

Press release

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[Deloitte 'Let's Play! 2022': Swiss gamers spend 25 francs per month on esports](#)

Before the pandemic, 35 per cent of the Swiss population were able to explain what the term 'esports' means; this figure has risen to 42 per cent in 2022. Around the same percentage of Swiss people (40 per cent) regularly spend money on esports events and gaming – 25 francs per month on average. These are the findings of the representative study 'Let's Play! 2022', for which Deloitte surveyed more than 14,000 Europeans. The industry now faces the challenge of converting its growing popularity into even more viewers and paying fans.

During the pandemic, the global revenues of the gaming industry reached around 150 billion Swiss francs, exceeding those of the film and music industries. As well as playing themselves, users also watch virtual tournaments. According to the study 'Let's Play! 2022', 45 per cent of the Swiss population have played a video game at least once in the past six months. As most of them play video games daily or weekly, it is not surprising that their average weekly gaming time amounts to more than eight hours.

A total of 12 per cent of the Swiss respondents stream esports events, spending an average of 21 francs per month (mostly on attending events and on merchandise). Three per cent are classed as heavy or hardcore users. This means that they have watched esports for at least one hour a day in the past six months. On average, they spend around 29 francs per month on it, compared to regular users and occasional users, who spend 14 francs and 7 francs, respectively. (Find [meaningful graphics](#) on the study for free use on our website.)

Switzerland compared to other European countries

In Europe, 41 per cent of respondents are able to explain what esports means – one per cent less than in Switzerland. Some 55 per cent of the European respondents said they play alone – 10 per cent more than in Switzerland. At almost 15 hours, their average gaming time is also significantly higher than in Switzerland. In Europe, around 18 per cent of respondents reported having watched esports events at least once in the past six months. This compares to 12 per cent in Switzerland.

The difference among regular esports viewers is not as pronounced: 5 per cent of the Swiss respondents said they had watched esports events at least once a week in 2022, compared to 8 per cent in Europe. In Switzerland, this percentage was only slightly higher during the pandemic (7 per cent). For Europe as a whole, the proportion almost halved between 2020 (15 per cent) and 2022 (8 per cent).

In Europe, Poland and Spain are leading the way in the esports industry and demonstrating the enormous potential of the market: 29 per cent of respondents in these two countries have watched esports events at least once a week in the past six months.

Esports: well-educated target group with spending power

Esports is defined as computer, mobile or console video games that are played competitively at a professional level, with teams or individuals going head to head in leagues or tournaments. 'The fan community is young, value-conscious and digitally well-connected, and can be encountered less and

less in traditional channels,' explains Timo Helbling, Assistant Manager of Deloitte Switzerland Sports Business Group. With regard to the channels that esports viewers use, the market is dominated by the streaming platform Twitch in terms of both coverage and viewing time. 'Viewers have an above-average level of income and education and mostly fall within the generational cohorts of millennials and zoomers.'

Sports games, shooters and free content are the most popular

In Switzerland, viewers mainly follow games in the sports genre (32 per cent), such as *FIFA*, followed by first-person shooters (24 per cent), such as *Counter-Strike: Global Offensive*, then battle royale games (22 per cent), such as *Fortnite* or *PUBG: Battlegrounds*. However, they tend to watch several genres, rather than focusing on just one. For regular viewers – in contrast to hardcore viewers – it is important that the content is free.

'Because there is still so much free, high-quality esports content available, it has only been possible to generate small revenues from esports broadcasts so far, despite the huge growth of the industry in recent years,' says Philipp Lüttmann, Head of the Deloitte Switzerland Sports Business Group. At the same time, the costs associated with professional teams are still considerable. 'Similar to football, the wages of players and staff make up around 45 per cent of the total expenditure,' says Lüttmann. Companies in the industry are therefore focusing more on the marketing, media and entertainment side. The proportion of content creation or consulting and agency services has increased significantly from 15 to 31 per cent since last year.

Fifty-one takeovers of esports teams since 2019

Experts from the esports industry (for example, esports teams, league/event organisers) were also surveyed as part of the study. A total of 56 per cent of the teams surveyed said they expect to be more profitable in 2022 than in 2021. 'However, 66 per cent of companies are still not likely to break even this year,' says Philipp Lüttmann. Instead, they are focusing their strategies on building stronger foundations in terms of total sales, coverage, the number of fans and the overall attractiveness of their product. The teams cited revenue growth as their most important business objective (80 per cent), followed by an increase in the fan/viewer base (70 per cent), then success in competitions, generating a profit and becoming attractive to financial investors (50 per cent each).

Indeed, due to greater awareness and good growth prospects, the esports industry has become much more attractive to investors in recent times. Worldwide, there have been 51 takeovers of esports teams and organisers of events and leagues since 2019 (Mergermarket, Esports Insider and analysis by Deloitte). Since the end of 2020 in particular, the number of mergers and acquisitions in the industry has also been increasing, with an average of four to five deals per quarter. 'We are expecting investment activity to remain at a high level in the future,' says Lüttmann.

About the study:

For the [representative esports study 'Let's Play! 2022'](#), conducted in late summer 2022, Deloitte and the Interactive Software Federation of Europe (ISFE) surveyed around 14,000 Europeans (including 1,267 people in Switzerland) aged 16 to 65 on their usage behaviour. In addition, 53 experts from the esports industry were surveyed on market trends and the economic situation.



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