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GAMBLING MARKET DEVELOPMENT IN THE PERIOD 2020-2021

The data presented below in this document are based on the assessed tax obligations of operators of individual types of gambling games in the Czech Republic, and the source of the data is the Ministry of Finance of the Czech Republic. The stated data may have changed since they were provided, in particular in connection with the additional assessment of the tax liability by public authorities, or on the basis of additional submissions by gambling operators, however, such changes should not result in any big change in the facts below.

The table below shows the individual quarters (tax periods) of the respective years 2020 and 2021. Within the data below, we must also take into account the consequences caused mainly by the Czech government's efforts to prevent the **spread of Covid-19** (government measures against the spread of the virus); the **tax periods of 2Q 2020** (gaming premises were closed for about 66% of the period), **4Q of 2020** (gaming premises were closed for about 75% of this period) and **1Q 2021** (gaming premises were closed for the entire tax period) were most **affected** by these efforts.

Within the period **1Q of 2021**, the assessed tax on gambling does not correspond to the achieved economic results, when the **institute of the so-called minimum partial tax** on technical gambling according to the provisions of Section 5, Paragraph 4 of Act No. 187/2016 Coll., on Gambling Tax, was **very questionably applied** by the state, although the operation of these gaming premises was in fact completely banned by the state.

The economic results of fixed-odds betting operators were most affected in the 2Q tax period in 2020, when the market had a decline of about 50%, mainly due to the almost global ban on sporting events organizing, when the offer of betting opportunities declined sharply as a result of these measures.

1. All Types of Gambling Games

GAME TYPE LB/online	I. Q 2020	II. Q 2020	III. Q 2020	IV. Q 2020	I. Q 2021	II. Q 2021	III. Q 2021
LOTTERY							
• land-based	559 464	430 634	517 071	717 127	517 925	557 735	581 152



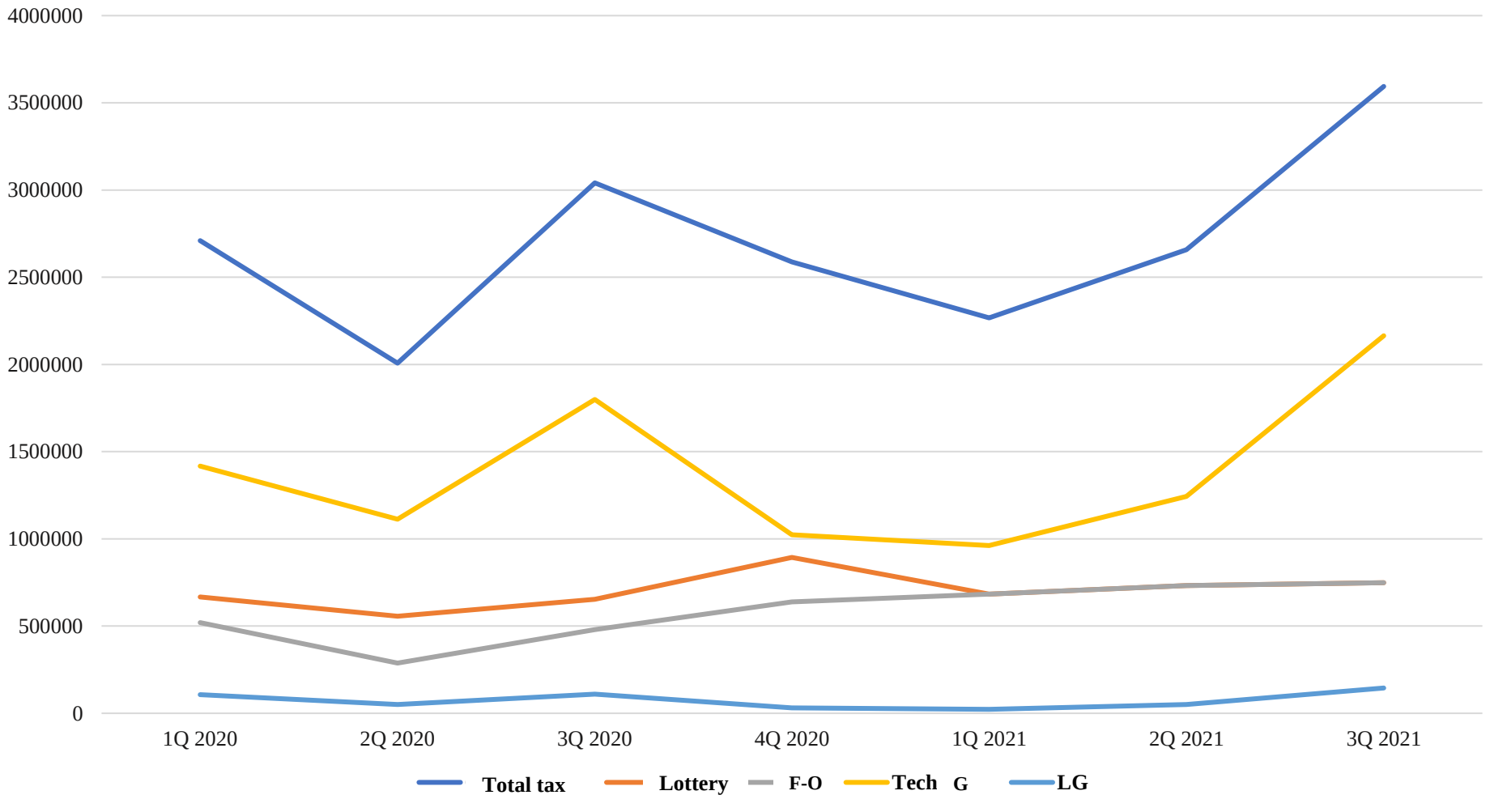
• online	106 990	125 611	135 907	176 496	166 002	174 640	167 463
total	**666 454**	**556 245**	**652 978**	**893 623**	**683 927**	**732 375**	**748 615**
FIXED-ODDS BETTING							
• land-based	56 076	23 261	51 173	48 254	16 547	55 712	39 695
• online	463 854	264 556	427 848	590 581	582 256	626 756	495 572
total	**519 930**	**287 817**	**479 021**	**638 835**	**683 927**	**682 468**	**535 267**
TOTALIZER							
• land-based	296	132	0	398	463	0	366
• online	0	0	0	0	0	0	0
total	**296**	**132**	**0**	**398**	**0**	**0**	**366**
BINGO							
• land-based	0	150	103	8	0	0	0
• online	0	0	0	0	0	0	0
total	**0**	**150**	**103**	**8**	**0**	**0**	**0**
TECHN. GAME							
• land-based	1 031 893	602 835	1 267 042	316 845	233 054	403 981	1 329 540
• online	384 742	509 618	532 299	706 988	728 628	839 368	835 303
total	**1 416 635**	**1 112 453**	**1 799 341**	**1 023 833**	**961 682**	**1 243 349**	**2 164 483**
LIVE GAME							
• land-based	89 132	30 695	95 106	12 400	0	28 941	128 066
• online	17 693	19 898	14 035	19 112	22562	22 155	16 831
total	**106 825**	**50 593**	**109 141**	**31 512**	**22562**	**51 095**	**144 897**
MEASURED TAX	**2 710 140**	**2 007 390**	**3 040 584**	**2 588 209**	**2 267 438**	**2 658 192**	**3 593 988**

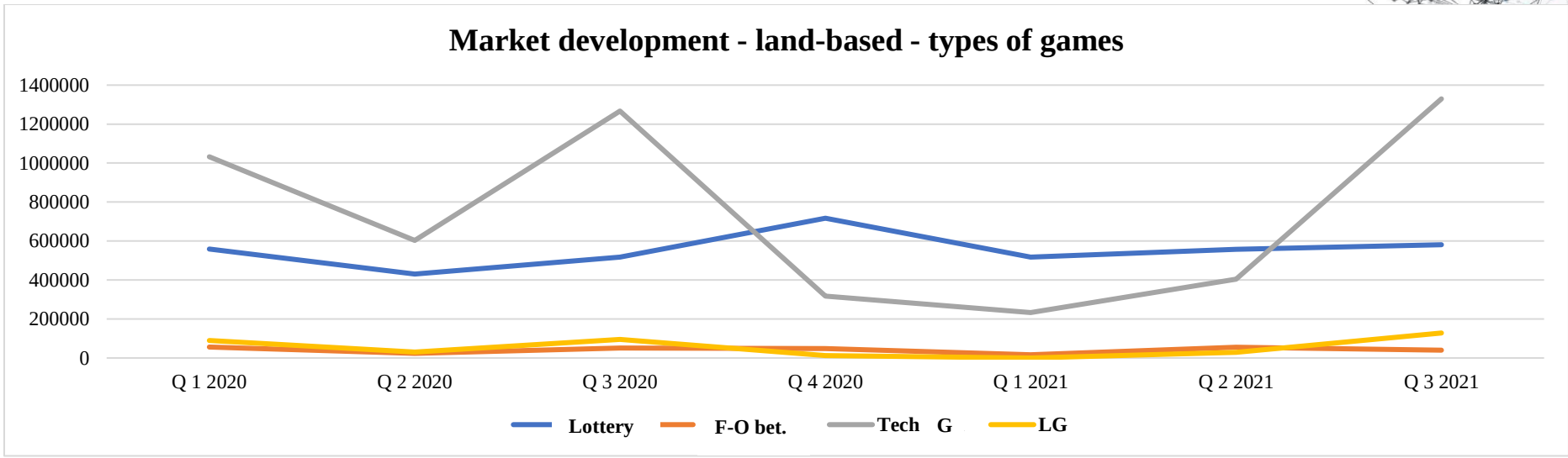
1 = CZK 1,000

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MARKET DEVELOPMENT - types of games - 2020 - 2021

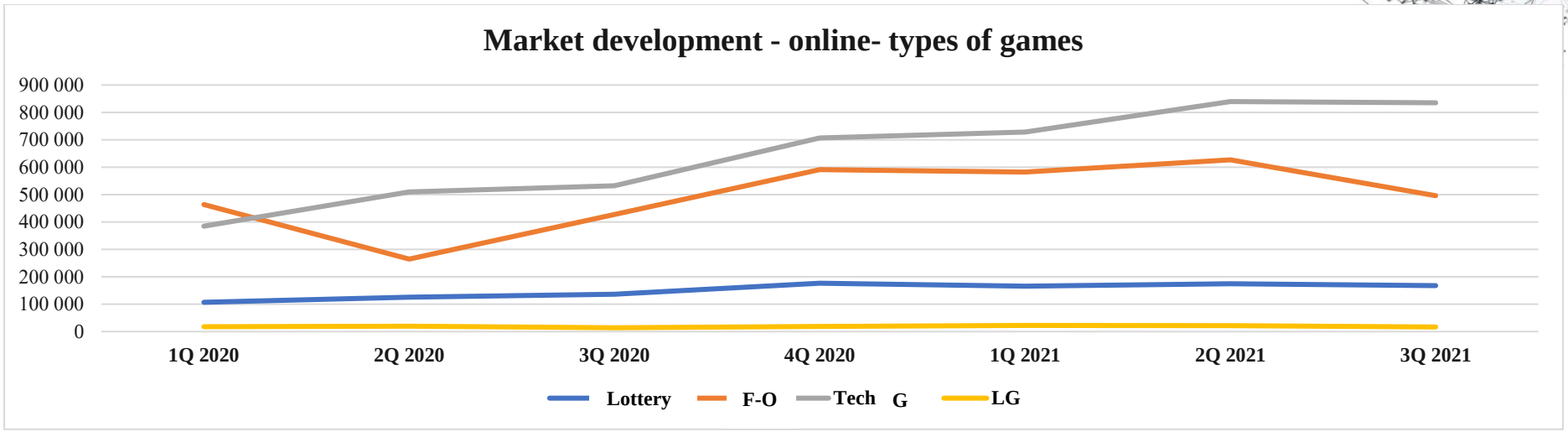



Market development - land-based - types of games
1400000
1200000
1000000
800000
600000
400000
200000
0
Q 1 2020
Q 2 2020
Q 3 2020
Q 4 2020
Q 1 2021
Q 2 2021
Q 3 2021
Lottery
F-O bet.
Tech G
LG

1 = CZK 1,000

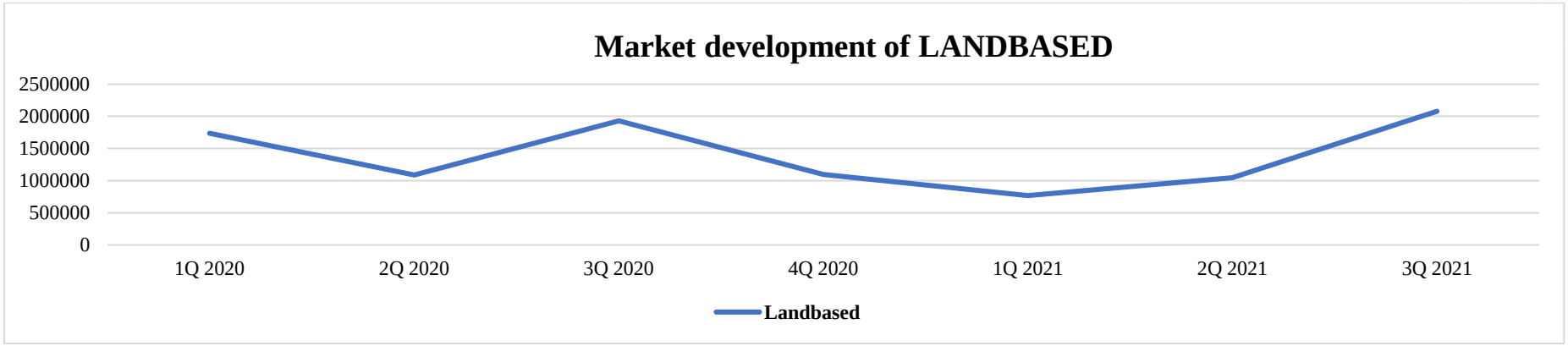
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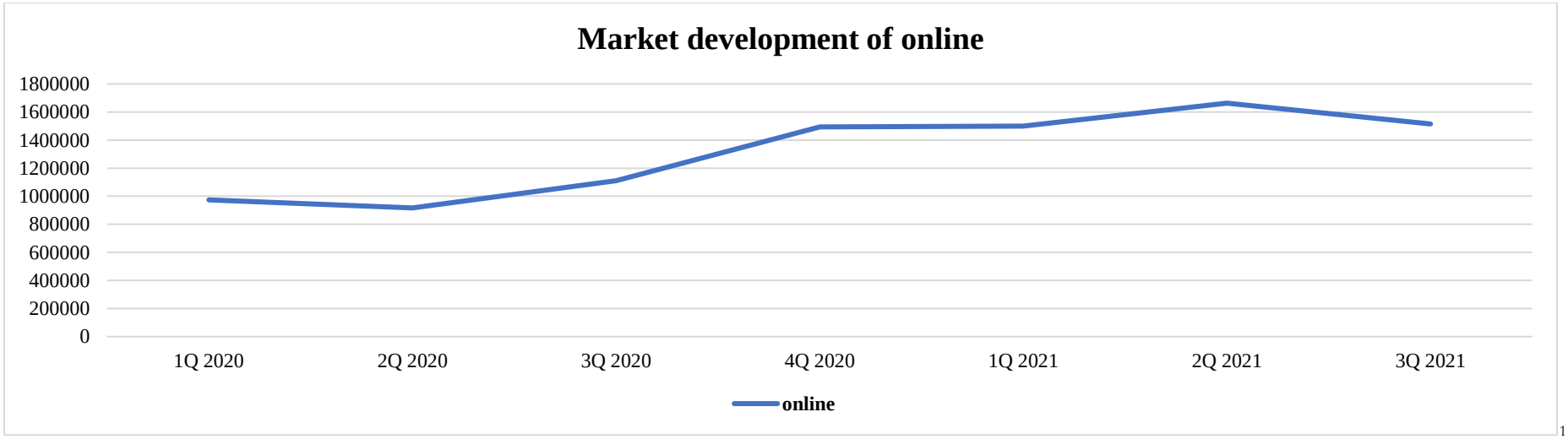


1 = CZK 1,000

2. Market Development with Land-Based and Online Divisions (Without Division into Game Types)

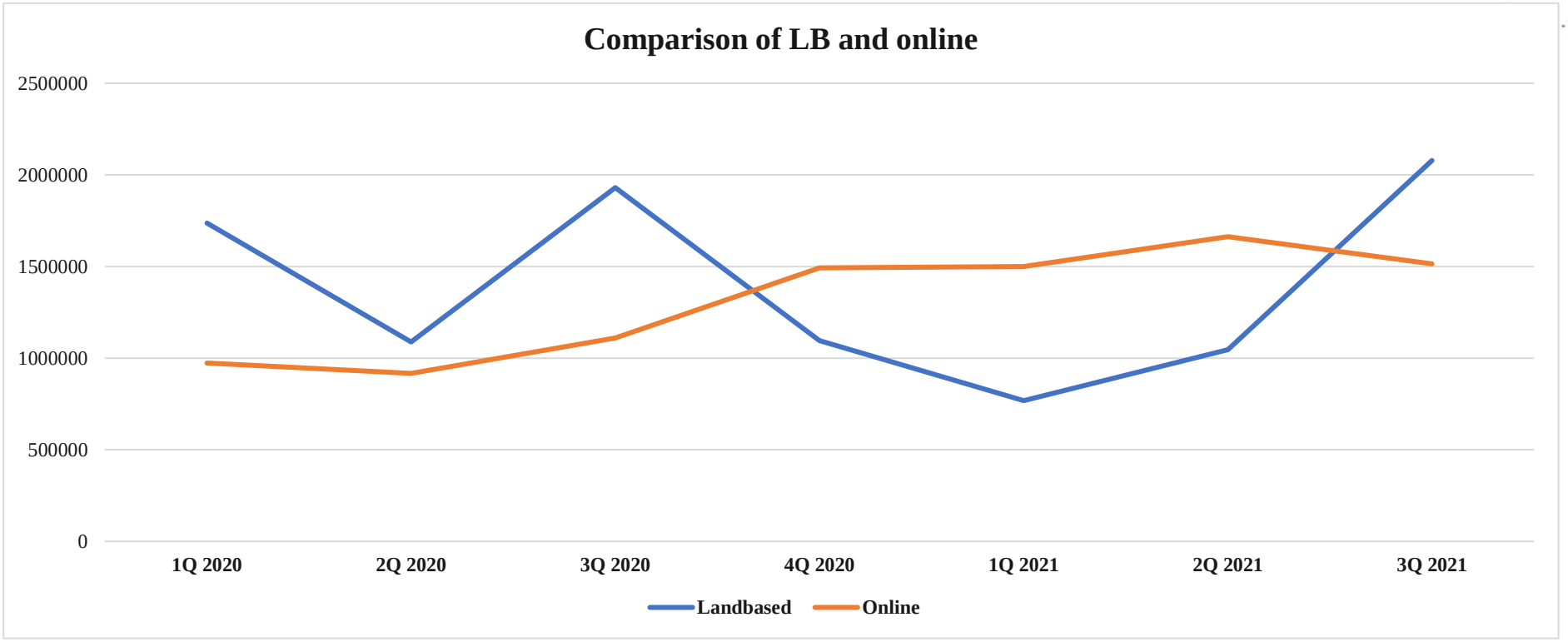


1 = CZK 1,000



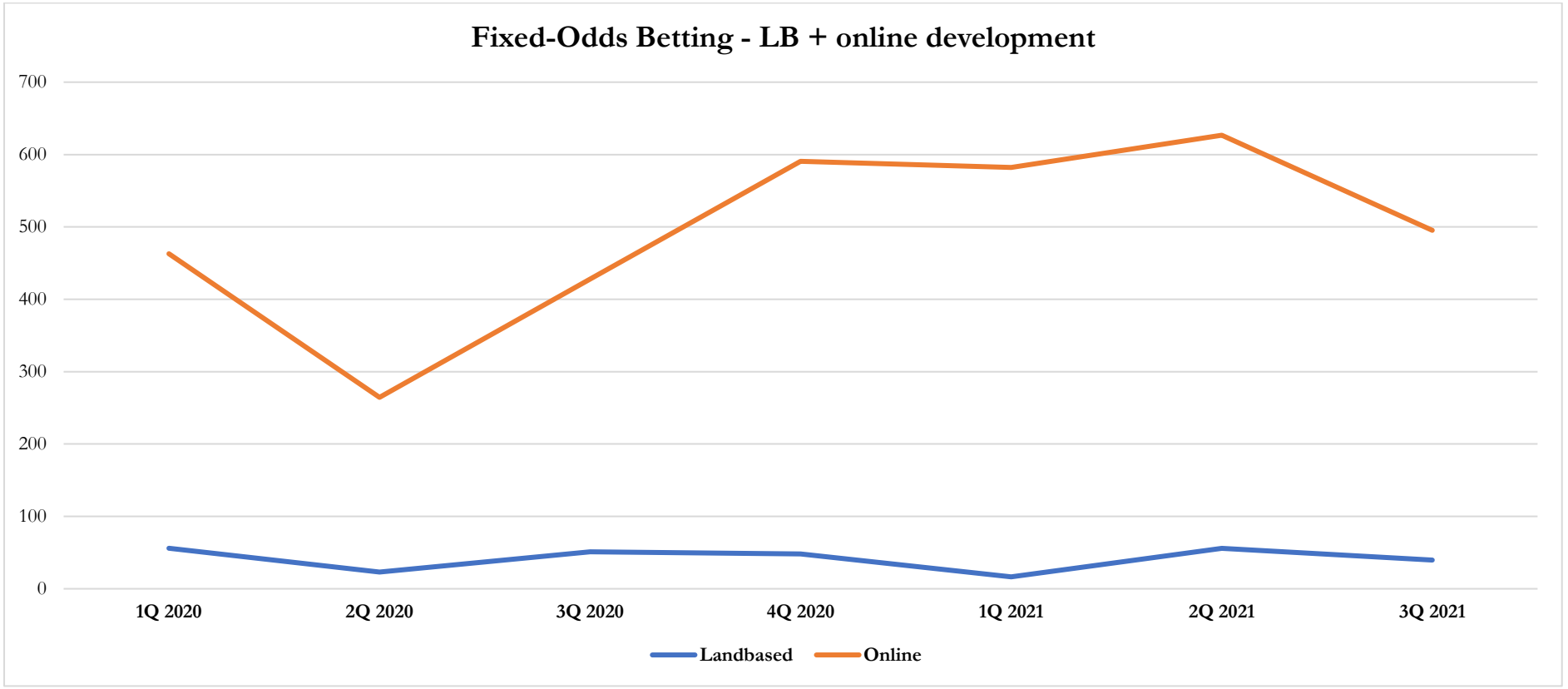
1 = CZK 1,000




Comparison of LB and online
2500000
2000000
1500000
1000000
500000
0
1Q 2020
2Q 2020
3Q 2020
4Q 2020
1Q 2021
2Q 2021
3Q 2021
Landbased
Online

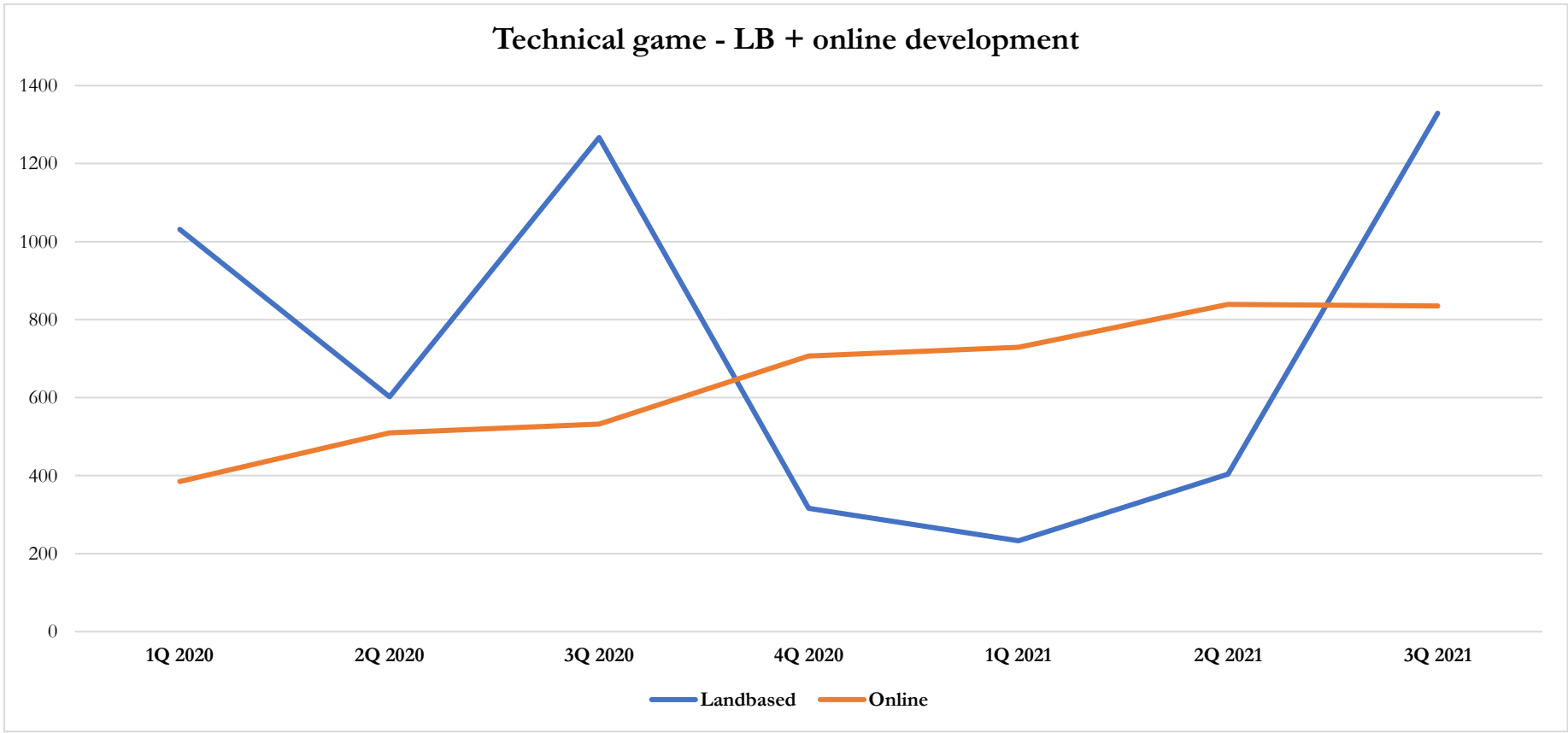
1 = CZK 1,000

3. Land-Based and Online Fixed-Odds Betting



1 = CZK 1,000

4. Land-Based and Online Technical Gambling Game



1 = CZK 1,000