Let’s Play, Switzerland!
Video gaming & esports 2022
01 | The Swiss Target Group (1/5)

Esports viewers are predominantly male and comparatively young in comparison to esports gamers. Both esports viewers and gamers belong to rather high income groups in relation to the overall population.
Esports viewers tend to be from larger cities and more frequently full-time employed than esports gamers. Comparatively often esports viewers and video gamers have a background in business/economics and STEM respectively.
Esports viewers and gamers tend to use free and paid subscription services relatively frequently. Both groups watch professional sports and attend live events relatively often in comparison to the wider population.

**Distribution of selected characteristics among the target group**

---

**Esports viewers vs. Video gamers vs. Overall sample**

- "I am a heavy user of paid subscription services."
  - Esports viewers: 36%
  - Video gamers: 50%
  - Overall sample: 30%

- "I am a heavy user of free subscription services."
  - Esports viewers: 62%
  - Video gamers: 47%
  - Overall sample: 50%

- "I am a heavy social media user."
  - Esports viewers: 55%
  - Video gamers: 54%
  - Overall sample: 71%

- "I have a lot of hobbies."
  - Esports viewers: 62%
  - Video gamers: 50%
  - Overall sample: 52%

- "I attend a lot of live events."
  - Esports viewers: 30%
  - Video gamers: 30%
  - Overall sample: 51%

- "I am actively looking for a job at the moment."
  - Esports viewers: 57%
  - Video gamers: 57%
  - Overall sample: 34%

- "I am highly knowledgeable in financial topics."
  - Esports viewers: 65%
  - Video gamers: 46%
  - Overall sample: 46%

- "I am highly knowledgeable in technological topics."
  - Esports viewers: 73%
  - Video gamers: 58%
  - Overall sample: 51%

- "I am highly concerned with social topics."
  - Esports viewers: 68%
  - Video gamers: 61%
  - Overall sample: 62%

- "I consider advertising useful and informative."
  - Esports viewers: 42%
  - Video gamers: 40%
  - Overall sample: 64%

- "I watch professional football regularly."
  - Esports viewers: 25%
  - Video gamers: 24%
  - Overall sample: 44%

- "I watch other professional sports regularly."
  - Esports viewers: 25%
  - Video gamers: 23%
  - Overall sample: 45%

- "I practice fitness regularly."
  - Esports viewers: 42%
  - Video gamers: 36%
  - Overall sample: 33%

- "I ride a bike regularly."
  - Esports viewers: 26%
  - Video gamers: 27%
  - Overall sample: 25%

- "I ride an E-bike regularly."
  - Esports viewers: 14%
  - Video gamers: 10%
  - Overall sample: 10%
01 | The Swiss Target Group: Business Opportunities in Video Gaming and esports (4/5)

Sports and Battle Royale belong to the esports genres that have the highest reach among esports viewers and video gamers in both Switzerland and Europe overall.

Relative and overall reach of selected esports and gaming genres

1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%
Source: Deloitte analysis
02 | Video Gaming in Switzerland (1/2)

While 81% of Swiss are aware of video games, 40% are commercially engaged. The monthly video gaming-related spending numbers to 25CHF per person on average.
Among Swiss video gamers, about 10% bought a product they first saw while playing or watching a stream. The most used game mediums are the mobile phone and the console.
As of 2022, 84% of Swiss are familiar with the term “esports”, 42% are aware of the definition. An esports viewer spends monthly about 21CHF on esports-related items on average, mainly on attending events and merchandise.
03 | Esports in Switzerland (2/2)

Crypto/NFT, trading apps and betting are more relevant for Swiss esports viewers in comparison to non-viewers. In terms of esports broadcasting channels, Twitch dominates the market both in reach and watch time.

Relevance of selected product categories among Swiss esports viewers vs. Non-viewers¹

<table>
<thead>
<tr>
<th>Category</th>
<th>Relevance Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video gaming peripherals</td>
<td>5.06x</td>
</tr>
<tr>
<td>Consoles and video games</td>
<td>3.51x</td>
</tr>
<tr>
<td>Crypto / NFT</td>
<td>2.94x</td>
</tr>
<tr>
<td>Trading apps</td>
<td>2.32x</td>
</tr>
<tr>
<td>Betting</td>
<td>2.16x</td>
</tr>
<tr>
<td>Job portals / agencies</td>
<td>2.07x</td>
</tr>
<tr>
<td>Computer hardware</td>
<td>1.26x</td>
</tr>
<tr>
<td>Automobiles</td>
<td>0.95x</td>
</tr>
<tr>
<td>Insurance</td>
<td>0.83x</td>
</tr>
<tr>
<td>Banking</td>
<td>0.80x</td>
</tr>
<tr>
<td>Internet and telecommunication</td>
<td>0.73x</td>
</tr>
<tr>
<td>Retail</td>
<td>0.66x</td>
</tr>
<tr>
<td>Fashion</td>
<td>0.61x</td>
</tr>
<tr>
<td>Food</td>
<td>0.41x</td>
</tr>
</tbody>
</table>

¹ Figures indicate the factor by which the relevance of the respective product categories is higher among esports viewers than non-viewers (values <1 indicate a higher importance among non-viewers).

Source: Deloitte analysis

Usage of selected esports broadcasting channels by consumer type among Swiss esports viewers over the last 6 months

<table>
<thead>
<tr>
<th>Broadcasting Channel</th>
<th>Twitch</th>
<th>Facebook Gaming</th>
<th>YouTube Gaming</th>
<th>Other channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach per broadcasting channel in %</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weekly watching time per broadcasting channel in minutes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Esports viewer groups with different weekly consumption time, in hours

Source: Deloitte analysis
Action & Adventure
Action & Adventure games feature a mix of elements that challenge the player to solve problems and react to real-time events and occurrences. The games may comprise storylines and combat situations which, however, is not prevalent in all titles of the genre.

Baby Boomers
Respondents age 57+

Battle Royale
In a Battle Royale match, multiple players compete on the same map, starting with minimal equipment. The object is to be the last remaining player on the map after all other players have been eliminated either by combat or by being ‘trapped’ outside a shrinking ‘safe zone’ on the map.

Card Games
Collectible Card Games bring classic trading card games into the digital world, often based on the same rules as the analogue games.

Commercial Conversion
Share of respondents who have paid money for esports-related content, products or services in the last six months, either for themselves or for someone else (for example, as a gift or paying a fee for friends and family).

Esports Engagement Maturity
Developmental stage of individual esports markets regarding term and definition awareness, overall reach, meaningful reach, regular reach and commercial conversion.

Endemic companies
Companies whose core products and services are related to video gaming and/or esports.

Esports
This study defines esports as playing computer, mobile and console video games on a professional competitive level, with teams or individuals playing each other within leagues or tournaments. Aside from the competitions, esports is primarily a spectator product and is watched by audiences on the internet, on TV and on-site at live events. Esports are a subcategory of the overall gaming industry, which includes the active and leisure playing of video games.

Esports Ecosystem / Sector (Stakeholders)
The esports ecosystem revolves around key value drivers and orchestrators of esports competitions, products, services and content. Besides the core value-creating stakeholders (league organisers, event hosts and esports teams and players), it includes stakeholders from the publisher segment, traditional media and online platforms, and strategic partners. Also, the esports audience is a key stakeholder in the esports ecosystem.

Esports Term Awareness
Share of respondents who know the term ‘esports,’ independent of the ability to define the term correctly.

Esports Genres
Category of games classified by structure, design and goals of the specific games.

Esports Term Awareness
Share of respondents who are aware of the term ‘esports,’ independent of the ability to define the term correctly.
Esports Titles
Individual game titles in which the competitions are held. Therefore, in the esports context, they are comparable to ‘ disciplines ’ in traditional sports.

Esports viewers
Respondents who have watched professional esports in the last six months on the internet, on TV or at a live event

Essential video gaming hardware
Video gaming consoles and Gaming PCs

Fighting
In fighting games, two or more players engage in battle, mainly featuring hand-to-hand combat elements

FPS / First-Person Shooter
FPS games focus on weapon-based combat between teams or individuals from a first-person perspective. There are different matches with distinct goals, for example, occupying the home base of the opponent

Game awareness
Share of respondents who know at least one video game

Game streaming viewer
Respondents who have watched game-related streaming content in the last six months

Generation X
Respondents aged 42-56

Gen Z
Respondents aged 16-24

Hardcore User
Esports viewers who watched esports content at least one hour per day in the last six months

Heavy User
Esports viewers who watched esports content between 4-6 hours per week in the last six months

Large city
100,000 to 499,999 inhabitants

Meaningful Esports Reach
Share of respondents who have watched professional esports content at least once in the last six months

Medium-sized town
50,000 to 99,999 inhabitants

Millennials
Respondents aged 25-41

Mini Games
Mini Games are small, often simplistic games for casual usage, featuring different gameplay elements

MOBA / Multiplayer Online Battle Arena
In MOBA, two teams compete against each other from a home base on different maps with distinct features. The players, who each control a character with specific strengths and weaknesses, collaborate as a team to execute their overall strategy. The objective is to destroy the opposing team’s home base

NFT / Non-Fungible Token
A non-copyable, non-changeable, and non-subdividable digital identification stored on a blockchain, used to verify ownership

Non-endemic companies
Companies whose core products and services are unrelated to video gaming and/or esports
Non-viewers
Respondents who have never watched professional esports

Occasional User
Esports viewers who watched esports content less than once per week in the last six months

Overall Esports Reach
Share of respondents who have watched professional esports content at least once in the past

Penetration rate
Reach of a content, product or service within a predefined market

Racing
Racing games simulate racing competitions based on a wide variety of vehicles

Regular Esports Engagement
Share of respondents who have watched professional esports content at least once per week in the last six months

Regular User
Esports viewers who watched esports content between 1-3 hours per week in the last six months

RTS / Real-Time Strategy
In RTS games, players develop assets such as infrastructure, resources or troops in an attempt to outmanoeuvre their opponents

Simulation
The Simulation genre aims to closely simulate/copy real-world activities

Small town or rural area
less than 50,000 inhabitants

Sports
Sports simulations bring sports into the video gaming world by either adapting real-world sports in their original game environment or adapting specific elements of sports in a more abstract setting

STEM
Science, Technology, Engineering and Mathematics

Very large city
more than 499,999 inhabitants

Video gamers
Respondents who have played video games in the last six months on console, PC, mobile devices or virtual reality devices

Video gaming
Active playing of video games as a leisure activity

Video gaming peripherals
Add-on video gaming products such as controllers, gaming chairs and headsets

Video gaming streamer
Respondents who create an online stream of their own video game play

Video gaming subscription services
Subscription-based offering of video game titles
Video game-related streaming / Game-related streaming
Transmission of video game content within an online network. Streamed content relates to free time / leisure video gaming and often contains entertainment elements. Therefore, it is distinct from esports. People can participate actively (streaming their own play) or passively (watching content generated by other people) and participation is open to every interested person.

VR
Virtual Reality Device
05 | Methodology

25,000 people from 22 global markets were surveyed in August and September 2022 regarding their video gaming and esports consumption. In addition, 53 European market experts were interviewed.

**Consumer survey:**
- Representative survey among ~25,000 participants globally
- 22 global markets
  - Asia-Pacific
  - Europe
  - Middle East
  - North America
- 1 | Video gaming, esports and game streaming consumption

**Expert survey:**
- Online interviews w/ 53 market experts
  - Teams
  - League & Event Hosts
  - Further stakeholders
- 15 European countries
- 1 | Economic situation of teams and event hosts
- 2 | Assessment of current market trends
06 | Contacts

Philipp Lüttmann  
Partner  
Head of Sports Business Group  
plueyttmann@deloitte.ch  
+41 58 279 7114

Timo Helbling  
Assistant Manager  
Sports Business Group  
thelbling@deloitte.ch  
+41 58 279 7612

Elio Keller  
Assistant Manager  
Sports Business Group  
ekeller@deloitte.ch  
+41 58 279 7353
This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte AG accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

Deloitte AG is an affiliate of Deloitte NSE LLP, a member firm of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NSE LLP do not provide services to clients. Please see www.deloitte.com/ch/about to learn more about our global network of member firms.

Deloitte AG is an audit firm recognised and supervised by the Federal Audit Oversight Authority (FAOA) and the Swiss Financial Market Supervisory Authority (FINMA).

© 2022 Deloitte AG. All rights reserved.