

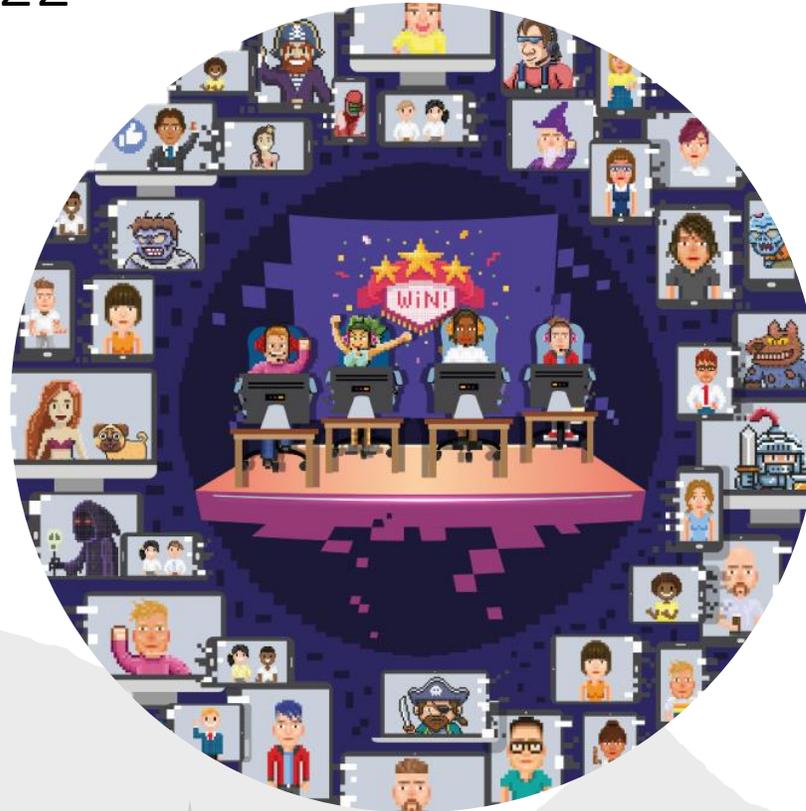


Let's Play, Switzerland!

Video gaming & esports 2022



November 2022



01 | The Swiss Target Group (1/5)

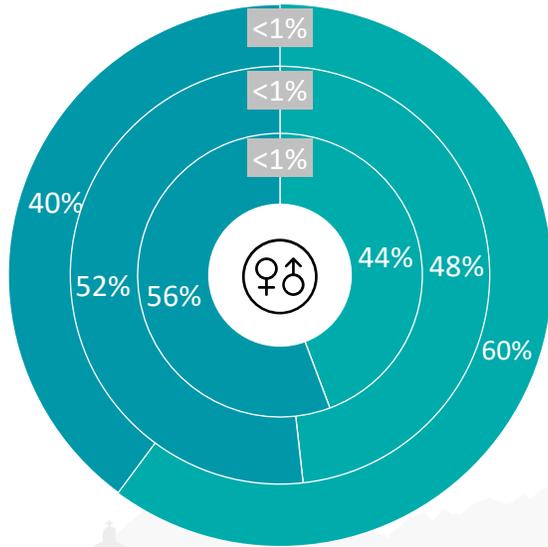
Esports viewers are predominantly male and comparatively young in comparison to esports gamers. Both esports viewers and gamers belong to rather high income groups in relation to the overall population



Gender distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

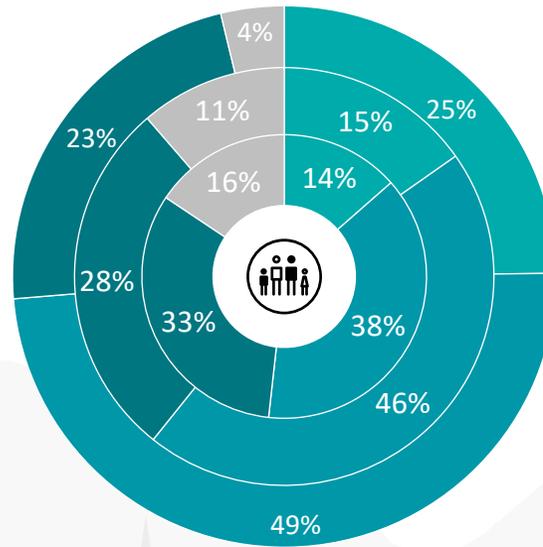
Male Female Other



Age distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

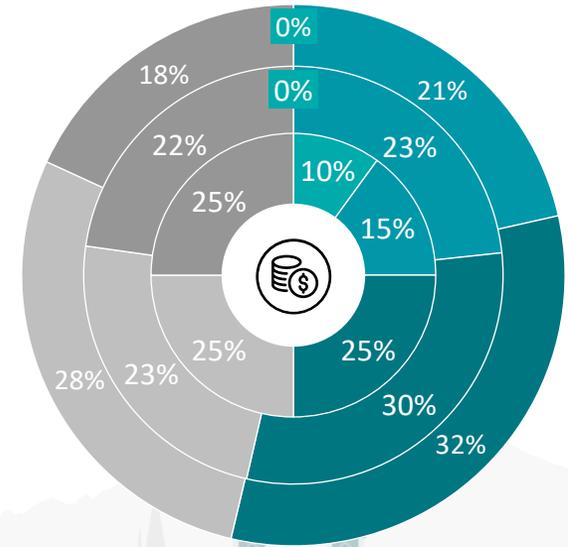
16-24 (Generation Z) 25-41 (Millennials) 42-56 (Generation X) 57+ (Baby Boomers)



Income distribution

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

Top-10% Top-11-25% 26-50% 51-75% Lowest 25%



01 | The Swiss Target Group (2/5)

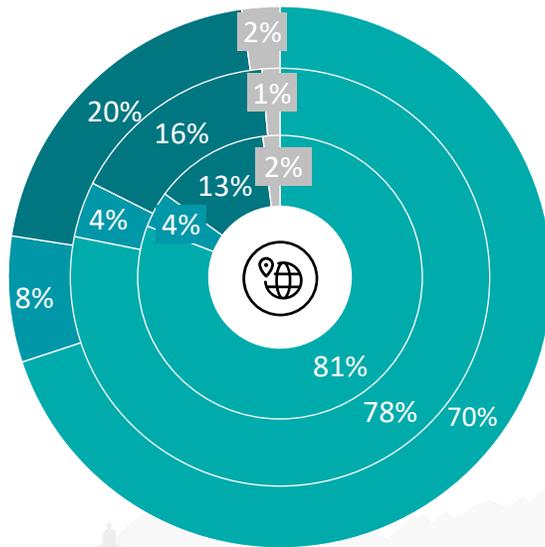
Esports viewers tend to be from larger cities and more frequently full-time employed than esports gamers. Comparatively often esports viewers and video gamers have a background in business/economics and STEM respectively



Hometown size

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

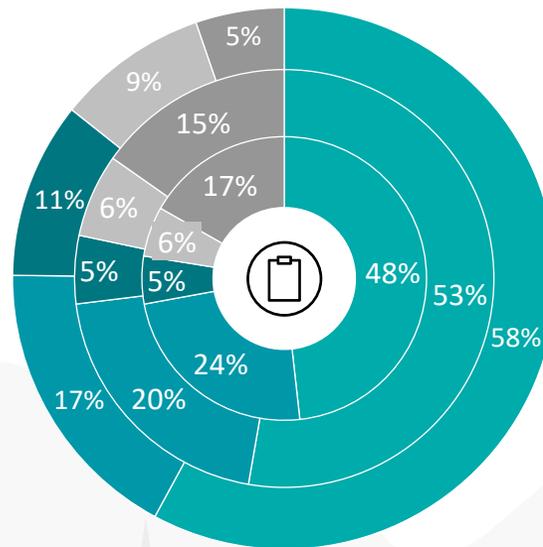
- Small town or rural area
- Medium-sized town
- Large city
- Very large city



Employment status

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

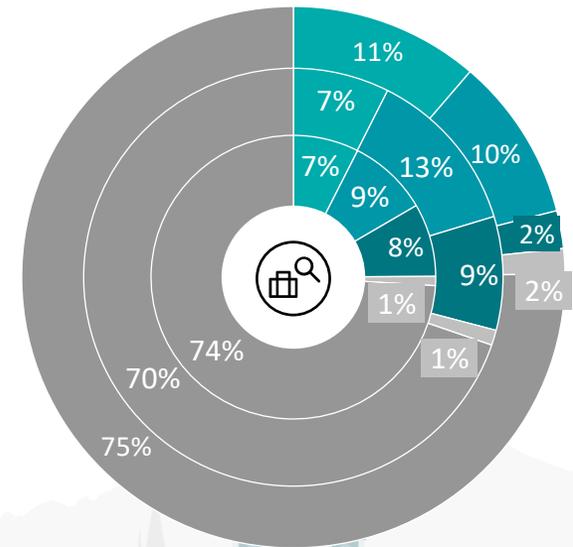
- Full-time
- Part-time
- Self-employed
- School / university student
- Other



Professional background

Esports viewers (outer circle)
vs. video gamers (centre circle)
vs. overall sample (inner circle)

- Business/ economics
- STEM
- Healthcare sector
- Sports/ fitness coaches
- Other



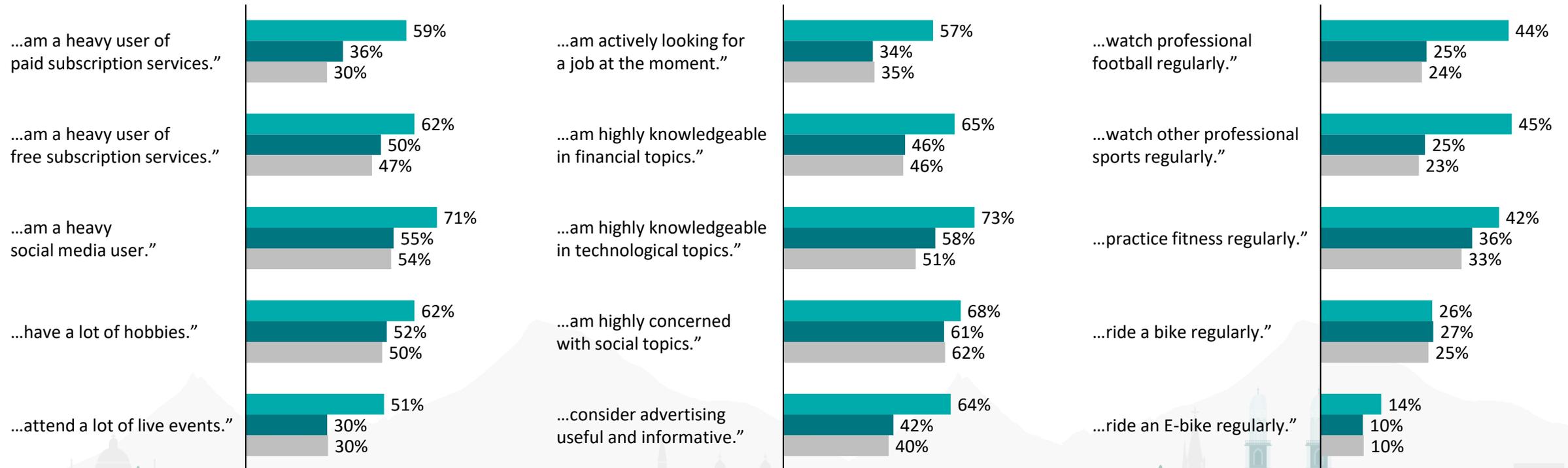
01 | The Swiss Target Group (3/5)

Esports viewers and gamers tend 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

 Esports viewers  Video gamers  Overall sample

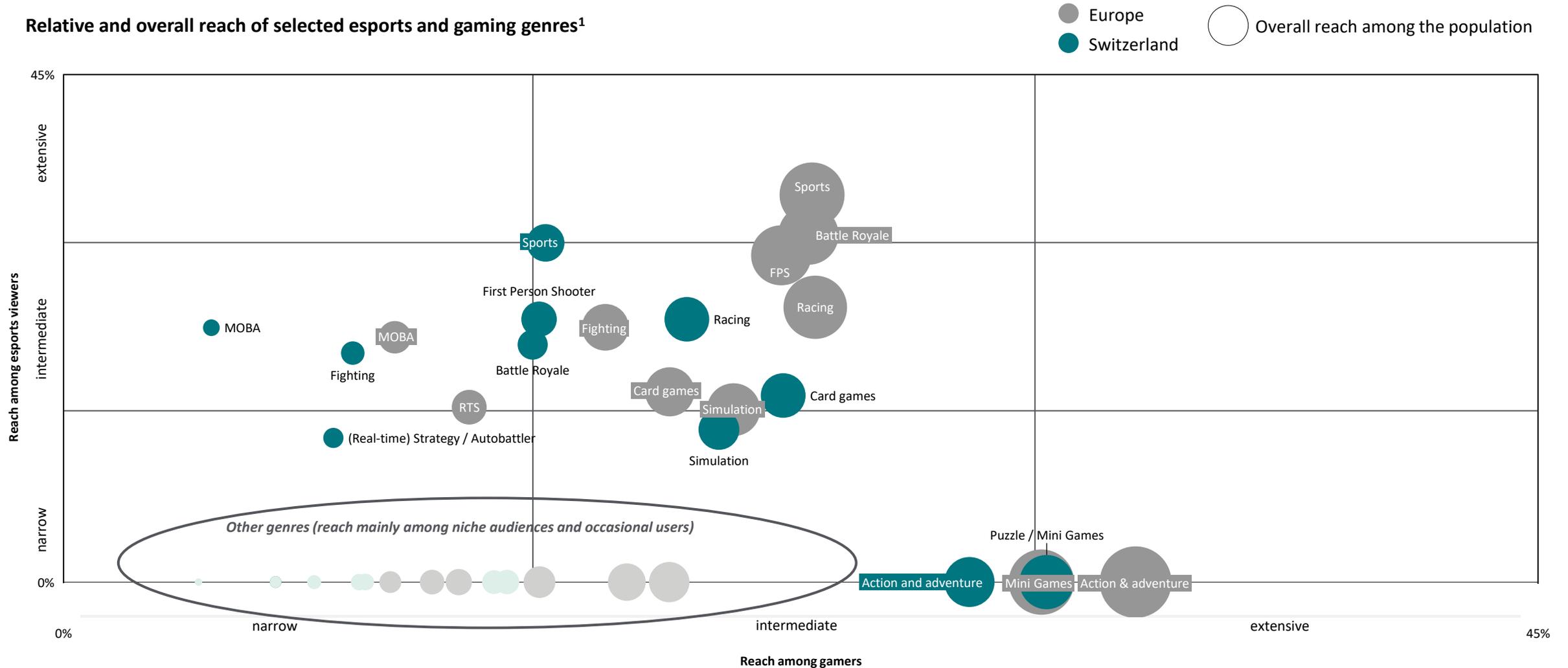
“I...



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 genres¹

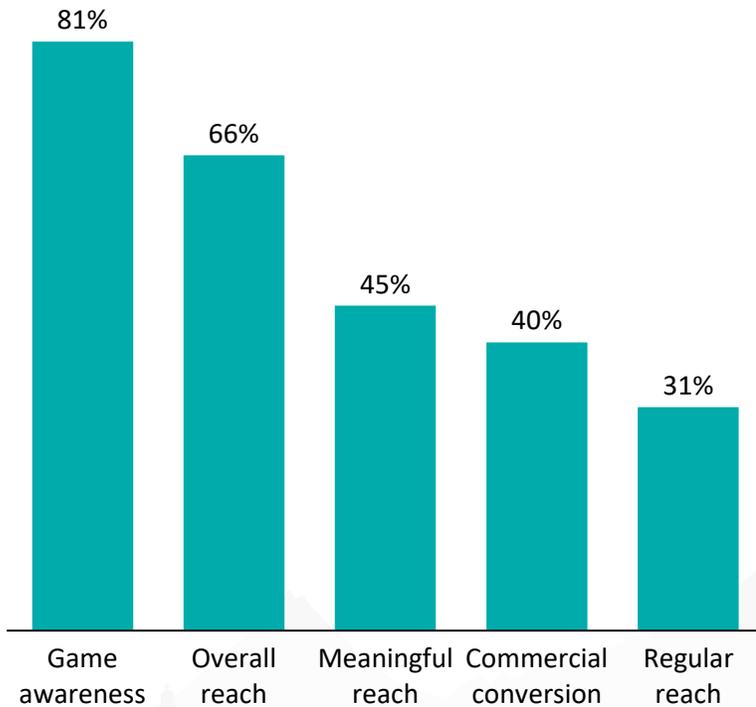


1) Some video gaming genres do not have a relevant esports scene and therefore have an esports reach of 0%
Source: Deloitte analysis

02 | Video Gaming in Switzerland (1/2)

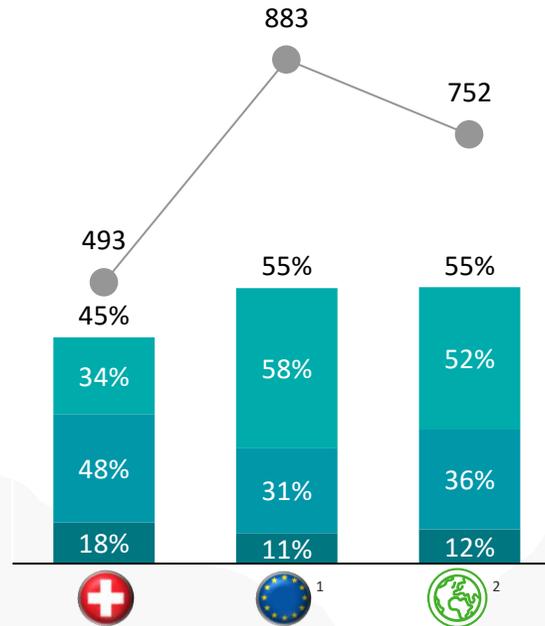
While 81% of Swiss are aware of video games, 40% are commercially engaged. The monthly video gaming-related spending numbers to 25CHF per person on average

Video gaming engagement maturity in 2022 % of Swiss to whom below categories apply

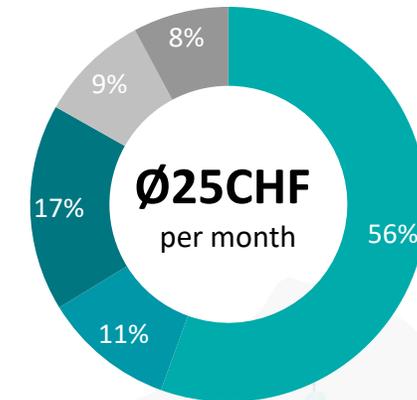
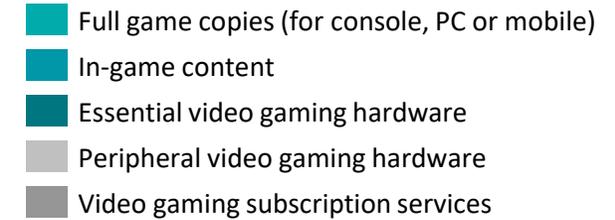


Weekly video gaming consumption times

Among Swiss in the last 6 months



Monthly video gaming-related spending (distribution) among Swiss video gamers over the last 6 months



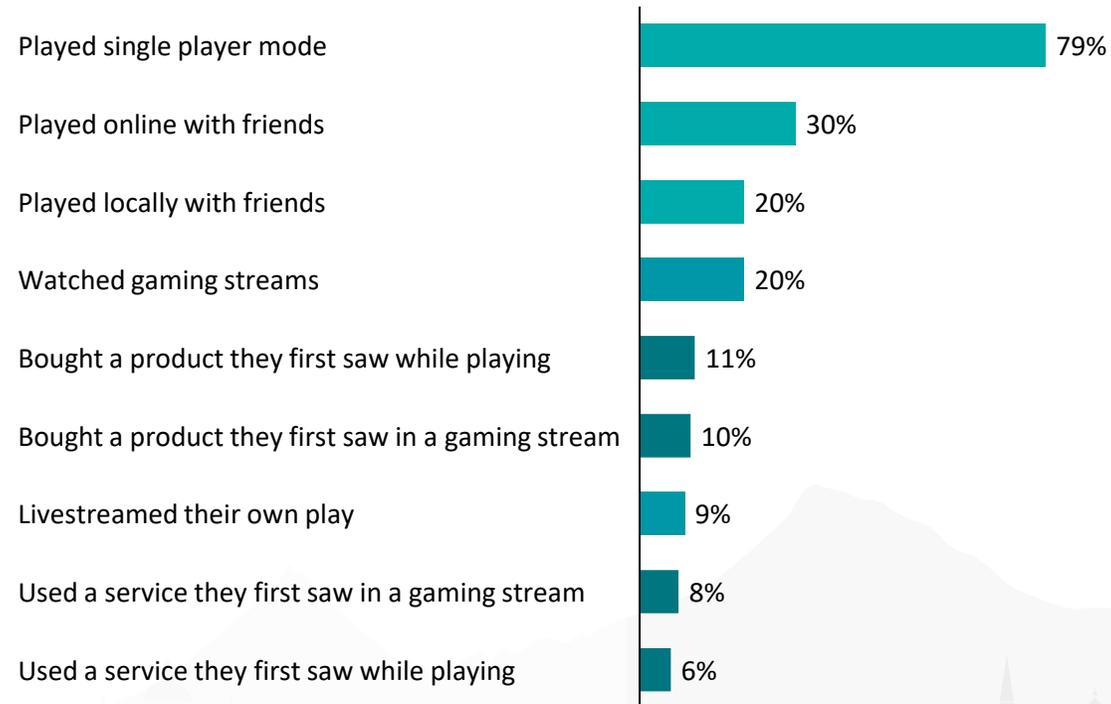
1) "Europe" refers to the 12 European countries included in the report; 2) "Global" refers to data from the 22 countries included in the report

02 | Video Gaming in Switzerland (2/2)

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

🇨🇭 Engagement habits with video gaming content among Swiss video gamers over the last 6 months

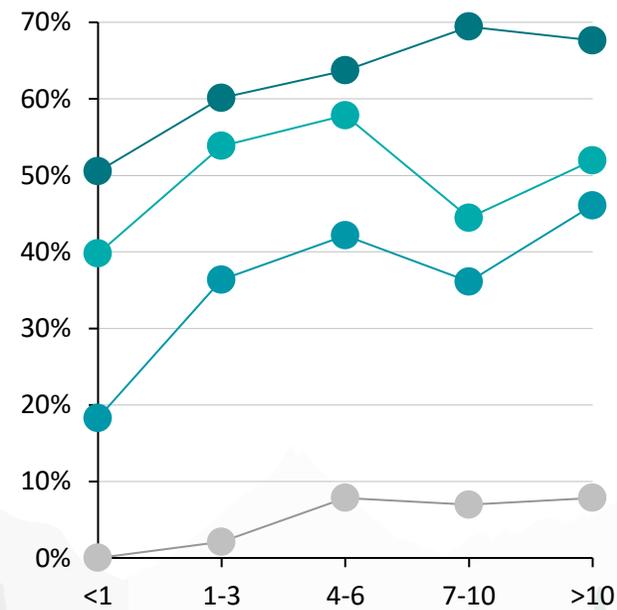
■ Playing behaviour ■ Video game streaming ■ Purchases driven by video gaming



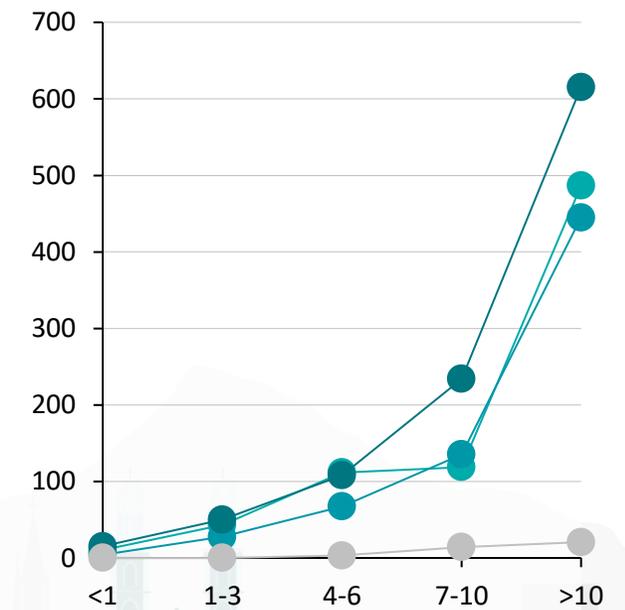
🇨🇭 Usage of selected video gaming media by consumer type among Swiss video gamers over the last 6 months

● Console ● PC ● Mobile ● VR

Reach per video game media in %



Weekly playing time per video gaming media in minutes



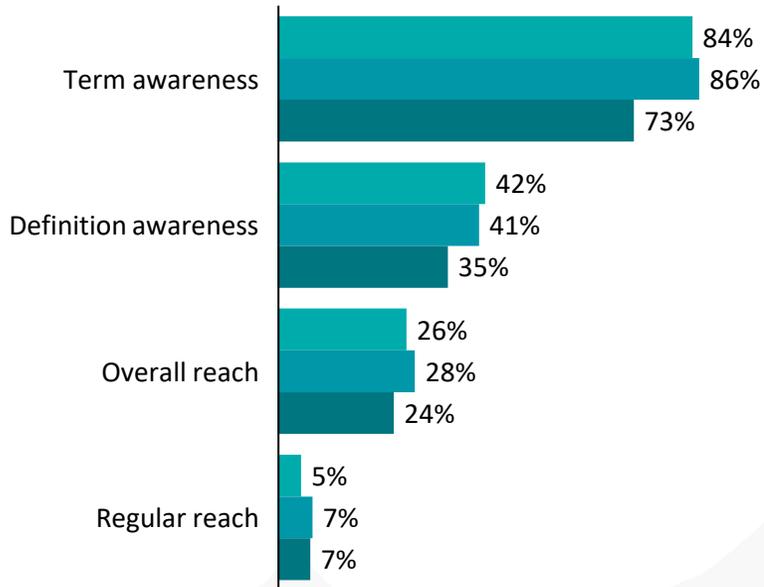
Gamer groups with different weekly playing time, in hours

03 | Esports in Switzerland (1/2)

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

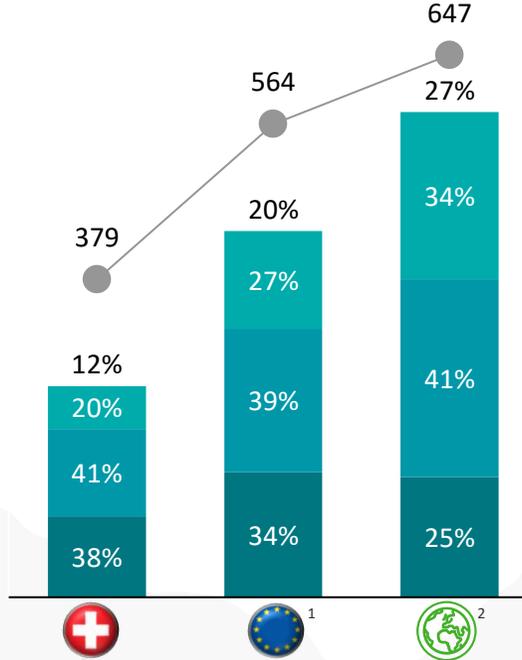
Development of esports engagement maturity

% of Swiss to whom below categories apply



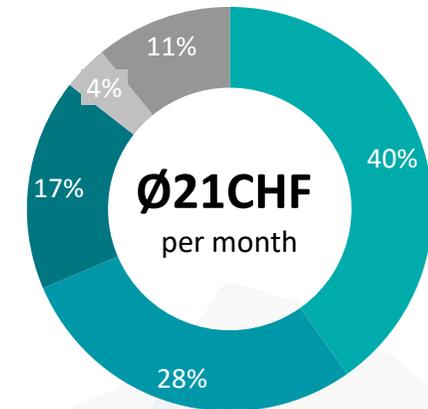
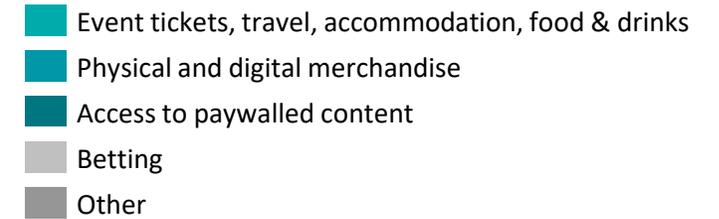
Esports reach and weekly consumption times

Among Swiss in the last 6 months



Monthly esports-related spending (distribution)

among Swiss esports viewers over the last 6 months

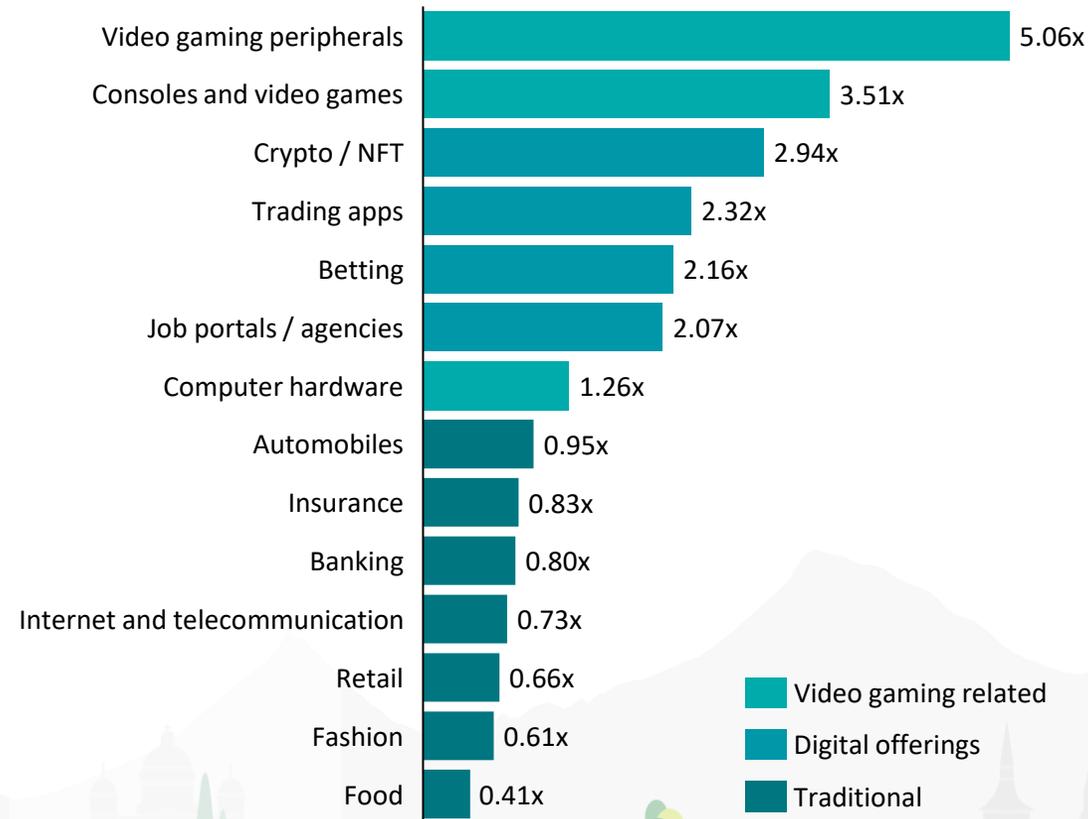


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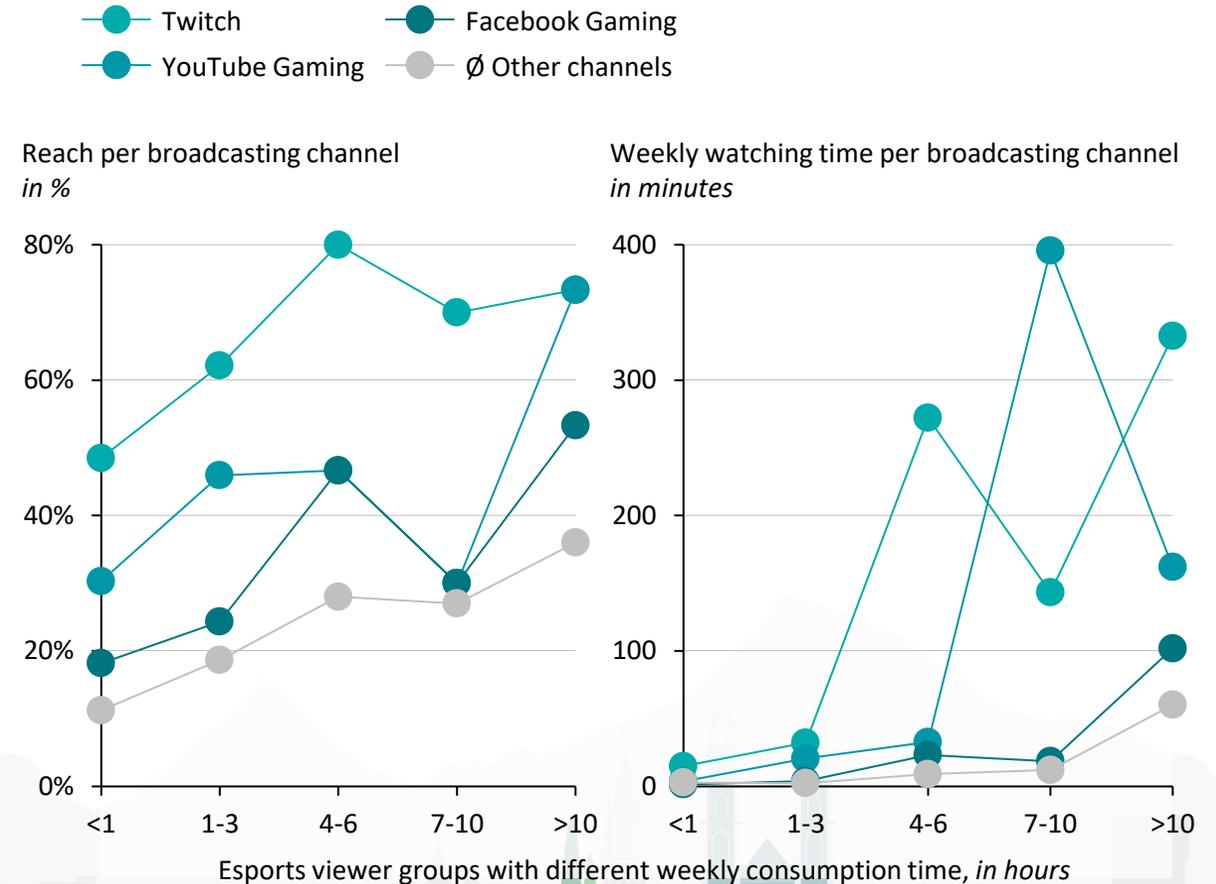
03 | Esports in Switzerland (2/2)

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



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



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

04 | Glossary (2/4)

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



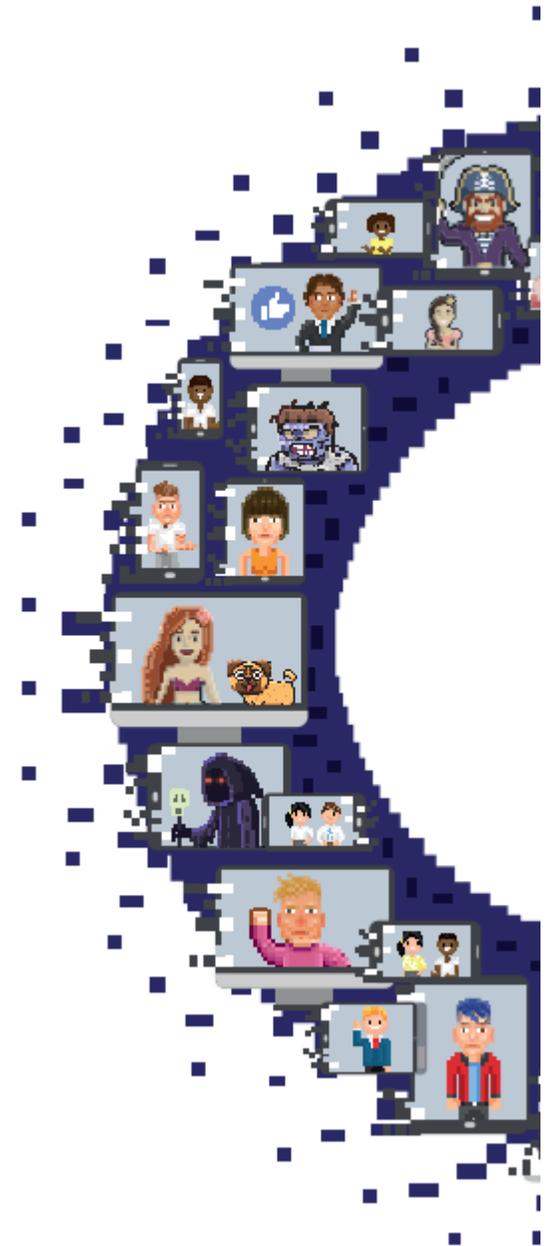
04 | Glossary (4/4)

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

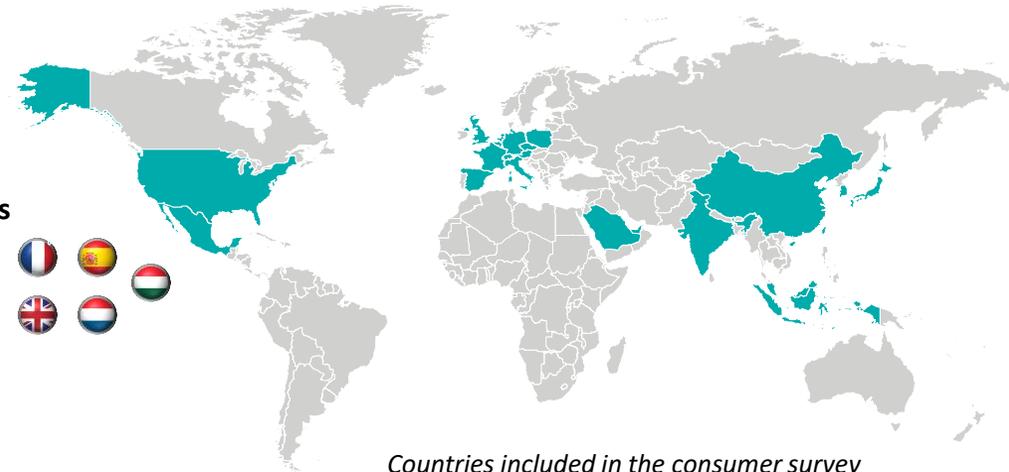


15 European countries



1| **Economic situation** of teams and event hosts

2| Assessment of current **market trends**



Countries included in the consumer survey

06 | Contacts



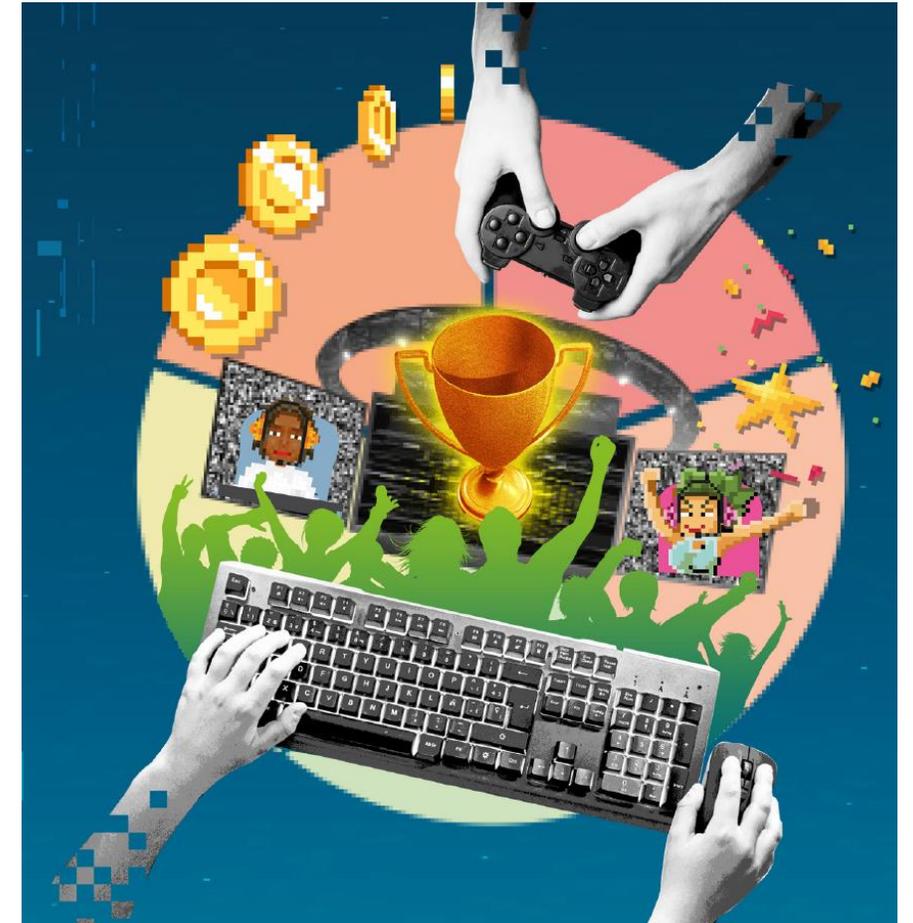
Philipp Lüttmann
Partner
Head of Sports Business Group
pluettmann@deloitte.ch
+41 58 279 7114



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





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