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Let's Play, Singapore!

Video gaming & esports 2022

April 2023



MAKING AN
IMPACT THAT
MATTERS
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01 | Profile of Singapore respondents (1/3)

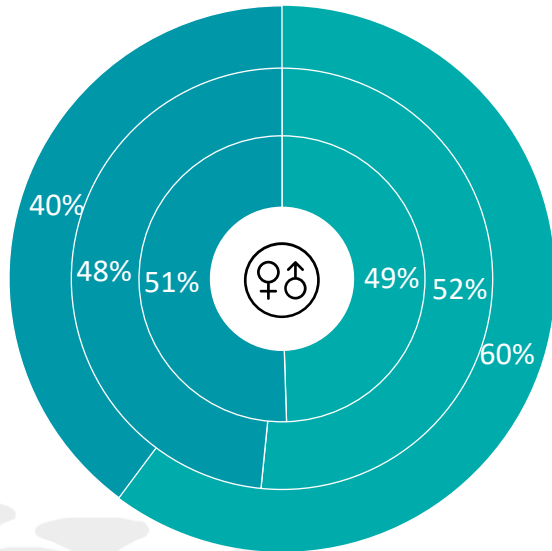
The survey population consists of an equal number of male and female respondents, but the proportion of males who watch esports is higher compared to females. While the overall population consists of a larger proportion of millennials and Gen X, when looking at the breakdown of video gamers and esports viewers by age group, we see that a larger proportion of Gen Z and millennials are esports viewers compared to Gen X and boomers. 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)

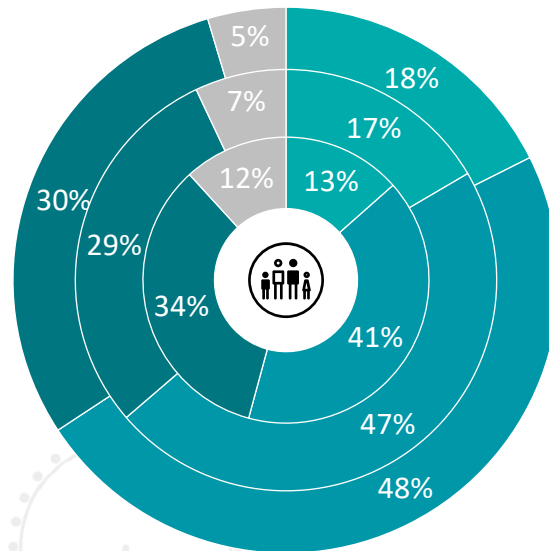
Male Female



Age distribution

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

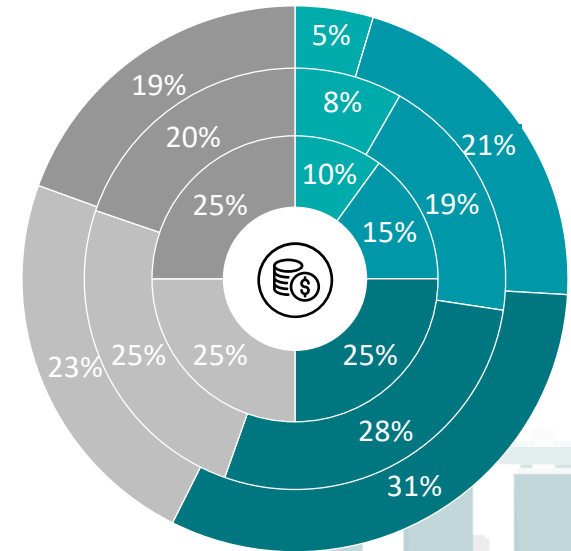
16-24 (Generation Z) 42-56 (Generation X)
25-41 (Millennials) 57+ (Baby Boomers)



Income distribution

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

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



01 | Profile of Singapore respondents (2/3)

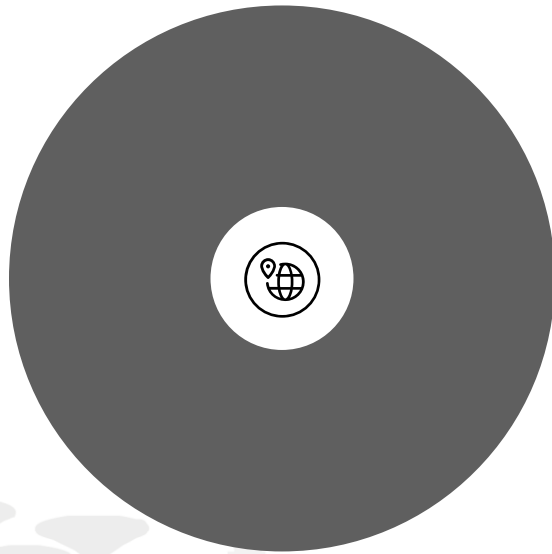
Esports viewers and video gamers, are predominantly people who have full-time employment. However, looking at the breakdown of esports viewers and video gamers by employment status, there is also a significant proportion of students with a side job. While the professional background of the largest group in the overall sample population was in the "others" category, the statistics suggested that individuals with professional backgrounds in business and economics and STEM are more likely to be esports viewers compared to video gamers and the general population.



Hometown size¹

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

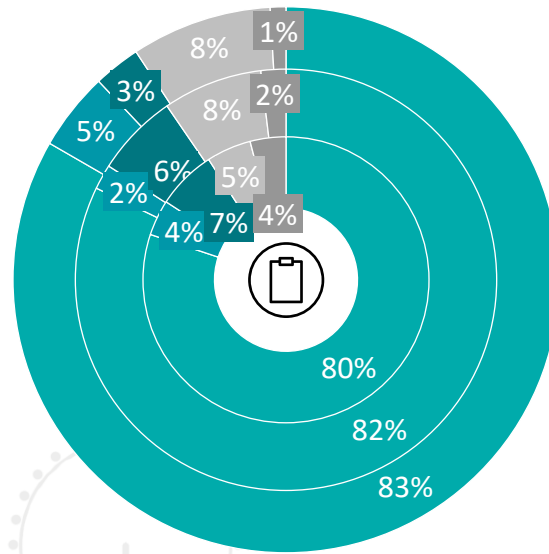
- Small town or rural area
- Large city
- Medium-sized town
- Very large city
- Not applicable



Employment status

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

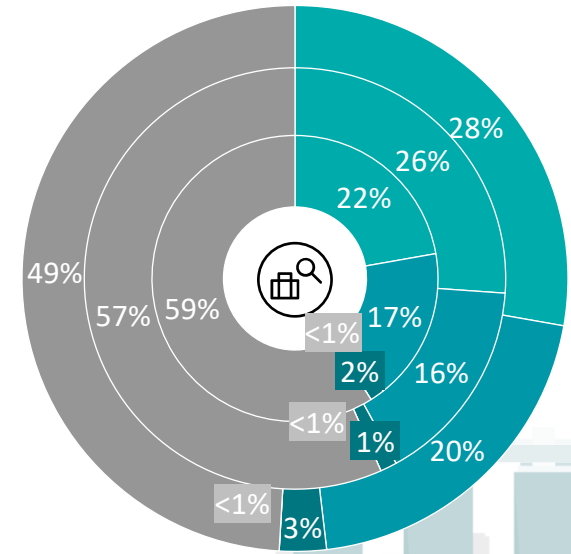
- Full-time
- School / university student
- Part-time
- Other
- Self-employed



Professional background

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

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



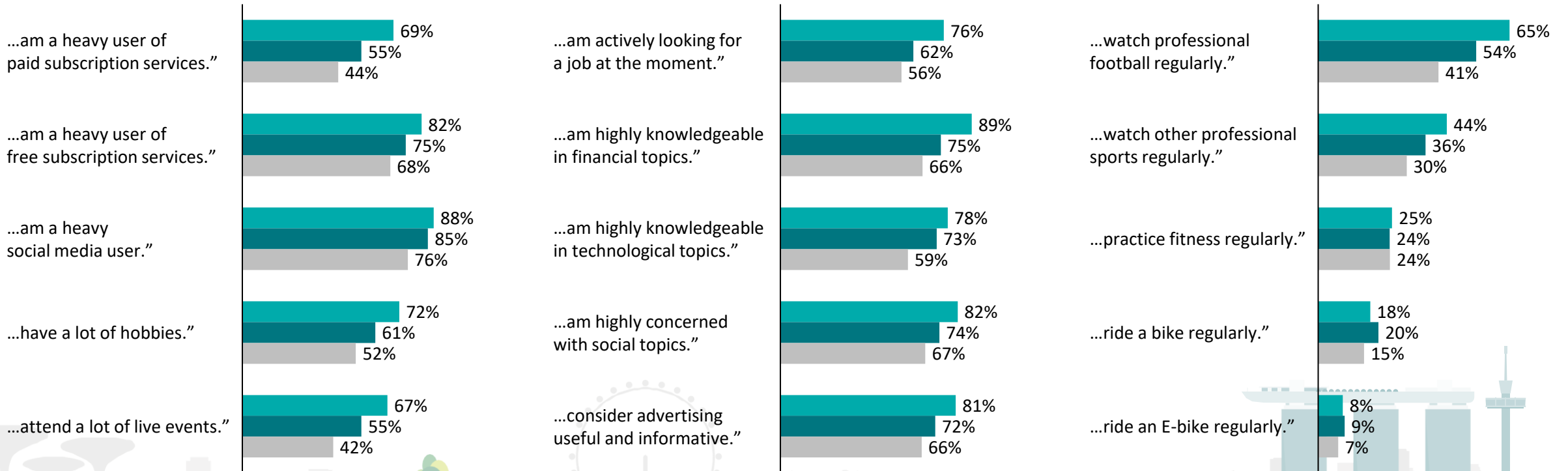
1) Information on hometown size are not included in the survey due to the fact that Singapore cannot be differentiated into different city sizes

01 | Profile of Singapore respondents (3/3)

Of the 15 specific characteristics surveyed in this study, esports viewers resonate and identify with all but 3 characteristics more frequently than the overall population. The 3 characteristics where esports viewers are comparatively on par with the population all relate to physical activities.



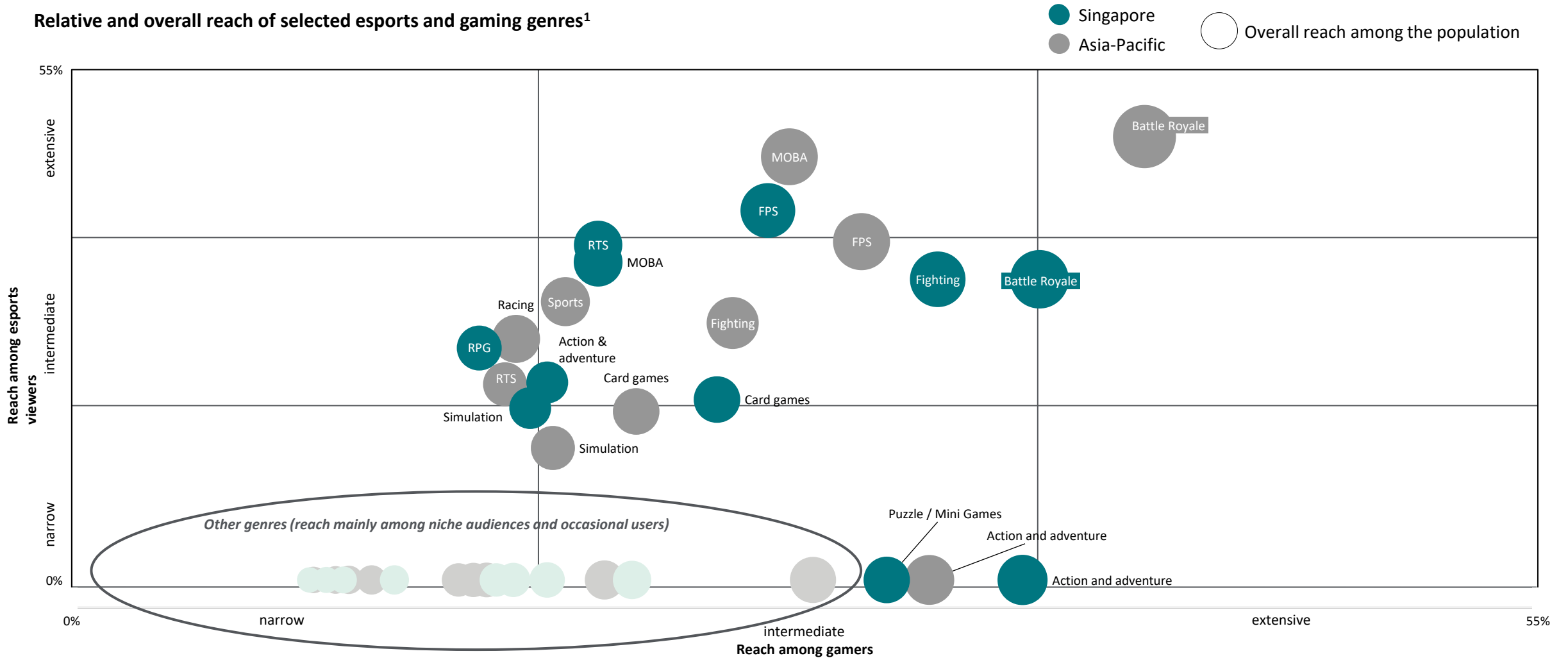
“I...



01 | Popular games among esports viewers and video gamers in the Singapore respondent group

Battle Royale and First-person Shooter (FPS) belong to the esports genres with the highest reach among esports viewers and video gamers in Singapore specifically and in Asia-Pacific overall.

Relative and overall reach of selected esports and gaming genres¹

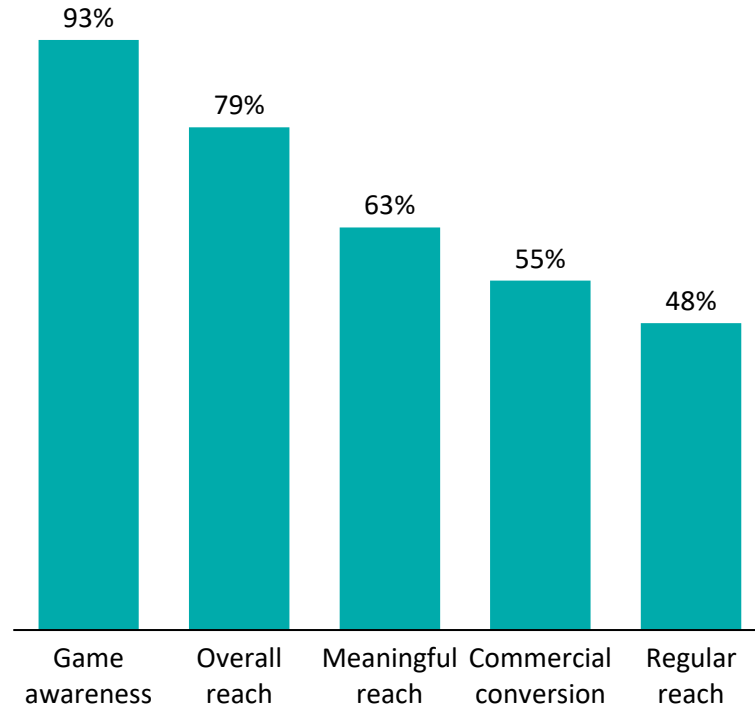


1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%
Source: Deloitte analysis

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

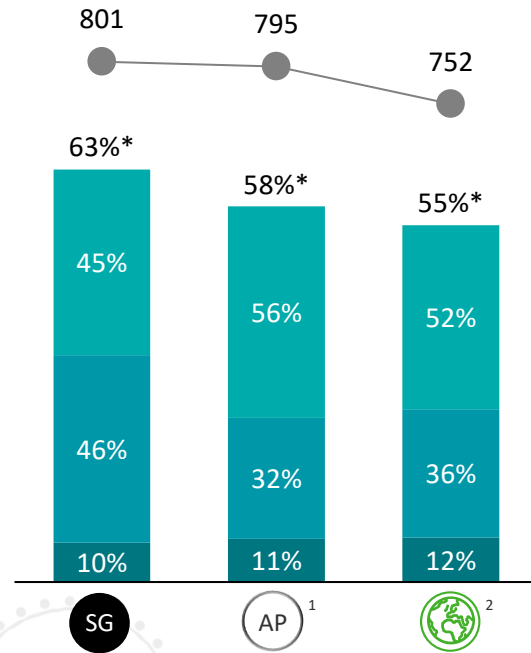
While 93% of Singapore respondents are aware of video games, only 55% are commercially engaged. The monthly video gaming-related spending numbers is 50 SGD per video gamer on average.

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



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

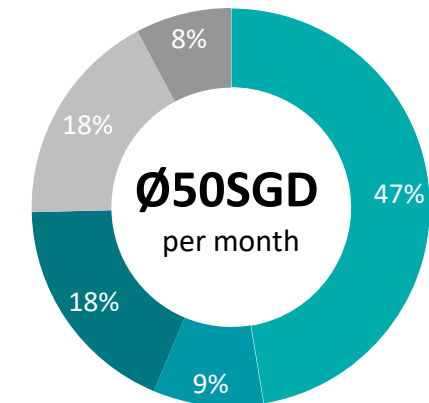
● ∅ min./week
■ played ≥1 hour/day
■ played ≥1 hour/week
■ played <1 hour/week



*63%, 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 Singaporean 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) Asia-Pacific (AP) includes data from China, India, Japan, South Korea, Indonesia, Malaysia and Singapore; 2) "Global" refers to data from all countries included in the consumer survey

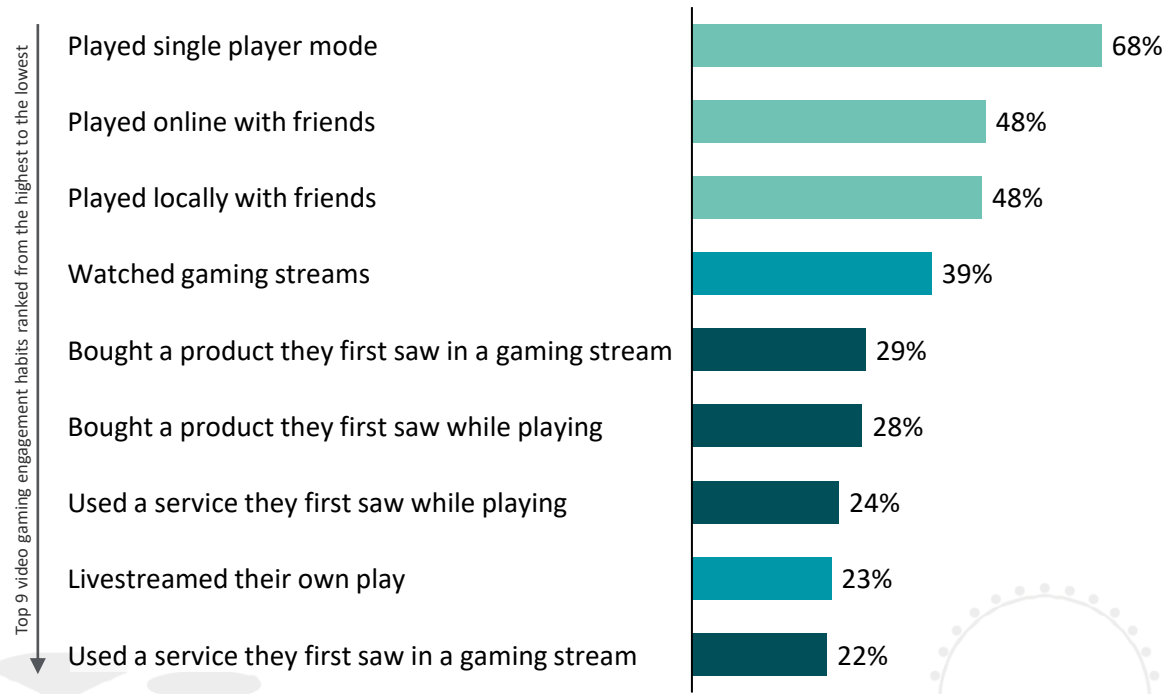
02 | Consumption of video gaming content in Singapore (2/2)

Among Singaporean video gamers, about 28% 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 weekly playing time is the mobile phone.



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

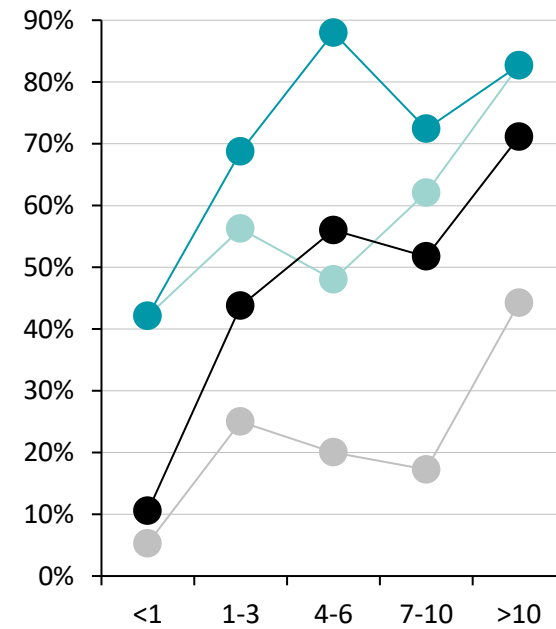
Playing behaviour Video game streaming Purchases driven by video gaming



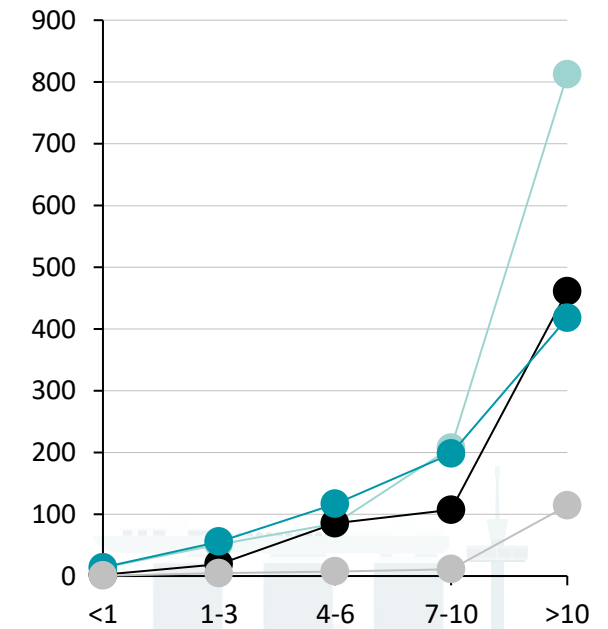
Usage of selected video gaming media by consumer type
among Singaporean video gamers over the last 6 months

Console Mobile PC VR

Reach per video game media
in %



Weekly playing time per video gaming media
in minutes

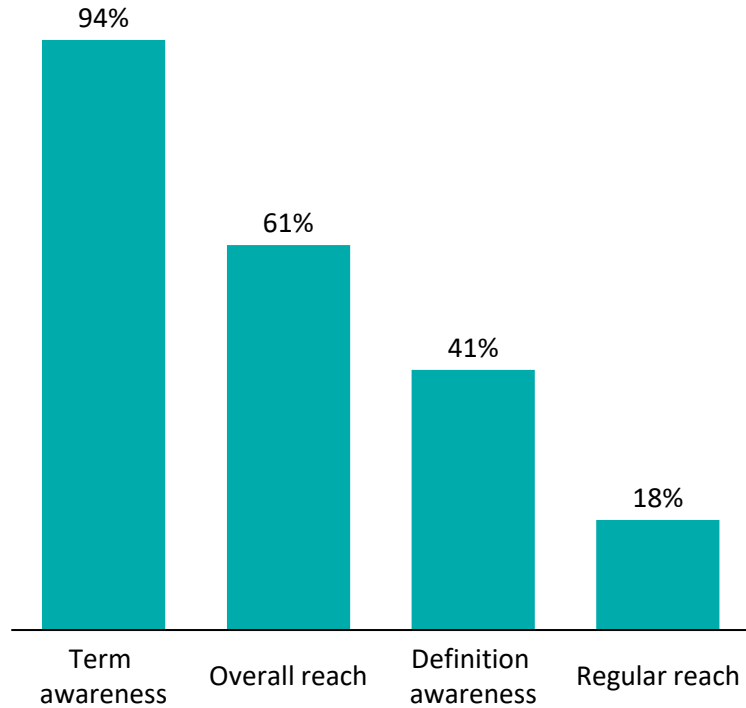


Gamer groups with different weekly playing time, in hours

03 | Esports in Singapore

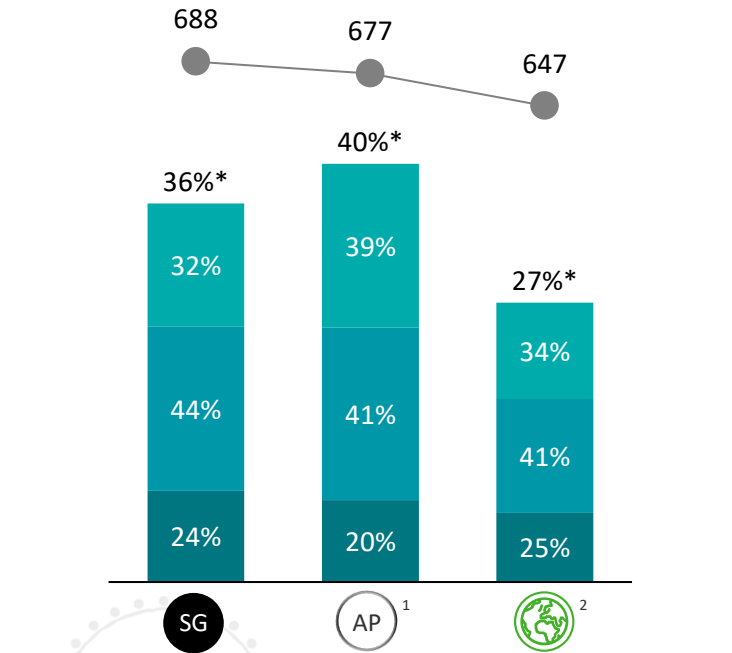
94% of Singapore respondents have heard of the term “esports”, but only 41% are aware of the definition. An esports viewer spends a monthly average of 30 SGD on esports-related items, mainly on attending events, merchandise and accessing content.

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



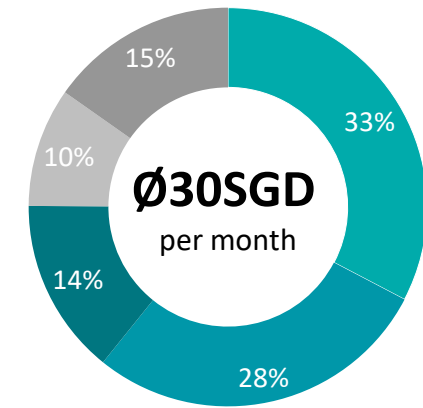
Esports reach and weekly consumption times among Singaporeans in the last 6 months

- ∅ min./week
- watched ≥1 hour/day
- watched ≥1 hour/week
- watched <1 hour/week



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

- Event tickets, travel, accommodation, food & drinks
- Physical and digital merchandise
- Access to paywalled content
- Betting
- Other



1) Asia-Pacific (AP) includes data from China, India, Japan, South Korea, Indonesia, Malaysia and Singapore; 2) “Global” refers to data from 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

06 | Authors of the study



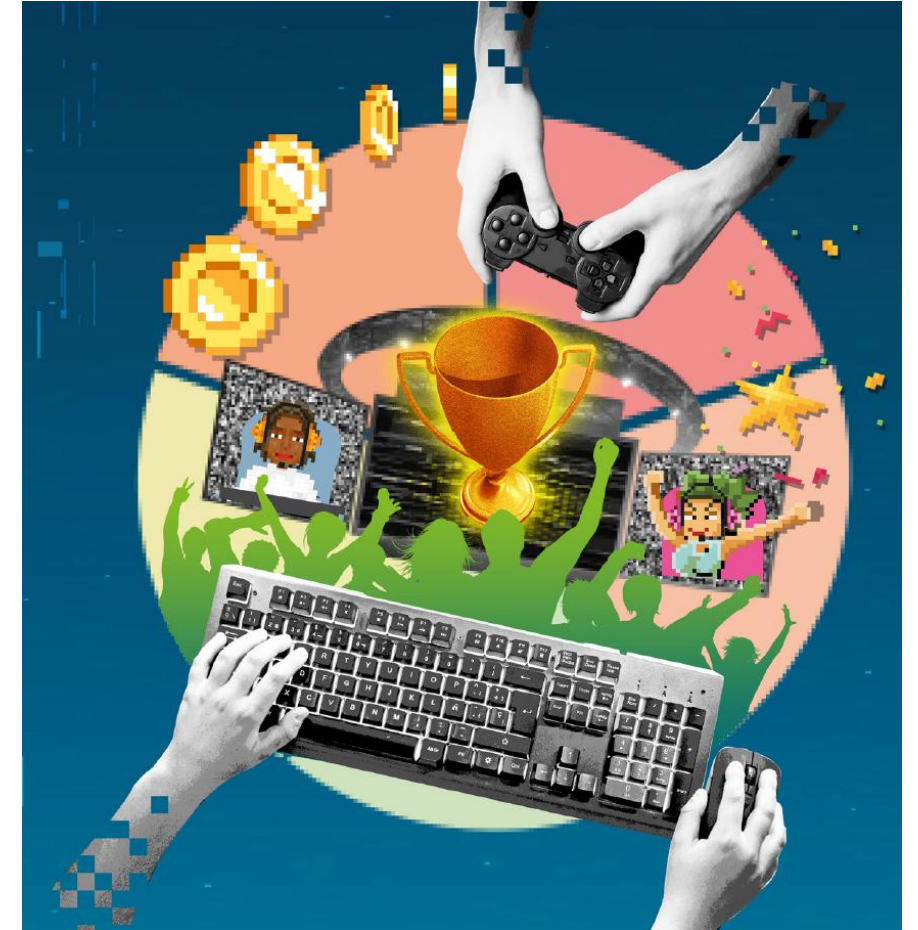
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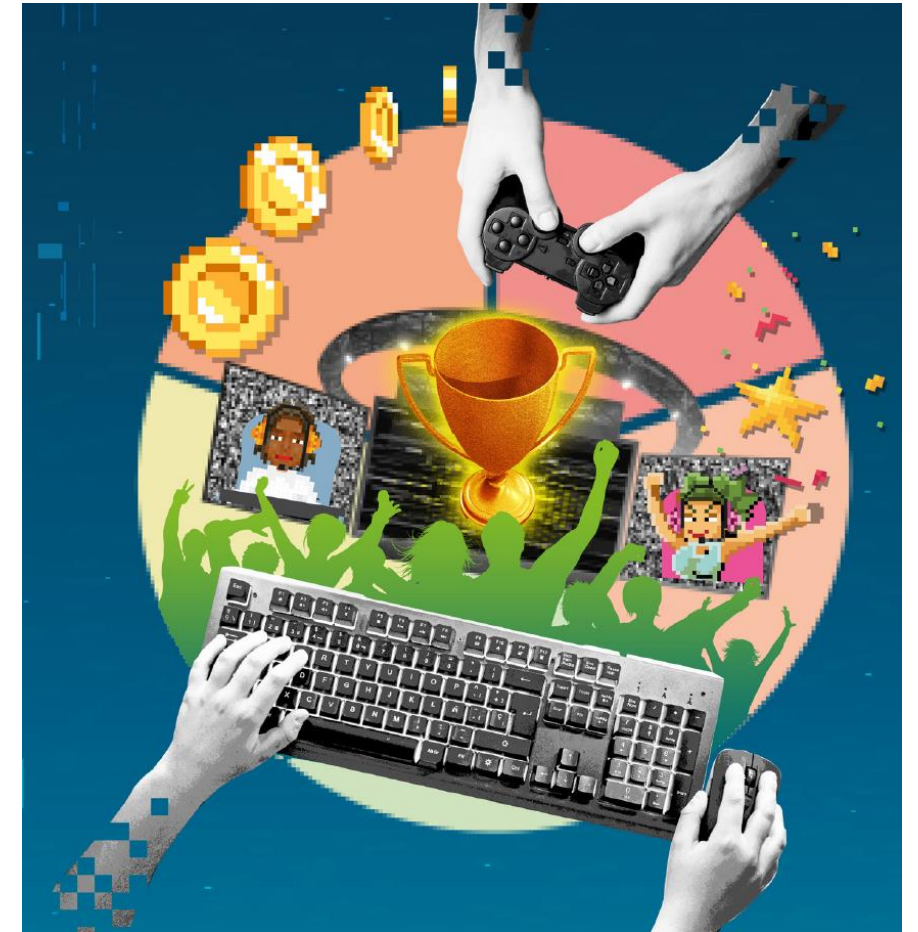
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