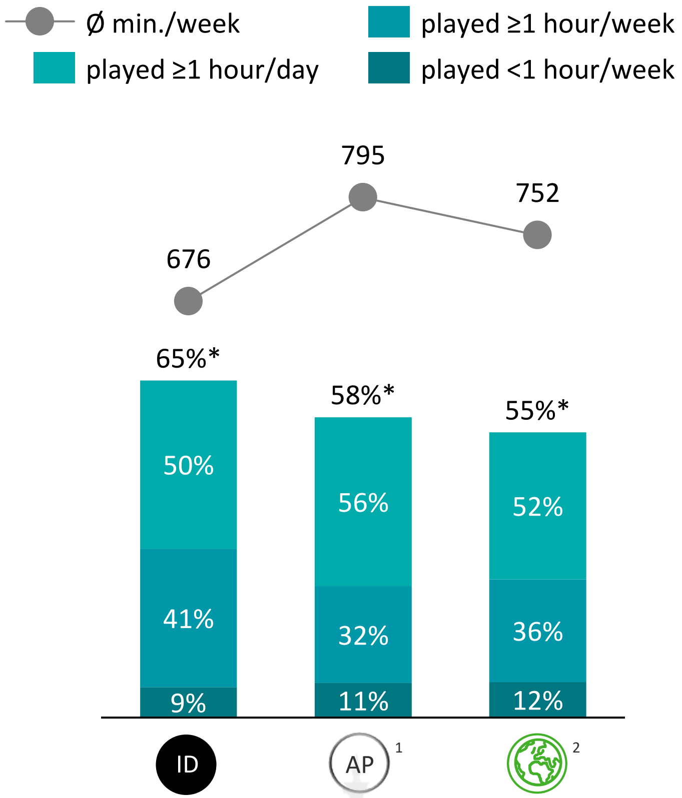
02 | Consumption of video gaming content in Indonesia (1/2)

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.

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

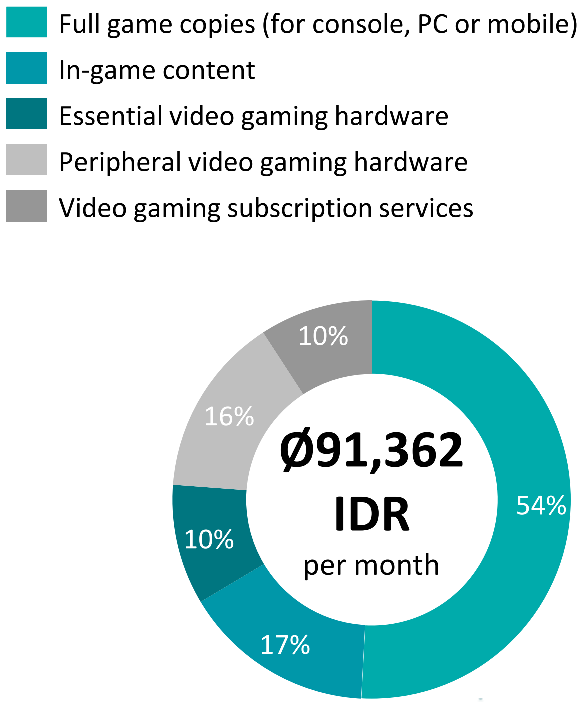


Weekly video gaming consumption times
among Indonesians in the last 6 months



*65%, 58% and 55% of the Singapore, AP and Global respondent group played video games at least once during the past 6 months, respectively.

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



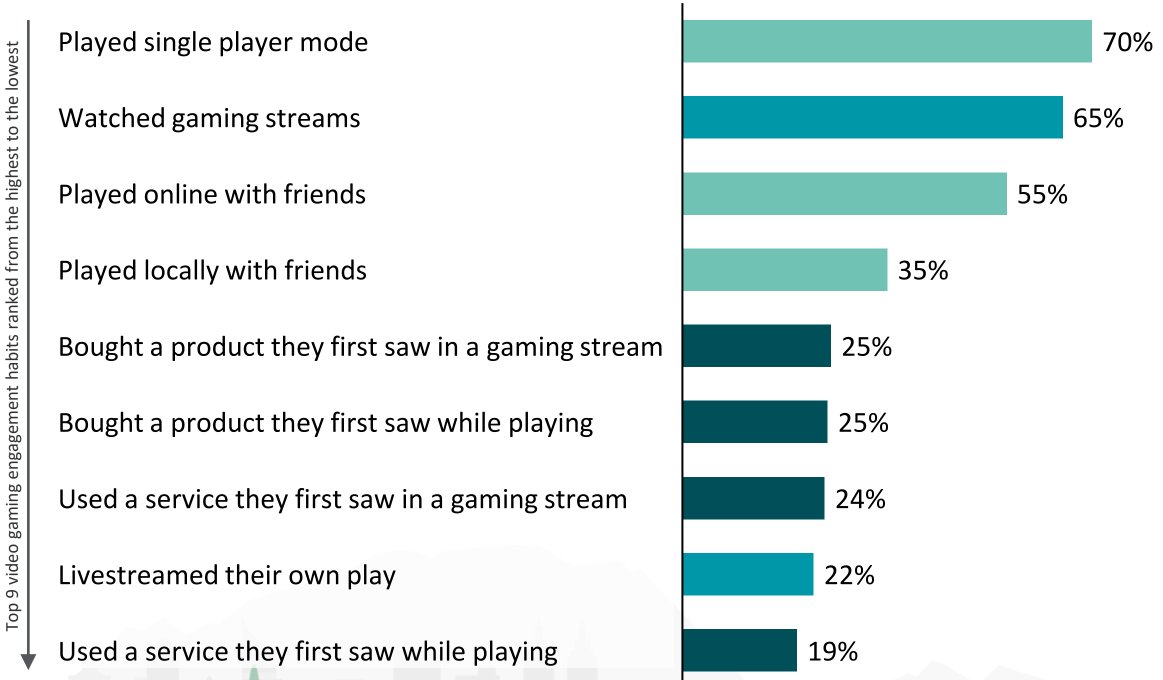
1) Asia-Pacific (AP) includes data from China, India, Japan, South Korea, Indonesia, Malaysia and Singapore; 2) "Global" refers to all countries included in the consumer survey

02 | Consumption of video gaming content in Indonesia (2/2)

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.

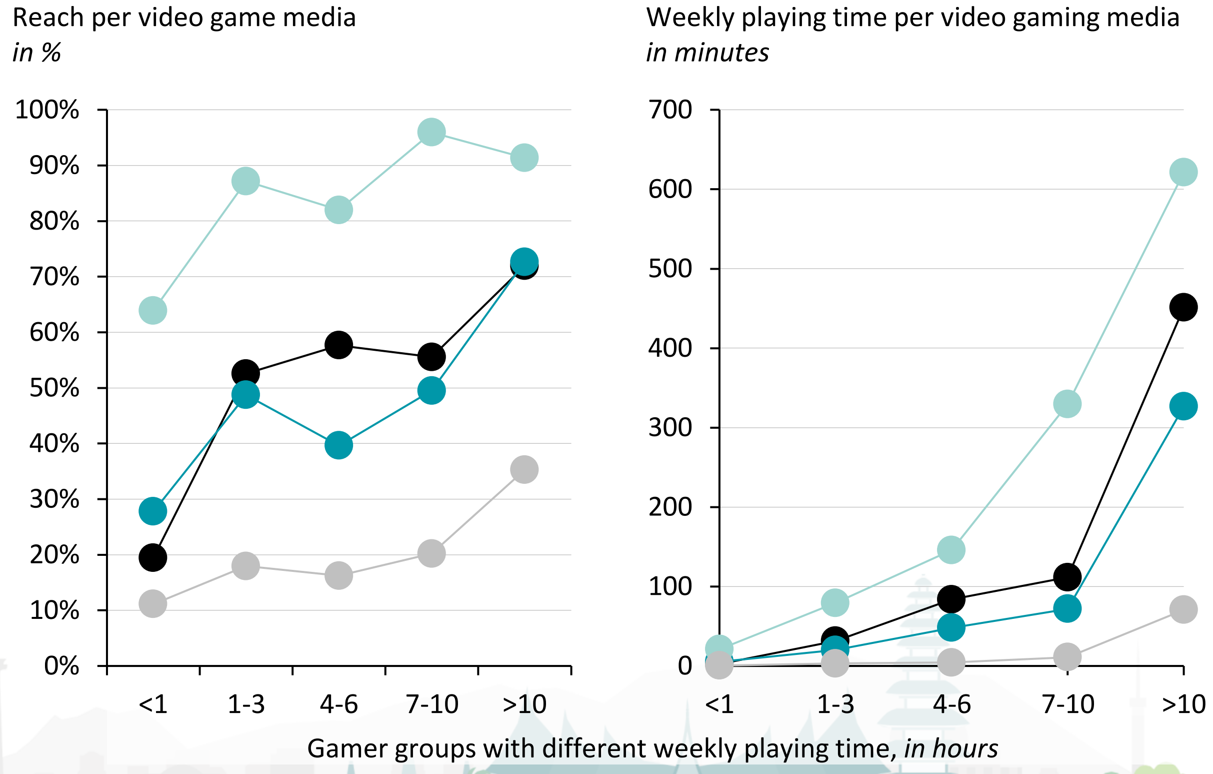
Engagement habits with video gaming content
among Indonesian video gamers over the last 6 months

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



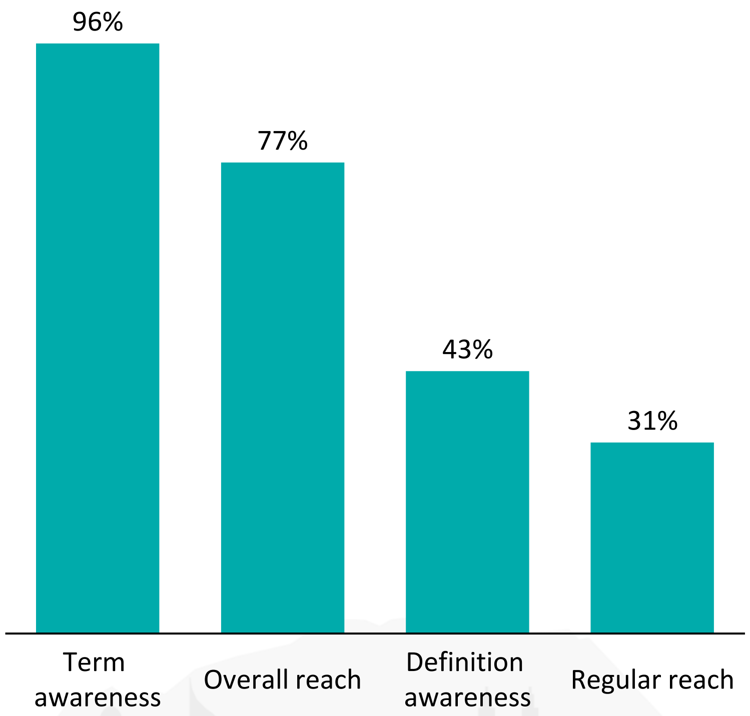
Usage of selected video gaming media by consumer type
among Indonesian video gamers over the last 6 months

Mobile | PC | Console | VR

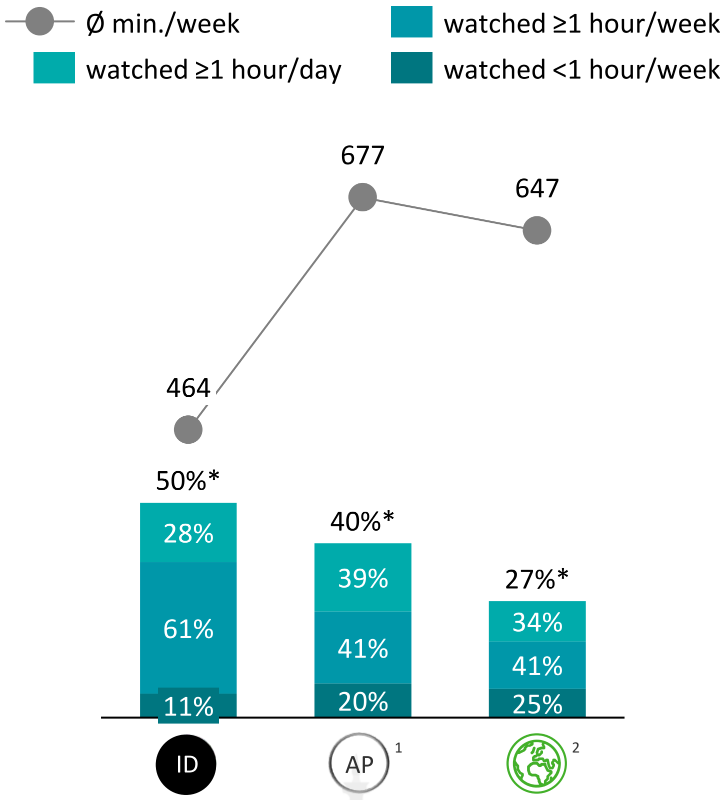


96% of Indonesians are familiar with the term “esports”, 43% are aware of the definition. An esports viewer spends a monthly average of 131,374 IDR on esports-related items, mainly on attending events, merchandise and accessing content.

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

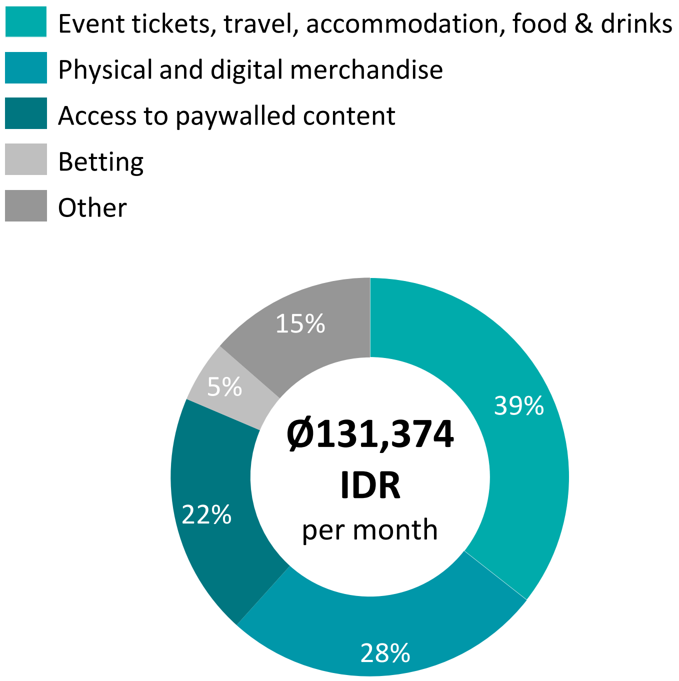


Esports reach and weekly consumption times
among Indonesians in the last 6 months



*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 month, respectively.

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



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

04 | Glossary (1/3)

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 (2/3)

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-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 (3/3)

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:

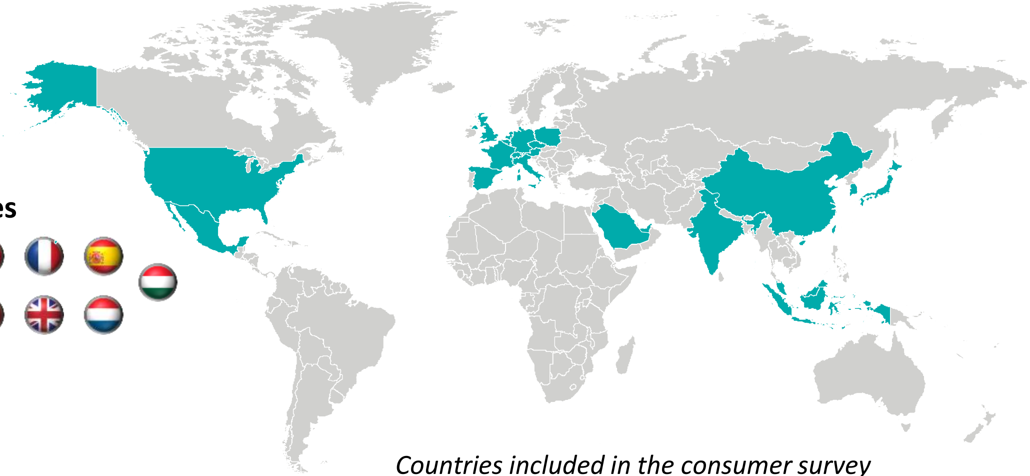
Online interviews w/
53 market experts

- Teams
- League & Event Hosts
- Further stakeholders

15 European countries

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

2| Assessment of current **market trends**



Countries included in the consumer survey

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