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School of
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eSports Switzerland 2019

A study by the Institute of Marketing Management under the direction of Marcel Hüttermann

upc

Baloise Group

Swiss Esports Federation
Schweizerischer Esports Verband
Fédération Suisse d'Esports
Federazione Svizzera di Esports

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Foreword

eSports Switzerland 2019 is the first study on eSports in Switzerland. The Institute for Marketing Management at the ZHAW is thus addressing a topic that is currently attracting attention worldwide for a variety of reasons: On the one hand, because the sales figures and prize money in eSports have recorded enormous growth rates in recent years, and on the other hand, because the question of whether eSports is a sport is increasingly being discussed by sports federations and the media and is therefore also attracting the interest of the general public. The aim of this study is to illustrate the status quo in the Swiss population with regard to eSports.

After a brief introduction to the topic, the worldwide eSports market will be examined. After a subsequent academic examination of the concept of eSports, the main part of the study follows: the status quo in Switzerland.

Many thanks go to Valerio Stallone, Bettina Gehring, Adrienne Suvada, Reto Heierli, Rafael Domeisen, Marija Caleta, and Linard Barth for their support during the course of the study and especially to Prof. Dr. Brian P. Rüeger, who made this study possible.

The Institute for Marketing Management hopes its readers have an exciting read and gain new insights into the subject of eSports.

Management Summary

Whether it is sales, prize money, spectators, or media rights, all areas related to eSports have grown tremendously in recent years around the world. The different types of games such as real-time strategy games, first-person shooters, and sports simulations address different needs – whether you are playing yourself or watching as a spectator. The various stakeholders such as the game developers, equipment manufacturers, sponsors, reporters, streaming platforms, agencies, and event organizers, as well as the eSports associations, leagues, and teams, are all benefiting from the boom and the industry is developing at a rapid pace.

The question whether eSports is a sport is currently the subject of much discussion, not only among the players but also among academics, the media, and the general public. In particular, the acceptance among young people shows that the question itself will soon become redundant, because now a generation is growing up which associates eSports more strongly with sport than older generations. Scientists are pointing out that even now eSports approximates to sport in most respects, and there are some who already fully recognize eSports as a sport. In 2022 eSports will be included in the official program of the Asian Games, the competition of Asian countries which is similar in character to the Olympics. An important step.

In the present study, 1,011 people aged 16–74 from Switzerland were interviewed. It should be noted that there is already an active eSports scene. 30.6% of people in Switzerland know what eSports is and associate the topic with the term competition or contest, which also comes close to the common definition of the term as eSports refers to playing computer games in special competitions either alone or in a team.

Respondents rated the topic in positive terms such as “exciting,” “interesting,” and “appealing.” The majority believe that eSports contributes to the development of analytical and strategic skills and dexterity. Above all, eSports is actually perceived as a sport by 27.6%. Those who actively engage in eSports (as players or as spectators) watch weekly content on TV or streaming platforms such as YouTube or Twitch.

In Switzerland, conventional video games, or “gaming,” is also popular – especially among younger people. In contrast to the eSports players, the video games in this category are not played in competitions. The weekly play time of gamers and eSportspeople is around 11 hours a week. About 30% refer to themselves as “gamers.” Both categories, gamers and eSportspeople, spend an average of CHF 1,270 on their equipment. The smartphone is the most popular platform for video games.

Unlike video games, most eSports take place on the PC. The game “FIFA” in particular can be seen as a link between gamers and eSportspeople. It is the most popular game in Switzerland. Again, in the game “Fortnite” a shift in the form of consumption is observed, because here the focus is no longer just on playing but also on watching.

It will be exciting to see how eSports develops in Switzerland and around the world. In Switzerland, the results of the present study show considerable potential. The Institute of Marketing Management will be closely following the development of eSports.

eSports – An Introduction

eSports itself is not new. Way back in 1972 the "Intergalactic Spacewar Olympics" were held at Stanford University (Good, 2019). The game "Pong," which resembles the table tennis game, was played and the winner received an annual subscription to the magazine "Rolling Stone." The first eSports competition was born. Today, developments have come such a long way that eSports serves as the basis for real activities. The racing simulation game "Gran Tourismo," for example, founded the GT Academy (NissanNews.com, 2019), a driver development program with driver license qualification and entry into real motorsport.

What exactly is eSports? eSports (or electronic sport) stands for video games in competition. At the most professional level, eSports is played by so-called pro-gamers who take part in professionally organized competitions – all over the world. Each video game has different rules and formats. However, most eSports competitions are played in teams competing against each other, not with individual players. There are many games that are played in competition mode and by semi-professional or full-time players. In particular, games played on smartphones are expected to shape the eSports of the future.

Today, three genres dominate eSports: Real-time strategy games, first-person shooters, and sports simulations. The most influential first-person shooter is "Counter-Strike." The game has the longest eSports history. The game principle has not changed in various editions since the end of the 1990's: Terrorists try to place a bomb at certain locations and anti-terrorists try to prevent this. This game is not only about shooting, but also about good teamwork, tactics, and communication skills.
"League of Legends" is the most important eSports title of our time. With a total of 99.6 million unique viewers following the finals of the world championships, this multiplayer online battle arena (MOBA) game is at the forefront of eSports.

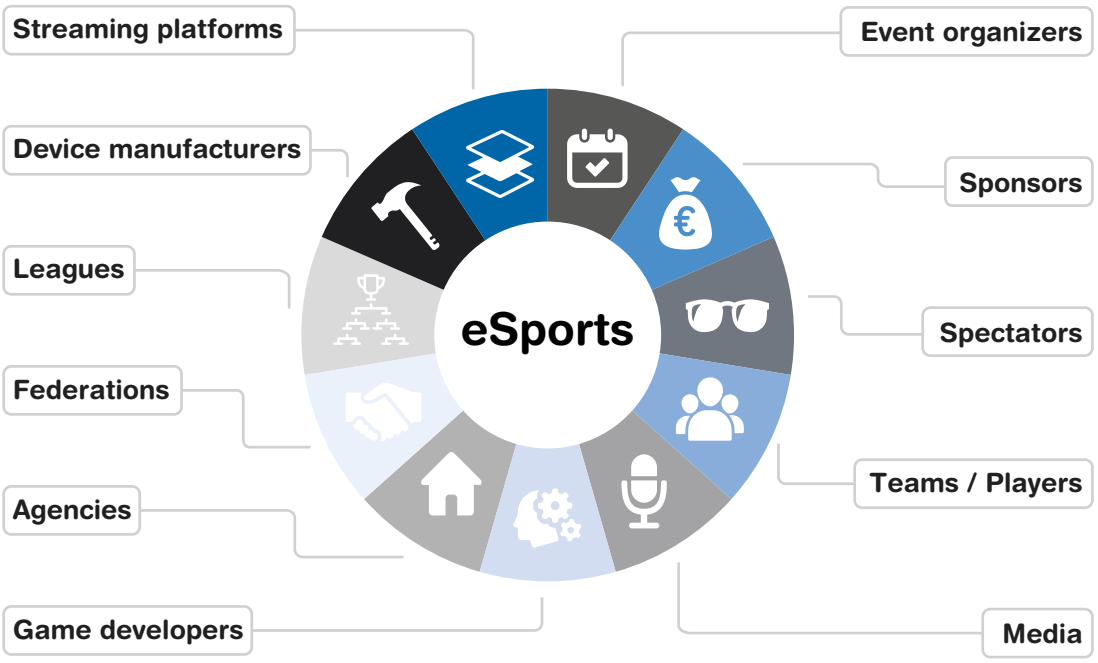
Like most MOBAs, League of Legends is played from a bird's eye view with two teams of five players competing in a virtual arena.

EA Sports' most famous game, "FIFA," is the most played video game of all time and simulates the game of football. FIFA is also a popular and much played game in the field of eSports. Despite its game sales and community, FIFA is having a hard time becoming one of the top games in eSports. Nevertheless, there are several competitions throughout the year; the highlight is the FIFA Interactive World Cup.

More and more companies are investing in eSports – also in Switzerland. Own clubs are founded or bought, while individual players or whole teams are contracted. Sports clubs have also discovered eSports for themselves. FC Basel, FC St. Gallen, and FC Winterthur, among others, have eSports players under contract. They play not only FIFA but also other eSports titles. Media interest in eSports is increasing, and with it its popularity. SRF has already broadcast eSports live on television. The following graphic gives an overview of the different "players" in the eSports market.

Fig. 1

STAKEHOLDERS IN ESPORTS



The Global eSports Market

The global eSports market has been growing strongly for years. While sales in the eSports market in 2015 only amounted to 325 million US dollars, they rose to approx. 906 million US dollars in 2018, thus almost tripling within four years (Newzoo, 2018). In 2021 sales are estimated at USD 1.6 billion (Newzoo, 2018). Sponsors in particular are the biggest sales drivers today. This is also because there is still great potential for media rights in the future. eSports is often and readily consumed on TV or streaming platforms, as this study also shows. This is confirmed by, among other things, global market analyses, which still reveal figures of less than 400 million eSports viewers in 2018, but already forecast 600 million viewers for 2021 (Newzoo, 2018).

Some prize money from eSports tournaments is already keeping pace with or even exceeding the prize money from sports events – even though the industry is still very young. In 2018, the eSports tournament "The International," where Dota2 was played in competition, paid out 25.53 million US dollars in prize money (e-Sports Earnings, 2019). This is ten times more than at the Tour de France 2018, and more than nine times more than the men's singles prize money at Wimbledon (Eurosport, 2019). In 2017, 121.1 million US dollars in prize money was paid out worldwide, demonstrating a strong upward trend (InvestmentBank.com, 2017). The pro-gamer with the highest earnings at the present time is a German, Kuro Takhasomi, nicknamed KuroKy, with earnings of over 4 million US dollars (e-Sports Earnings, 2019).

Apple and Google have also discovered the relevance of eSports and are developing their own platforms. Apple is planning a subscription service for games. The service works like Netflix for the gaming sector and allows users who pay a subscription fee to access games. Apple began discussing such a subscription service with game developers in the second half of 2018 (Cheddar, 2019).

Google presented its new gaming platform at the 2019 Games Developer Conference (GDC). "Stadia" should make it possible for games to be started quickly - even directly - via a play button from YouTube videos. In future, gamers will be able to use the new streaming platform on various devices such as desktops, notebooks, consoles, or smartphones and tablets. A Chromecast Ultra Stick is required to use the platform on the TV. Gamers play by using various controllers, a keyboard, or mouse. As Google boss Sundar Pichai explained in the Google keynote (t3n, 2019), lengthy downloads are now a thing of the past.

eSports in a Research Context

In the research context, eSports is still a very young field of research. In the mid-2000's, researchers all over the world began to come to grips with the topic in concrete terms. Today there is still no uniform definition of the term eSports. And tackling the question "Is eSports a sport?" is also afforded great attention by research.

DEFINITION

To date only a few researchers have come up with a concrete definition of eSports. Perhaps the oldest and most explicit definition, by Wagner (2006), is strongly based on a definition of traditional sport that goes back to Tiedemann (2004). According to the latter, sport is "a field of sporting activities in which people develop and train mental or physical abilities ...." In the definition of eSports, Wagner (2006) expands this general definition of sport with the clause "the use of information and communication technologies." However, this leaves a lot of room for interpretation. This is mainly because many aspects of every current sport are computer-supported or computer-mediated (see e.g., Witkowski, 2012). The definition by Wagner (2006) also poses another problem: The definition refers to such a large number of activities that even software training in the office could be included as a sport. Furthermore, it is not only about the use of information and communication technologies, but also, and this is crucial, about the mixing of physical and electronic aspects.

So when defining eSports, more focus must be placed on what the "e" means in eSports. The crucial question, then, is which parts or aspects of the sport have to be conveyed electronically and/or computer-aided so that a sporting activity can be classed as an eSport. Hamari and Sjöblom (2017) argue that the main difference between a sport and eSports is where the game or team activities that achieve the results of the sport or game take place. In traditional sport, all the activities that determine results can be observed in the real world, even though athletes can use electronic and computer-based systems to support sporting activities. On the other hand, it can be observed that the result-determining activities in eSports take place in a virtual world, i.e., in electronic/digital/computer-based environments. Since the players live in the "physical world," but the events that determine the results of eSports take place in the "virtual world," eSports players are always forced to use a human–computer interface or similar to interact.

Building on this, Hamari and Sjöblom define eSports as "a form of sport in which the primary aspects of sport are facilitated by electronic systems; the input of players and teams as well as the output of the eSports system is mediated by human–computer interfaces" (Hamari & Sjöblom, 2017, p. 213).

The present study becomes even more concrete and uses the following definition especially to distinguish itself from "gaming": "By 'eSports' we mean playing computer games in special competitions either alone or as a team. The players meet either at eSports events or play against each other via the Internet." The decisive factor here is the concept of competition, which distinguishes classic video games or "gaming" from eSports. In eSports, players and entire teams compete against each other. Gaming, on the other hand, can also be done by individuals on their own.

IS ESPORTS A SPORT?

To answer this question, it is necessary to consider how sport is defined as such. According to Rodgers (1977) and Suits (2007), sport stands for a physical activity that requires skills, is competitive, and has a degree of stability and institutional organization. The researchers investigating whether eSports is a sport have agreed that eSports requires competence, is competitive, has a certain degree of stability (e.g., coaches, sponsors, and large fan communities) and involves a certain degree of institutionalization of rules and other standards, although this last point is also being discussed (Funk et al., 2018; Hallmann & Giel, 2018; Jenny, Manning, Keiper & Olrich, 2017; Keiper, Manning, Jenny, Olrich & Croft, 2017).

Using the term eSports to refer to physical activity is far more controversial. Funk et al. (2018) present data on fine motor skills and elevated physiological values suggesting that eSports has a physical component. In view of the fact that some activities that are not stereotypically considered to be too physical, such as racing car driving or shooting, are also considered to be sports, the justification of Funk et al. (2018) is convincing. Physiologists have provided empirical evidence that racing car drivers have similar cardiorespiratory capacity to athletes in basketball, football, or baseball (Jacobs, Olvey, Johnson & Cohn, 2002) and have demonstrated physical activity levels comparable to those in basketball or football (Beaune, Durand & Mariot, 2010). Cardiorespiratory fitness shows how well breathing and blood circulation are able to supply the body with oxygen. In view of these studies, such comparative research could be helpful for eSports to show that it is a physical activity. However, the performance of fine motor skills is not necessarily synonymous with physical activity (Hallmann & Giel, 2018). In fact, eSports competitors sit during training and competitions and remain seated up to 15 hours a day (Hattenstone, 2017). Given the connection between sitting and poor physical, psychological, and cognitive health (de Rezende, Lopes, Rey-López, Matsudo & do Carmo Luiz, 2014; Owen, Healy, Matthews & Dunstan, 2010), eSports is thus in a controversial position when it comes to considering it as a sport.

Ingo Froböse, Professor at the German Sports University in Cologne, argues that eSports is a sport. He argues (Westdeutsche Allgemeine Zeitung, 2019) that anyone who competes in eSports competitions makes up to 300 movements per minute, that according to his research the stress factor can be compared with that of penalty kicks in a Champions League final, and that even rally drivers have a heart rate of 140 to 150 beats per minute. Furthermore, according to Froböse, the technical and tactical skills are to be taken into consideration. The question will probably continue to occupy the world of research – and beyond.

Status Quo: eSports in Switzerland

STUDY DESIGN

Aims and interviewed persons

The aim of the study is to ascertain the status quo regarding eSports in Switzerland from the Swiss population for the first time. It examines the views, attitudes, and behavior of the Swiss in relation to eSports.

In order to determine this, a representative online survey was conducted with 1,011 Swiss nationals throughout Switzerland. The representativeness refers to the gender, age, and language region of the interviewees. The online survey lasted from February 5 to 13, 2019. The sample was composed as follows (see Table 1).

Questionnaire

In order to maintain representativeness, the socio-demographic characteristics were first queried. Following this, and in order to ensure an easy introduction to the topic, behavior regarding video games and consoles used was queried. Then concrete questions about the term "eSports" were asked, followed by questions about activities related to eSports. The final part consisted of a block of questions on the topic of eSports consumption.

The questionnaire included a total of 49 questions, which took an average of 10 minutes to answer.

Table 1

SOCIODEMOGRAPHIC DATA

Gender		Age		Linguistic region	
Male	49%	16 – 29	22%	German-speaking Switzerland	72%
Female	51%	30 – 44	32%	French-speaking Switzerland	24%
		45 – 59	35%	Italian-speaking Switzerland	4%
		≥60	11%		

Occupation		Graduate		Salary	
Full-time employee	42.6%	Apprenticeship / vocational school	42.2%	Not specified	19.9%
Part-time employee	17.6%	Higher vocational training	15.4%	Less than 40,000	25.2%
Pensioner, retiree	11.3%	University	14.6%	40,000 – 60,000	15.9%
Self-employed	7.6%	College of higher education	12.1%	60,001 – 90,000	20.8%
Student	6.8%	High school diploma or similar	9.0%	90,001 – 120,000	11.9%
Other	6.5%	Compulsory school	6.3%	120,001 – 180,000	4.1%
Job-seeker	4.4%	Without training / undefined	0.2%	More than 180,000	2.2%
Apprentice	1.8%	Other	0.2%		
School pupil	1.4%				

VIDEO GAME BEHAVIOR

33.9 percent of the Swiss population plays video games at least once a week, more than one in ten even daily.

What is striking is that playing video games is not, as you might think, just a matter for the younger population. The opposite is true. While 65.8 percent of 16- to 29-year-olds say they never play video games, only 27.2 percent of 45- to 59-year-olds and 24.7 percent of over 60-year-olds say they never play video games.

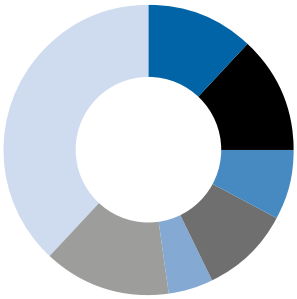
It also shows that video game play is more popular among men than among women. Only one in four men (26.5 percent) never plays video games. In contrast, one in two women (48.5 percent) never uses a controller, keyboard, or joystick.

Video games are particularly popular in French-speaking Switzerland. Here only 30.3 percent of the subjects state that they never play video games, while in Italian-speaking Switzerland 47.6 percent have no affinity for video games. 17.2 percent of the French-speaking population plays video games daily; 13.1 percent several times a week.

Fig. 2: How often do you play video games?

33.9% OF THE SWISS POPULATION PLAYS VIDEO GAMES AT LEAST ONCE A WEEK

Daily	**12.1 %**
Several times a week	**13.4 %**
Weekly	**8.4 %**
Several times a month	**10.0 %**
Monthly	**4.7 %**
Several times a year	**13.6 %**
Never	**37.8 %**



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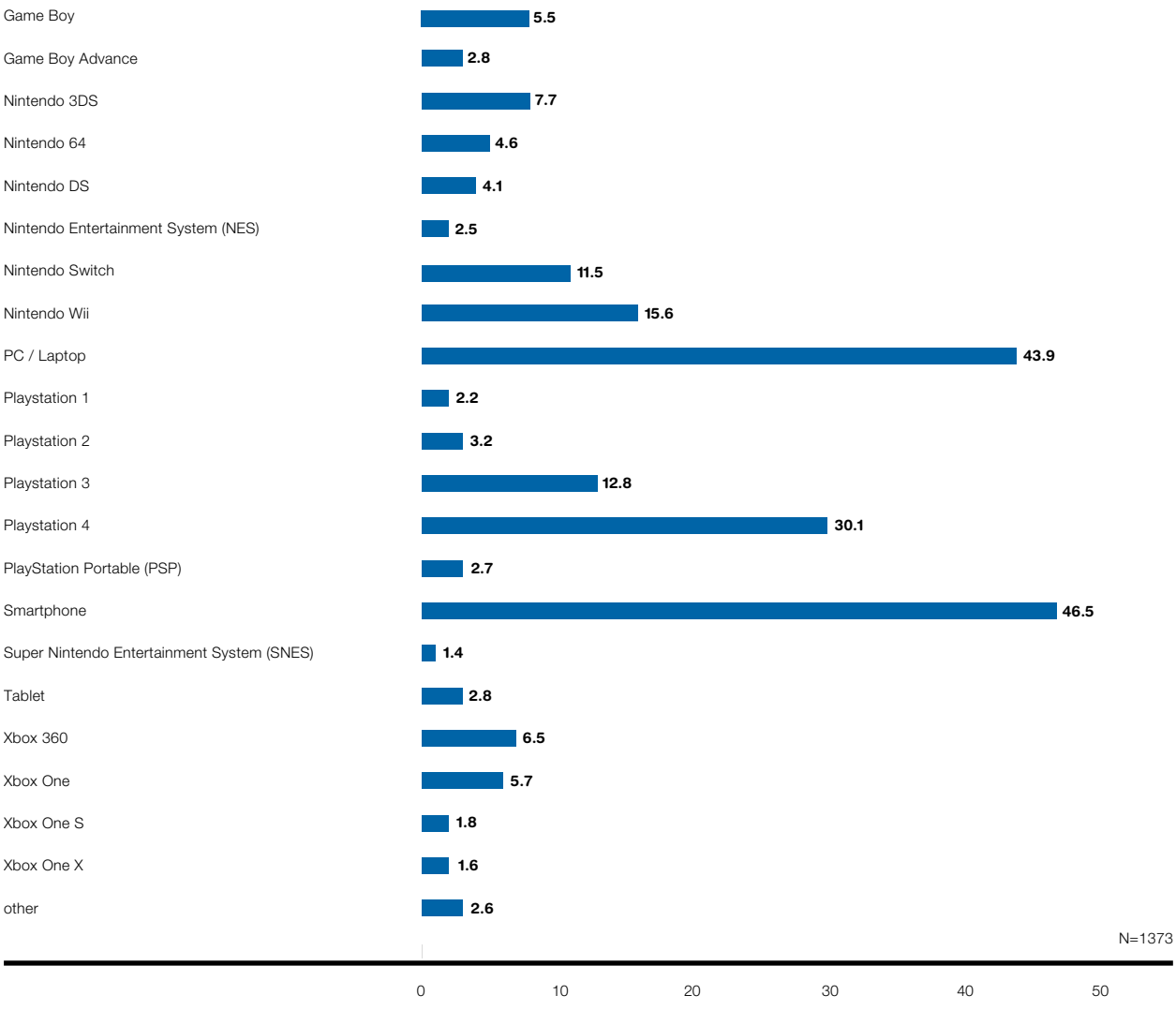
The most popular device for playing video games is the smartphone. 46.5 percent of the Swiss population use their smartphone not only for telephoning and chatting, but also for playing games at home and while on the go. The PC or laptop is also very popular with the Swiss for video games, especially among the over 60's. A total of 43.9 percent use the PC/laptop to play video games.

In third place in terms of popularity is the Playstation 4 with 30.1 percent. Sony's current game console is used much more frequently by under 45-year-olds (47 percent of 16- to 29-year-olds; 32.6 percent of 30- to 45-year-olds) than by over 45-year-olds.

It will be exciting to observe how these values develop in the coming years and whether the smartphone will continue to gain in, importance and if the PC, like consoles, will be able to maintain these values.

Fig. 3: On which device do you play video games? (multiple answers possible)

THE MOST POPULAR DEVICE ON WHICH TO PLAY VIDEO GAMES IS THE SMARTPHONE Frequencies in %



THE TERM "ESPORTS"

30.6 percent of Swiss people know exactly what eSports is. A further 45.4 percent are familiar with the term, but are either unsure of its meaning (29.7 percent) or do not know what it means (15.7 percent). 24 percent have never heard of eSports.

It is not surprising that in particular the younger population, with its affinity for digital technology, knows what the term eSports stands for. 44.4 percent of 16- to 29-year-olds and 40.4 percent of 30- to 44-year-olds know exactly what the term stands for. Conversely, 42.3 percent of those over 60 are completely unfamiliar with the term. In addition, men (44.7 percent) have a much better knowledge than women (17.1 percent) of what eSports means.

Fig. 4: Have you heard of the term eSports?

30.6% OF SWISS PEOPLE KNOW EXACTLY WHAT ESPORTS IS.

Frequencies in %

Yes, and I know exactly what it is.	**30.6%**
Yes, but I'm not quite sure what it means.	**29.7%**
Yes, but I don't know what it is.	**15.7%**
No.	**24.0%**

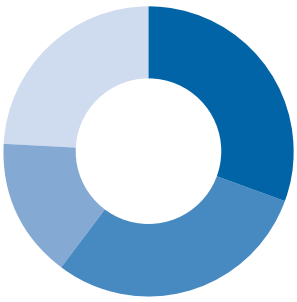


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Fig. 5: Have you heard of the term eSports? (by age)

THE YOUNGER POPULATION IN PARTICULAR KNOWS WHAT THE TERM ESPORTS STANDS FOR

Frequencies in %

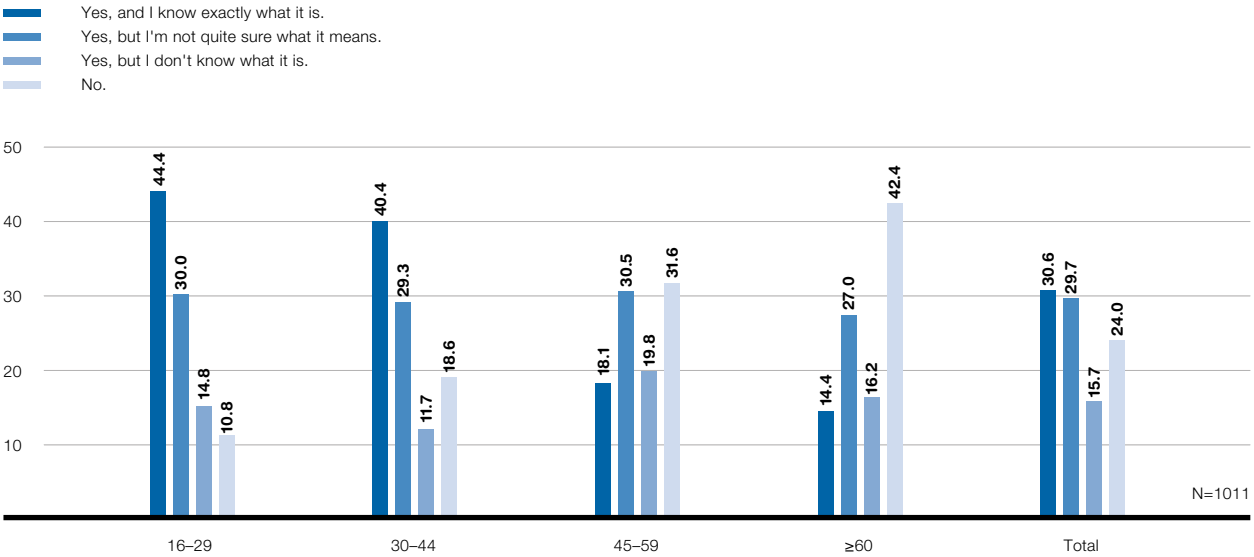
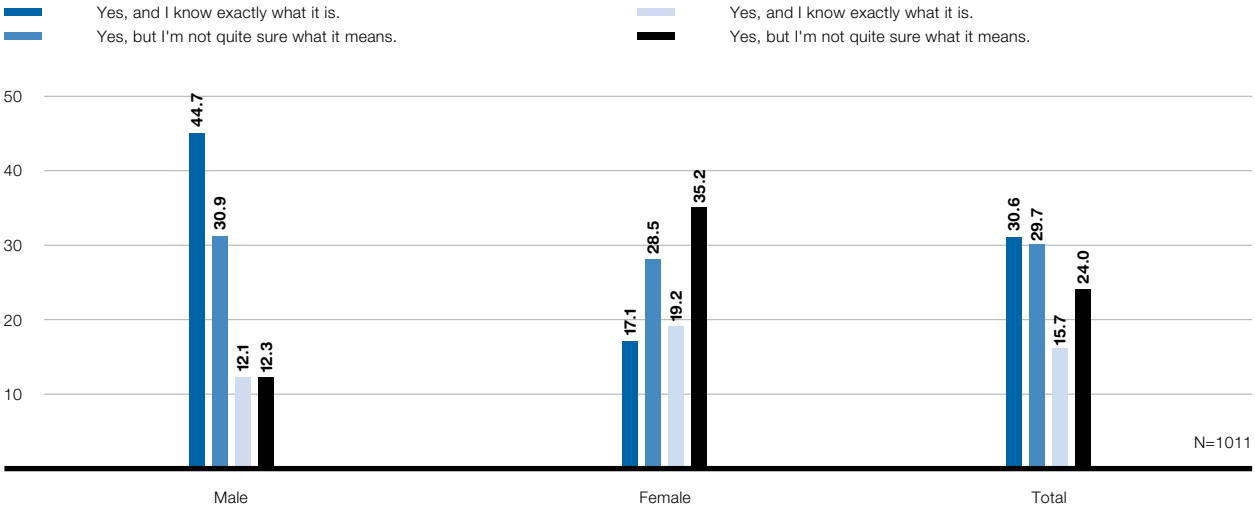


Fig. 6: Have you heard of the term eSports? (by gender)

MEN HAVE A MUCH BETTER UNDERSTANDING OF WHAT ESPORTS IS THAN WOMEN

Frequencies in %



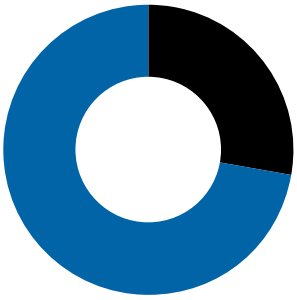
In the opinion of 27.6 percent of the Swiss population, eSports is a sport. Here, too, there are significant differences between the age and gender groups. While 34.5 percent of 16- to 29-year-olds and 33.3 percent of 30- to 44-year-olds see eSports as a sport, only 18.9 percent of over 60's think so. More than a third of men (35.1 percent) but only one in five women (20.5 percent) consider eSports to be a sport. The results show that the younger generation in particular recognizes eSports as a sport and that this will be a matter of course for future generations. The term alone includes the word sport and is therefore per se difficult to separate from classical sport.

Fig. 7: Do you consider eSports to be a sport?

27.6% OF THE SWISS POPULATION CONSIDERS ESPORTS TO BE A SPORT

Frequencies in %

Yes, I consider eSports to be a sport.	**27.6 %**
No, I don't consider eSports to be a sport.	**72.4 %**



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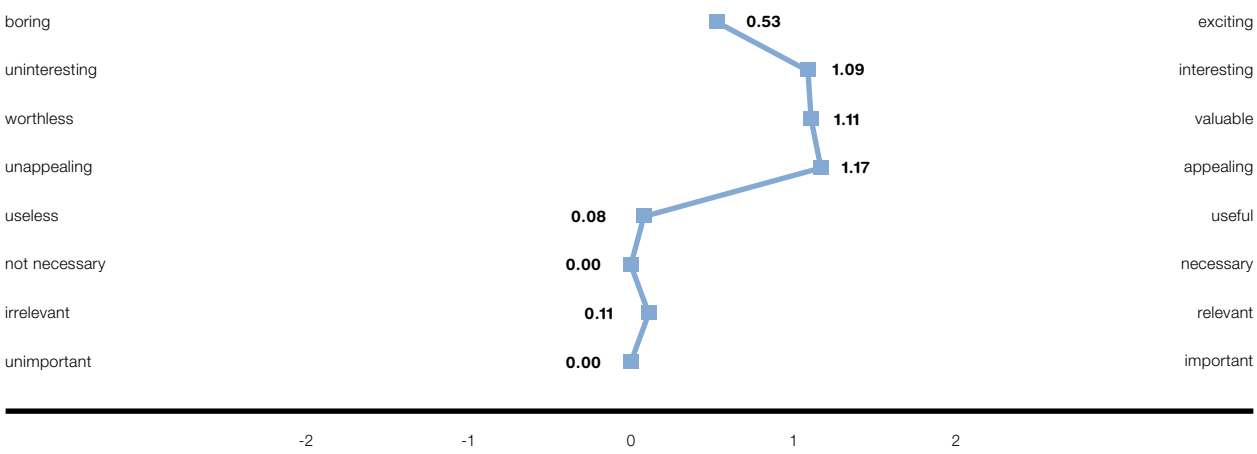
eSports is described as exciting, interesting, valuable, and appealing. On a scale from -2 to +2, the subjects indicated to what extent they relate different terms to eSports or not. In particular, eSports is described as appealing (+1.17). Furthermore, eSports is considered valuable (+1.11), interesting (+1.09), and exciting (0.53). None of the terms is negatively associated with eSports, but eSports is not classified as particularly useful, necessary, relevant, or important.

These results are extremely relevant for stakeholders in eSports. Thus it is very lucrative for existing and potential sponsors to be associated with terms such as appealing, interesting, or exciting. These results are also positive for teams, players, and other sponsored parties as they can provide the sponsors with these values in return.

Fig. 8: Which term do you prefer to refer to eSports?

ESPORTS IS DESCRIBED AS EXCITING, INTERESTING, VALUABLE, AND APPEALING



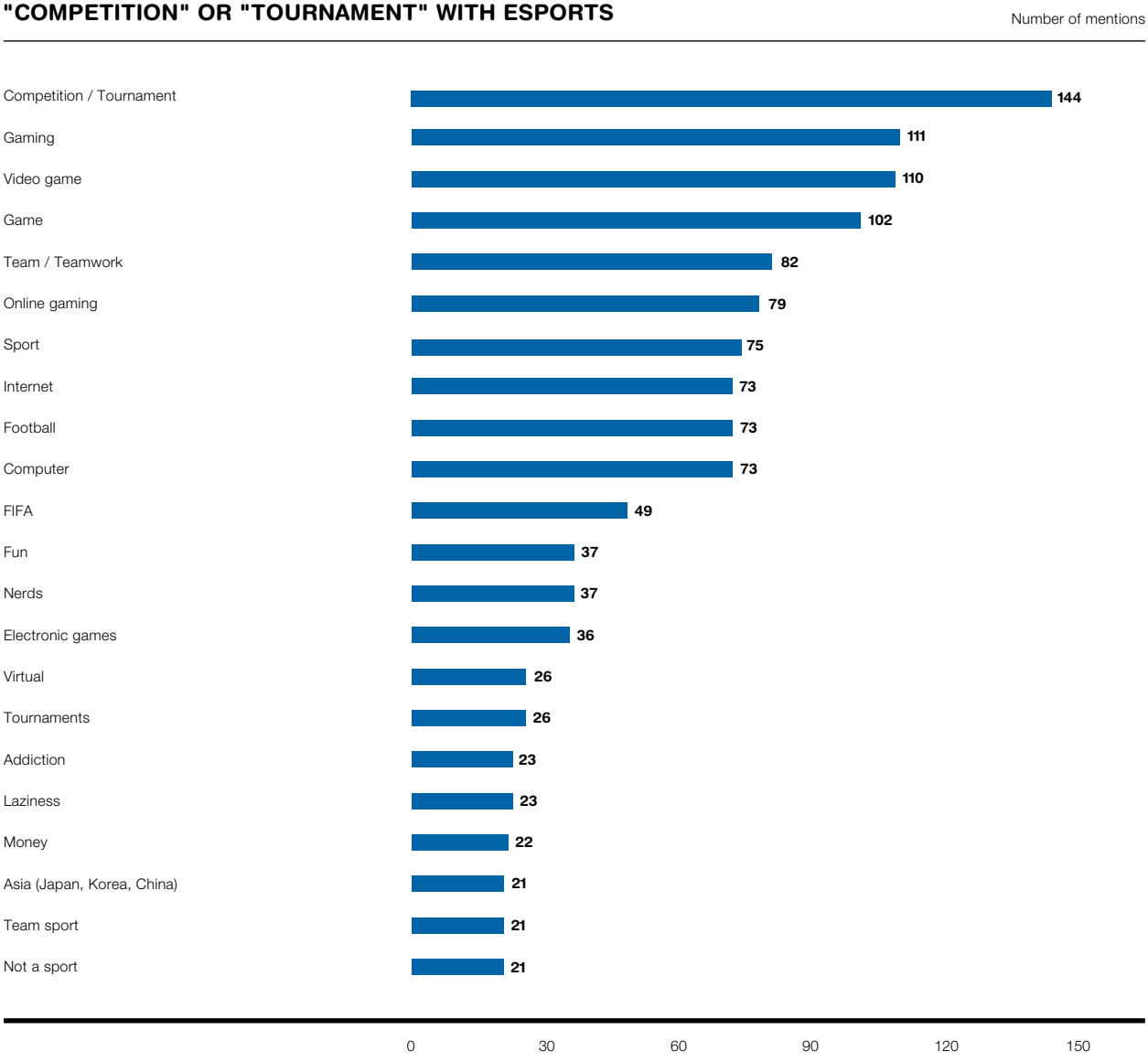
The Swiss population associates the term "competition" or "tournament" with eSports. Unsupported, questions were asked about terms which Swiss people associate with eSports. "Competition" or "tournament" was most clearly associated with eSports. This is close to the eSports definition underlying this study, which defines eSports as "playing computer games in special competitions."

The term "gaming" is also associated with eSports. This seems logical while “gaming” is not regulated, for example in competitions. Here it should be the task of all stakeholders in eSports to distinguish the term eSports even more clearly from "gaming" and thereby highlight the differences.

In addition to positive associations such as "teamwork" or "fun," negative associations such as "laziness" and "addiction" must not be ignored. These terms should be used carefully as they have a negative impact on the industry as a whole. Above all, the responsible protagonists would do well to address the issue of addiction to gambling and put measures back on track to draw attention to it.

Fig. 9: Associations with the term "eSports" (unsupported, >20 mentions)

THE SWISS POPULATION ASSOCIATES THE TERM "COMPETITION" OR "TOURNAMENT" WITH ESPORTS

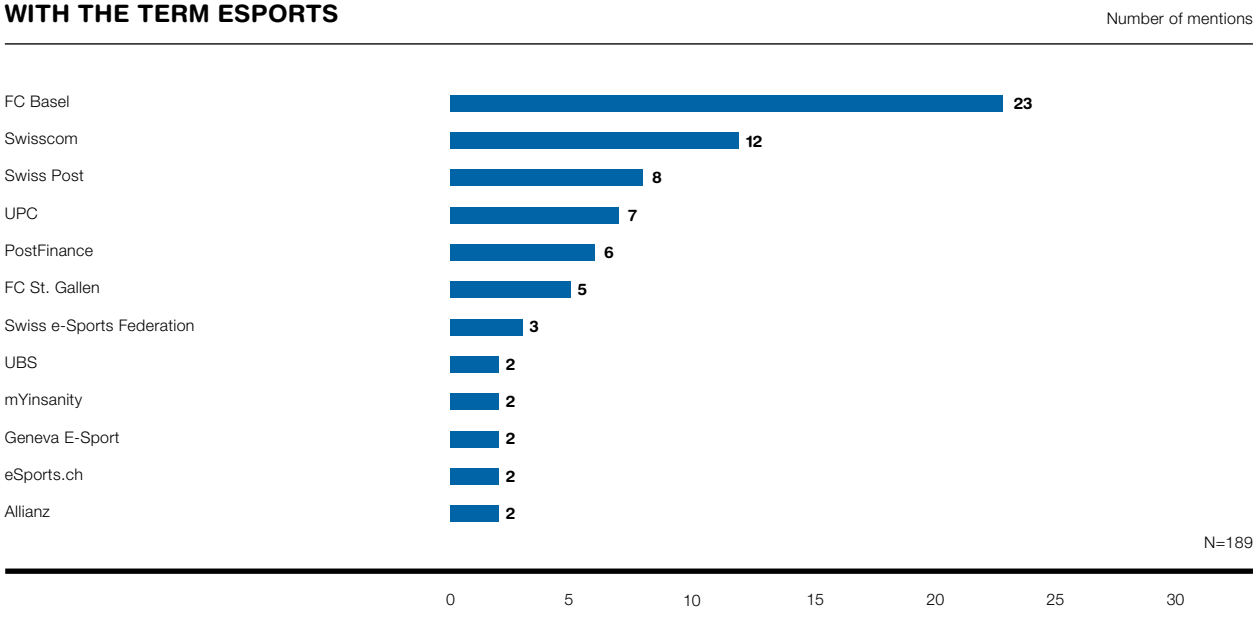


FC Basel is the organization most often associated with the term eSports. Likewise unsupported, questions were asked about the organizations and companies that come to the subjects' mind when they think of eSports. FC Basel stands out in particular here, partly because it was the first club in Switzerland to set up its own eSports team which was highly publicized in the media. It is also interesting to note that in addition to companies active in eSports (e.g., UPC, PostFinance), companies are also mentioned that are not (yet) present in the eSports environment (e.g., Swiss Post, UBS).

The number of mentions is very low. This points to great potential for companies active in eSports to position themselves in society through the topic and to anchor themselves in the minds of consumers.

Fig. 10: Name Swiss companies or organizations that are active in eSports. (unsupported, number of mentions >2)

FC BASEL IS THE ORGANIZATION MOST OFTEN ASSOCIATED WITH THE TERM ESPORTS



ACTIVITIES AROUND ESPORTS

5.5 percent of the Swiss population watch eSports without playing themselves. In particular, the game "Fortnite" is watched much more often than it is played. In general, too, the games are watched more than played. This is mainly because considerably more people describe themselves as "gamers" (28.6 percent) than as "eSports players" (a total of 3.7 percent). "Fortnite" can be seen here as a current phenomenon of pop culture and is an expression of eSports as a spectator sport.

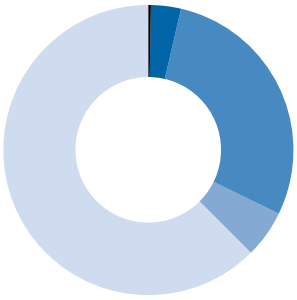
0.5 percent state that they earn money from eSports. What sounds like a few people at first must be seen in context. With a current population of 8.5 million in Switzerland, there are 42,500 people who actively participate in eSports and earn money from it. For comparison: The Swiss Federal Railways (SBB) has 33,000 employees (as of June 2018); Swiss Post, 44,131. But the figure of 0.5% should be treated with caution, as experts today consider this figure to be too high. Nevertheless, eSports has become a source of income in Switzerland that should not be underestimated.

Fig. 11: Active involvement with eSports

5.5% OF THE SWISS POPULATION WATCH ESPORTS WITHOUT PLAYING THEMSELVES

Frequencies in %

I'm an eSports player and I make money from it.	**0.5%**
I am an eSports player and compare myself with other players.	**3.2%**
I'm a gamer and I play to my heart's content.	**28.6%**
I'm an eSports viewer without playing myself.	**5.5%**
I'm not an eSports player or viewer.	**62.2%**



N=1011

The younger the person, the more likely they are to be involved in eSports or gaming. In particular, the generation ≥60 (79.1 percent) and the 45- to 59-year-olds (72.3 percent) describe themselves as neither eSports players nor eSports spectators. Gaming and eSports are mainly pursued by under 44-year-olds. More than a third of them describe themselves as "gamers" or compare themselves more or less professionally with other eSports players.

In contrast to classic video games, eSports is mainly played via a PC or laptop. 51.8 percent use their home PC or laptop to play eSports. 39.3 percent use a Playstation. This is mainly because most games designed for eSports were programmed for these platforms. Here, too, it will be possible to observe how these figures develop over the next few years and whether developers will focus more on mobile devices such as the smartphone, which is the medium of choice for 28.4 percent of eSports players today. Xbox, the Nintendo Wii or other devices play a minor role in Switzerland.

Fig. 12: Active involvement with eSports (by age)

THE YOUNGER THE PERSON, THE MORE LIKELY YOU ARE TO BE INVOLVED IN ESPORTS OR GAMING

Frequencies in %

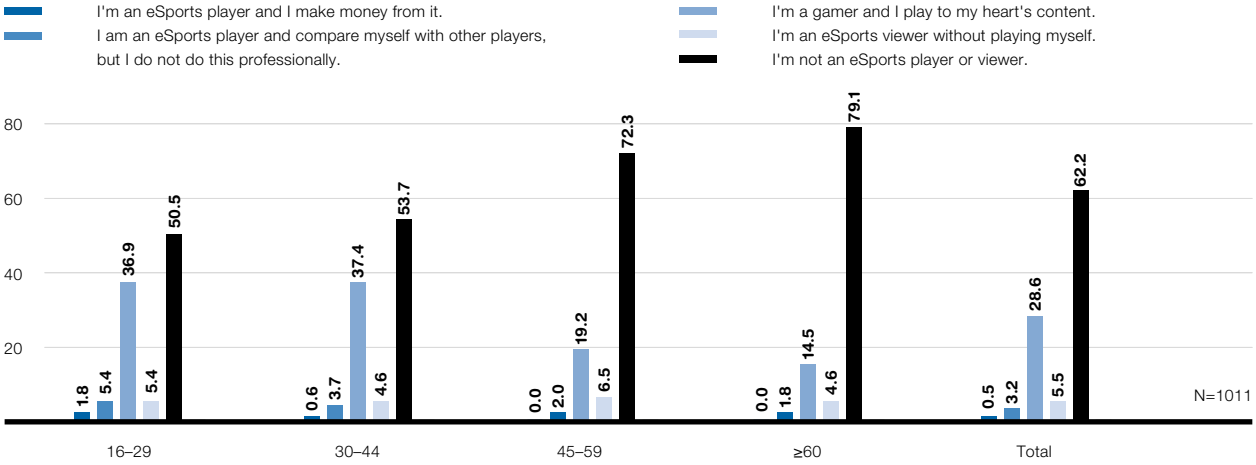
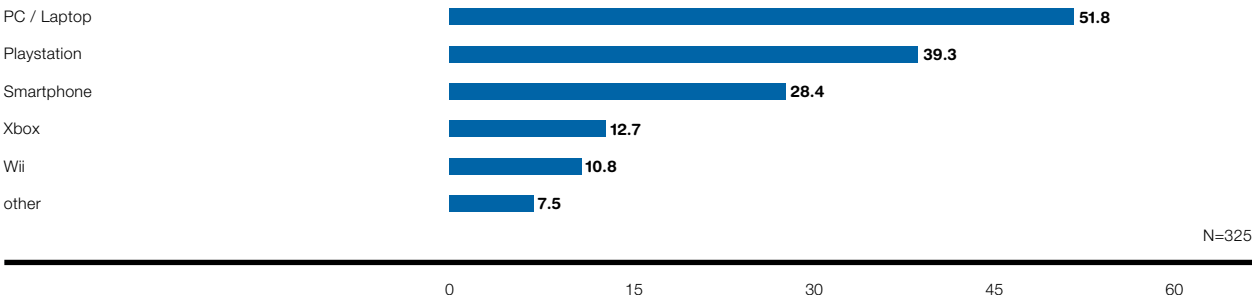


Fig. 13: On which device do you play eSports?

ESPORTS IS MAINLY PLAYED VIA THE PC OR LAPTOP

Frequencies in %



It is interesting to note that 16- to 29-year-olds in particular rely on the Playstation to play eSports (46.4 percent), while 45- to 59-year-olds (54.7 percent) and the over 60's (52.6 percent) clearly favor the PC or laptop. The Nintendo Wii and smartphone also play a role among the older rather than younger generation.

FIFA 19 is the game that is played the most in Switzerland (38.2 percent). Call of Duty: Black Ops IV (30.1 percent) and Minecraft (24.8 percent) follow in 2nd and 3rd place respectively. As already mentioned, Fortnite is the most watched (33.5 percent). FIFA 19 is also extremely popular here and ranks second with 31.1 percent. Football has thus also managed to play a leading role in eSports in Switzerland. However, products competing with the FIFA series, such as Pro Evolution Soccer, are not mentioned at all, not even under "other games."

Fig. 14: On which device do you play eSports? (by age)

YOUNGER PEOPLE IN PARTICULAR USE THE PLAYSTATION TO PLAY ESPORTS

Frequencies in %

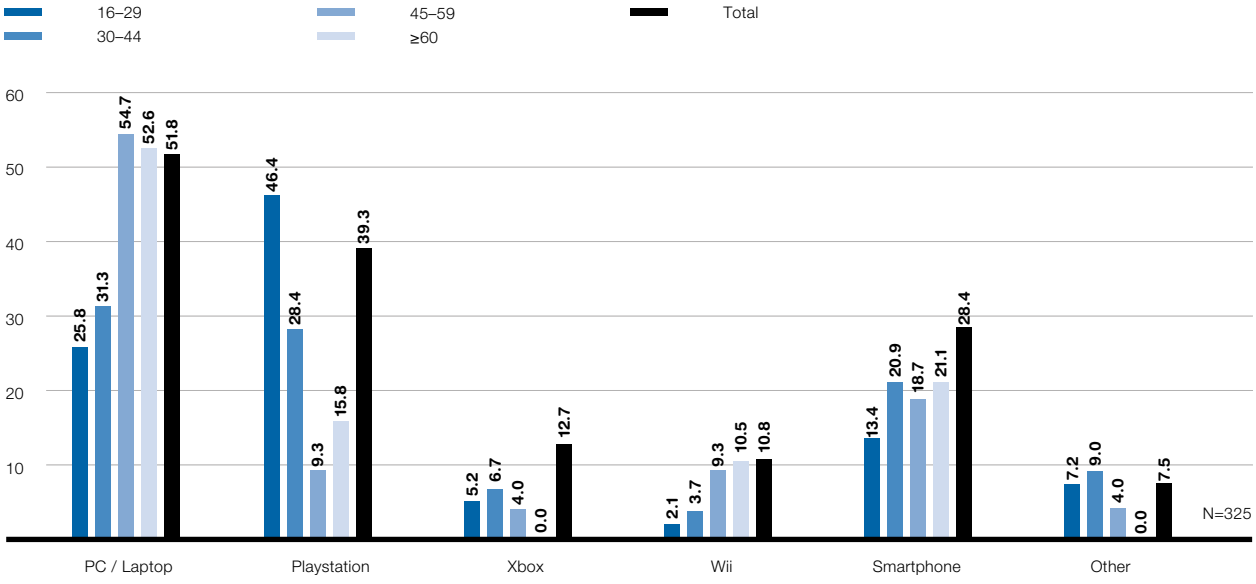
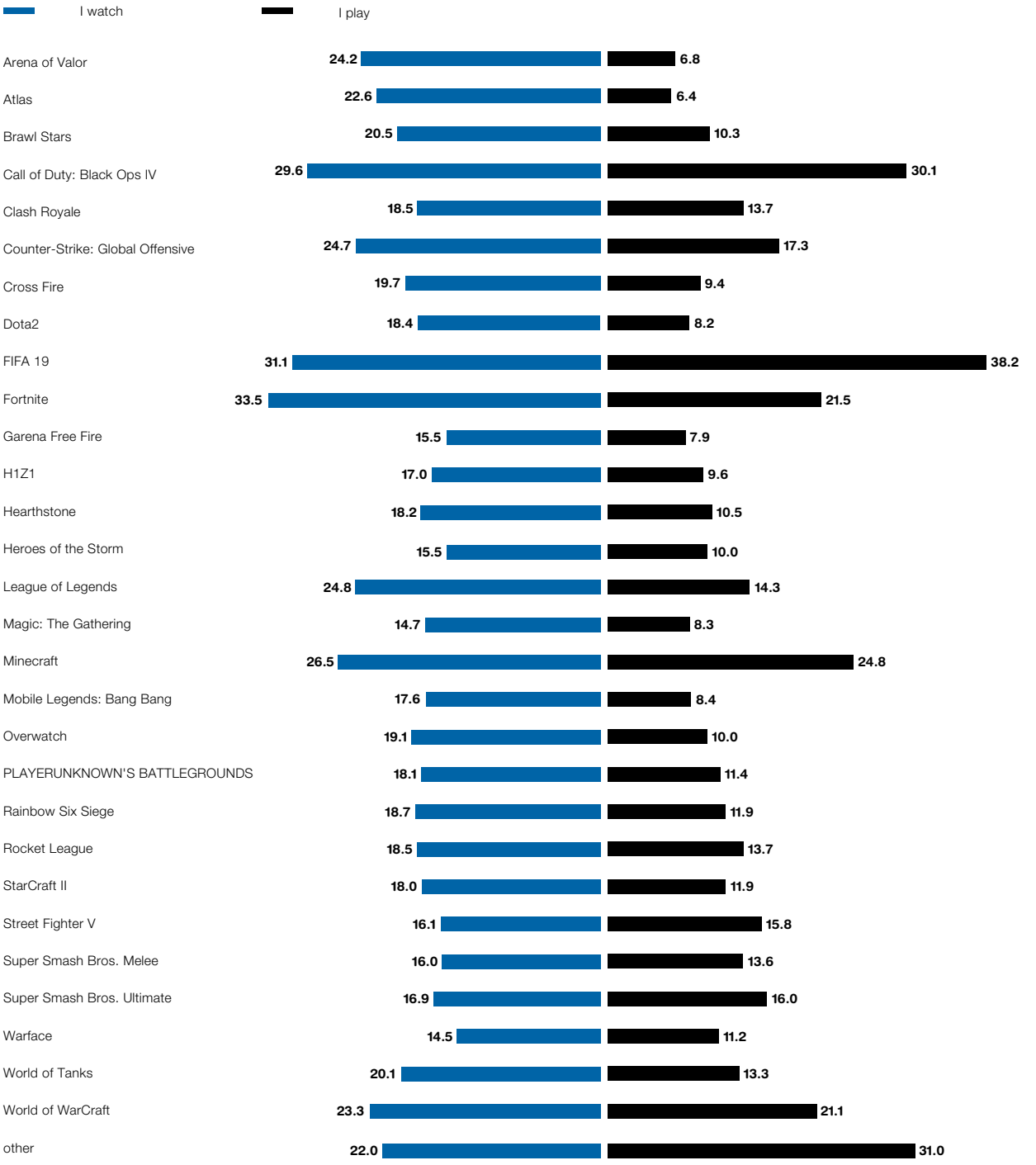


Fig. 15: Which games do you play/watch?

GENERALLY GAMES ARE WATCHED MORE THAN PLAYED

Frequencies in %



On average, eSports players and gamers spend CHF 1,270 on gaming equipment. At current console prices of 300 Swiss francs and games priced at 70 Swiss francs, there is still a lot to be done for controllers, armchairs, and similar accessories in order to optimally design the gaming and eSports experience. Alternatively a PC suitable for eSports can be purchased. 3.9 percent even spent more than 5,000 Swiss francs on their gaming equipment.

eSports and gaming are played 11 hours a week. This is about 1.5 hours a day and thus more than the daily consumption of social media in Switzerland (1.25 hours a day; DataReportal, 2019). Most, however, play between two and five hours a week, with those who invest a lot of time in eSports classed as professional eSports players.

Fig. 16: How expensive is your gaming equipment?

ON AVERAGE, ESPORTS PLAYERS AND GAMERS SPEND CHF 1,270 ON GAMING EQUIPMENT

Frequencies in %

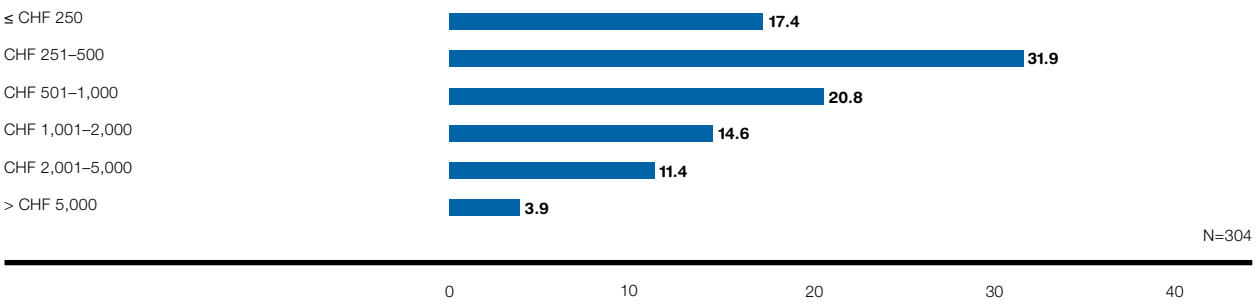
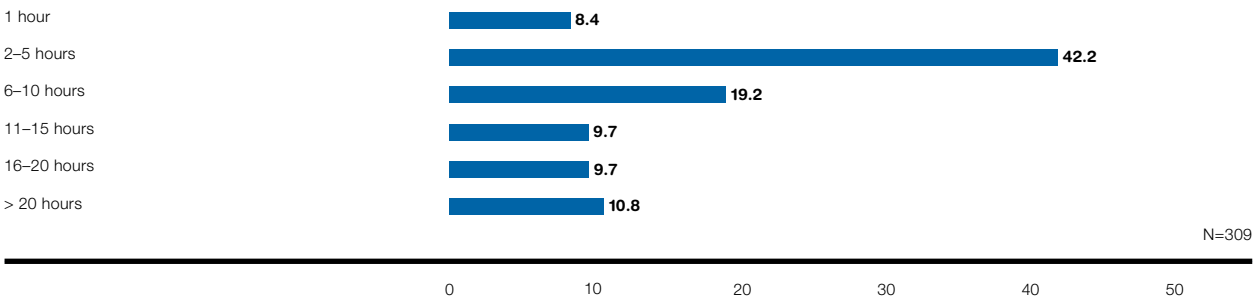


Fig. 17: How many hours a week do you play?

ESPORTS AND GAMING ARE PLAYED 11 HOURS A WEEK

Frequencies in %



SAFETY IN ESPORTS AND GAMING

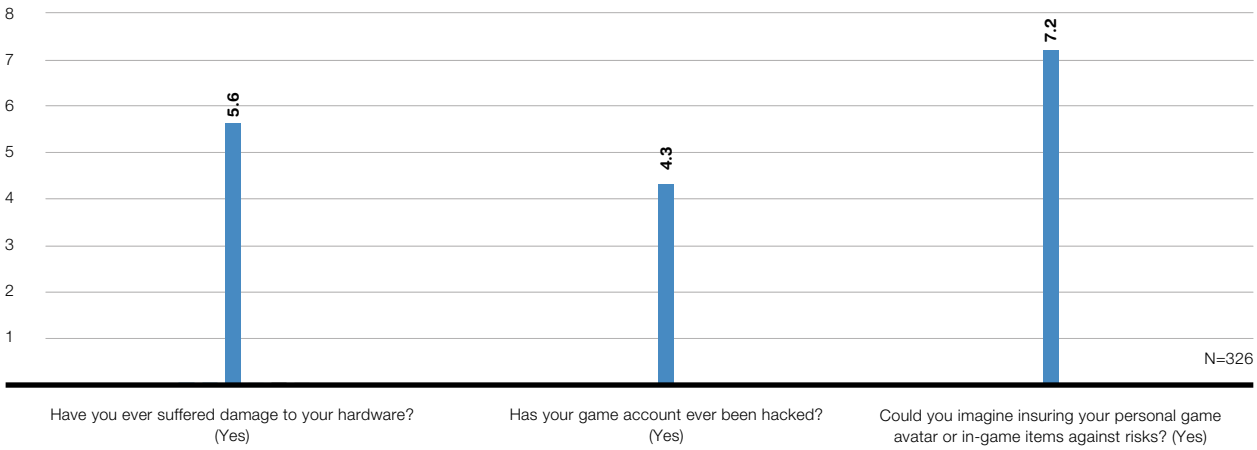
7.2 percent of those actively involved in eSports can imagine taking out insurance for their game avatar. This makes sense above all because, depending on the type of game, the interviewees invest up to 500 hours in the development of game characters. This figure is comparable to a workload of 25 percent and would therefore represent a severe loss for eSports players and gamers. The Swiss German population in particular would be badly affected if their created avatar were suddenly and irretrievably deleted (41.9 percent). Moreover, it is men who would be irritated by this (44.8 percent) as well as the 45- to 59-year-olds (47 percent).

The young target group, on the other hand, is more likely to see the danger that they will not be able to play for a certain period of time. This is stated by 24.2 percent of 16- to 29-year-olds. The 45- to 59-year-olds are most likely to worry about hacker attacks. In this age group, 41.3 percent see a great danger that their account could suffer damage from a hacker attack, for example. In addition, this age group also sees the danger of damage to the hardware. 9.5 percent even say they perceive a very high risk. Men (17.6 percent) as well as women (20.4 percent) see an equally high risk here.

Fig. 18: Safety in eSports and gaming

7.2% CAN IMAGINE INSURING THEIR GAME AVATAR

Frequencies in %



ESPORTS CONSUMPTION

YouTube is the most popular information channel for eSports among Swiss people. When asked about the channels on which those interested in eSports obtain information about eSports, only YouTube stands out rather slightly – with an average value of 3.9 on a 7-point scale from *very rare* to *very often*. There is great potential here for the industry and the stakeholders involved, as the rather weak values show.

The other results show that there is a great deal of interest in eSports content, for example on TV or on streaming platforms: 41.3 percent of those who watch eSports watch eSports games at least once a week, and 41.8 percent watch eSports games at least once a month.

Fig. 19: On which channels do you inform yourself about eSports?

YOUTUBE IS THE MOST POPULAR INFORMATION CHANNEL FOR ESPORTS AMONG SWISS PEOPLE

Mean values

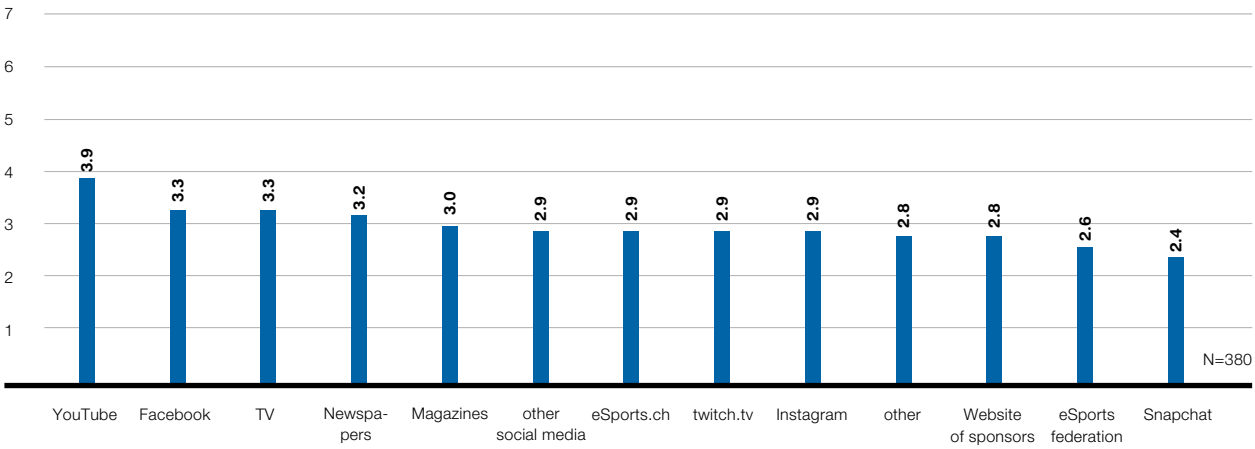
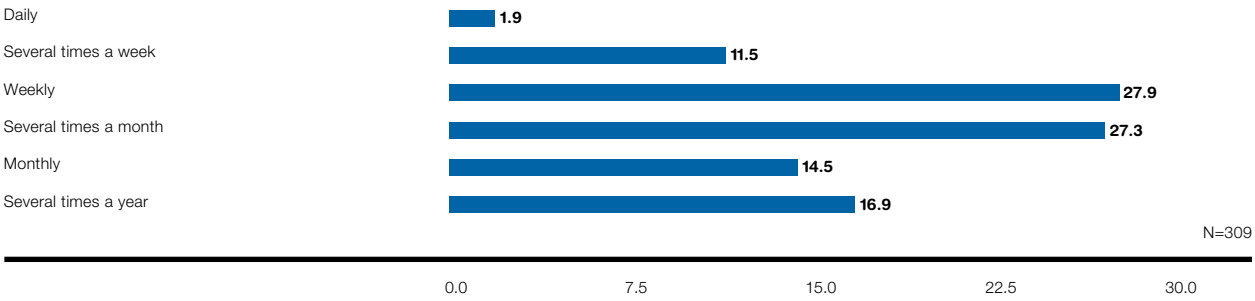


Fig. 20: How often do you watch eSports games?

41.2% OF THOSE ACTIVELY INVOLVED IN ESPORTS WATCH ESPORTS GAMES AT LEAST ONCE A WEEK

Frequencies in %

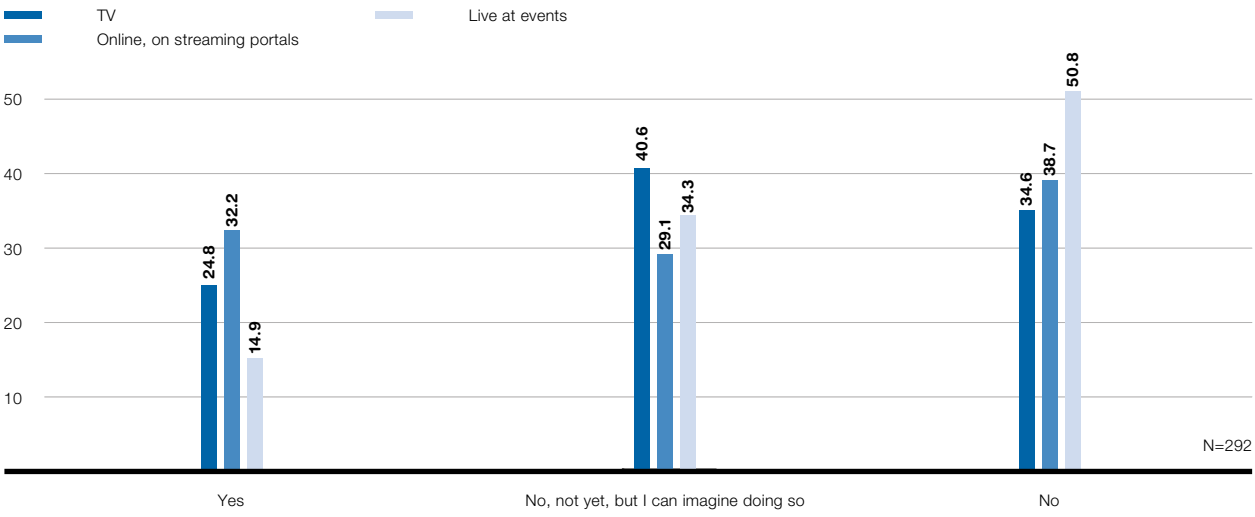


In addition, 40.6 percent of those actively involved in eSports can imagine watching eSports on television. 24.8 percent are already doing this. Streaming platforms such as Twitch and YouTube are also enjoying greater popularity and are already being used by almost a third (32.2 percent) of those interested.

Fig. 21: Do you follow eSports via television, streaming portals and/or live at events?

40.6% OF THOSE ACTIVELY INVOLVED IN ESPORTS CAN IMAGINE WATCHING ESPORTS ON TV

Frequencies in %

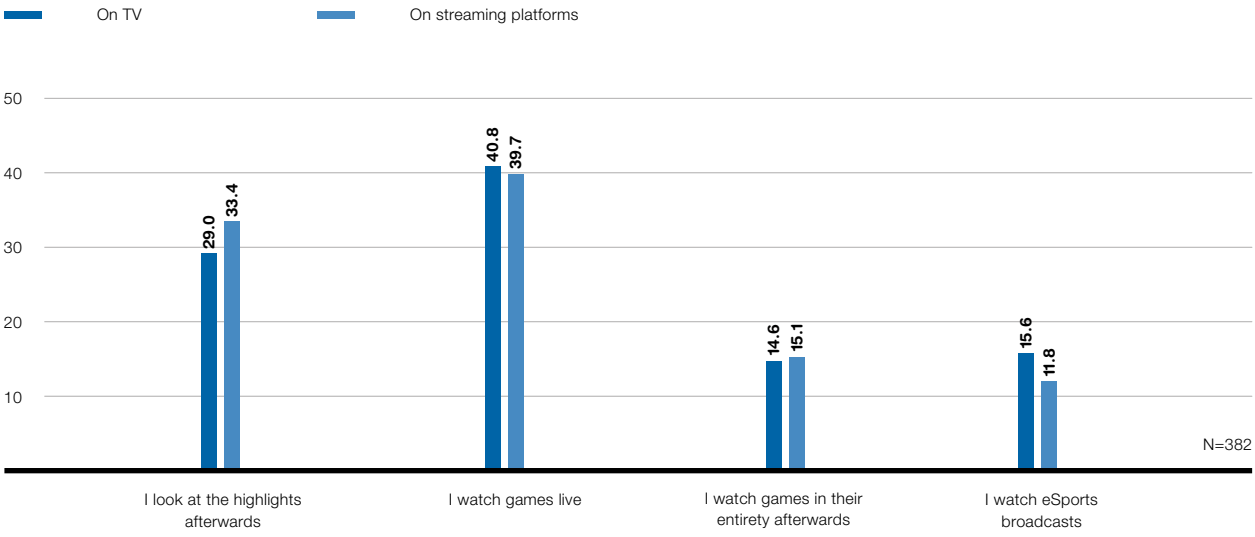


Above all, there is great potential for the advertising industry and thus for sponsors to position themselves in the streaming environment, since when games are consumed, they are complete games – and this is done live (40.8 percent on TV; 39.7 percent on streaming platforms).

Fig. 22: In what form do you watch games on television or streaming platforms?

WATCHING GAMES LIVE IS THE MOST POPULAR WAY TO FOLLOW ESPORTS

Frequencies in %



Outlook

It will be exciting to see how eSports develops in Switzerland and around the world. In Switzerland, the results of the present study show considerable potential. There is also plenty of potential with regard to media rights. Today, eSports on TV is still a peripheral phenomenon. This is likely to change in the coming years – also because the younger population shows great interest in the topic. In addition to the media, more and more sponsors will show an interest in eSports, as eSports represents a very good opportunity to reach lucrative target groups.

In addition to revenue and marketing potential, the development of eSports itself will also continue. In the Asian market, for example, the smartphone is already a central tool in eSports. When will this become established worldwide? How will the games evolve overall? How rapidly will the popularity of eSports develop across all sections of the population? And: How is eSports establishing itself in the world? These and other questions will have to be followed up.

Partners of the Study

UPC is a leading provider of communication and entertainment in Switzerland. The company is a subsidiary of the British company Liberty Global (LG) and provides quick and easy access to the digital world for more than 1.1 million private and business customers – at home and on the move. UPC Switzerland reaches almost 3 million households with its high-performance fiber optic network. Together with other distribution partners, the company operates the sports channel MySports, which was successfully positioned as the "Home of eSports" in Switzerland shortly after its launch in September 2017.

The Baloise Group is more than just a traditional insurance company. The focus of its business activities is on the changing security and service needs of society in the digital age. The approximately 7,300 Baloise employees therefore focus on the wishes of their customers. Optimum customer service and innovative products and services make Baloise the first choice for all people who simply want to feel safe. Located in the heart of Europe with headquarters in Basel, Baloise Group operates as a provider of prevention, pension, assistance, and insurance solutions. Its core markets are Switzerland, Germany, Belgium, and Luxembourg. In Switzerland, it also acts as a focused financial services provider with Baloise Bank SoBa, a combination of insurance and banking. Baloise operates its business with innovative provision products for private customers throughout Europe with its competence center in Luxembourg. The Baloise Holding AG share is listed in the main segment of the SIX Swiss Exchange.

Switzerland's largest mobility club I since 1896 I with 24 sections I around 1.5 million members I 210 patrollers I 370,000 breakdown operations I 82% continuation rate I 49,000 assistance services from the ETI headquarters I 5,100 medical examinations and 1,300 patient transports I 21 technical centers I 143,000 vehicle checks I 15 driving training tracks I 9,500 driving training sessions with over 100,000 participants I 8 legal protection service centers process 40,000 legal cases per year and provide over 5,000 legal information telephone services I 2 hotels and 29 campsites with 650,000 tourist overnight stays I 48 million page views on the TCS app and website I 9 million views on own YouTube channel I delivery of 80,000 illuminated vests for first graders I TCS - always at my side.

Swiss Esports Federation
Schweizerischer Esports Verband
Fédération Suisse d'Esports
Federazione Svizzera di Esports

The Swiss eSports Federation (SESF) is a non-profit federation made up of the most active Swiss eSports organizations. Its goal is to promote eSports, professionalize it, and promote the community. The most important point here is recognition as a sport. The federation proudly stands up for fair play and the athletes. And it has a zero tolerance policy towards discrimination.

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