

INTERIM RESULTS 6 MONTHS TO JUNE 2020

SEPT 2020



ESCAPE HUNT

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OVERVIEW

OVERVIEW

"Overall we have been encouraged by trading in the period post lockdown and we are making good progress against the strategy laid out during the fundraise. We are aware of the growing rate of COVID-19 infections and the possibility of further restrictions which may impact our progress, but remain confident that our strategy will deliver the expected levels of growth once life returns to normal."

Period under review

- ✦ Strong LFL sales growth, mature targets being met, and target ROI being delivered prior to COVID
- ✦ Careful management of cash through COVID-19
- ✦ Adjusted EBITDA loss reduced to £816k (2019: £1,059k)
- ✦ Launch of downloadable and play at home games

Post Period End

- ✦ Successful £4.1m (net) fundraise
- ✦ All nine UK sites re-opened in July
- ✦ Encouraging trading since reopening with significantly improved EBITDA conversion
- ✦ 10th site at Norwich opened 23 Sept; 11th in Basingstoke to open in Oct
- ✦ Contracts completed and on site at 12th location in Cheltenham; two further sites in legals underpinned by favourable property conditions
- ✦ Launch of scalable digital games and digital platform license signed
- ✦ Marketing partnership with Netflix re Enola Holmes

The background is split diagonally from the top-left to the bottom-right. The upper-left portion is a solid orange color. The lower-right portion features a complex geometric pattern of concentric squares, creating a tunnel-like effect that draws the eye towards the center. The squares are formed by alternating bands of light and dark gray, with the lines converging as they approach the center.

2

**ABOUT
ESCAPE HUNT**

WHAT IS AN ESCAPE HUNT?

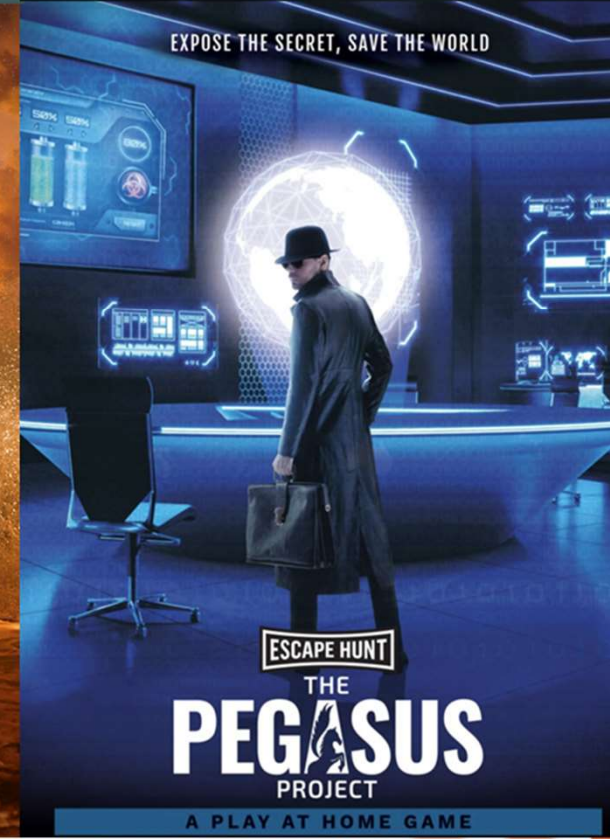
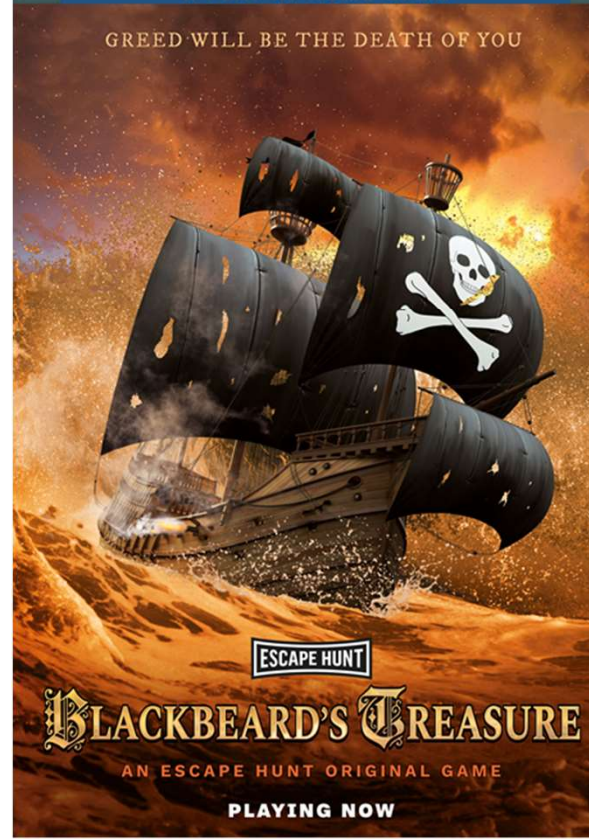
NOUN

Def: An adventure packed with excitement where you and your teammates leap into new worlds, taking on pulse-racing missions and challenges in an incredible entertainment experience against the clock.

VERB

Def: The act of leaving behind ordinary reality to do something extraordinary as teams of heroes adventuring through different times and different worlds racing against the clock on pulse-racing missions and challenges.

ESCAPE HUNT



THE WORLD'S NUMBER 1 ESCAPE ROOM BRAND

- ✦ Established experiential design and production studio
- ✦ Large franchise footprint
 - 37 locations
 - 16 countries
- ✦ UK owned and operated estate
 - 10 sites trading as Escape Hunt
 - Basingstoke in build
 - Cheltenham recently exchanged
 - 2 sites in legals
 - Attractive and well developed pipeline

ARGENTINA

Buenos Aires x2

AUSTRALIA

Adelaide

Brisbane

Gold Coast

Melbourne

Perth

Sydney

BELGIUM

Brussels

FRANCE

Belfort-Montbéliard

Bordeaux x2

Clermont-Ferrand

La Rochelle

Lille

Marseille

Metz

Nancy

Nantes

Paris

Toulouse

JORDAN

Amman

KUWAIT

Kuwait

LUXEMBOURG

Luxembourg

NETHERLANDS

Groningen

Maastricht

NORWAY

Oslo

Bergen

Trondheim

PORTUGAL

Lisbon

QATAR

Qatar

SAUDI ARABIA

Jeddah

SINGAPORE

Singapore

SPAIN

Barcelona

UAE

Dubai

UNITED STATES

Houston

Miami

UNITED KINGDOM

Birmingham (Central and Resorts World)

Bristol

Leeds

Edinburgh

Manchester

Oxford

Liverpool

Reading

Norwich

OWNER OPERATED BOX ECONOMICS

Revenue

- ✦ 4 players @ £22 incl VAT
- ✦ 5 - 6 rooms per site¹
- ✦ Median 40% occupancy (8 sessions per day, 7dpw)
- ✦ Additional 'outdoor' revenue
- ✦ Target £450k - £550k revenue per annum

Build cost

- ✦ Target £500k - £600k build cost
- ✦ Target £100k - £200k capital contribution from landlords
- ✦ Aim for £120k - £180k Site level EBITDA per site
- ✦ Medium term Target 20 UK sites; long term target of 50 sites

Costs

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

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SUMMARY OF FINANCIAL STATEMENTS

PERFORMANCE: 6 MONTHS TO JUNE '20

✖ Strong revenue growth pre COVID

- Overall sales (£1,304k) were 41% lower than 2019, driven by forced closure of sites on March 21st
- Sales were 61% ahead of 2019 until point of closure

✖ Adjusted EBITDA loss reduced by 23% to £816k

- UK site EBITDA (£254k) increased by 65% vs 2019, despite all units being closed for 3 months of the period
- UK site performance was driven by improved operating leverage and the maturing profile of the estate
- Franchise EBITDA (£249k) was 53% lower than 2019, driven by COVID -19 closures and the 3-month payment holiday support
- Central costs were reduced by 24%

✖ Downloadable games contributed £53k revenue and profit

- A suite of play at home propositions were successfully launched during lockdown to retain engagement with customers
- Downloadable games will remain part of our product portfolio

£m	Six months to June		Change
	2020	2019	
Revenue	1,304	2,208	-41%
Owner-operated sites	1,017	1,675	-39%
Franchise network	287	533	-46%
Gross profit	904	1,613	-44%
Owner-operated sites	655	1,080	-39%
Franchise network	249	533	-53%
Site level EBITDA¹	499	687	-27%
Owner-operated sites	254	154	65%
Franchise network	249	533	-53%
Unallocated	(4)	0	
Central costs	(1,359)	(1,788)	-24%
IFRS 16 Adjustments	44	42	
Group EBITDA loss	(816)	(1,059)	-23%
Group loss before tax	(3,089)	(3,168)	-2%
Period end cash balance	1,113	3,922	-72%

1. Pre IFRS 16

CASHFLOW: 6 MONTHS TO JUNE '20

Overview of the period:

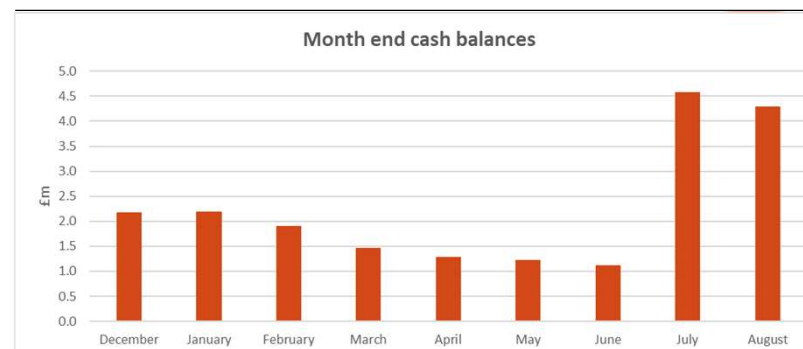
- ✦ **Cash outflow from operating activities carefully managed**
 - Benefit from deferrals and Government support schemes
 - Benefit from unwinding year-end debtor levels as expected
- ✦ **Capex used predominantly for site fit-out and games production**
 - Norwich and Basingstoke
 - Advance purchases for Cheltenham
 - Launch of “A Dalek Awakens” in Resorts World and Reading
- ✦ **Post period end cash position boosted by £4.1m (net) fundraise in July 2020**

Impact of COVID-19 on Cash:

c. £350k net cash was used on operating activities between March and June 2020, with around £500k of deferrals accrued, 30% of which have unwound in July and August

- ✦ **Mitigating actions taken**
 - Ceased all site CAPEX, non-critical supplier work, and marketing activity
 - Furloughed all site staff and reduced head office pay by 10% and senior team pay by 25%
 - Deferred rents, VAT, NI and PAYE

£k	Six months to June	
	2020	2019
Adjusted Group EBITDA loss	(816)	(1,059)
Working capital and non-cash movements	720	(492)
Tax	2	(18)
Net Cash used in operating activities	(94)	(1,569)
Investing activities		
Purchase of tangible fixed assets	(634)	(734)
Disposals	47	20
Purchase of intangible assets	(170)	(92)
Other movements	(38)	46
Net cash used in investing activities	(795)	(760)
Financing		
Net proceeds from share issue	0	3,724
IFRS 16 interest and capital repayments	(161)	(140)
Net cash from Financing activities	(161)	3,584
Net increase / (decrease) in cash	(1,050)	1,255
Cash at beginning of the year	2,171	2,657
Forex	(7)	10
Cash at end of year	1,114	3,922



BALANCE SHEET: AT 30 JUNE '20

✦ £1.1m cash at period end and £4.3m as at 31 August 2020

- C.30% of deferrals unwound by end of August
- Resumption of capex for site roll-out
- IFRS 16 recognition from 1 Jan 2019 gives rise to right of use assets of £2.6m at Jun 2020 and corresponding lease liabilities of £2.8m
- Tangible assets comprise principally leasehold improvements and escape games at owner-operated sites
- Intangible assets include £1.8m of IP and £0.5m of franchise agreements from acquisition of Experiential Ventures in 2017
- Goodwill on acquisition of Experiential Ventures written off in 2018

£k	Jun-20	Dec-19
Non current assets		
Property, plant and equipment	3,606	3,935
Right of use assets	2,642	2,470
Intangible assets	1,990	2,906
Loan to franchisee and rent deposits	374	326
	8,612	9,637
Current assets		
Inventories	12	12
Trade receivables	114	370
Other receivables and prepayments	379	473
Cash and bank balances	1,114	2,171
	1,619	3,026
Total Assets	10,231	12,663
Current liabilities		
Trade payables	445	317
Deferred income	478	360
Lease liabilities	342	304
Other	1,157	948
	2,422	1,929
Non-current liabilities		
Deferred income	214	262
Provisions	101	74
Lease liabilities	2,462	2,298
	2,777	2,634
Total liabilities	5,199	4,563
Net assets	5,032	8,100

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**A CLOSER LOOK AT THE
UK SITES**

UK SITES: TRADING PERFORMANCE PRE-COVID

Pre-COVID performance was strong. Sites were delivering mature targets for both sales and EBITDA, and 12 week rolling LFL sales growth was +25% for the 2 year old sites, and +59% for all sites combined.

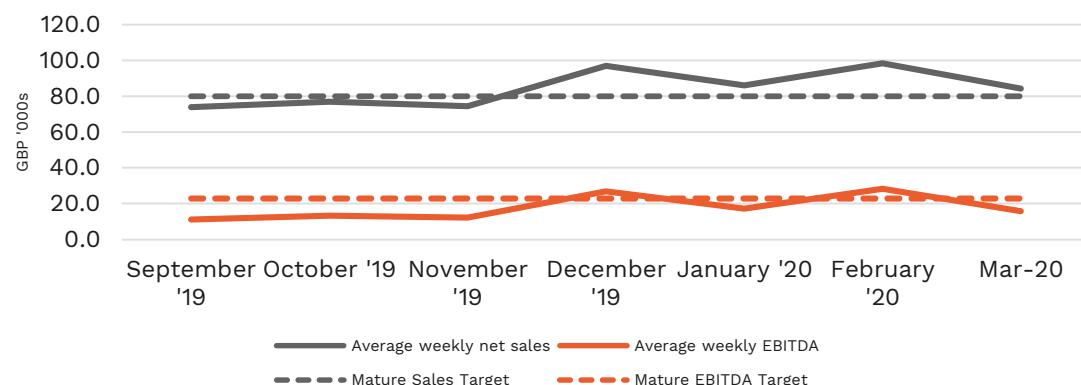
Summary:

- ✦ Target economics being achieved across aggregated estate
- ✦ Strong LFL sales growth (+59% 12 wk rolling average)
- ✦ As sales increase, the relative flow through to EBITDA increases faster

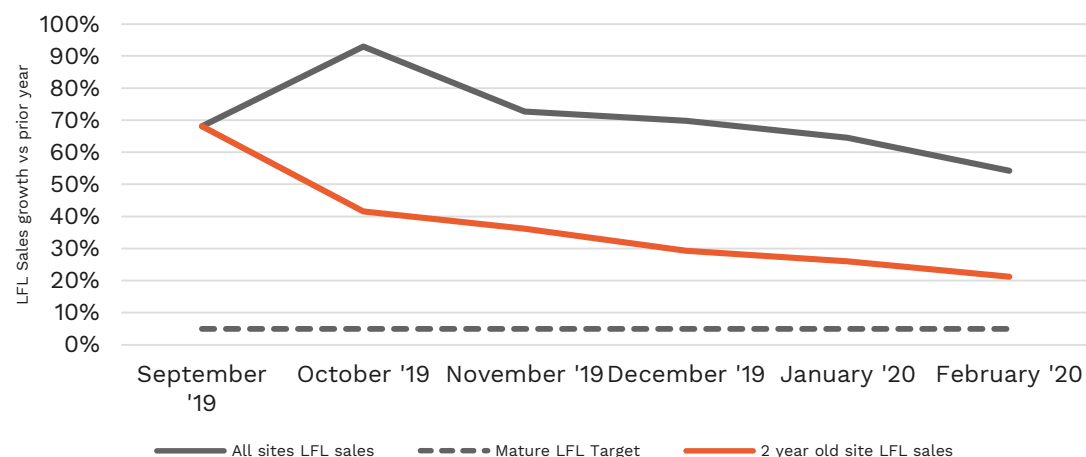
LFL sales summary

Data as at 1 March 2020	Year on Year growth (Rolling average period)		
	4 week	12 week	24 week
First 3 sites	18%	25%	30%
Next 5 sites	70%	99%	na
All mature sites	44%	59%	na

Average weekly sales and EBITDA performance



Like for like sales growth vs prior year



UK SITES: DELIVERING ATTRACTIVE RETURNS PRE COVID

- ✦ Cashflow return³ on invested capital significantly in excess of management's estimated cost of capital
- ✦ Several factors provide confidence that up-front investment in new sites will be significantly lower, further enhancing returns
 - Capital contributions from landlords and favourable property conditions
 - Management expect improvements in game design to reduce build cost further
- ✦ Longer period of operation and range of site types provides greater confidence in forecasts
- ✦ Introduced new targets for site assessment
 - 10% cash return on investment in Yr1; > 25% in Yr2
 - Payback; target under 3.5 years
 - Positive net present value at 12% over 5 years

Data as at 1 Mar 2020, annualised	First 12 months	26 Weeks to 1 Mar 2020
<i>Actual returns</i> ¹		
First 3 sites	7.6%	22.8%
Next 5 sites	-0.8%	12.3%
Next 5 sites, excl Edinburgh	3.4%	16.4%
All mature sites	2.5%	16.4%
<i>Pro-forma returns</i> ²		
First 3 sites	12.9%	38.7%
Next 5 sites	-1.3%	19.5%
Next 5 sites, excl Edinburgh	5.6%	26.8%
All mature sites	4.0%	31.9%

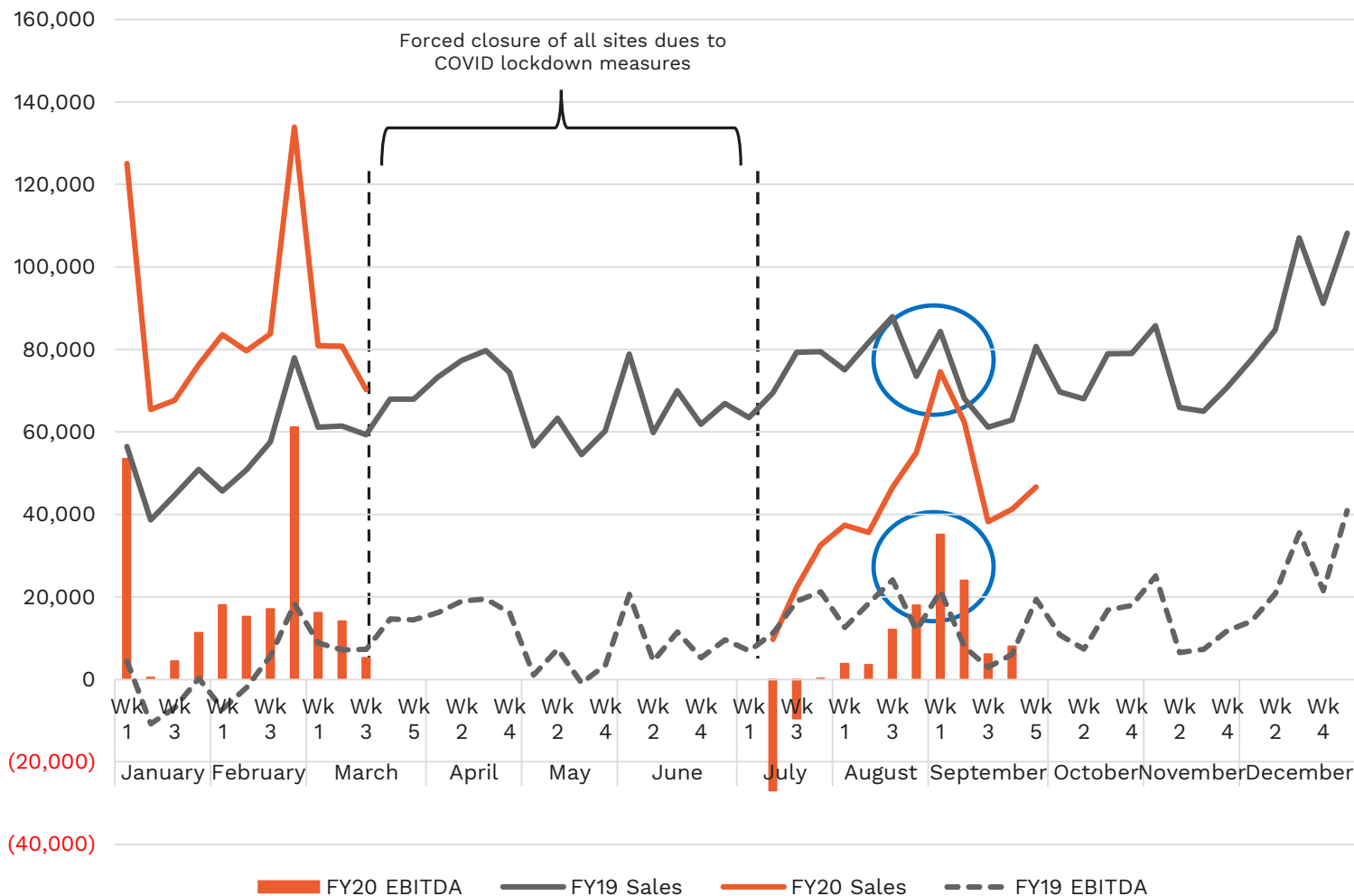
1. Using weekly site EBITDA (source: Escape Hunt)

2. As for 1, but assuming net investment per site of £450k

ENCOURAGING SIGNS ON REOPENING

Whilst still early days, trading post lockdown has been encouraging, with sales approaching 2019 levels and EBITDA converting more efficiently.

UK Sales and EBITDA: 2020 vs 2019



- The UK estate was reopened in the 2nd week of July, but only from Thursday to Sunday
- Sales growth has been encouraging, reaching a high of 90% vs 2019 in September, and an average of 72% vs prior year across the 6 weeks to September 20
- Conversion to EBITDA has been particularly efficient, with 3 weeks tracking ahead of 2019, despite lower sales
- Each site has been awarded the “AA COVID Confident” accreditation, and customer feedback on the safety measures established has been very positive

STILL DELIGHTING 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.



Best of the Best

Escape Hunt Birmingham

★★★★★ 1,329 Reviews

#2 of 116 Fun & Games in Birmingham

[Room Escape Games](#)

Escape Hunt Leeds

★★★★★ 1,013 Reviews

#2 of 87 Fun & Games in Leeds

[Room Escape Games](#)

Escape Hunt Reading

★★★★★ 535 Reviews

#4 of 36 Fun & Games in Reading

[Room Escape Games](#)

Escape Hunt Manchester

★★★★★ 860 Reviews

#4 of 88 Fun & Games in Manchester

[Room Escape Games](#)

Escape Hunt Bristol

★★★★★ 1,124 Reviews

#2 of 83 Fun & Games in Bristol

[Room Escape Games, Game & Entertainment Centres](#)

Escape Hunt Oxford

★★★★★ 782 Reviews

#1 of 36 Fun & Games in Oxford

[Room Escape Games](#)

Escape Hunt Liverpool

★★★★★ 624 Reviews

#1 of 96 Fun & Games in Liverpool

[Room Escape Games](#)

Escape Hunt Edinburgh

★★★★★ 589 Reviews

#3 of 93 Fun & Games in Edinburgh

[Room Escape Games](#)

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**PROGRESS AGAINST
THE STRATEGY**

A RECAP OF THE STRATEGY

During the fundraising roadshow in June, we outlined a 5-point plan to build shareholder value, summarised below.

THE 5-POINT PLAN TO BUILD SHAREHOLDER VALUE

1. Roll-out the owner-operated network through direct investment, targeting 20 sites in the short term
2. Deliver a US Franchise network in partnership with PCH
3. Sustain and support growth in existing franchise network; sign further master franchise agreements
4. Broaden the product offer and market reach
5. Invest in infrastructure to improve efficiency and scalability

The following few slides will touch briefly on recent progress in each area.

1. ROLL OUT THE OWNER OPERATED NETWORK

COVID-19 forced us to stop all building work on Norwich and Basingstoke – two sites which should have opened in Q2. However, Norwich has now been completed and opened last week, and Basingstoke will open at the end of October.

Escape Hunt Norwich:



Norwich is a prime unit at the entrance of Chapelfields, the INTU shopping centre which anchors the town.

Progress:

- Norwich, Group's 10th site, opened on 23 Sept 2020
- Basingstoke, Group's 11th site, is back in build and due to open in the last week of October
- Cheltenham, Group's 12th site, exchanged and completed two weeks ago, builders are on site, and games have already been delivered
- Watford and Kingston are progressing through legals
- Reached agreement to bring UAE master franchise in-house; Dubai site will become directly owned; revenue share from other UAE sites increases to 10% through direct relationship

2. DELIVER A US FRANCHISE NETWORK WITH PCH

- ✦ The restrictive measures currently in place in Minneapolis have slowed PCH's progress in establishing the Escape Hunt "Super Centre" in St Paul
- ✦ PCH are instead focusing first on reinvesting in Houston, to transform the site into the showcase centre for the brand.
- ✦ 4 legacy games will be replaced with the most recent EH content, supplied by EH UK.
- ✦ These games will accompany "Alice in Puzzleland" and "Houston, we have a problem"
- ✦ The site will then be used as the brand's showcase for potential franchisees.



3. SUSTAIN AND SUPPORT EXISTING FRANCHISEES

The impact of COVID on the existing network has varied by city, but overall, cash pressure has put a strain on many of the franchisee businesses. However, most sites are back up and open and revenues to Escape Hunt were an encouraging 65% of prior year August

Current state of play:

- All but 6 sites have reopened for business
- Of the 6 closed sites, 5 are within the UAE master franchise; one will become directly owned and 4 will become direct franchisees
- The other is in Melbourne, where a local lockdown is in place
- Overall, sales are growing across the territories and some sites in Australia and Norway have actually delivered record weeks post lockdown

Additional support to the network:

- Escape Hunt offered a payment holiday to the network from April to June
- Facebook Workplace was launched to improve communication and facilitate better information sharing between territories
- The library of print and play games created through lockdown was made available to the network, enabling franchisees to generate revenues whilst sites were closed and generating franchise revenue share
- Digital solutions have been trained in to all sites, allowing the network to service their respective corporate markets remotely

4. BROADEN PRODUCT OFFER AND MARKET REACH

During the fundraising, we talked about broadening the product offer around 4 key customer groups: 1) EH for Retail, 2) EH for Business, 3) EH for Education, and 4) EH for Brands. Focus so far has been on two of the four area – EH for Business and EH for Brands.

EH for Business:

- Focus has been on creating a digital solution which is highly scalable, so we can service Corporates looking to run team building and social events for very large groups
- To that end, we signed a licensing agreement with a software provider, giving Escape Hunt full access to a digital platform on which to develop remote multi player games
- The first handful of bookings for large, multi-locational teams (50-150 people) have already been received

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
- Print & Play Doctor Who game launched



5. INVEST IN INFRASTRUCTURE

We highlighted 4 key areas where targeted investment could drive operational efficiencies across the business and allow us to scale. Progress on each is summarised below.

Games management systems – £100K¹ ✓

- ✦ Further investment in IT solutions to allow multiple games to be managed by one person and to allow remote game management
- ✦ Aim to enable substantial labour cost reduction, improve scalability and improve flexibility
- ✦ System in testing

Data management – £100k¹ ✓

- ✦ Complete data warehouse project; improve management information and marketing evaluation
- ✦ In progress

E-commerce platform - £300k¹ ✓

- ✦ Upgrade for better flexibility on site by site basis; Improve booking engine
- ✦ Agency appointed; discovery phase in progress

Operational systems improvement - £100k¹ ✗

- ✦ Upgrade accounting systems, IT support and infrastructure
- ✦ All internal projects subject to clear return on investment criteria
- ✦ Not yet started



6

OUTLOOK

OUTLOOK & CONCLUSION

Overall we have been encouraged by trading in the period post lockdown and we are making good progress against the strategy laid out during the fundraise. We are aware of the growing rate of COVID-19 infections and the possibility of further restrictions which may impact our progress, but remain confident that our strategy will deliver the expected levels of growth once life returns to normal.

- ✦ Strong LFL sales growth, mature targets being met, and target ROI being delivered prior to COVID
- ✦ Careful management of cash through COVID-19
- ✦ Successful fundraise strengthened the balance sheet
- ✦ Encouraging trading since reopening with significantly improved EBITDA conversion
- ✦ Favourable property conditions underpin rollout
- ✦ Good progress being made against strategic objectives

7

APPENDIX



THE INVESTMENT CASE

- ✦ Attractive industry dynamics – strong growth in experiential leisure
- ✦ International brand and ability to partner with global IP studios
- ✦ Site economics now proven
 - Attractive site commercials; positive cash dynamics and flexible costs
 - Target 10%+ cash return on investment in Yr 1; 25%+ in Yr 2
- ✦ Strong UK like for like growth pre COVID-19 demonstrates strength of proposition
- ✦ Encouraging performance since re-opening post COVID
- ✦ Opportunity to scale internationally through franchise network leveraging UK experience

BOARD OF DIRECTORS

RICHARD ROSE, NON-EXECUTIVE CHAIRMAN

Richard has been CEO of two quoted multi-site business where in each case he created a significant increase in shareholder value. He went on to Chair a number of growth companies, both public and private, including Booker plc, AO World plc and Anpario plc. He currently hold Non Executive Chairman roles at Watchstone plc and Innovative Bites Ltd

KAREN BACH, NON-EXECUTIVE DIRECTOR

Karen is a Chairman and non-exec 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 non-exec director of Escape Hunt Plc, Karen is Chairman of Amino Technologies Plc (media tech), Chairman of Consult Red Ltd (media, IoT and connected device consulting) and non-exec director of Datapharm Ltd (health tech). Previously she was Independent Chairman of IXCellerate Ltd, non-exec director of Belvoir Lettings Plc and trustee of the Learning Foundation. Karen gained much experience internationally as CFO 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 member of the 30% Club which supports boards to appoint more female directors and increase the pipeline of upcoming female talent.

RICHARD HARPHAM, CHIEF EXECUTIVE OFFICER

Richard joined the Company on its Admission to AIM after working since November 2016 with the Escape Hunt management team, getting to know the business. 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 joined the Company on 6 January 2020. Graham 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 Escape Hunt, Graham was one of the founding employees at Gresham House plc where, in addition to supporting the growth of Gresham House plc, 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, including director of strategic planning and corporate development and executive chairman and president of PayByPhone. Before joining PayPoint plc, 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.

MAJOR SHAREHOLDERS

(AS AT 31 JULY 2020)

SHAREHOLDER	ORDINARY SHARES HELD	% HELD
Canaccord Genuity Group Inc	16,639,915	20.70%
Jo Hambro Capital Management	8,080,838	10.05%
Mr John Story	7,999,999	9.95%
Mr Stuart Hawthorne	7,777,777	9.68%
Zeus Capital	3,166,669	3.94%
Crux Asset Management	2,833,334	3.53%
Mr Luke Johnson	2,666,668	3.32%

THANK YOU

ESCAPE HUNT

