

INTERIM RESULTS

6 MONTHS TO JUNE 2021

SEPT 2021



ESCAPE HUNT

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**PERFORMANCE
OVERVIEW**



OVERVIEW – PERIOD UNDER REVIEW

“It is clear that Escape Rooms have now entered the mainstream consumer psyche underpinning confidence in our strategy to expand both our owner operated and franchise networks”

Strong bounce back from UK sites re-opened on 17 May

- Revenue £1,178k with UK sites open for only six weeks in the period (2020: £1,306k from c.11 weeks UK trading)
- Site level EBITDA £441k (2020: 499k)
- Downloadable and play at home games contributed £151k in the period
- Adjusted EBITDA loss in the half year reduced to £796k (2020: £816k)

Company acquisitions

- Dubai acquisition performing ahead of expectations, having already fully paid back its investment
- Completion of £1.4m placing of new shares at 17.5p per share in January to fund acquisition of Master Franchise in France and Belgium and provide working capital

Further strategic progress

- New sites opened in Watford and Kingston on 17 May 2021
- Further sites secured and in build at Lakeside and Milton Keynes
- Healthy pipeline of future sites

OVERVIEW – POST PERIOD END HIGHLIGHTS

Significant milestone achieved – Group profitability in both July and August

Sales in the owner operated estate running significantly ahead of management expectations

- Strong bounce back in sales post COVID has accelerated
- UK LFL sales up 17% vs 2019, and **total sales up 92%** in the 16 weeks to 5 September 2021,
- UK **LFL sales up 31%** vs 2019 in 9 weeks to 5 September 2021
- New owner operated sites hitting maturity quicker than the historic precedent
- Franchise business trading in line with expectations, but still hampered by lockdown restrictions in some territories
- **Receipt of £950k (net of fees) in R&D credits** in September 2021, further boosting cash resources

All owner operated sites contributing profitably

- UK LFL EBITDA up 172% vs 2019
- Total site **EBITDA up 326%** vs 2019
- In both July and August, the Company was **profitable at Group EBITDA level** - a major milestone for the business
- Even stripping out the current VAT benefit, trading supports the previous assertion that the business would become profitable and cash generative over a full year once it exceeded 15 O+O sites

Still delighting customers

- Received TripAdvisor™ Traveller's Choice awards at all eligible UK sites for second year in a row, recognizing the top 10% of attractions globally

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SUMMARY OF FINANCIAL STATEMENTS

PERFORMANCE: 6 MONTHS TO JUNE '21

Strong bounce back after re-opening

- Owner operated revenue £936k with UK sites open for only 6 weeks in the period (2020: £1,017k from c.11 weeks trading)
- Franchise revenue sustained notwithstanding closures

Adjusted EBITDA loss reduced £796k (2020: £816k)

- UK site EBITDA (£199k) sustained with only 6 weeks trading in the period; helped by govt support, outdoor and remote
- UK site performance benefitting from improved operating leverage and larger estate
- Franchise EBITDA (£242k) was 4% lower than 2020, notwithstanding smaller network and significant closures
- Central costs were reduced by 9% highlighting enduring cost savings

Downloadable games contributed £151k revenue at high margin

- Investment in business development to focus on B2B sales
- Corporate activity is returning

£m	Six months to June	
	2021	2020
Revenue	1,178	1,306
Owner-operated sites	936	1,017
Franchise network	242	287
Unallocated	0	2
Gross profit	801	900
Owner-operated sites	559	655
Franchise network	242	249
Unallocated	0	(4)
Other income	341	130
Site level EBITDA	441	499
Owner-operated sites	199	254
Franchise network	242	249
Unallocated	0	(4)
Central costs	(1,237)	(1,359)
Owner-operated sites	(146)	(81)
Franchise network	(99)	(110)
Unallocated	(992)	(1,168)
IFRS 16 Adjustments		44
Group EBITDA loss	(796)	(816)
Group loss before tax	(2,338)	(3,089)
Period end cash balance	2,414	1,114

CASHFLOW: 6 MONTHS TO JUNE '21

Continued careful management of cash

- Positive working capital movement from capex creditors and others
- C.£500k of property related creditors will unwind in H2

Capex used predominantly for site fit-out and games production

- Kingston and Watford completion; Sites delivered to budget
- Advance purchases for Lakeside and Milton Keynes

Successful fund raise in January 2021

- Raised £1.4m via placing at 17.5p per share
- Funds used to finance acquisition of France / Belgium plus working capital

£k	Six months to June	
	2021	2020
Adjusted Group EBITDA loss	(796)	(816)
Working capital and non-cash movements	704	720
Tax	(8)	2
Net Cash used in operating activities	(100)	(94)
Investing activities		
Purchase of tangible fixed assets	(1,001)	(634)
Disposals		47
Purchase of intangible assets	(70)	(170)
Loan to franchisee	(146)	(47)
Acquisitions, net of cash	(139)	
Other movements	26	9
Net cash used in investing activities	(1,330)	(795)
Financing		
Net proceeds from share issue	1,356	0
Loan repayments	(18)	
IFRS 16 interest and capital repayments	(224)	(161)
Net cash from Financing activities	1,114	(161)
Net increase / (decrease) in cash	(316)	(1,050)
Cash at beginning of the year	2,722	2,171
Forex	8	(7)
Cash at end of year	2,414	1,114

BALANCE SHEET AT 30 JUNE '21

£2.4m cash at period end and £2.4m as at 31 August 2021

- Goodwill of £500k recognized on acquisition of France / Belgium which assumes £250k earnout
- Investment into Houston site via enhanced profit share (loan to franchisee)
- Trade payables includes £390k of capex
- 'Other' includes £250k earnout provision, property dilapidations provision, rent-free provisions
- Loans include £310k of convertible loan notes, redeemable on 2 July 2025
- Other loans include €100k vendor loan re France plus bank borrowings in Brussels
- Receipt of £1.2m (£950k net) of R&D credits from HMRC in September 2021, further boosting cash balance

£k	Jun-21	Dec-20
Non current assets		
Property, plant and equipment	4,165	3,885
Right of use assets	2,852	2,940
Intangible assets	1,240	913
Loan to franchisee and rent deposits	123	28
	8,380	7,766
Current assets		
Inventories	21	16
Trade receivables	182	182
Other receivables and prepayments	765	691
Cash and bank balances	2,414	2,722
	3,382	3,611
Total Assets	11,762	11,377
Current liabilities		
Trade payables	(940)	(606)
Deferred income	(582)	(441)
Lease liabilities	(1,080)	(489)
Other	(1,708)	(815)
	(4,310)	(2,351)
Non-current liabilities		
Deferred income	(98)	(152)
Provisions	(160)	(128)
Loans, including convertible	(429)	(289)
Lease liabilities	(2,608)	(3,253)
	(3,295)	(3,822)
Total liabilities	(7,605)	(6,173)
Net assets	4,157	5,204

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The text 'RECENT PERFORMANCE' is written in a bold, white, sans-serif font, positioned below the number '3'. It is centered horizontally relative to the orange area.

RECENT PERFORMANCE



UK PERFORMANCE SURPASSING EXPECTATIONS

Strong like for like growth from mature sites

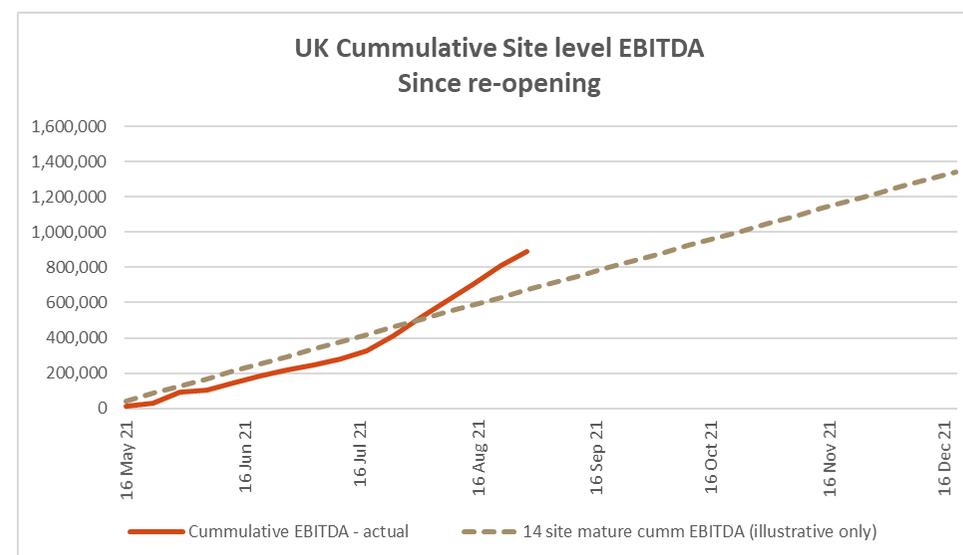
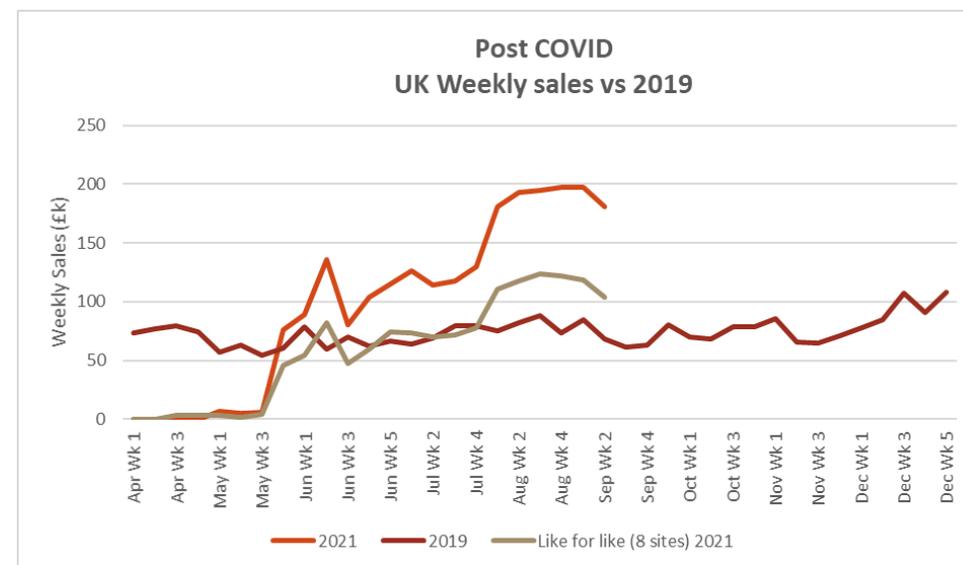
- Like for like revenue growth of 17% in 16 weeks since re-opening
- Accelerating trend – like for like growth in 9 weeks since period end was 31%
- Like for like site level EBITDA up 172% on 2019 in 16 week period

New sites reaching ‘mature’ performance ahead of expectations

- New sites at Watford, Cheltenham, Norwich and Basingstoke are already performing in line with some of our best sites
- Kingston tracking positively, with 3 rooms still to open

Ebitda margins significantly improved

- Drop through to EBITDA running ahead of plan
- Performance exceeding target site economics
- Benefitting from 15% VAT reduction and rates holidays
- Underlying margins are nevertheless stronger than expected
 - Evidence of technology and labour strategy paying off



CONTINUING TO DELIGHT CUSTOMERS

Each UK site open for more than one year has earned the prestigious TripAdvisor Travellers' Choice accreditation, awarded only to the very best bookable experiences globally.



- All sites in top 4 in their respective locations
- 9 / 14 are ranked #1

Escape Hunt Basingstoke

●●●●● 219 • #1 of 19 Fun & Games in Basingstoke • Escape Games

Escape Hunt Birmingham

●●●●● 1,627 • #1 of 124 Fun & Games in Birmingham • Escape Games

Escape Hunt Bristol

●●●●● 1,290 • #3 of 83 Fun & Games in Bristol • Escape Games & Entertainment

Escape Hunt Cheltenham

●●●●● 157 • #1 of 24 Fun & Games in Cheltenham • Escape Games

Escape Hunt Edinburgh

●●●●● 723 • #4 of 100 Fun & Games in Edinburgh • Escape Games

Escape Hunt Kingston

●●●●● 84 • #1 of 12 Fun & Games in Kingston upon Thames • Escape Games

Escape Hunt Leeds

●●●●● 1,244 • #1 of 95 Fun & Games in Leeds • Escape Games

Escape Hunt Liverpool

●●●●● 847 • #1 of 106 Fun & Games in Liverpool • Escape Games

Escape Hunt Manchester

●●●●● 1,048 • #3 of 96 Fun & Games in Manchester • Escape Games

Escape Hunt Norwich

●●●●● 383 • #1 of 53 Fun & Games in Norwich • Escape Games

Escape Hunt Oxford

●●●●● 996 • #1 of 38 Fun & Games in Oxford • Escape Games

Escape Hunt Reading

●●●●● 672 • #4 of 36 Fun & Games in Reading • Escape Games

Escape Hunt Resorts World

●●●●● 390 • #3 of 124 Fun & Games in Birmingham • Escape Games

Escape Hunt Watford

●●●●● 99 • #1 of 21 Fun & Games in Watford • Escape Games

ACQUISITIONS AND FRANCHISE DELIVERING

International Owned Sites

- **Dubai**
 - Site has been open throughout the period, although impacted by covid
 - Has consistently performed in line with or ahead of expectations
 - Acquisition has already paid back from profits
 - Exciting opportunity to exhibit in the Royal Kingdom of Saudi Arabia in the Riyadh Season
- **France / Belgium**
 - Closed until early June, but demand now returning
 - Both sites contributing meaningfully to site EBITDA

Escape Hunt



588 reviews

Galleria Mall Al Wasl Rd, Dubai, Emirate of Dubai, United Arab Emirates

Escape Hunt - Escape Game Paris



1,001 reviews

5 rue de Hanovre, Paris, Ile-de-France, France

Escape Hunt Brussels



713 reviews

Rue de Livourne 13-15, Brussels, Belgium

International Franchise Sites

- **International**
 - Australia had strong H1, but has since been affected by further lockdowns
 - Argentina and Singapore closed
- **USA**
 - Houston super centre delayed due to travel restrictions but now progressing
 - Discovery days held for prospective franchisees

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OUTLOOK



SUMMARY

Escape Hunt is a materially stronger business now than it was pre-COVID, and is extremely well poised to grow significantly from its now profitable base.

- Trading has been much stronger than expected post COVID
- Group profitability in July and August is cause for optimism about the remainder of the year and the future
- UK site 'box economics' proven and being exceeded
- Mature sites continue to show like for like growth
- New sites achieving 'mature' performance faster than previously
- Continue to 'delight' customers with 5-star ratings
- Target of 20 owner operated sites to be achieved ahead of schedule
- Acquisitions performing well and generating shareholder value

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APPENDIX



BACKGROUND ON ESCAPE HUNT

A LEADING INTERNATIONAL ESCAPE ROOM BRAND

A 360 GAMING BUSINESS

In venue immersive escape rooms or virtual reality

Outdoor explorer games

Location Neutral games for Consumers & Corporates

LOVED BY CUSTOMERS

100% 5* reviews from customers in the UK

Top rated across “Fun and Games” on TripAdvisor

TRUSTED BY WORLD CLASS STUDIOS

Partnered with the BBC to bring Doctor Who to life in site

Created a game for Netflix to accompany the launch of their film “Enola Holmes”



GLOBAL REACH ACROSS KEY TERRITORIES

GLOBAL FOOTPRINT

45 **12**

VENUES **COUNTRIES**

Owner operated estate:

- 17 owner-operated sites (including Paris, Brussels, Dubai) with a further 2 UK sites in build
- Further sites in pipeline
- Medium term target of 20 O+O sites by June 2022¹ expected to be exceeded

Franchisee estate:

- Additional 28 franchise sites
- Area representation agreement in place with Proprietor's Capital Holdings to roll out in the US



USA
Houston
Miami

BELGIUM
Brussels

NETHERLANDS
Groningen
Maastricht

KUWAIT
Kuwait

UK
Basingstoke
Birmingham (2)
Bristol
Cheltenham
Edinburgh
Leeds

AUSTRALIA
Adelaide
Brisbane
Gold Coast
Melbourne
Perth
Sydney

FRANCE
Belfort
Bordeaux (2)
Clermont-Ferrand
La Rochelle
Marseille
Metz
Nancy
Nantes
Paris
Toulouse
Lille

NORWAY
Bergen
Oslo
Trondheim

QATAR
Qatar

UAE
Dubai

PORTUGAL
Lisbon

SPAIN
Barcelona

Liverpool
Manchester
Norwich
Oxford
Reading
Watford
Kingston
Lakeside (in build)
Milton Keynes (in build)

1. Target set by the directors in June 2020 at the time of the fundraising which completed on 2 July 2020

A PREMIUM ESCAPE ROOM EXPERIENCE



PREMIUM LOCATIONS



PREMIUM LOUNGES



PREMIUM HOSTS



PREMIUM CONTENT

DIGITAL AND REMOTE PLAY

During 2020 Escape Hunt developed its portfolio to include digital and other remote play solutions catering to remote audiences, businesses and brands.

EH for Business:

- Developed portfolio of digital and 'play at home' products from scratch during 2020
- Scalable products
 - Largest game so far delivered to 342 players at once
- Growing B2B brand and opportunity
 - Served over 6,000 individuals through nearly 200 corporate bookings in December 2020 alone

EH for Brands:

- The print and play games launched during lockdown proved popular with customers and were picked up by Netflix
- In partnership with Netflix, we created a game to accompany the launch of the *Enola Holmes* film, released on September 23rd 2020 and generated over 15,000 downloads
- A Print & Play *Doctor Who* game was also launched in Summer 2020



THE BUSINESS MODEL

Escape Hunt operates owner managed sites in the UK and has a predominantly franchised business internationally.

OWNER MANAGED SITES

Revenue

- 4 players @ £22 incl VAT
- 5 - 6 rooms per site
- Median 40% occupancy (8 sessions per day, 7dpw)
- Additional 'outdoor' revenue
- Target £450k - £550k revenue per annum

Build cost

- Target £450 - £550k build cost; offset by any landlord contribution
- Aim for £120k - £180k Site level EBITDA per site

Costs

- Staffing c.35% of revenue
- Rents, rates, service charge @ £7k - £9k per month
- Marketing c.£5k per month
- Utilities and maintenance c.£2k per month

Returns

- Target >10% Cash return on investment yr 1; >25% in yr 2

FRANCHISE

Existing franchise network

- Typically 7.5% - 10% revenue share
- Fixed monthly admin fees - \$250 - \$500 per month
- Up-front fees typically US\$50k

US franchises

- 8% revenue share (min \$3.5k per month)
- Up front cash contribution \$50k
- Games license fees (for branded content)
- Revenue share and upfront fees shared with PCH subject to minimum threshold

THE INVESTMENT CASE

- ✦ Attractive industry dynamics – strong growth in experiential leisure
- ✦ International brand and ability to partner with global IP studios
- ✦ Site economics proven
 - Attractive site commercials; positive cash dynamics and flexible costs
 - Target 10%+ cash return on investment in Yr 1; 25%+ in Yr 2
- ✦ Very strong performance since UK sites re-opened in May 2021
 - Significantly enlarged UK estate
 - Encouraging performance from international, notably recent acquisitions
 - Strong like for like growth and EBITDA margins
- ✦ Opportunity to scale internationally through franchise network leveraging UK experience

BOARD OF DIRECTORS

RICHARD ROSE, NON-EXECUTIVE CHAIRMAN

Richard has a wealth of experience chairing high profile boards. He has been Non-Executive Chairman of Watchstone Group plc since May 2015. Previously he has held a number of positions in organisations such as AC Electrical Wholesale, where he was Chairman from 2003 to 2006 and Whittard of Chelsea plc, where he was Chief Executive Officer and then Executive Chairman from 2004 to 2006. In accordance with best practice under the UK Corporate Governance Code, he stepped down as Non-Executive Chairman of Booker Group plc in July 2015 having served three terms of three years each and in 2016 he retired as Chairman of AO World plc. Most recently, he was Non-Executive Chairman of CurrencyFair Limited, where he served from 2016 to 2019.

KAREN BACH, NON-EXECUTIVE DIRECTOR

Karen who joined the Company on its admission to AIM in May 2017 is a Chair and non-executive director with strong technology, scale-up and transactional expertise. She describes herself as a lover of clever tech and is a huge fan of digitalisation and simplification. She chooses to work with teams with energy, passion and transparency. In addition to being the Senior Independent Non-Executive Director of Jigsaw, Karen is Chairman of Aferian plc (formerly known as Amino Technologies plc) and DeepMatter Group plc and Consult Red (a trading name of Red Embedded Consulting Limited) and a non-executive director of Datapharm Limited. Previously, she was Chairman of IXCellerate Limited, a non-executive director of Belvoir Lettings Plc and KRM22 plc and trustee of the Learning Foundation. Karen gained much experience internationally as Chief Financial Officer at growing technology businesses IXEurope Plc, ACS Plc and Kewill Plc and with blue chip multi-nationals, including EDS France, MCI WorldCom, General Motors and Ernst & Young. Karen is also a member of the 30% Club which supports boards to appoint more female directors and increase the pipeline of upcoming female talent.

RICHARD HARPAM, CHIEF EXECUTIVE OFFICER

Richard joined the Company on its admission to AIM in May 2017 having worked since November 2016 with the Jigsaw management team. Richard's prior role was with Harris + Hoole, having been Chief Financial Officer and then Managing Director, responsible for its turnaround. Before this, Richard spent over four years at Pret A Manger as Global Head of Strategy. Richard has also held a number of strategic and financial positions at companies including Constellation Brands, Shire Pharmaceuticals and Fujitsu Siemens Computers.

GRAHAM BIRD, CHIEF FINANCIAL OFFICER

Graham, who joined the Company in January 2020, has significant experience in financial and City matters and in growing small businesses. He is a chartered accountant, having qualified with Deloitte in London, and has worked in advisory, investment, commercial and financial roles. Prior to joining Jigsaw, Graham was one of the founding employees at Gresham House plc ("Gresham House") where, in addition to supporting the growth of Gresham House, he was responsible for establishing and managing the successful strategic equity business unit which focuses on both quoted and unquoted equity investments using the principles and practices of private equity. Prior to joining Gresham House, Graham spent six years in senior executive roles at PayPoint Plc ("PayPoint"), including director of strategic planning and corporate development and executive chairman and president of PayByPhone. Before joining PayPoint, he was head of strategic investment at SVG Investment Managers, having previously been at JPMorgan Cazenove, where he served as a director in the corporate finance department. Graham is a non-executive director of SpaceandPeople Plc, Universe Group plc and Gresham House Strategic plc.

MAJOR SHAREHOLDERS

(AS AT 30 JUNE 2021)

SHAREHOLDER	ORDINARY SHARES HELD	% HELD
Canaccord Genuity Wealth Management	18,568,772	20.94%
Hargreaves Lansdown, stockbrokers	12,003,733	13.53%
Mr John Story	10,447,599	11.78%
JO Hambro Capital Management	8,594,159	9.69%
Interactive Investor	6,393,794	7.21%
HSDL, Stockbrokers	3,430,507	3.87%
Mr Stephen Lucas	3,099,998	3.50%
Justin Waite	3,000,000	3.38%

Directors, former directors and PDMR holdings comprise 15.31%

PROGRESS SINCE JUNE 2020 FUNDRAISE (1)

Further in the period, placing the business in a substantially stronger position to benefit from a recovery in demand post COVID

Owner-operated site roll-out

- New sites completed and opened in Watford and Kingston
- Paris and Brussels sites acquired
- Lease signed in Milton Keynes (owner operated site 18)
- Work nearing completion at site in Lakeside (owner operated site 19)
- Pipeline of further sites under discussion including central London
- New generation of modular games working well in new sites

US Franchise network

- Franchise disclosure document filed in individual states in the US
- Games delivered to new 'super centre' in Houston with installation in progress following
- Pipeline of both new and conversion franchisees now in active development with first of a series of 'Discovery Days' held in March 2021

PROGRESS SINCE JUNE 2020 FUNDRAISE (2)

Further in the period, placing the business in a substantially stronger position to benefit from a recovery in demand post COVID

New products and markets

- Developed portfolio of digital and 'play at home' products from scratch in 2020
- These products contributed £151k of revenue in the six months
 - Over 400 bookings from corporates year to date (to end August)
- Scalable products
 - Largest game delivered to 342 players in a single game in December followed by several large scale sales in early 2021
- Growing B2B brand and opportunity
- Progress on EH for Brands – working closely with other major media brands

International Franchise network

- Acquisition of master franchise in Middle East has already paid back and is delivering strong returns
- Acquired master franchise in France and Belgium and franchise agreements extended for 6 years on better terms

Investment in infrastructure

- S/w to allow multiple game management by GM's delivering on promise to reduce labour costs
- eCommerce project (£300k) now commenced and will continue for 12 – 18 months

THANK YOU



ESCAPE HUNT