

# **Market potential of the E-sports industry in Switzerland**

**Bachelor Project submitted for the degree of  
Bachelor of Science HES in International Business Management**

by

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**International Business Management**



## Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

The student accepts the terms of the confidentiality agreement if one has been signed. The use of any conclusions or recommendations made in the Bachelor Project, with no prejudice to their value, engages neither the responsibility of the author, nor the adviser to the Bachelor Project, nor the jury members nor the HEG.

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Sebastian CERNADAS

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# Executive Summary

This paper provides an analysis of the interest in video games by Swiss residents and the current state of e-sports investment in Switzerland. It provides information aiming to facilitate the investment for firms interested by the e-sports industry as well as an estimation of the expected revenue from video game accessories purchases in Switzerland for 2020.

The first objective of this research was to define Swiss video game players and their gaming behavior, as well as having a glance of the Swiss market for video games and e-sports. The second major objective was to perform a market analysis by identifying the present firms involved in e-sports sponsorship and assessing the firms that could be potentially interested in becoming sponsors given the results from the first objective.

The research methods included: data collection from an online survey, data treatment and analysis, quantitative analyses by the creation of economic models using ordinary least squares estimation methods and a linear probability model, qualitative analysis of data as well as interviews and an estimation of market value.

The results permitted to understand that the attributes making a person more likely to be a video games player are being a male, having achieved mandatory or post-mandatory education as highest degree, being single or divorced and having a large share of friends interested in video game. Additional analyses permitted to find the characteristics as well affecting the participant's commitment to play, the interest they have in e-sports and the amount they spend to fully enjoy their gaming experience.

The analysis of the market allowed the paper to identify Swiss firms having a suitable profile to invest in e-sports. These firms were: Digitec, Microspot, Sunrise, Rivella, Ramseier and more. Finally, the estimation of the market value for video game accessories purchases in 2020 amounted to 542 million Swiss Francs. Given the incoming innovation in the video games industry, such as the 5G network or the creation of gaming streaming platforms, the researcher strongly recommends these companies to consider investigating in the e-sports and video games industry.

This paper proves that Swiss residents, corresponding to the sample's representation, show a true interest for video games and this market represents an investing opportunity for e-sports investment and sponsorship.

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# 1. Introduction

In 2018, 99.6 million persons around the world watched the *League of legends* finals eSports championship (League of legends, 2018). They were only 57.6m in 2017 (League of legends e-sports, 2017) and 210'000 viewers for the first edition in 2011 (Engadget, 2011).

As a comparison, the most recent figures available for the Champions league football final viewership show that the competition was watched by about 180 million viewers across the world in 2015 (UEFA, 2015) and the Super bowl final, who scored their smallest audience since 2009, had an estimated 103.4 million people watching for the 2017 season according to CBS News, 2018.

The e-sports industry is rather new but has an enormous growth potential. According to Newzoo (2019), the global e-sports revenue is expected to reach more than a billion US dollars in revenue in 2019, and 1.4 billion in 2020 reaching more than 10 times the value it had in 2012 (Statista, 2018). This industry is growing exponentially, and more investors appear as time passes. Football clubs, NBA teams, celebrities or even big brands like Coca Cola or Red Bull have already invested in E-sports (Business Insider, 2017). Already in August 2014, Amazon's acquisition of Twitch, a streaming platform for video games, for almost a billion US dollars attracted a lot of attention (Business Insider, 2016).

This paper aims to provide an answer to the following question: what is the market potential of the e-sports industry in Switzerland and for which companies would it be interesting to invest in sponsoring e-sports? It expects to encourage the investment in the e-sports industry in Switzerland and raise awareness on the expected future profitability of the business. Eventually, this paper could facilitate the investment decision for companies having the right profile to become sponsors. As a result, the study will principally focus on two of the main actors involved in the e-sports industry: the sponsors and the average players / viewers.

The research has two major objectives. The first objective is to find out what the Swiss market looks like with respect to video games; by researching what characteristics make someone more likely to play video games; by understanding what impacts the hours the players spend playing video games or the number of games they play frequently; by investigating what affects their interest on e-sports related streaming and finally by discovering what factors make some participants spend more than others. Once the understanding of the average player profile is clearer, the second major objective is to

identify which companies in Switzerland offer goods or services corresponding to the Swiss players' interests and should therefore invest in E-sports to reach new customers.

First, the reader will find the methodology used for the various analyses conducted for the research. Then, an overview of the data collected will be presented, followed by, the analyses of the profile of the Swiss video game players. Following that, some qualitative research will complement the previously presented quantitative results. After the analysis, the reader will find a discussion section where broader topics are discussed, and the second objective of this paper is addressed. Finally, a conclusion section gathers the main findings of the paper. For the reader's convenience, a glossary was created summarizing the terms used throughout the paper that could need a clarification. This glossary can be found in appendix 1.

## 1.1 E-sports<sup>1</sup>

By definition, e-sports are electronic sports. Concretely, e-sports are the activity of playing online video games while competing with other players. The set of games that can be considered as e-sports is very broad. Some famous categories are:

- Fighting games
- First-person-shooter games (FPS)
- Real-time-strategy games (RTS)
- Multiplayer online battle arena (MOBA)
- Sports games
- Racing games
- Battle royale

All of these categories include competition and all games in these categories need to have some kind of online scoring system or online competitive domain to be considered as being part of e-sports. While the fact of e-sports actually being categorized as sports is debatable, they are undoubtedly an immense source of entertainment across the world.

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<sup>1</sup> Note that part of the structure for this section was inspired by a documentary available on Netflix named: *Explained – E-sports* (source included in the bibliography).

The term “e-sports” may be relatively new, but competitive gaming is not. According to the webpage Esports for gamers (undated), in 1972 at Stanford University, students created the “Intergalactic Spacewar! Olympics” based on the game *Spacewar!* created in 1962 with a prize for the winners. This is considered as an indicator of the beginning of competitive gaming. As the years passed, more and more games were created, and competitions were launched along with them. Either highest score-based or one-vs-one tournaments, arcade competitions were popular for a while. But with the arrival of home consoles, the arcade popularity decreased until the industry eventually collapsed. Competitive gaming remained active mainly due to the existence of gaming communities organising encounters. Everything got accelerated for the industry when LAN<sup>2</sup> gaming was created in 1993 (Techcrunch, 2015). In 1996, the release of *Quake*, a first-person-shooter multiplayer game, made LAN gaming even more popular. Later that year, after winning the first *Quake* tournament, Dennis Fong, alias ‘Thresh’, became famous among video game players (Wall Street Journal, 1996). The competition Dennis Fong won is considered by people among the gaming community as being the beginning of e-sports competitions (Hotspawn, 2018).

Just as in football or basketball, the e-sports industry is essentially a business with its customers. In the e-sports industry, the customers are the viewers, the fans and the average players. It is mainly thought that the fans are male persons, but this empirical research aims to verify that and identify specifically who they are in Switzerland.

According to Newzoo’s report (2017), the e-sports industry global revenue is composed of five main revenue streams: the media rights, the merchandise and tickets sale, the game publisher fees, the advertising and finally the sponsorship, being the major contributor to the global revenue and accounting for 38% of it in 2017. Sponsors are typically electronics manufacturers or retailers, often video game accessories’ producers. Like in football or other sports, they pay players or teams to endorse their brand. They give them material, clothes and other miscellaneous products in exchange for the promotion of their products and / or services. In this paper, a part of the focus will be directed to sponsors and one of the objectives addresses which Swiss companies could be interested to invest in this industry.

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<sup>2</sup> LAN: Local-area network, basically a network of computers interconnected.

## **2. Methodology and data collection**

In order to respond to the objectives of this research, stated earlier in the introduction, a survey was conducted to evaluate the Swiss market on different aspects of their behavior towards video games and e-sports. While the goal of the analysis was to have a better knowledge of the potential customers of the e-sports industry, some questions were also directed to non-players. The goal of doing this was to better understand their general behavior with technology for example, or to notice differences from participants playing video games. The survey was responded by Swiss residents only, or people living very close to Switzerland's border. Although there is no question about it in the survey, from the distribution of the survey and the language taken by respondents it can be assumed that most of them probably live in the French-speaking part of Switzerland. The survey accepted answers during approximately two and a half months and most of the answers were collected in January 2018. The final sample is composed of 199 participants.

### **2.1 Survey questions**

The survey questions were available in French and English. The first question was simply a verification that the respondent was a resident of Switzerland. The rest of the questions could be categorized as per the following. The reader will find the questionnaire provided to participants in appendix 2.

#### **2.1.1 Demographics**

In this section, the participant was asked about his gender, age, occupation and relationship status. The relationship status of the participant was asked specially to verify if the representation of video game players being single men was accurate or just a common stereotype. Participants were also asked about the highest degree of education they had achieved and the highest degree of education one of their parents had achieved. Whilst the first question can give an idea of the participant's level of income, the second one can give an idea of the participant's wealth. Finally, participants were asked to estimate the number of leisure hours they had per day.

#### **2.1.2 Consumption basket**

Several products were proposed and participants were demanded to rank their consumption frequency of each product for the past month, in a given scale from 0 to 5, zero being never and 5 being all the time. The goal was here to identify if some products were exclusively consumed by video game players. If a clear difference is noticeable, it

could give hints on which type of companies could have an interest in sponsoring e-sports. The consumption basket created was inspired from different videos from YouTube displaying players recording themselves on a typical day or while playing online. If a product appeared frequently, it was added to the consumption basket. Some other products of the basket were added due to initial assumptions of the researcher. Other products were added to contradict these personal assumptions. For example, if an assumption was that video game players eat a lot of potato chips, then healthy snacks were also included to counterbalance the basket diversity. Finally, it is important to note that all the videos watched were from people living in other countries than Switzerland. The fact that people do not consume something here might be due to cultural differences. Nonetheless, the observation's focus was really on the difference in consumption from people playing video games and those not playing. At the end, participants were also asked if they wanted to add a product they frequently consume, not mentioned in the consumption basket.

### **2.1.3 Video games and online connectivity**

In this category, the questions were more focused on the topic and at the end of this section, participants were split between video game players and non-players until the end of the survey. The first question, to define if they were video game players, was to ask if they play video games online involving competition. As developed in the introduction, the two important factors to consider when talking about e-sports games are the ability to play online and the fact of including competition in the game. If these two conditions are met, this paper considers that the participant is a video game player, if not they are considered as non-players. The terms of player and non-player will be used given this definition throughout the paper. For the second question, participants were asked to rank how often they played video games as kids, on a scale from “never” to “all the time” (from 0 to 4). The objective of this question was to evaluate if there was some kind of habit creation throughout the years. For the third question, participants were asked to estimate, in percent, the share of their friends interested in video games. For this question, the goal was to see if the participants' interest on video games was influenced by their friends. The fourth and fifth questions had as a goal to investigate the overall level of connectivity of the participant. In the fourth question, participants had to select how many of the proposed devices they owned and used. In the fifth question, they had to mention how often they performed various online activities on a scale from never to all the time (from 0 to 4).

#### **2.1.4 Non-players reasons and interests**

A few more questions were asked to participants not playing video games. Most of them had a qualitative purpose. The participants were first asked about their interest in online video games. Those responding they were not interested at all, finished the survey. The others were asked why they did not play video games. Finally, the participants were asked if they ever watched e-sports related videos. For those responding yes, they were given the opportunity to explain briefly the reasons they watched e-sports videos, which lead for one of the respondents to be interviewed.

#### **2.1.5 Video game players detailed questions**

In this section, video game players were asked more details about their general gaming habits. First, they were asked how many years ago they started playing online video games involving competition. This question's intent was again to have an idea of the respondent's habit creation if any. For the second question, the participants were asked to say how many different games they frequently played. For the third question, they were asked to approximate the number of hours they played competitive video games online each week. For the fourth question in this section, the participants were asked to choose the category of games they played the most among these six categories: fighting games, sports games, racing games, FPS games, RTS games and MOBA games. These categories were thoroughly selected being the ones considered as the most important. One category was omitted on purpose: the battle royale games category, mentioned earlier in the introduction. This category is rather new, and it was believed that the segment of players is not mature yet. It would be more adequate to wait some years in order to capture the most accurate information from this category of games. Category of games like role-playing games (RPG) or massively multiplayer online role-playing games (MMORPG) were also purposefully excluded of the pool of choices since games in this category are not very famous for doing e-sports events or tournaments. RPG or MMORPG games are mainly focused on a character development over its virtual life.

#### **2.1.6 E-sports viewership**

First, the video game players were asked how often they watched e-sports related videos. If their answer was never, they were simply asked the reason for it. For all other answers, participants were asked: how many streamers they followed on social media, how many hours per week they watched e-sports related videos and the reasons they watched this kind of videos.



### **2.1.7 Video game players purchasing behavior**

All the video game players were first asked if they had ever bought or had received as gift video game accessories. By video game accessories, it was meant any physical and / or virtual item that could potentially improve their gaming experience. This was renamed as video game accessories throughout the paper. If they had never purchased any accessories, participants were asked what had prevented them from never purchasing any item and if they would ever consider buying some if they were certain that it would enhance their gaming skills. If the participants responded they had already purchased video game accessories, they were asked which articles exactly they purchased. The goal was to evaluate the popularity of each item proposed. They were then asked how they had heard about the items they purchased, to understand which type of promotions induced them to purchase video game accessories. Finally, the participants were asked to estimate in Swiss Francs the total value of the video game accessories they purchased during these last three years. They were asked an estimation for three years because the research presumed a long-time frame could correct the instability of purchases, i.e. individuals not purchasing anything for a whole year or others purchasing a consequent amount of items in a given month.

## **2.2 Quantitative data analysis**

While the data was being collected, the structure of the quantitative analyses was already defined. Various economic models were created. Almost all the models created used ordinary least-square estimation methods, either they were multiple regressions or simple linear regressions. One of the models used was a Probit model. The models aimed at responding to the objectives stated in the introduction of this paper. Additional details on the methodology of each specific model creation are provided in the analyses.

## **2.3 Qualitative data analysis**

A qualitative analysis was conducted to complement the findings from the quantitative analyses. From the survey's answers, two participants having an interesting profile were interviewed for a duration of approximately thirty minutes each. Additionally, some survey responses where participants were invited to give some explanations on specific topics have also been analysed, by summarizing the most mentioned answers.

## 3. Analysis

### 3.1 Overview of the survey's responses

This first part of the analysis aims to give an overall overview of the survey's responses so the reader can have a glance of the data used throughout the paper. It is also the occasion to include questions from the survey that could not be treated in the economic models used for the quantitative analyses.

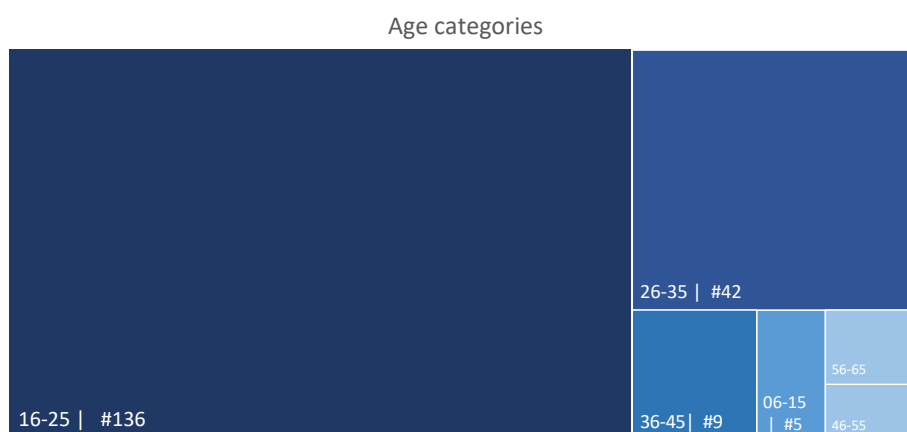
#### 3.1.1 Demographics

Ideally, the sample should be representative and be as varied as possible. Unintentionally, the sample reached an almost perfect parity for one of the variables with 50% of the participants being video game players and 50% being non-players.

The gender variable is not perfectly balanced but is still satisfactory. The sample is composed of 57% male participants and 43% are female participants.

As for the age variable, a huge disparity can be observed among the categories. The age category with more participants in the study is the 16-25 category – probably due to a higher presence on the distribution channels used for this survey – followed far behind by the 26-35 years old category. Unfortunately, the other age categories are not as consequent.

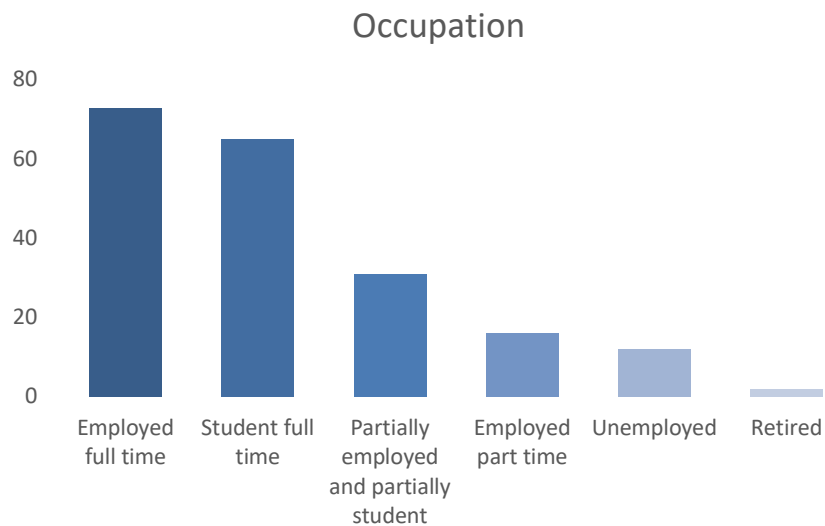
**Figure 1 – Age categories' heatmap**



Then, for the relationship status variable, the sample is mainly composed of single participants (40%) and participants in a relationship (50%). This is understandable, given the number of young participants in the study it would be unusual to see more married or divorced participants.

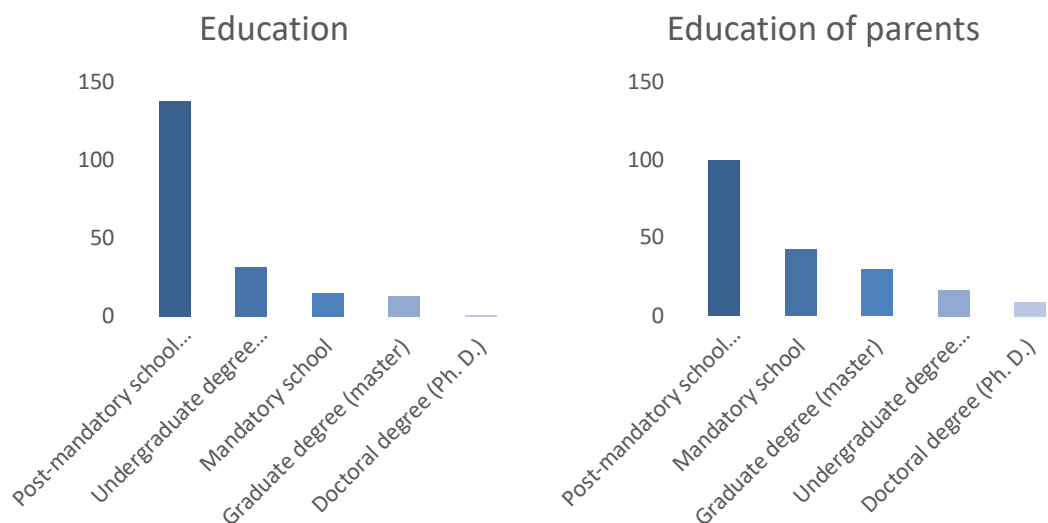
The occupation variable shows responses being more spread across the sample. Nonetheless two categories stand out: participants employed full-time and participants studying full-time.

**Figure 2 – Occupation repartition of the sample**



Finally, the education variable were participants were demanded to state their highest level of education achieved by them and by their parents was mainly, as shown in the figure below, post-mandatory school degree in both cases.

**Figure 3 – Education levels from the sample**



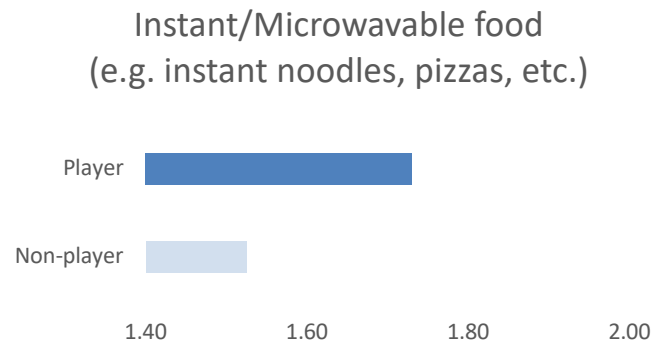
### 3.1.2 Consumption basket

As mentioned in the methodology section, a consumption basket was included as part of the survey questions. Participants were demanded to select how frequently they consumed (or performed when talking about actions) the different items proposed. The scale given was the following one: never, occasionally, sometimes, often, very often and all the time. The objective of such question was to see if participants playing video games had common consumption patterns. Obviously, the sample for this analysis is really small so it is not possible to affirm this is completely representative of the total population. An additional study should be conducted if that wants to be confirmed and this goes beyond the scope of this paper. Nonetheless, it can already give an indication on which products, or more specifically which firms producing these products/services could have a potential interest in sponsoring e-sports content. The reader will find more about this in the discussion section.

Each segment of the scale, previously mentioned, was given a value (from 0 to 5) and an average was computed for the player's responses and the non-player's responses. On average, seven of the items proposed were consumed more frequently by non-players than by players. Three other items were found to be equally consumed for both. Finally, players showed they consumed on average five items more frequently than non-players. This paper emphasizes on these five items, consumed more frequently by players: instant / microwavable food, cigarettes, energy drinks, soft drinks and the action of ordering food online (or by phone).

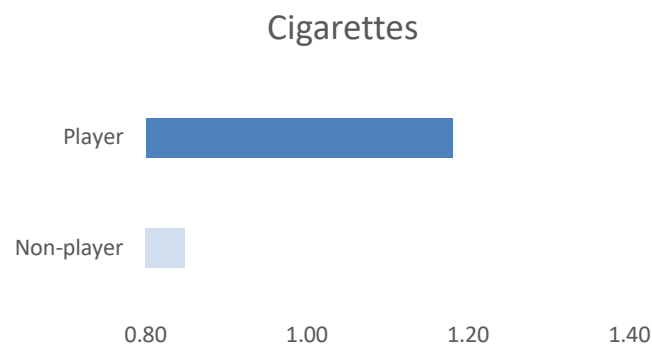
The figure 4 displays the average consumption for instant or microwavable food by players and non-players. According to the results, players consume instant or microwavable food 13% more frequently than non-players. This is not the most significant difference found across the analyses, but the average consumed frequency, scoring 1.73 over 5, is one of the highest among the five items chosen for this focus. The difference in means is statistically different from zero with a 90% confidence level.

**Figure 4 – Instant / microwavable food consumption**



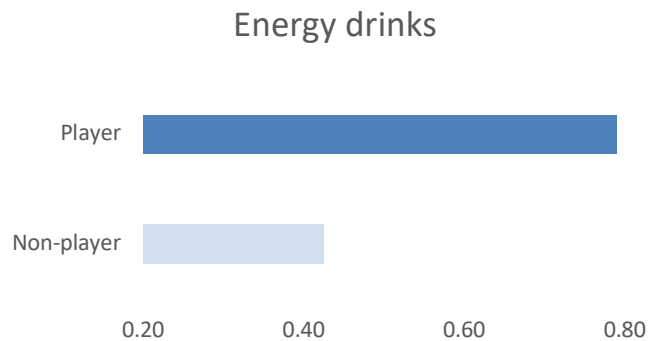
The figure number 5 shows the average cigarette monthly consumption frequency for players and non-players. In this analysis, the difference between both types of participants is already larger than for the previous one. Indeed, players appear to smoke cigarettes 40% more frequently than non-players. The difference in means is statistically different from zero with a 90% confidence level.

**Figure 5 – Cigarettes consumption**



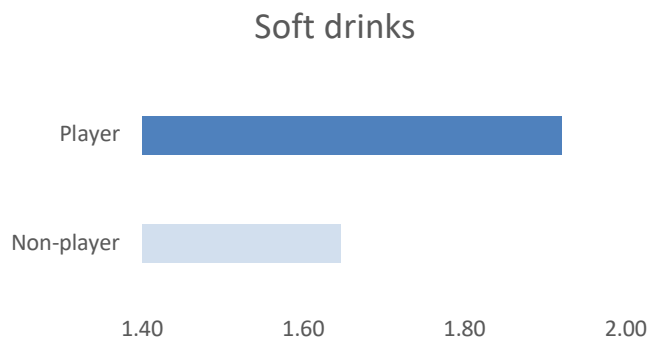
This following figure represents the average energy drinks monthly consumption for players and non-players. This represents the highest difference in value reported in this analysis. Video game players consume energy drinks 88% more frequently than non-players, almost the double. Interestingly, important firms from the energy drinks industry, like Red Bull or Monster Energy, have already sponsored and created e-sports teams for various video games. Nevertheless, the total score is rather small. The average consumption scores 0.79 out of 5. The difference in means is statistically different from zero with a 99% confidence level.

**Figure 6 – Energy drinks consumption**



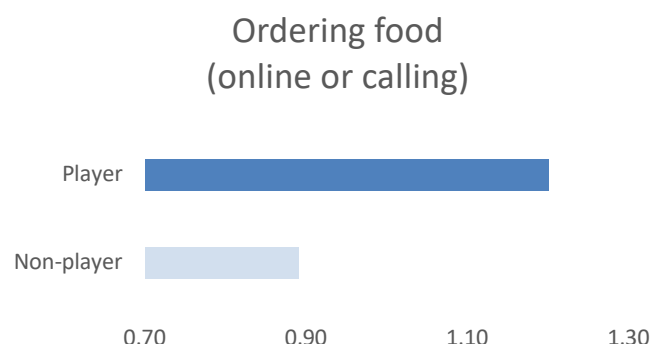
As for the soft drinks consumption frequency, the figure number 7 displays the largest average score of this analysis, 1.92 over 5. In this case, players consume soft drinks on average 16% more frequently than non-players. The difference in means is statistically different from zero with a 95% confidence level.

**Figure 7 – Soft drinks consumption**



The last figure illustrates the average frequency players and non-players ordered food either online or by calling. According to the results, players ordered food 35% more frequently than non-players. The data also shows that among the participants having mentioned ordering food very often, 80% of them are players. The difference in means is statistically different from zero with a 95% confidence level.

**Figure 8 – Food ordering frequency**



While the survey respondents were encouraged to respond honestly, low scores for cigarettes (total average of 1.01/5) or energy drinks (total average of 0.61/5) consumption allow one to question if the consumption basket faced a response bias. Indeed, some respondents might have decreased the frequency of consumption for items considered as unhealthy, while increasing the frequency of consumption for healthy products such as fruits<sup>3</sup> (total average of 2.56/5) to fit the social representation of what is acceptable.

Finally, participants were invited to share products they believed could belong to their own consumption basket because how often they consumed them. Although some of the answers indicated some similarities, the results were too few to be considered; consequently, the paper decided not to investigate further on this.

### **3.1.3 Online activity and connected device ownership**

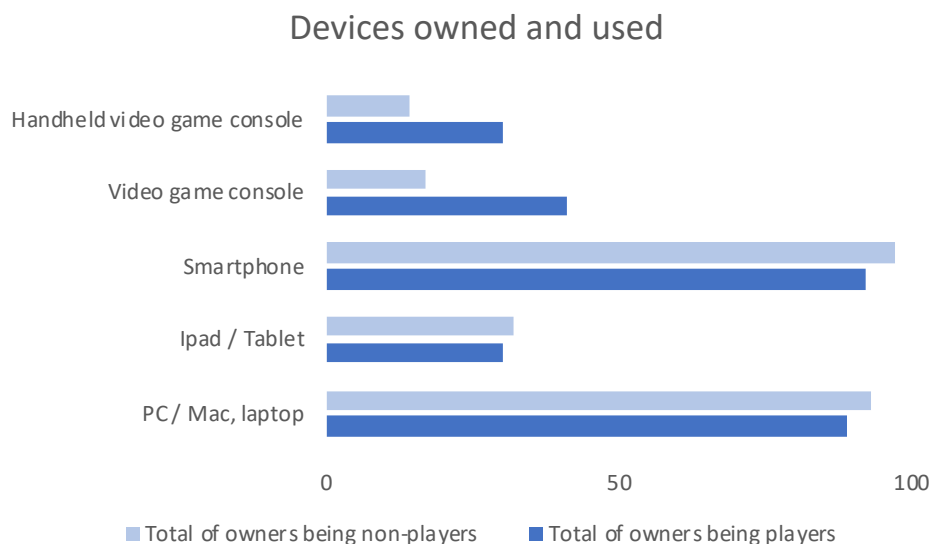
The devices owned and used by the participants can be observed in the figure number 9, with a focus on those owned by video game players. The goal of this analysis was to observe how connected participants are with current technologic devices. The goal was also to detect if there was any gap in ownership and usage of such items from players and non-players. Unsurprisingly, the item most owned and used by participants is smartphones, very closely followed by computers. It is extremely rare nowadays to find people not owning at least one of these items. Regarding the comparison between what is owned by players and what is by non-players, there does not seem to be a significant difference for smartphones, computers and tablets. However as expected, video game players own more video game consoles than non-players. Note that some participants

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<sup>3</sup> Fruits scored the second highest average consumption frequency, behind the action of wearing comfortable clothing.

categorized as non-players also own video game consoles. This means they probably play video games but not online or the ones they play do not involve competition and thus, they were categorised as non-players for this study.

**Figure 9 – Connected devices owned and used by participants**

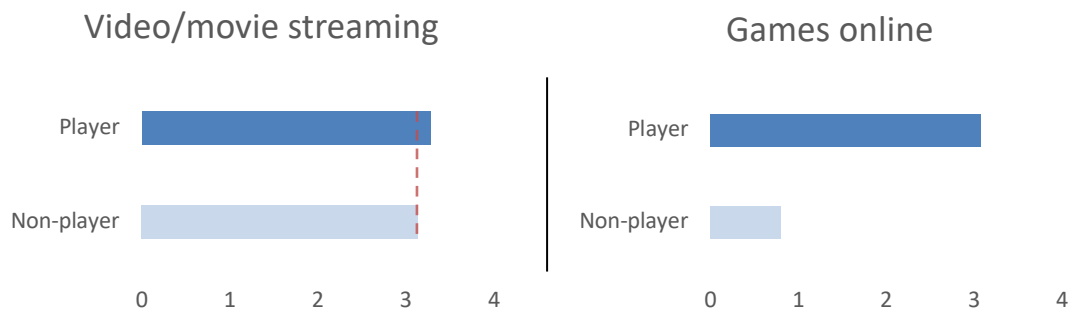


In order to measure the participant's level of online activity, respondents of the survey were asked to rate how frequently they performed some activities. The scale used for that question was: never, occasionally sometimes, often and all the time. Just as for the consumption basket, each segment of the scale was given a value (from 0 to 4) and the average for players and non-players was calculated. The paper was expecting to see less online activity from non-players. Surprisingly the results prove the contrary. Non-players appear to perform the following activities more frequently than video game players: reading or sending e-mails, using search engines, using social networks and buying products or services online. The activity of reading / accessing news online was equally performed by both categories of participants<sup>4</sup>. Lastly, as showed in the next figure, video game players appeared as being more active than non-players for two activities: videos / movies streaming and gaming online.

<sup>4</sup> A very slight advantage was detected for players with an average of 1.71 vs. 1.72 for non-players but the research considered the gap was too small to be significant.



**Figure 10 – Frequency of streaming videos and playing games online**



While the difference for the activity of streaming videos / movies online is barely noticeable, there is a clear majority for the other activity as one would expect. The fact that some participants categorized as non-players are playing online games can be explained if they play games online not involving competition like *Candy Crush* for example.

In conclusion, the results from the frequency of online activities (gaming online excluded) and the ownership of technologic devices (gaming consoles excluded) did not show any extreme differences between the two categories of participants. Moreover, for most of the online activities, non-players proved to be more active than video game players. As a result, the paper can confirm that the level of online activity and connected device ownership of participants does not impact their decision of whether or not they play to video games.

### **3.2 What makes someone more likely to be a player?**

The goal of this analysis was to determine the set of criteria that makes a person more likely to play video games. The dependent variable (Y) chosen for the analysis is the participant's response at the following question: "Nowadays, do you play video games online (involving competition)?" As a reminder, according to the conditions defined in this paper: being a player involves playing online to competitive games, both conditions need to be met. Since this study focuses on e-sports competitions, participants were not asked about other types of video games than the ones meeting those conditions.

The dependent variable is comprised of binary responses where: 'Yes' = 1 and 'No' = 0. Accordingly, the type of model chosen for this analysis was a probit model regression. The independent variables (Xs) are mainly demographic criteria such as gender, age category of occupation. There are also two continuous independent variables included: the participants' number of leisure hours per week and the participants' percentage of friends interested in video games. Finally, some dummy variables were created to group some categories where the amount of responses was too low, which permitted to correct multicollinearity issues encountered while creating the model. The first dummy variable grouped ages from 6 to 35 years old on one side, and 35 years old and above on the other. The second dummy grouped people with a doctoral degree with those owning a master's degree for the education variable. The last dummy category grouped retired and unemployed people.

### 3.2.1 Model outputs

**Table 1 Model outputs from probit regression**

Model 1: Who is a player?		
Variables		Coefficient
<b>Gender</b>	Male	1.0512***
<b>agbelow35</b>	Less than 35 years old	0.8015
<b>Occupation</b>	Student full time	0.0438
	Part-time employee / Part-time student	-0.4450
	Part-time employee	-0.2000
	Retired or Unemployed	-0.6154
<b>Education</b>	Master or PhD.	-0.8187
	Mandatory school	0.9871*
	Post-mandatory school	0.6380**
<b>Education of the parents</b>	Master	0.0214
	Mandatory school	0.0076
	Post-mandatory school	-0.1027
	Bachelor	0.4911
<b>Relationship status</b>	In a relationship	-0.5378**
	Engaged	0.6217
	Married	-0.5786
	Divorced	2.9687***
<b>Frequency of playing as kid</b>	Never	0.3314
	Occasionally	-0.3077
	Often	0.1005
	Sometimes	-0.4229
<b>Continuous variables</b>	Leisure hours	0.0117
	% of friends interested in video games	0.0172***
<b>Constant</b>		-2.9872**
Pseudo R2		0.3909
Prob > chi2		0.0000
Number of observations		199

\*  $p < 0.10$ , \*\*  $p < 0.05$ , \*\*\*  $p < 0.01$

### 3.2.2 Analysis

In the first place, by looking at the Chi2 value of the model it is possible to conclude that the set of independent variables as a whole is statistically significant. Additionally, the pseudo r-squared value of the model is quite good. It shows that the independent variables chosen can describe up to 0.39% of the variation in the dependent variable. Since it is up to everyone's interest to play or not video games, this idiosyncratic factor cannot be captured from the variables included in this model.

In this analysis, the sign of the coefficient indicates if the participant is either more or less likely to be a player based on the criteria chosen, i.e. the independent variables. Also, in categories where participants had various possibilities of responses (e.g. occupation), the analysis is made in comparison to one of the variable's categories. In other words, the results show how much they are more or less likely to be video game players compared to those in the compared category.

The first variable to observe is the gender variable, the compared category was the female category. The results show that participants being male are more likely to be video game players than female with a 99% confidence level.

For the education variable, the compared category was bachelor's degree. As explained earlier, a new variable was created by summing the participants having a PhD with the second least responded category being participants having a master. Fortunately, the two categories follow each other in a logical order. In any case, this category did not appear as statistically significant. The two other categories, however, are both statistically relevant. Participants with mandatory school as their highest level of education are more likely to be video game players than bachelor's degree owners with a 90% confidence level. Participants with a post-mandatory school degree are also more likely to be video game players than those in the compared category with a 95% confidence level. Which allowed the research to conclude that less educated individuals are more likely to be video game players.

The following variable observed is the relationship status for which single participants were the compared category. According to the results, participants being in a relationship currently are less likely to be video game players than those being single, this result is statistically significant with a 95% confidence. Whereas the category of divorced participants appears as being more likely to be video game players than the single participants. For this variable, the model shows a 99% confidence level rejecting the null hypothesis that the coefficient is zero.

The last variable to observe in this model is the variable showing the percentage of the participant's friends interested in video games. The objective of this variable is to show whether or not the participants are influenced by their friends. According to this model, it is possible to confirm that the higher the percentage of friends interested in video games the more likely the participants will be video game players too. For this variable, the null hypothesis can be rejected with a 99% confidence level.

Although the paper presumes that participants under 35 years old would be more likely to play video games than those above, the results from the model did not show statistical significance. The following variables did not show any statistical significance either: occupation, education of the participant's parents, participant's frequency of playing video games as a kid and participant's number of leisure hours.

All in all, the model chosen provided a lot of information. It is possible to analyse its reliability by looking at the fitness of the model to the data. In order to do so, an estimation was computed for each participant showing the likeliness they have being video game players given their profile. In other words, based on the model, each profile was given a predicted probability assessing their chances of being players or not. The probabilities could end up being wrong as some of the participants may match the characteristics of being a player but do not play video games. At last, the accuracy of each prediction for the different profiles of participants was valued. The model was able to predict correctly if the participant was a player or not in 78% of the cases. This number confirms that the model and the exogenous variables chosen to describe the endogenous variable are fairly reliable.

### **3.2.3 Further analysis**

According to the model, male participants are more likely to be players than female participants. These results could be complemented by the following figures showing the repartition of the data. This survey accounted for 82 % of the players being male and 18% being female. The objective of this research is not to highlight any discriminatory practices that could be present on the video game industry. Nonetheless, the paper acknowledges that the disparity represented in this small sample is noteworthy. Additionally, this paper considers that targeting females to play video games could be interesting for some game developers. Obviously, the current offering would need to be adapted since it does not seem to attract a lot of female prospects for the time being.

Lastly, to complement this analysis, the reader can observe in table 2 a summary of the participants most played game categories and its proportion to the total. This table aims

to give a further understanding on the player's profiles by showing the representation of interests in game categories over the sample.

**Table 2 Participants playing to the different game categories**

<i>Game category</i>	<b>Participants playing it (%)</b>
<i>First-person-shooter games (FPS)</i>	33%
<i>Fighting games</i>	10%
<i>Multiplayer online battle arena (MOBA)</i>	22%
<i>Racing games</i>	4%
<i>Sports games</i>	17%
<i>Real-time strategy games (RTS)</i>	14%

### 3.2.4 Conclusion

This first quantitative analysis aimed at understanding what factors made someone more or less likely to be a player and the model demonstrated being quite good at predicting this probability, given its accuracy rate of 78%. There is however an idiosyncratic factor that cannot be predicted by the model given that the response to: "Are you a video games player?", varies according to individual's interests.

In conclusion, the characteristics that could make someone more likely to be a video games player are: being a male, having achieved only mandatory school or post-mandatory school education, being single or divorced – they will be less likely to be players if they are in a relationship – and having an important portion of their friends interested in video games.

### **3.3 What determines the time spent playing video games?**

In this analysis, the paper aims to investigate what factors affect the time spent playing video games. The question asked to the participants was “how many hours do you play competitive video games online per week?” and their answers will be used as the dependent variable.

For this analysis a multiple linear regression model was built. It is important to note that this question was only ask to respondents having formerly confirmed they were video game players. Hence, no information was displayed in the data set for the dependent variable when the participant was a non-player. Consequently, all the missing values were not taken into account. Finally, all the continuous variables were logged as it smoothed the outliers' values.

### 3.3.1 Model outputs

**Table 3 Model outputs from linear regression**

Model 2: What impacts the number of hours played?		
Variables		Coefficient
<b>Continuous variables</b>	Number of leisure hours	0.4227*
	% of friends interested in video games	0.1170
	Years since the participant plays	0.0695
<b>Gender</b>	Male	0.1054
<b>Age categories</b>	Age (26-35)	-0.4570
	Age (36-45)	-0.7340
	Age (46-55)	0.1722
	Age (56-65)	-0.9376
	Age (06-15)	-0.9406*
<b>Occupation</b>	Part-time employee	0.3546
	Part-time employee / Part-time student	-0.3406
	Student full time	-0.2973
	Unemployed	-0.0395
<b>Education</b>	Mandatory school	-0.7382
	Post-mandatory school	-0.8679
	Bachelor	-0.9027
<b>Education of parents</b>	Master	-0.2799
	Mandatory school	-0.4947
	Post-mandatory school	-0.5697
	Bachelor	-0.0753
<b>Relationship status</b>	Engaged	0.4887
	In a relationship	0.1484
	Married	0.9126
	Single	0.2688
<b>Frequency of playing as kid</b>	Often and all the time	0.6608**
<b>Constant</b>		1.3597
R-squared		0.4093
Prob > F		0.0160
Number of observations		96

\*  $p < 0.10$ , \*\*  $p < 0.05$ , \*\*\*  $p < 0.01$



### 3.3.2 Analysis

The first observation that can be made is that the r-squared value demonstrates that the model is capable to explain about 41% of the variation in the endogenous variable. The F-test value shows that the independent variables included in the model are statistically relevant as a whole within a 95% confidence level.

The first variables displayed are continuous variables. Since the dependent variable and the continuous variables were logged, in this case the coefficients express the elasticity between the variables. The first one among this category represents the number of leisure hours the participants have per day. It is possible to observe that a one percent increase in the leisure hours per day would cause a 0.42% increase in the hours playing video games by the participants. The results of the model showed a significance acceptable with a 90% confidence level. The second and third continuous variable are non-significant.

Then, for the age variable the compared category was the “16-25 years old” category. Only the last category displayed, for the 06-15 years old, is statistically significant. All the others appeared to be statistically non-significant. From the results, it is possible to observe that the category of players between 06-15 years old play 0.94 hours less than those being 16-25 years old.

The last variable to observe in this model is the frequency participants played video games as kids. This last dummy variable was changed to correct collinearity issues and replaced by a single variable: “often\_playkid”. In this variable, the participants playing video games often or all the time as kids were valued as 1, all the other categories were valued as 0. It is possible to observe from the results that the more a person played frequently as a kid, the more hours they play now. Indeed, participants playing often or all the time as kids play today 0.66 hours more than those playing less frequently as kids. Consequently, it can be noted that playing patterns from the past are still subsisting today and it confirms a habit creation among the participants of this study.

The results of the gender variable, the percentage of the participant’s friends interested in video games, the years since the participant plays online video games, the occupation, the education, the education of the participants’ parents and the relationship status variables, appeared all as statistically insignificant.

Finally, the data showed that participants playing video games played on average nine and a half hours video games per week.

### **3.3.3 Conclusion**

This second quantitative analysis aimed to understand what factors influenced the number of hours spent playing video games by participants. The F-test value confirmed that the exogenous variables chosen to explain the dependent variable are, as a whole, statistically significant. The value of the R-square shows that the exogenous variables were appropriately selected, and the model built was adequate to explain the variations in the endogenous variable.

The first takeaway from this analysis is the more the participants played video games frequently when they were kids, the more hours they play video games today.

The second takeaway is that participants from the 16-25 years old category play more hours to video games than those in the 06-15 years old category.

The third and last takeaway is that as the number of leisure hours increase, the number of hours played to video games by participants increases as well.

## **3.4 What impacts the number of games frequently played?**

In this analysis, the paper attempts to discover what factors influence the number of games frequently played by the participants. The question that was asked to the participants was “how many different games do you frequently play? (at least once a week)” and their answers will be used as the dependent variable.

For this analysis, a multiple linear regression model was built. As in the previous analysis (3.3), this question was only asked to respondents having formerly confirmed they were video game players, hence no information was displayed in the data set for these variables when the participant was a non-player. Finally, all the continuous variables were logged to smooth the outliers' values and estimate the elasticity between these variables and the dependent variable, that was also logged like in all other linear models throughout this analysis.

### 3.4.1 Model outputs

**Table 4 Model outputs from linear regression**

Model 3: What impacts the number of games played ?		
Variables		Coefficient
<b>Continuous variables</b>	Number of leisure hours	-0.1486
	% of friends interested in video games	0.0947
	Years since the participant plays	0.0997
<b>Gender</b>	Male	0.2761*
<b>Age categories</b>	Age (26-35)	-0.6176***
	Age (36-45)	-0.8442
	Age (46-55)	-0.6743
	Age (56-65)	-0.5200
	Age (06-15)	0.1282
<b>Occupation</b>	Part-time employee	0.0605
	Part-time employee / Part-time student	-0.0758
	Student full time	-0.1398
	Unemployed	0.3539
<b>Education</b>	Mandatory school	-0.3495
	Post-mandatory school	-0.5830
	Bachelor	-0.4306
<b>Education of parents</b>	Master	-0.4090
	Mandatory school	-0.5085*
	Post-mandatory school	-0.3281
	Bachelor	-0.1942
<b>Relationship status</b>	Engaged	-0.5127
	In a relationship	-0.8186
	Married	-0.2172
	Single	-0.9340
<b>Frequency of playing as kid</b>	Often and all the time	0.3665***
<b>Constant</b>		1.8826*
R-squared		0.4160
Prob > F		0.0110
Number of observations		97

\*  $p < 0.10$ , \*\*  $p < 0.05$ , \*\*\*  $p < 0.01$

### 3.4.2 Analysis

The F-test result show that the ensemble of variables used for the model are statistically significant and acceptable with a 95% confidence level. The R-square value is fairly high and shows that the exogenous variables used for the model are a good to explain 42% of the variation in the endogenous variable.

The first variable for which the coefficient is statistically different from zero is the gender variable. The results show that male participants play 0.28 more games frequently than female participants.

For the age variable, the compared category was the category of 16-25 years old. Among the categories, only one is statistically significant with a 99% confidence level. The age category of 26-35 years old appears to play 0.26 less games frequently than those in the 16-25 years old category. It is reassuring for the video game industry to see that this younger generation (16-25) is more engaged in playing video games. Note that while the earlier is true, the results from the data collection of this study actually prove that the older the participants, the more years they have been playing to competitive video games online (see table 6). Therefore, the results from the age variable show that while participants might keep playing throughout the years, the amount of games they play frequently diminishes.

**Table 5 Average years since playing video games per age category**

AGE CATEGORY	AVERAGE YEARS
6-15	3
16-25	8.53
26-35	11.16

Another variable showing statistical significance was the one for the education of parents. For this variable, parents having achieved a doctoral degree were the compared category. Participants having parents that achieved mandatory school degree as highest education degree showed a coefficient statistically different from zero with a 90% confidence level.

The last variable analysed in this model is the frequency participants played video games as kids. Again, the dummy variable was changed to correct collinearity issues and replaced by a single variable: "often\_playkid". In this variable, the participants playing video games often or all the time as kids were valued as 1, all the other categories were valued as 0. This variable's coefficient is different from zero with a 99% confidence level. It is possible to observe from the results that the more a person played frequently as a kid, the more hours they play now. Indeed, participants playing often or all the time as kids play today 0.37 more games than those playing less frequently as kids. As a result, it can be confirmed again that video games create a habit that subsists throughout the years among the participants of this study.

The model did not display any statistical significance for the remaining variables: the number of leisure hours, the percentage of friends interested in video games, the years since participants play to competitive video games online, the occupation, the education level and the relationship status of participants.

Finally, the data showed that participants played on average 3 games frequently per week.

### **3.4.3 Conclusion**

This third model intended to understand what characteristics influenced the number of games frequently played by participants. The R-square value shows that the independent variables were accurately selected, and the model built was representative of the dependent variable. The value of the F-test confirmed that the exogenous variables chosen to explain the dependent variable were, as a whole, statistically significant with a 99% confidence level.

The first takeaway from this analysis is that male participants play more games frequently than female participants.

The second takeaway is that participants from the 16-25 years old categories play more games frequently than participants being 26-35 years old.

The third takeaway is that the more frequently a participant used to play video games as a kid, the more games he will play frequently nowadays. This confirms the habit creation that was also observed in the previous analysis having the number of hours played as the dependent variable.

The fourth and last takeaway is that participants whose parents achieved mandatory school as highest degree of education play less games frequently than those whose parents achieved a doctoral degree.

### **3.5 What impacts the hours watching e-sports related videos?**

The objective of this analysis was to focus on explaining the number of hours participants watched e-sports related videos per week. The exact question that was asked to participants was: “how many hours per week do you dedicate to watching other people play video games?”.

For this analysis, a multiple regression model was built, and the continuous variables were logged. Note that the question, mentioned in the introduction, was only asked to participants having previously answered that they played video games and watched e-sports related videos as well. A similar question was asked to non-players, since this is a less common case; the reader will find more details about it in the interview section of the qualitative analysis. The dependent variable as well as the continuous independent variables were logged to estimate the elasticity between these variables.

### 3.5.1 Model outputs

**Table 6 Model outputs from linear regression**

Model 4: What impacts the number of hours of e-sports videos watched?		
Variables		Coefficient
<b>Continuous variables</b>	Number of leisure hours	0.5620*
	Percentage of friends interested in video games	0.1244
	Years since the participant plays	-0.0677
<b>Gender</b>	Male	0.4311
<b>Age categories</b>	Age (26-35)	-0.6104
	Age (36-45)	-1.4334
	Age (06-15)	0.1777
<b>Occupation</b>	Full-time employee	1.2092**
	Part-time employee	0.4720
	Student full time	0.2007
	Unemployed	0.8594
<b>Education</b>	Mandatory school	-0.4807
	Post-mandatory school	-1.0956
	Bachelor	-0.9334
<b>Education of parents</b>	Master	0.5485
	Mandatory school	0.2741
	Post-mandatory school	0.1766
	Bachelor	0.5302
<b>Relationship status</b>	Divorced	0.9224
	Engaged	0.9700
	In a relationship	-0.3218
	Single	0.2939
<b>Frequency of playing as kid</b>	Often and all the time	0.3439
<b>Game categories</b>	Fighting games	-0.5363
	Multiplayer online battle arena (MOBA)	0.3993
	Real-time strategy games (RTS)	-0.1737
	Sports games	-0.6975*
<b>Constant</b>		-0.8898
R-squared		0.5490
Prob > F		0.0211
Number of observations		72

\*  $p < 0.10$ , \*\*  $p < 0.05$ , \*\*\*  $p < 0.01$

### 3.5.2 Analysis

The first thing that can be observed is that the F-test value is acceptable within a 95% confidence level even though the model contains less observations than in other analyses. Thus, it is possible to say that as a whole, the independent variables chosen for the model are statistically significant. Given the R-square value, it can be stated that the independent variables chosen can explain about 55% of the variation in the dependent variable.

The first variable to observe is the one showing the participants' leisure hours. The variable is statistically significant with a 90% confidence level. The leisure hours participants have, are positively correlated to the number of hours they watch e-sports related videos. This was somehow expected since the first variable gives information about their time availability and the endogenous variable is time-consuming. According to the results of this model, one percent increase in the number of leisure hours of the participant would lead to a 0.56% increase in the number of hours they watch e-sports related videos.

For the occupation variable, the compared category was the one of partially employed and partially studying participants. The only category having statistically significant results for this variable is the category of employed full-time participants, with a 95% confidence level. It shows that they watch 1.21 hours more of e-sports related videos than participants from the compared category.

The last thing to observe from the model is the new variable that was introduced. The variable of game categories for which the FPS category was used as comparison. As a reminder, the question asked to video game players was: "what category of video games do you play the most?". One category appeared as statistically significant, the category of sports games being statistically significant from zero with a 90% confidence level. The results show that participants playing predominantly to sportive video games watch 0.70 less hours of e-sports related videos than those playing majorly to FPS games. The importance of integrating this variable in this model is that the paper assumes that participants watching e-sports do it mainly for the games they play the most. This is an assumption based on the possibility that their interest to play is linked to their interest to watch. The objective was to have an indication of which category of games was most watched by Swiss video game players. Readers of this paper interested in investing in e-sports may have now a better idea on which category of games is more appreciated in Switzerland.



The model did not reflect any statistical significance for the remaining variables: percentage of the participant's friends interested in video games, number of years since the participant started playing video games, gender, age, education, education of the participants' parents, relationship status and the frequency of playing video games as kids. This last dummy variable was changed to correct collinearity issues and replaced by a single variable: "often\_playkid". In this variable, the participants playing video games often or all the time as kids were valued as 1, all the other categories were valued as 0. The coefficient for this variable is not statistically different from zero.

### **3.5.3 Further analysis**

Some additional analysis was made for the dependent variable. The responses of this sample for this variable were filtered by the gender of the participants and an average of the responses was made. It was found that female participants watch on average one and a half hour of e-sports related videos weekly. On the other hand, male participants watch on average four hours and twenty minutes of e-sports related videos each week. Note that these averages represent the hours watched by participants given that they mentioned watching e-sports videos. This does not include responses for which the value was 0 in the dependent variable.

A second analysis was made for a whole new variable, not introduced before but related to this analysis. This variable represents the number of streamers followed by the participants on social media. Note that this question was only viewed by participants having mentioned they watch e-sports videos beforehand. The average of streamers followed by participants is 15. Although, some respondents answered values extremely high compared to others, saying they followed 100 or even 400 streamers on social media. When these outliers are taken out, the average of streamers followed is approximately divided by two, giving a result of 8 streamers.

### **3.5.4 Conclusion**

The objective of this analysis was to understand what influenced the number of hours video game players spent watching e-sports related videos. The R-square value showed that the independent variables chosen in the model explained slightly more than half of the variation in the dependent variable. The value of the F-test confirmed that the exogenous variables chosen to explain the endogenous variable were, as a whole, statistically significant with a 95% confidence level.

The first takeaway from this analysis is that as leisure hours increase, the hours participants watch e-sports videos increase too.

The second takeaway is that full-time employees watch more hours of e-sports videos than participants being employed part-time and studying part-time.

The third and last takeaway is that participants playing predominantly to sports video games watch less hours of e-sports videos than those playing to FPS games. This finding was important as it gave to some extent an indication on which category of e-sports is most watched, if it is assumed that participants watch mainly e-sports concerning the category of games they play the most.

### **3.6 What explains the amount spent on video game accessories?**

The goal of this analysis was to determine the various factors that affect the amount paid by video game players for accessories, either virtual or physical items. The endogenous variable is the total amount in Swiss Francs the participants paid these last three years for their consumption of video game accessories. Accessories range from the purchase of keyboards or mice, to the purchase of virtual weapons, equipment or characters in a game. Additional information is provided in the qualitative analysis. Also, given that some participants do not necessarily purchase this type of goods themselves, especially younger participants, this amount also takes into account video game accessories having been received as gifts.

For this analysis, an economic model was built using the ordinary least squares estimation method, as done for all the previous analyses in the paper excluding the first one. The dependent variable and the continuous variables were logged in order to smooth the outliers' values and estimate the elasticity between them.

### 3.6.1 Model outputs

**Table 7 Model outputs from linear regression**

Model 5: What explains the amount spent on video game accessories?		
Variables		Coefficient
<b>Continuous variables</b>	Number of hours watching e-sports videos weekly	-0.1614
	Number of leisure hours	0.2520
	Percentage of friends interested in video games	-0.5663
	Years since the participant plays	-0.1677
	Number of games frequently played	0.9764**
	Number of hours playing video games weekly	0.8304***
<b>Gender</b>	Male	0.7799
<b>Age categories</b>	Age (26-35)	0.7672
	Age (06-15)	-0.0766
<b>Occupation</b>	Part-time employee	-0.2501
	Part-time employee / Part-time student	-0.1485
	Student full time	0.3410
	Unemployed	0.5131
<b>Education</b>	Mandatory school	-1.1327
	Post-mandatory school	-0.7390
	Bachelor	-0.8631
<b>Education of parents</b>	Master	-0.3765
	Mandatory school	-0.6403
	Post-mandatory school	-0.5656
	Bachelor	-0.1921
<b>Relationship status</b>	In a relationship	-0.1386
	Married	1.8981
	Single	0.0455
<b>Frequency of playing as kid</b>	Occasionally	-1.4892*
	Sometimes	-0.3245
	Often	0.0291
<b>Constant</b>		7.0685***
R-squared		0.6502
Prob > F		0.0103
Number of observations		60

\*  $p < 0.10$ , \*\*  $p < 0.05$ , \*\*\*  $p < 0.01$

### 3.6.2 Analysis

In the first place, it can be stated that the exogenous variables – used to explain the endogenous variable – are as a whole statistically significant with a 95% confidence level. The R-squared value shows that the set of independent variables chosen can explain about 65% of the variation in the dependent variable.

The first of the continuous variable observed is the one on the participant's number of games frequently played. For this variable, it is possible to reject the null hypothesis that the coefficient is zero with a 95% confidence level. According to the results, a 1% increase in the number of games frequently played by participants would lead to a 0.98% increase of his/her video game accessories' consumption. This allows the research to confirm that the more games an individual plays the more they will spend on additional accessories to enhance their video games experience.

The second of the continuous variables observed is the number of hours the participant plays video games per week. This variable is statistically significant with a 99% confidence level. An increase in 1% of the number of hours someone plays video games would cause an increase of 0.8% in the amount they pay for video game accessories.

Finally, the last variable observed in this model is the frequency participants played video games as kids. The scale used for this variable was: never; occasionally, sometimes, often and all the time. The frequency "all the time" was the compared category used in this model. From the model's results, it is possible to reject the null hypothesis that the coefficient is zero with a 90% confidence level for the "occasionally" frequency. The coefficient shows that participants that used to play occasionally to video games when they were kids spend 1.49% less on video game accessories than those that played all the time. One more time, this goes along with the finding that those that used to play more frequently as kids are those engaging the most in video games today.

The model did not reflect any statistical significance for the remaining variables: number of hours watching e-sports related videos, leisure hours, number of years since the participants play video games, percentage of friends interested in video games, gender, age, occupation, education, the participants' parents education and the participant's relationship status. Although these variables are not statistically significant, they are considered as essential in the model to avoid an omitted variable bias.

Finally, from the data collected the average amount spent by participants over these last three years for video game accessories was 1'892 CHF.

### 3.6.3 Further analysis

According to the model, the number of hours playing video games was one of the variables influencing the amount paid for video games accessories. Consequently, the paper wanted to comment additionally on the matter, especially for readers having trouble to understand why someone would pay for video games accessories. If this was a different context, for example football: the more someone trains their shoots and moves, the better they will become. This is true up to a certain point, since even geniuses have their limits. Once a person's maximum competence level is achieved, and they are not satisfied yet, what is left to do for them? They may want to try buying the same football boots than their idols because they think that these boots are lighter, and they will be able to run faster. The same logic could be applied for video games. A person will have more chances to improve their gaming skills by purchasing the adequate equipment. In the end, the outcomes of this analysis allow the paper to state that if people want to generate profit out of video games, they should make sure that players spend many hours playing their games. Some game developers have understood that, and they regularly include events and tournaments in their games, so players are attracted to keep playing their games. The mobile e-sports game *Clash Royale* for example, creates events and tournaments almost every week. This permits them to retain their players and increases the chances they will purchase the items in the game's virtual shop.

### 3.6.4 Conclusion

The objective of this last quantitative analysis was to understand what influenced the amount video game players spend for video game accessories. The R-square value of the model showed that the independent variables chosen in the model were good to represent the variation in the dependent variable. The value of the F-test confirmed that the exogenous variables chosen were, as a whole, statistically significant with a 99% confidence level.

The first takeaway is that as the amount of games played frequently by participants increase, the amount spent on video game accessories increases too.

The second takeaway is that as the number of hours the participants play weekly increase, the amount they spend on video game accessories increases. As a result, incentivise players to play more hours could importantly increase the amount they spend on video game accessories.

The third and last takeaway is that the more frequently a participant used to play video games as a kid, the more games he will play frequently nowadays.

### 3.7 Complementary qualitative analysis

In order to complement the acquired understanding on the general behaviour towards video games from Swiss players, this qualitative analysis will include some of the survey questions for which participants typically gave reasons explaining their decisions or other details completing the quantitative analyses. Also, among all answers of the survey, two participants appeared to have very interesting profiles. As a consequence, they were interviewed and the main findings from these interviews will also be included in this analysis.

#### 3.7.1 Qualitative answers from the survey

This section of qualitative answers will be treated following the chronological order used for the quantitative analysis of this paper. It will start by the reasons given for not playing video games. Then, the thematic of e-sports will be addressed and finally, the reader will find some additional details on the participant's spending for video games accessories.

Among participants not playing competitive video games online, some participants stated being interested by video games. The reasons for them not to play were summarized in the table below. Most of them answered they did not play because they do not have time or don't think about it in their free time. Some of the participants also responded that it was for financial reasons that they did not play video games. Note that the sample range of this question was of 51 participants only, from the 99 non-players of the study. The remaining 48 participants stated not being at all interested by online video games and no further questions were asked to them.

**Table 8 Reasons for not playing video games**

Reasons for not playing video games	Percentage
I don't feel like they should play video games at their age	4%
I don't have money	33%
I don't have time	47%
I don't think about it during my leisure hours.	49%

While the following topic has been further developed in one of the interviews, it is interesting to have a look at the table 12 showing the reasons why video game players watch e-sports related videos. The three categories of answers proposed obtained almost equal amounts of records. Players said the main reasons they watch e-sports videos are that: it allows them to improve their gaming skills, it is entertaining, and they watch it just to pass the time, meaning they watch them as a distraction which is slightly different from entertainment.

**Table 9 Reasons for watching e-sports videos**

Reasons for watching e-sports videos	Percentage
Just to pass the time	55%
As entertainment	56%
To improve gaming skills	59%

Not all video game players watch e-sports videos, table 13 displays their reasons. The main reason is that they do not see any interest in watching them. The paper supposes that for these players, the entertainment is maybe not enough, and they want to know what the advantage is of watching this type of videos. It could be interesting for game developers or e-sports events' organizers to communicate clearly the benefits of watching e-sports to players (e.g. it allows one to improve its gaming skills).

**Table 10 Reasons for not watching e-sports videos**

Reasons for not watching e-sports	Percentage
Never heard of it	10%
Don't see any interest in watching it	90%

As for the video game accessories, you can find in table 14, a summary of the different video game accessories that were purchased by the participants as well as the portion, from all buyers, that purchased the item. The most popular purchases were headsets, mice and keyboards. Clearly, headsets can also serve another purpose than only enhancing the player's gaming experience. Nonetheless participants were asked to mention accessories they purchased specifically to satisfy their gaming needs.

**Table 11 Rate of video game accessories purchased by participants**

Video game accessories purchased	Rate of buyers
Headset	78%
Mouse	68%
Keyboard	66%
Computer	59%
Game features	56%
Console	53%
Desk / Gaming chair	22%
Streamer support	13%

The next table complements the previous one and shows the participant's answers to the question: "how did you heard about the item(s) you purchased?" The assumptions that can be established from having a look to this table are that Swiss players mostly use search engines to investigate on the accessories they wish to purchase. An important

part of them was recommended by friends or heard about the items in a physical shop, so it can be assumed that having a personal recommendation is also quite important for Swiss players. Finally, another significant promotion method was articles that appeared on the virtual game's shop, but this is only relevant for game's features.

**Table 12 Promotion methods attracting participants**

Promotion method attracting participants to buy	Percentage
They saw it on an online advertisement	12%
It was used / recommended by a streamer they watch or follow	21%
They saw it in a physical shop	40%
It was used or recommended by a friend or a relative	41%
They saw it on the game's virtual shop (for a virtual item)	44%
On search engines / forums	46%

The reasons for purchasing video game accessories will be developed in the interviews section. As for the reasons some participants never bought video game accessories, the reader can find a summary of them in the following table. The most chosen reason was that they prefer to use their money for something else. There is probably nothing that can be changed about that. Although, the two following most chosen reasons are that they do not want to pay to improve and / or that they do not need it. Both reasons are kind of similar since they imply that the participants can succeed in video games without having to use or buy additional accessories. The paper supposes some players might feel pride and want to prove to themselves (or others) that they can play just as good or better than players that buy accessories. Once again, it could be interesting for sponsors or brands wishing to capture video game players as clients to work on their communication. A strategy they might want to adopt to attract this kind of players would be to accentuate on how the video game accessories can make their gaming experience more comfortable rather than saying that it will improve their gaming efficiency. That could have an impact on their state of mind towards video games accessories.

**Table 13 Reasons for not purchasing video games accessories**

Reasons for not buying video games accessories	Records
I don't have money	9%
I never had the occasion to buy any	9%
I don't need it	38%
I don't want to pay to win / improve	44%
I would rather use money for something else	59%



Finally, to complement the previous analysis, participants were asked if they would consider buying video game accessories if they were absolutely certain it would improve their gaming skills. The majority of the respondents would never consider buying video game accessories in this case. The rest of them stated they would consider it. It is possible to observe a clear resistance to change and a need for a different message to be delivered if one expects to also acquire this share of video game players.

**Table 14 Resistance to change from players not purchasing accessories**

Resistance to change	Records
Would never pay for more than the game itself	57%
Would consider it	34%
Would pay if the amount is reasonable	9%
Would pay right away	0%

### 3.7.2 Interviews

As mentioned earlier, some respondents of the survey revealed intriguing profiles given some of their responses. In order to complement this research with some qualitative information and opinions, it was decided to perform an interview with some of the respondents. Two participants agreed to participate to the interview and the reader can find the details of these interviews in the appendices 3 and 4.

In order to provide some context to the findings, the profile of the first interviewee is presented below:

- Male
- 26-35 years old
- Full-time employee
- Married

Additionally, the reason for contacting this person was that he does not play video games at all, and yet, he showed a great interest for e-sports streaming. In his responses, he mentioned watching at least 10 hours of e-sport videos per week.

To start with, the interviewee was asked what he liked in e-sports. He responded that just as for any other sport, he liked the competition and the excitement he feels when watching a game. He said he prefers to watch e-sports videos than playing because he realises how difficult it is to attain the level of a professional player. Consequently, he only watches e-sports and says it makes him feel the same excitement as a player,

without having to invest a lot of time training to improve his gaming skills. The interviewee also mentioned really enjoying the unpredictability of e-sports. According to him, each game is very complex since players have to learn strengths and weaknesses of each characters of a game<sup>5</sup>. One thing he considers as a major advantage of e-sports over other entertainments is that he can watch it at any time. Any day and any hour of the day, streamers are broadcasting e-sports games live on platforms like Twitch or YouTube. He does not have to wait for an event to come up or for tournament matches, he is able to watch e-sports whenever he wants to, and this is a strong advantage in his opinion. The interviewee also declared that he liked being able to follow the evolution of some gamers and by contrast with other sports, e-sports players rarely get injured which allows him to always watch them. Another thing he mentioned was that he appreciates the fair-play he encounters in e-sports. He does not see violence or insults in e-sports games, like he has seen in other sports. But above all, whether a person's favourite team wins or not, he affirms people are never disappointed from watching e-sports because the winners are always indisputably the best.

When asked if someone could watch e-sports even if they have never played video games, his response was "many people out there watch football and have never been on a pitch". And so, he says, that just as for football, people can enjoy watching it simply for the entertainment of the competition. When asked if it is easy to understand e-sports, he replied that it is important to first understand the rules of the game to appreciate, on the best possible manner, actions undertaken by gamers. Finally, when asked if e-sports were open to everyone, the interviewee responded with a strong conviction that they are. He answered that there are many different types of e-sports and that one must just find the one that fits its interests.

As for the second interview, the profile of the interviewee was:

- Male
- 16-25 years old
- Full-time job
- Married

This person was contacted because of the strong engagement in video games he showed by his answers to the survey. Indeed, this individual estimated having paid 8000

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<sup>5</sup> Note that the character's skills are constantly changed by game developers to keep the game balanced and avoid having a character too overpowered.

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CHF for video game accessories this last three years and playing on average 30 hours per week to video games. These results were rather high when compared to other video game players' responses from the survey. Hence, this interview was carried out to obtain more information about him and his motivations.

This person does not consider himself as a professional, if anything, he says he would be a semi-professional because according to him 30 hours of gaming per week are not enough to become a professional player. He enjoys playing online because every time he plays feels like a new experience. In contrast, when he finishes other type of video games, like role-playing games, there is nothing he can do anymore so he rarely plays to them again. Also, he does not feel like playing against artificial intelligence is as entertaining as playing against humans. Humans are more unpredictable according to him and he really enjoys the competitiveness that arises from online video games. He can play an online game over years and the game is constantly being updated which keeps it interesting.

When asked about his purchases, the interviewee said he mainly buys keyboards and mice, but also mentioned buying headsets. He explained that he purchases these items for their functionalities, rapidity, ergonomics and precision. He also mentions that he strongly appreciates the beauty of some accessories' design. The interviewee emphasized on the mice he buys, some of them have between 12 and 15 buttons that can be personalised, compared to three for a regular mouse. He needs to try a certain number of mice before finding the right one. According to him, it is extremely important to have an adequate material that feels good and is suited to his needs because of something called: muscular memory. He says reflexes are key when playing online video games and a person must be comfortable with its material if they wish to develop these reflexes. Lastly on this topic, he said he adapts the equipment he uses given the category of games he plays, and he considers the category of FPS games as being the one he spends the most on.

For him, watching e-sports is a way to learn and understanding better a game. He watches professional gamers playing the same games he does, and it inspires him. It is also a way for game developers to convey messages to players through e-sports streams, according to him. Indeed, he explains that players streaming e-sports content are often asked by game developers to try new games or updates and review it, which permits to inform the gaming community on upcoming events of the game. Before, he had to consult the developer's website and he did not find that convenient. He finally expressed watching e-sports to research new items to buy. He is inspired by what

professional gamers use, and often buys the same items they have to replicate the same conditions in which professional gamers play. Additionally, he says sponsored players often have promotional codes on certain articles, offering discounts that incentivise him to purchase the items.

In the end, he recommends buying video game accessories because it helps one create their own experience, which makes it more entertaining. He said: “to have the best movements, the best sound quality and the best image quality you have got to have the best material”.

All things considered, these two interviews permitted to understand more specifically the reasons for watching e-sports related content and the reasons for purchasing video game accessories. Watching e-sports is something non-players can appreciate for the entertainment and unpredictability it has. It is open to everyone given the broad choice in game categories available and the fact that there is always something to watch no matter the hour it is. For a player, watching e-sports helps learning new features of a game and getting inspired by other players. Moreover, it can help someone finding the material they want in terms of video game accessories. About video game accessories, the reasons explaining why they are purchased were: better functionality, rapidity, ergonomics and / or precision. The interviewee justified that finding the right equipment is worth the feeling of having a comfortable, adequate and personalised gaming experience.

## 4. Discussion

One of the key objectives of the research was to estimate the market potential value of the e-sports industry in Switzerland. More precisely, the market value estimated accounted for the expected spending for products bought by Swiss people to enhance their video game skills or make their gaming experience more comfortable. These products could be advertised by various firms if they sponsor e-sports videos, streamers or events for example.

The value of the market potential was calculated using the data collected from the survey and demographic data from the Federal Statistical Office (Bundesamt für Statistik, 2018). All the participants used as a reference to estimate the market potential value are e-sports players, meaning they frequently play online competitive games. The calculation of the market value was made for the year 2020, accounting for female participants (16-35 years old) and male participants (06-35 years old), since only participants from these age categories appeared as having purchased video game accessories among the sample. The final amount found from this calculation represents the total value expected to be spent for video game accessories by Swiss citizens for 2020. From the perspective of sponsors or firms willing to invest in e-sports, it represents the total amount of revenue that will be generated from the Swiss market and from which, they could expect to capture a share. Note that since the amounts stated by participants in the survey included as well their spending for virtual items and streamers donations, and those amounts<sup>6</sup> are mingled with the others, the estimated final amount could be lessened for good measure.

The first step of this calculation was to calculate the percentage increase from the total population in 2017 to the expected total population for 2020 (Worldometers, undated). This would be used later in the calculation.

**Table 15 Swiss population increase rate from 2017 to 2020**

	2017	2020
Swiss population	8'484'150	8'670'000
Increase rate	2.144%	

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<sup>6</sup> Amounts that included spending for virtual items or streamer donations did not exceed 35% of the total amount spent on video game accessories by the whole sample.

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Then, for the five categories of ages – three age categories of male participants (06-15, 16-25, 26-35) and two age categories of females (16-25, 26-35) – the rate of purchase participation was calculated. By the rate of purchase participation, it is meant how many participants purchased video game accessories from the total number of participants in the specific gender and age category.

**Table 16 Rate of purchase participation**

Gender	Age category	Total by category	Participants having purchased accessories	Rate of purchase participation
Female	16-25	55	5	0.091
	26-35	17	2	0.118
Male	06-15	5	3	0.600
	16-25	81	48	0.593
	26-35	25	10	0.400

This rate was then multiplied with the total population by the same gender and age categories. The number obtained per category was multiplied then by the percentage increase mentioned before for the 2020 year and rounded up since it accounts for human beings there should not be any decimals.

**Table 17 Population estimated to purchase accessories in 2020**

Gender	Age category	Rate of purchase participation	Population in 2017	Buyers share in 2017	Estimated buyers share in 2020
Female	16-25	0.091	459453	41768.45	42664
	26-35	0.118	585660	68901.18	70379
Male	06-15	0.600	426643	255985.80	261474
	16-25	0.593	488010	289191.11	295391
	26-35	0.400	599399	239759.60	244900

This allows to have the total number of people that could be potentially involved in purchasing video game accessories in 2020, per gender and age category. After this, the average amount paid for video game accessories was calculated also by gender and age category and divided by three since participants were invited to share the amount they spent within a three years period in the survey.

**Table 18 Average amount paid for video game accessories**

Gender	Age category	Average amount paid for 1 year
<b>Female</b>	16-25	CHF 531.30
	26-35	CHF 750.00
<b>Male</b>	06-15	CHF 387.20
	16-25	CHF 630.10
	26-35	CHF 731.70

Finally, the average amount spent was multiplied by its share of population summarized in Table 20 and all the final results were summed. The results are that the estimated market could be worth slightly more than 542 million CHF. The market potential is huge. The question is: which Swiss companies are taking advantage of this market potential?

The *Servette Geneva Esports* team for example is sponsored by Naxoo. Naxoo is a Swiss network provider that offers phone, television and internet services. Obviously, the most interesting part for them is to promote their internet services, since it is essential for e-sports to happen. But other Swiss network providers are also present in the e-sports industry. UPC is the owner of the information domain: *www.esports.ch*, a website providing information about upcoming events, rankings for the different e-sports leagues and videos on the most recent confrontations. In their company website, they also advertise some products specifically designed for e-sports players like smartphones for gamers for example. More recently, Swisscom also took a step into the Swiss e-sports industry. In the last quarter of 2018, Swisscom announced the launch of the *Swiss Hero League* with the collaboration of ESL (electronic sports league), a company organizing e-sports events and competitions across the world and powered by Intel. Additionally, Swisscom stated being the first to introduce the e-sports channels ESL.tv, ES1 and Ginx to Swiss televisions (Swisscom, 2018). Moving to another type of industry, Logitech, the Swiss hardware developer, has a major stake in e-sports sponsorship worldwide. They are sponsors of some of the most famous e-sports teams in the world such as: Team SoloMid and Cloud9 e-sports teams (Logitech, 2015). They provide the teams with

various accessories: keyboards, mice, headsets, etc. As a result, Logitech is now internationally recognised in the video games community.

Now that the Swiss companies having invested in e-sports have been mentioned, the focus can turn to companies that have not made a move in the industry yet. The companies that will be mentioned are companies for which it could be interesting to invest in e-sports given the services / products they provide and the results of this research.

Microspot and Digitec have two very similar business models. They are retailers with only a few pick-up stations across Switzerland and mainly focused in online retailing and delivery. Both focus in selling multimedia and hardware products although Microspot's website offers as well other unrelated products. Digitec in contrast focuses exclusively on electronic products. Surprisingly, none of them have invested in e-sports. However, both offer a wide range of video-game accessories. Sponsoring e-sports could be a great promotion strategy for these companies. InterDiscount, while focused principally on physical retail, offers similar products to the two previous companies mentioned. It could also be interesting for them to invest in e-sports. Additionally, it was previously discussed that Naxoo, UPC, and Swisscom – being Swiss network providers – had all invested in e-sports in their own way already. Sunrise is a swiss network provider too, yet they have not taken any action related to e-sports for the time being. Knowing that their main competitors have all invested in the industry, Sunrise may want to start looking for investment opportunities.

Finally, from the results of the consumption basket analysis, it is possible to identify a few other firms for which it could be interesting to sponsor e-sports teams or events even though their products are not directly related to video games or video game accessories. The first one that was addressed was instant or microwavable food. A famous German brand, undertaken by Unilever, is for example sponsoring the Swiss E-sports League (SESL); this brand is Knorr, quite famous for their instant soups and other pre-cooked microwavable dishes. On the other hand, the Swiss producer of instant soups and instant noodles Maggi – owned by Nestlé – has not showed any interest in e-sports for the moment. This research considers it could be interesting for Maggi to consider it. Another industry revealing a stronger interest from video game players than non-players was the tobacco one. Hence, Swiss tobacco producers like Heimat or Davidoff – who already sponsored tennis events in the past – could also consider investing in e-sports. Regarding energy drinks, this research found one energy drink producer being Swiss,



aside generic branded energy drinks<sup>7</sup>. That energy drink is named Swiss synergetic Drink and appears as being focused on online retailing. They could potentially be interested in partnering with e-sports events and / or teams to promote their beverage. As for soft drinks, there are some really important Swiss soft drink brands; Rivella and Ramseier might be the most notorious. This research genuinely believes these two brands could fit perfectly as sponsors for e-sports in Switzerland. After all, they would not be the first soft drinks brands to do it as Coca Cola has already shown a strong interest in partnering with e-sports leagues. The last outcome from the consumption basket was that Swiss video game players tend to order food more often than non-players. The multinational food ordering and delivery platform Uber Eats is already sponsoring some of the best e-sports teams in various games and particularly one of the most followed streamer on the Twitch platform: Richard Tyler Blevins alias 'Ninja'. As a result, the paper would recommend the Swiss Delivery platform Smood to consider sponsorship for e-sports as well.

E-sports may look like a casual trend that has increased in popularity quite fast and that people will forget about soon. This paper could make one think the contrary. E-sports seem to have found a special place in the entertainment industry. The video games industry is constantly evolving, and some major events will definitely impact positively the popularity growth of e-sports whether it is locally or at a global scale. Locally, as this research paper is being written, a new game centre will open its doors in Geneva. The opening of the 'Division 1' is currently scheduled for the 31<sup>st</sup> of May 2019. The Servette Geneva Esports team has already announced that Division 1 would be one of their sponsors too. At a larger scale, Swisscom has made 5G network now available in "54 towns, including Basel, Bern, Chur, Davos, Geneva, Lausanne and Zurich" (The Local, 2019). The arrival of 5G will be a game-changer as it has been said it could be 100 times faster than 4G network (CNN Business, 2019). This means online gaming will be much more comfortable and performant. Finally, a major change in the video games industry will be happening in 2019. It will probably be a key year in the history of video games. Google announced recently that they will release *Stadia*, a streaming game platform (CNBC, 2019). Video game consoles, physical video games or even digital video games will be totally obsolete for this future product announced by the giant tech company. The concept: playing video games everywhere, whether it is from your computer, phone or television. There are no downloads involved and everything will be stored in Google's cloud. If you are familiar with Netflix services, Stadia will be "the Netflix" of video games.

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<sup>7</sup> Energy drinks marketed by Coop, Migros or Denner, and named with their generic brands

## 5. Conclusion

Switzerland represents a concrete investing opportunity as far as e-sports are concerned. The research permitted to prove that the Swiss residents, corresponding to the demographics represented by this research's sample, have a strong interest in video games. Three quarters of the Swiss residents from this sample show an interest in video games, and half are competitive video game players. Among these players, 68% have already purchased goods for the whole purpose of enhancing their gaming experience and 78% watch e-sports streaming regularly.

On the one hand, the paper intended to provide readers with a better understanding of the Swiss video game players. The comprehension of the Swiss players as individuals was made through different steps, starting by understanding who they are and what influences their gaming activity. Then, the research investigated on what affects their interest in e-sports, if any. At last, the factors that encourage them to consume were addressed.

On the other hand, this research aimed to prove the potential of the Swiss market with regard to e-sports and video games. The objective was to raise awareness on the current state of the video games industry in Switzerland and recognise the different actors currently taking advantage of this valuable market. At the same time, the goal of this research was also to identify companies offering products and services fitting the needs of the Swiss video game players, expressed in the analyses conducted beforehand, and not exploiting sufficiently the business opportunity they are confronted to.

Eventually, by joining both the understanding of the Swiss players and the evidence of the potential value the e-sports market has in Switzerland, the paper expects to stimulate the investment for e-sports and video games related activities in this country.

Few Swiss firms have taken an interest in the growing e-sports industry. They demonstrated different ways of accessing the market; some relay e-sports related information, whereas others formed e-sports teams or chose to sponsor players and as a result became well-known worldwide. Meanwhile, other companies are pondering on whether or not investing in e-sports in Switzerland, and day after day, losing market share to those that seized the opportunity earlier.

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## Appendix 1: Glossary

The following words, acronyms or expressions are defined given their usage and meaning throughout the paper. The reader may refer to this glossary when looking for the explanation for one of these terms.

<b>E-sports</b>	Electronic sports, the activity of playing online video games involving competition with other players.
<b>FPS</b>	First-person-shooter, an e-sports game category.
<b>LAN</b>	Local-area network, a network of computers interconnected.
<b>MOBA</b>	Multiplayer-online-battle-arena, an e-sports game category.
<b>MMORPG</b>	Massively multiplayer online role-playing games, an online game category.
<b>Player</b>	In this paper, only people playing competitive online games are considered as players.
<b>RTS</b>	Real-time-strategy, an e-sports game category.
<b>RPG</b>	Role-playing games, a game category potentially playable online but not necessarily.
<b>Streamer</b>	A person broadcasting videos of them playing video games either live or not, usually on social media platforms like Twitch or YouTube.
<b>Video game accessories</b>	In this paper, this regroups any physical or virtual item that permits a player to enhance its gaming experience.
<b>Viewer</b>	A person watching streamers, usually on social media.

## Appendix 2: Survey questions

27/03/2019

E-sports

### E-sports

This survey is for Switzerland's residents only, data will be used confidentially for the purpose of a Bachelor thesis. Your help is greatly appreciated, please try to respond as honestly as possible. The survey will take about 5 minutes.

Ce sondage est destiné aux personnes résidant en Suisse uniquement, les données seront traitées de façon confidentielle et pour l'unique but d'une thèse de Bachelor. Votre aide est grandement appréciée, essayez de répondre le plus honnêtement possible. Le sondage devrait durer environ 5 minutes.

\*Required

### E-sports

1. **Vivez-vous en Suisse? (ou près de la frontière) / Do you currently live in Switzerland? (or close to the border) \***

Mark only one oval.

☐ Yes / Oui

☐ No / Non Skip to question 71.

### E-sports

2. **Preferred language / Langue de préférence: \***

Mark only one oval.

☐ English

☐ Français Skip to question 37.

### E-sports

3. **Gender \***

Mark only one oval.

☐ Female

☐ Male

4. **Age \***

Mark only one oval.

☐ 6-15

☐ 16-25

☐ 26-35

☐ 36-45

☐ 46-55

☐ 56-65

☐ 66+

[https://docs.google.com/forms/d/1dnF5uN15UnFoO9HrBHEA9eKF3claDI-oJ\\_fZ9QyPU1k/edit](https://docs.google.com/forms/d/1dnF5uN15UnFoO9HrBHEA9eKF3claDI-oJ_fZ9QyPU1k/edit)

1/15

**5. Occupation \****Mark only one oval.*

- ☐ Student full time
- ☐ Employed full time
- ☐ Partially employed and partially student
- ☐ Employed part time
- ☐ Unemployed
- ☐ Retired

**6. What is the highest degree of education YOU have achieved ? (one option only) \****Mark only one oval.*

- ☐ Mandatory school
- ☐ Post-mandatory school diploma
- ☐ Undergraduate degree (bachelor)
- ☐ Graduate degree (master)
- ☐ Doctoral degree (Ph.D.)

**7. What is the highest degree of education either your MOTHER or FATHER has achieved ? Please take the highest among the two. (one option only) \****Mark only one oval.*

- ☐ Mandatory school
- ☐ Post-mandatory school diploma
- ☐ Undergraduate degree (bachelor)
- ☐ Graduate degree (master)
- ☐ Doctoral degree (Ph.D.)

**8. What is your current relationship status? \****Mark only one oval.*

- ☐ Single
- ☐ In a relationship
- ☐ Engaged
- ☐ Married
- ☐ Divorced

**9. On average, how many hours do you have for leisure activities per DAY? (hours when you don't sleep, work or eat) \***

---

**E-sports**

10. Please indicate how often you have consumed (used) the following items in the PAST MONTH. (from Never to Very often, one option only) \*

Mark only one oval per row.

	Never	Occasionally	Sometimes	Often	Very often
Coffee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instant/Microwavable food (ex: instant noodles, pizzas...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cigarettes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy drinks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soda	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cereals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Milk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fruits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Healthy snacks/crackers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potato chips, pop-corn...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chewing-gum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Candies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chocolate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have ordered food (online or calling)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I wore comfortable clothing (Training pants, slippers, sweatshirts,...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. If you can think of things you consume frequently not mentioned above, please write it here:

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## E-sports

12. Nowadays, do you play video games online involving competition? (Candy crush = No / Call of duty, Fifa, Clash Royale, LoL... = Yes) \*

Mark only one oval.

☐ Yes    After the last question in this section, skip to question 22.

☐ No

13. How often did you play video games as a kid? (one option only) \*

Mark only one oval.

☐ Never

☐ Occasionally

☐ Sometimes

☐ Often

☐ All the time



14. Please estimate in %, how many of your friends are interested in video games: \*

---

15. From the following devices, which ones do you own AND use ? (multiple options available) \*

*Tick all that apply.*

- ☐ PC / Mac, laptop...  
☐ Ipad, Tablet...  
☐ Smartphone/lphone  
☐ Video game console  
☐ Handheld video game console

16. Nowadays, how often do you perform these online activities? (from never to all the time, one option only) \*

*Mark only one oval per row.*

	Never	Occasionally	Sometimes	Often	All the time
Read/send emails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use search engines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Get/read news online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use social networks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy products/services online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video/movie streaming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Games online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## E-sports

17. How strong is your interest in online video games? (one option only) \*

*Mark only one oval.*

- ☐ Not interested at all    *Skip to question 71.*  
☐ Slightly interested  
☐ Interested  
☐ Very interested tell me more

## E-sports

18. I don't play online video games because I don't... (multiple options available) \*

*Tick all that apply.*

- ☐ have time  
☐ have money  
☐ think about it in my free time  
☐ feel like I should play video games at my age  
☐ Other: \_\_\_\_\_

19. What could incentivise you to play? \*

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## E-sports

20. Do you watch other people play video games on youtube, twitch...? \*

Mark only one oval.

- ☐ Yes  
☐ No

21. If yes, please briefly explain how often and why do you watch these kind of videos:

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Skip to question 71.

## E-sports

22. Approximately, how many YEARS AGO did you started playing online video games involving competition? \*

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23. How many different games do you frequently play? (at least once a week) \*

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24. How many hours do you play competitive video games online per WEEK? \*

---

25. What category of video games do you play the MOST? (one option only) \*

Mark only one oval.

- ☐ Fighting games  
☐ Sports games  
☐ Racing games  
☐ "First-person-shooter" games (FPS)  
☐ Real-time strategy games (RTS)  
☐ Multiplayer online battle arena (MOBA)

## E-sports

26. How often do you watch other people play video games on youtube, twitch...? (one option only) \*

Mark only one oval.

- ☐ Never Skip to question 30.
- ☐ Couple of times
- ☐ Often
- ☐ Always

## E-sports

27. How many streamers (= people recording and sharing their own games) do you follow on social media such as Youtube, Twitch... ? \*

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28. How many hours per WEEK do you dedicate to watching other people play video games? (30 minutes = 0.5) \*

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29. Why do you watch them? (multiple options available) \*

Tick all that apply.

- ☐ To improve my gaming skills
- ☐ It's entertaining
- ☐ Just to pass the time
- ☐ Other: \_\_\_\_\_

Skip to question 31.

## E-sports

30. Why have you never watched other people play video games? (multiple options available) \*

Mark only one oval.

- ☐ I never heard of it
- ☐ I don't see any interest in it
- ☐ Other: \_\_\_\_\_

## E-sports

31. Have you ever bought (or received as a gift) any physical and/or virtual item to potentially improve your gaming experience? (examples: game chest/character(s)/currency, headset, gaming keyboard...) \*

Mark only one oval.

- ☐ Yes Skip to question 34.
- ☐ No

## E-sports

### 32. What prevents you from paying? (multiple options available) \*

*Tick all that apply.*

- ☐ Don't have money
- ☐ Don't want to pay to win/improve
- ☐ I'd rather use my money in something else
- ☐ I don't need it
- ☐ Never had the occasion to do so
- ☐ Other: \_\_\_\_\_

### 33. If you had certainty that paying for your favourite game would make you become better at it, how likely would you be to do it? (one option only) \*

*Mark only one oval.*

- ☐ I would never pay for more than the game itself
- ☐ I would consider it
- ☐ I would pay if the amount is reasonable
- ☐ I would pay right away

*Skip to question 71.*

## E-sports

### 34. What did you purchased (or received as gift)? (multiple options available) \*

*Tick all that apply.*

- ☐ Mouse
- ☐ Keyboard
- ☐ New PC (for the whole purpose of better performances or playing the game)
- ☐ New console (for the whole purpose of playing the game)
- ☐ Game features (characters, items, game's currency, other..)
- ☐ Headset (with or without microphone)
- ☐ Desk / Gaming chair
- ☐ Streamer support on Twitch/Youtube
- ☐ Other: \_\_\_\_\_

### 35. How did you heard about the items you purchased? (multiple options available) \*

*Tick all that apply.*

- ☐ Game's shop
- ☐ Used or recommended by a streamer I watch/follow
- ☐ Used or recommended by a friend or relative
- ☐ Online advertisement
- ☐ Physical shop
- ☐ Search engines / Forums
- ☐ Other: \_\_\_\_\_

36. Please estimate in CHF how much you have paid (received as gift) in the last 3 years for your online gaming experience? (According to your answers above) \*
- 

*Skip to question 71.*

## E-sports

37. Sexe \*

*Mark only one oval.*

- ☐ Femme  
☐ Homme

38. Âge \*

*Mark only one oval.*

- ☐ 6-15  
☐ 16-25  
☐ 26-35  
☐ 36-45  
☐ 46-55  
☐ 56-65  
☐ 66+

39. Occupation \*

*Mark only one oval.*

- ☐ Étudiant à temps plein  
☐ Employé à temps plein  
☐ Étudiant à mi-temps ET employé à mi-temps  
☐ Employé à mi-temps  
☐ Sans emploi  
☐ Retraité

40. Quel est le degré d'éducation le plus haut que VOUS avez déjà obtenu? (une seule option) \*

*Mark only one oval.*

- ☐ École obligatoire  
☐ CFC / Maturité (École de commerce, ECG, Collège ou équivalent)  
☐ Bachelor  
☐ Master  
☐ Doctorat (Ph. D.)

41. Quel est le degré d'éducation le plus haut que votre MERE OU PERE (le plus haut des deux) a déjà obtenu? \*

Mark only one oval.

- ☐ École obligatoire
- ☐ CFC / Maturité (École de commerce, ECG, Collège ou équivalent)
- ☐ Bachelor
- ☐ Master
- ☐ Doctorat (Ph.D.)

42. Quel est votre situation amoureuse? \*

Mark only one oval.

- ☐ Célibataire
- ☐ En couple
- ☐ Fiancé(e)
- ☐ Marié(e)
- ☐ Divorcé(e)

43. En moyenne, combien d'heures par jour avez-vous comme temps libre? (heures où vous ne dormez pas, mangez pas, travaillez pas) \*

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## E-sports

44. Indiquez à quelle fréquence vous avez consommé (utilisé) les articles suivants dans le mois passé. (de Jamais à Très souvent, une seule option) \*

Mark only one oval per row.

	Jamais	Rarement	Parfois	Souvent	Très souvent
Café	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plats pré-préparés (Pizza, Nouilles instantanées, repas au micro-ondes...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cigarettes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boisson énergétique ou Red Bull	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soda, boisson sucrées (Coca Cola, Fanta...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Céréales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lait	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fruits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snacks sains ("healthy")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chips, Pop-corn...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chewing-gum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bonbons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chocolat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J'ai commandé à manger à domicile (par appel ou en ligne)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J'ai porté des vêtements confortables (Trainings, pantoufles, sweatshirts)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

45. Si vous pensez à d'autres articles non-mentionnés que vous consommez fréquemment, écrivez le ci-dessous:

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## E-sports

46. De nos jours, jouez-vous à des jeux vidéos en ligne incluant de la compétition? (Ex: Candy Crush = Non / Call of duty, Fifa, Clash Royale, LoL... = Oui) \*

Mark only one oval.

- ☐ Oui    *After the last question in this section, skip to question 56.*  
☐ Non

47. À quelle fréquence jouiez-vous aux jeux vidéos quand vous étiez enfant? (une seule option) \*

Mark only one oval.

- ☐ Jamais  
☐ Rarement  
☐ Parfois  
☐ Souvent  
☐ Tout le temps

48. Estimez en % combien de vos amis sont intéressés par les jeux vidéos. \*

---

49. Parmi les appareils suivants, combien en possédez vous que vous utilisez fréquemment? (plusieurs options possibles) \*

Tick all that apply.

- ☐ PC / Mac, ordinateur portable  
☐ Ipad / tablette  
☐ Smartphone / Iphone  
☐ Console de jeux vidéos  
☐ Console de jeux vidéos PORTABLE

50. De nos jours, à quelle fréquence réalisez-vous ces activités en ligne? (De jamais à Tout le temps, une seule option) \*

Mark only one oval per row.

	Jamais	Rarement	Parfois	Souvent	Tout le temps
Lire/écrire des emails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utilisez des moteurs de recherche en ligne	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recevoir/lire le journal en ligne	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utiliser des réseaux sociaux	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acheter des produits/services en ligne (Ex: billet d'avion)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visionnage de vidéos/films	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jeux en ligne	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## E-sports

51. Quel est votre intérêt pour les jeux vidéos en ligne? (une seule option) \*

Mark only one oval.

- ☐ Aucun      Skip to question 71.
- ☐ Un peu intéressé
- ☐ Intéressé
- ☐ Très intéressé

## E-sports

52. Je ne joue pas aux jeux vidéos en ligne parce que je... (plusieurs options possibles) \*

Tick all that apply.

- ☐ n'ai pas le temps
- ☐ n'ai pas d'argent à y consacrer
- ☐ n'y pense pas pendant mon temps libre
- ☐ ne pense pas que j'ai l'âge de jouer aux jeux vidéos
- ☐ Other: \_\_\_\_\_

53. Qu'est-ce qui pourrait vous inciter à jouer? \*

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## E-sports

54. Regardez-vous d'autres personnes jouer à des jeux vidéos sur YouTube, Twitch... ? \*

Mark only one oval.

- ☐ Oui
- ☐ Non



55. Si oui, expliquez brièvement à quelle fréquence et pourquoi vous regardez ce genre de vidéos:

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*Skip to question 71.*

## E-sports

56. Approximativement, depuis combien D'ANNÉES jouez-vous à des jeux vidéos en ligne incluant de la compétition (Fifa, Dota2, LoL...)? \*

---

57. Combien de jeux vidéos différents jouez-vous de façon régulière? (au moins une fois par semaine) \*

---

58. Combien d'heures jouez-vous à des jeux vidéos compétitifs en ligne par SEMAINE? \*

---

59. Quelle catégorie de jeux vidéos jouez-vous le PLUS? (une seule option) \*

*Mark only one oval.*

- ☐ Jeux de combat  
☐ Jeux de sport  
☐ Jeux de courses  
☐ Jeux de tir à la première personne (FPS)  
☐ Jeux de stratégie en temps réel (RTS)  
☐ Jeux d'arène de bataille en ligne multijoueur (MOBA)

## E-sports

60. À quelle fréquence regardez-vous d'autres personnes jouer à des jeux vidéos en ligne sur YouTube, Twitch...? (une seule option) \*

*Mark only one oval.*

- ☐ Jamais *Skip to question 64.*  
☐ Quelques fois  
☐ Souvent  
☐ Toujours

## E-sports

61. Combien de "streamers" (= personnes s'enregistrant et partageant leur propre parties de jeux) suivez-vous sur des réseaux sociaux comme YouTube et Twitch...? \*

---

62. Combien d'heures par SEMAINE consacrez-vous à regarder d'autres personnes jouer à des jeux vidéos en ligne? (30 minutes = 0.5) \*

---

63. Pourquoi regardez-vous ce genre de vidéos? (plusieurs réponses possibles) \*

*Tick all that apply.*

- ☐ pour améliorer mes compétences  
☐ c'est amusant  
☐ pour passer le temps  
☐ Other: \_\_\_\_\_

*Skip to question 65.*

## E-sports

64. Pourquoi n'avez-vous jamais regardé ce genre de vidéos? (plusieurs réponses possibles) \*

*Tick all that apply.*

- ☐ Je n'en ai jamais entendu parler  
☐ Je n'y vois aucun intérêt  
☐ Other: \_\_\_\_\_

## E-sports

65. Avez-vous déjà acheté (ou reçu comme cadeau) un objet physique ou virtuel permettant potentiellement d'améliorer votre expérience de jeux vidéos en ligne? (Exemples virtuels: coffrets, personnages spéciaux, monnaie du jeu... / Exemples physiques: casque audio, clavier adapté pour jeux vidéos, ordinateur plus performant...) \*

*Mark only one oval.*

- ☐ Oui *Skip to question 68.*  
☐ Non

## E-sports

66. Qu'est ce qui vous a empêché d'acheter de tels objets? (plusieurs options possibles) \*

*Tick all that apply.*

- ☐ Je n'ai pas d'argent  
☐ Je ne veux pas payer pour gagner / pour m'améliorer  
☐ Je préfère utiliser mon argent dans autre chose  
☐ Je n'en ai pas besoin  
☐ Je n'en ai jamais eu l'occasion  
☐ Other: \_\_\_\_\_

67. Si vous aviez la certitude que payer pour votre jeu préféré vous rendrai bien plus performant à celui-ci, quelle serait la probabilité que vous achetiez de tels objets? (une seule option) \*

Mark only one oval.

- ☐ Je ne paierais jamais plus que pour le jeu lui-même
- ☐ Je le prendrais en considération
- ☐ Je pourrais en acheter pour un montant raisonnable
- ☐ J'en achèterai au plus vite

Skip to question 71.

## E-sports

68. Qu'avez-vous déjà acheté (ou reçu en cadeau)? (plusieurs options possibles) \*

Tick all that apply.

- ☐ Souris d'ordinateur
- ☐ Clavier d'ordinateur
- ☐ Nouvel ordinateur (ayant pour but principal de jouer ou d'avoir de meilleures performance aux jeux vidéos en ligne)
- ☐ Nouvelle console (ayant pour but principal de jouer un jeu spécifique)
- ☐ Articles virtuels (personnages, objets, coffres, monnaie du jeu...)
- ☐ Casque audio (avec ou sans micro)
- ☐ Bureau / Chaise (spécifiquement adapté à mes besoins de jeux vidéos en ligne)
- ☐ Abonnement/Sponsoring d'une chaine Twitch, YouTube...
- ☐ Other: \_\_\_\_\_

69. Comment avez-vous entendu parler des objets que vous avez acheté (reçus)? \*

Tick all that apply.

- ☐ Je l'ai vu dans le magasin du jeu
- ☐ Utilisé ou recommandé par un joueur que je regarde/suis sur Youtube, Twitch...
- ☐ Utilisé ou recommandé par un ami / membre de ma famille
- ☐ Publicité en ligne
- ☐ Dans un magasin (physique)
- ☐ Sur des moteur de recherches / Forums
- ☐ Other: \_\_\_\_\_

70. S'il-vous-plaît estimez la valeur en CHF de ce que vous avez payé (reçu en cadeau) ces 3 dernières années pour vos jeux vidéos en ligne? (prenant en compte vos réponses au-dessus) \*

\_\_\_\_\_

## Thank you for your participation! / Merci pour votre participation!

This research aims to understand the profile of viewers of e-sports videos. / Cette recherche a pour but de comprendre le profile des personnes qui regardent des vidéos concernant les e-sports.

27/03/2019

E-sports

**71. Leave your email address if you're interested in being potentially interviewed (you'll be rewarded for your time at the interview) / Laissez votre adresse email si vous êtes intéressés par une potentielle interview (récompense à la clé)**

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15/15

## Appendix 3: First interview

**Interviewer**

Hello.

**Interviewee**

Hi.

**Interviewer**

Thank you for accepting to participate to this interview. First let me remind you that all your answers will be treated confidentially and that you can feel free to respond honestly because of that.

**Interviewee**

Okay.

**Interviewer**

Thank you again. So just as a reminder I will just mention the type of person that you are. So, you are a male.

**Interviewee**

Yes.

**Interviewer**

You have between 26 and 35 years old.

**Interviewee**

Yes exactly.

**Interviewer**

You have a full-time job and you are married.

**Interviewee**

Yes.

**Interviewer**

Thank you. So, without further ado let's start with the interview. Your profile was very interesting because you don't play video games online involving competition maybe other video games but not this kind of video games, but you mentioned that you really enjoyed watching esports videos and these types of competitions. Could you tell me a bit more about that?

**Interviewee**

Well yes, I don't play much online video games nor competitive. but I do watch a lot of videos about eSports whether it's livestream or a video on demand. Whether it's on Twitter or YouTube, anything ...

**Interviewer**

I'm sorry to interrupt. You mentioned watching ten hours of esports related videos that week. What do you like in this in these videos?

**Interviewee**

What do I like...? I think it's like watching any other sport. Like when you're watching football on TV or I don't know basketball if you're a basketball fan even if you don't play yourself you just like to see the competition the excitement. The fact that people make very important decision in a very little time. You know it's like their capacity for adapting to... It's like any other sport. I think that's what interests me.

**Interviewer**

So, you really watch sports videos because it is entertaining for you?

**Interviewee**

Yes

**Interviewer**

Okay. Why did you stop playing video games? You mentioned that you played quite a lot when you were a kid. What made you stop playing video games?

**Interviewee**

Well, I got older. So, I had less and less time and I had other things to do in my life, responsibilities. I'm married. I have my wife, my job, family, friends. Also, I have other hobbies other passions I like to do on a regular basis too. I prefer to watch because... how do you say... you know if you want to play a competitive video game you've got to

play a lot to get good. You get to really spend many hours to be a good player and not a professional player but just an average good player. While when you watch a competition, a huge competition for a competitive game. You can see really good players, the best players in the world in a specific game and you can almost feel the same excitement as playing. For example, even if you're a fan of a particular player, you're excited to see him evolving in a tournament or a competition, having many matches that may be hard or not. It's very exciting to watch and much more enjoyable because all I do is watch. I don't have to put many hours, it's not a huge investment to go where I want to go. I know that I will watch the competition and I will be excited watching the matches.

**Interviewer**

And you know what to expect?

**Interviewee**

I know what to expect. But what I don't expect is who is going to win and that's exciting.

**Interviewer**

Do you watch other types of entertainment? What else do you watch?

**Interviewee**

Yes. Well I watch football. I watch of course every World Cup. I watch for example movies or TV series, TV shows sometimes I read. It's not as exciting but I can read books too. But yeah other sports as well.

**Interviewer**

Which do you find the most entertaining among all of these?

**Interviewee**

It really depends on the mood. It really depends on the mood. For example, if I'm in the mood to watch. I don't know something light-hearted; I am okay to watch a comedy show or a comedy movie. If I want to feel excited, to see something really emotional somehow, I can watch e-sports or huge sports competition too. But e-sports more because there is every day e-sports you know even when there is no competition, there is always good players who play the games and stream their match on many platforms like Twitch or Mixer for example.

**Interviewer**

So, is this one of the advantages of e-sports?

**Interviewee**

Yes, it's one of the advantages because it's every day any hour of the day. No matter what time it is, no matter where you are in the world, if you are travelling to the other side of the world and it's 2:00 a.m. something like that and you want to watch someone play a game you like, a competitive game. You know you can watch someone play this, but not a game you've seen before. It's not something you expect; you watch him play live. You know it's any day any hour you can watch someone play and there's also often competition sometimes more local than others but always interesting too.

**Interviewer**

For how long have you been watching e-sports now?

**Interviewee**

Many years, three or four years maybe

**Interviewer**

Do you do you ever pay for or watching e-sports? Have you ever gotten some money out of the wallet?

**Interviewee**

Not for watching e-sports because most of the time the competitions are free to watch. But I've done some donation to some streamers I like. I really like. I find interesting to follow. So, to support them I've given them a few dollars here and there, to different streamers. So yes, I also buy merchandise many times from streamer or players I really like of from team of e-sports I really like.

**Interviewer**

So, is this for example T-shirts?

**Interviewee**

Yeah t shirts. I also have a mug from a team I like. It's a beautiful mug and I like to drink my coffee with that.

**Interviewer**



It's understandable.

**Interviewee**

Yes, and I have a T-shirt of the team as well.

**Interviewer**

Okay well very nice. Okay. So here comes the last question of the interview.

**Interviewee**

Okay.

**Interviewer**

How could you describe e-sports to someone that has never heard about it? And why would you recommend him or her watching e- sports?

**Interviewee**

How to describe it...? That's a good question. Well basically e-sports is like a sport. That's why they're is "sport" in e-sport. But the difference is that it's played online not in real life like football, where there is 22 people on the pitch, and they play on the pitch. It's online but there's this connectivity... it's that it's really interesting to see people who are really different from each other playing together on the same game you know and all being very good at it. And it's also something weird because what's different from sports is that in e-sports when you play your video game there's many other variables that there isn't in a regular sport you know like for example over the course of a season a football player or a basketball player can get injured. That's something that almost never happens in e-sport because you don't really use your body. But where it gets tricky is that for example sometimes you get a team to play games. It's really... you're really co-dependent from your teammates. Sometimes you can make something individually that is great but you can't really carry your team alone. It's possible but it's really hard not like in football where sometimes a player is good. I mean the team is good but there's really one player that stands out and really carries his team. Well in e-sports I feel like it's different. You can't really carry a team by yourself.

**Interviewer**

You really have to work as a team.

**Interviewee**

Yes it's really I think the idea of team play is much more... there is much more emphasis on that in e-sports than in real life sports and also you've got to learn the characters in the game because for example if a play a versus fighting game, I don't know if I can mention games...

**Interviewer**

Of course.

**Interviewee**

For example, if I am playing Street Fighter, you play one versus one. And the thing is that not only you have to learn how to, how you're going to play against a specific opponent. You've got to learn how to play against a specific character in the game. You know there is characters who are more defensive others more offensive, others for short range attack others for long range attack and when one character has a specific way of being played and you've got to learn all weaknesses and strengths of this character and then how a particular player applies those strengths and weaknesses in the game so, it's really different from any other sport these days that's something that I think for me at least is way more exciting because it ask I think it's much more unpredictable any other sport and it asks much more of your mental than your body but it asks a lot of your mental because you have to have pinpoint reflexes, really on point and that to know on the maps, the specific characters specific weapons you know it's not like.. you've got to be right in every move you make otherwise your losing

**Interviewer**

You have to be polyvalent within the game?

**Interviewee**

Yes, Yeah, I think and it's much more exciting too because... Because I think also what I like is that people are more polite in e-sport than in real sports. Like for example when you look at rivalries in some sports, the games can get really rough. Sometimes the audience can be very violent. And that's something that never happens in e-sports, at least not yet.

**Interviewer**

Why do you think that is?

**Interviewee**

I think it's because there is one thing in e-sport that any other sport doesn't have is the connectivity. That it is born on the Internet that it is accessible for everyone. it's not like a rivalry between two teams from the same city or two countries that have a long time rivalry because of old politics. And here it's because internet is one place like one big country where everyone is welcome. And so, I think during this thing where of course you have your preferences, you'll like this team because of this or you prefer this team because of that, maybe because of the way they play or a specific player they might have. but in the end even if the team you like the most loses the tournament and it's another team that wins, there is not violence, you're not insulting people on the Internet... which is weird because the internet is the place where everyone insults everyone. Yeah and weirdly enough when there's an e-sports competition people are very polite, open minded and they're just enjoying the competition as well.

**Interviewer**

They just come for the entertainment.

**Interviewee**

Yes. In the end you know if the best team wins, they'll be happy even if it is not the team they came supporting. If it's the best team they're just happy, it's like oh yeah that's the best team I'm happy. Yeah.

**Interviewer**

Okay. Is there more fair-play in e-sports than in other sports?

**Interviewee**

Yeah I think so because it's something I've never seen in the other sports.

**Interviewer**

One last word for recommending esports to people that never watched it?

**Interviewee**

Well. Well the reason I recommend e-sports is because it's exciting. It's refreshing. It's always changing always. Every day almost. And also, you can watch it on your term. It's when you want you can watch it when you want. it's you who chooses when you want to watch it or not. And I think that's really one of the biggest perks of watching esports.

**Interviewer**

Maybe just one last question.

**Interviewee**

Yeah.

**Interviewer**

Can you watch esports if you have never played video games?

**Interviewee**

Oh yes totally. I mean there's many people out there that watch football and have never been on a pitch.

**Interviewer**

Yes.

**Interviewee**

And they still enjoy because they like seeing competition. That's the same with e-sports.

**Interviewer**

Is it easy to understand?

**Interviewee**

Well yes. It depends on the game. Of course, like any other sport you've got to understand the rules first. Understand how it goes. So, then you can understand why a player acted this way or that way...

**Interviewer**

It's open to everyone?

**Interviewee**

Yes, it's open to everyone. Everybody can watch it. And there is many types of different games. You know it's not only war games or fighting games... there is sports games as well. There are many kinds of games that have e-sport competitions throughout the world. So that's also interesting because you can watch a few different games, streams from different games and maybe you find one you find really interesting because you see that it's not very competitive or very strategic or very fast paced maybe it's very exciting and you can find the one you prefer.

**Interviewer**

OK. Well thank you so much for this interview. It was a pleasure to listen to all your opinions on e-sports.

**Interviewee**

I thank you.

**Interviewer**

And that is the end of the interview I just wanted to remind you that all your answers will be treated confidentially, and it was a great help for me and for my research. Thank you.

**Interviewee**

Thank you. Goodbye.

**Interviewer**

Goodbye.

## Appendix 4: Second interview

**Interviewer**

Hello.

**Interviewee**

Hello.

**Interviewer**

Thank you for accepting to participate in this interview.

**Interviewee**

That's all right.

**Interviewer**

So, first of all, I just would like to remind you that all your answers will be treated confidentially so feel free to be honest when answering and again thank you for participating for this interview. Yep. So, let's just uh do maybe a refresh of key information about you, you are a male, you have between 16 and 25 years old.

**Interviewee**

That is correct.

**Interviewer**

You also have a full-time job and you are married.

**Interviewee**

Yeah totally.

**Interviewer**

Okay. To be totally honest with you, the amount you mentioned paying for their video games accessories you bought during these 3 years was among the highest of the sample.

**Interviewee**

Oh okay. Didn't think so but okay.

**Interviewer**

Yeah. So, it was very interesting for me to get to know a bit more about your background with video games, so you mentioned that you started playing video games competitively online 10 years ago.

**Interviewee**

Yeah.

**Interviewer**

So, tell me a bit more maybe about the start. How did you get to start video games?

**Interviewee**

Well I started playing video game when I was very young but back then it was mostly alone you know, solo experience

**Interviewer**

You mean without online connection?

**Interviewee**

Yes without connection. You know like, games that were more focusing on storytelling maybe or narration

**Interviewer**

Role play?

**Interviewee**

Yes. And you know as I grew older, I started playing video games but with some friends you know at home I found it really fun. So, then I saw that the online were becoming more and more present in video games. And I thought it was interesting back then, so I decided to try it. And then I got hooked to it and they played more and more of online video games.

**Interviewer**

Okay so it was more progressive? So, throughout the years you increased.

**Interviewee**

Yeah.

**Interviewer**

Okay. And what is it like now? How much do you play?

**Interviewee**

Ninety percent of the games I play are online video games. I play very rarely alone.

**Interviewer**

Okay so what do you like in online video games?

**Interviewee**

What I like... I think first it's that you can play it more. You know for example solo games, You start it you finish it you put it back in the box and you never play it again unless you really love it. That's really a specific case. While the online video game you can play it again and again and again because every time you play it it's going to be different.

**Interviewer**

Okay.

**Interviewee**

You can play it over the years even and have hundreds and thousands of hours on the game. And it's always a new experience because as time goes on they are updating the game you know there is new things that come in the game and yeah you can play again for two or three years straight. Having like 2-3000 hours on it maybe even more. And the game feels very different. And also, what I like is the competition because when you play alone against a computer you know it's an AI. So basically, they have kind of a pattern you know, you just have to learn how the machine thinks. And then you can just use what the machine doesn't understand.

**Interviewer**

I see.

**Interviewee**

While you know when you're playing online. Competition is against a real human and to beat another human it's not just knowing... it's just not using what he doesn't understand because a human is much more unpredictable than a machine. So, when you play online if you really want to be the best you have to play a lot and train a lot and learn, play, play,



train, learn and play. That's the only way you're going to be the best. That's I think is what is the most interesting. It's the competition.

**Interviewer**

Okay. I also saw that you play around 30 hours of video games a week. Do you also do tournaments? or do you play as a professional?

**Interviewee**

I don't play as a professional because thirty hours a week is not really enough to be a professional.

**Interviewer**

Okay.

**Interviewee**

I think I would be like yeah semi-professional maybe.

**Interviewer**

Okay.

**Interviewee**

Maybe. So yes, I did some tournaments mostly local, not, you know, big tournaments with cash prizes of millions of dollars but small cash prizes and such things.

**Interviewer**

When you say local, do you mean with gaming communities in Geneva?

**Interviewee**

Yeah gaming communities here, there has been few tournaments on very specific games.

**Interviewer**

Okay. But is this something regular or is it more occasional?

**Interviewee**

No it's mostly occasional, too occasional for me because I think and I know that I'm not the only one interested in having more tournaments. I sometimes participate in friendly

competitions online. So, you know you go on the website with a particular community from a game and you can subscribe to play to a competition. And if you win the competition you don't win you win a prize. You know sometimes. Yeah sometimes they offer you a skin in game.

**Interviewer**

For a game character?

**Interviewee**

Yeah yeah for a character, you know a new costume for a character stuff like that. It's cheap price you know. But it's because it's mostly a friendly competition. It's just you know mostly fans than professional players.

**Interviewer**

Okay. So maybe you could tell us a bit more about what you like to purchase up for your gaming experience?

**Interviewee**

What I like to buy. Well. Pretty often I buy new keyboards or a new mouse, you know to have more up-to-date material and more functional with more precision you know.

**Interviewer**

Okay. Do you like the ergonomics or the rapidity ...?

**Interviewee**

Yes ergonomics, rapidity yes. But also, options because for example on a mouse... you know when you have a desktop mouse for work in an office you have three clicks: the left click, middle click and right click. On a gaming mouse you can have up to more than 12 to 15 buttons. And put options on it to put specific actions to personalize the mouse with your game. And the thing is that by having 15 or 20 buttons on the mouse. It's not very easy to make it ergonomic. So, you often have you know they are working on it a lot to find the best value. Like how many buttons can be put and still have a very good ergonomics so you can really play nicely. And you know it just feels to play. You know, it feels natural.

**Interviewer**

How important is it for you to have all this up to date material?

**Interviewee**

It's very very important because when you play in competitive games you have something professional like to call muscular memory. It's when you've got a certain situation against a specific character or you know in a specific place on a map or a specific combo you want to make. You've got to train it a lot until it becomes reflexes. The thing is that it's much easier to develop this kind of reflexes when you're comfortable with your material, when you can personalize it and choose which button makes which action and you make your own kind of experience. And when you feel really comfortable with what you have then train yourself and learn the way of the game in that particular disposition and that's why it's important because you should have... it's not necessary having the best materials you know... I mean of course the best is the best. But it also has to be adapted to you, you know it has to be personal. Because I think we're all different and we might not all like to play with the same device. If I can say it that way. So yeah that's why I bought different keyboards and mouse. It's really to find for me the best. You know if I have a mouse and I think this one is a bit too sharp or I can't really click on all the buttons very easily. Maybe there's just too many buttons on it or maybe they're misplaced. Then I'm going to look and search for a mouse that may be more suited for how I like to play.

**Interviewer**

Okay. I saw that you play different games frequently. I think it was three maybe it changed I don't know... Do you adapt your equipment to the games you play?

**Interviewee**

Yes. Also of course because for example if I'm playing first person shooter game it's very different than playing a versus fighting game or a strategy game or a sports game. For example, some games are much more appealing and easier to play with a controller not a keyboard and mouse but really a controller like in a game console. And some games are way better with a keyboard and mouse.

**Interviewer**

Okay.

**Interviewee**

So it really depends on that and it depends on the game it's better to have one type of material or the other.

**Interviewer**

In your opinion which category of games do you typically spend the most on accessories?

**Interviewee**

I think it's first person shooter. Well the specific one I play is Counter Strike global offensive, very famous but also, it's a game that asks you to be aware all the time you've got to be aware. You know you've got to be aware you know of everything you do in the game; you know like where you are on the map and you know what kind of stuff you have on you. But you also have to be very careful of what you can see because sometimes you can see an enemy kind of hiding or making a small move and you can also sometimes hear them if they're running and not walking. You've got to be very focused. But you know to have the best movement, have the best sound and have the best image quality you've got to have the best material

**Interviewer**

OK well. Very interesting. And I also saw that you watched quite some hours of esports per week, I think you mentioned watching four hours on average of esports videos per week.

**Interviewee**

Yeah.

**Interviewer**

So why do you like to watch these videos?

**Interviewee**

I think the first reason is that the e-sports I watch are the same as the games I play. So it's interesting for me because I can see professional players you know who are better than me, playing so it's very exciting to see people that are really good. It's very entertaining and it's also you need to learn the game a bit better. Like when you're watching a really good player doing specific things, you're like "wow I didn't even know you could do that". And you are learning. You're inspired by watching professional players or not necessarily professional players, but you know you're watching them and they're really good and you can learn things and you know you learn things about the

game, about the developers or you know... Also, what I like is that it gives you a good contact with the community of the game and sometimes even the developers.

**Interviewer**

What do you mean?

**Interviewee**

Well, when you're watching a very famous streamer from a specific game or very famous player. Obviously the community, the fans of the game will come on stream or on his Website or anything and you talk about the game you know the last updates maybe you hear some news about this and that and sometimes developers of the game are involved because sometimes they contact a particular streamer to play their games or their new update live you know on the streaming platform like twitch and the developer doesn't really talk directly to the community because they know they have less impact than famous streamer you know.

**Interviewer**

I understand.

**Interviewee**

But suddenly the famous streamer becomes kind of middle man between the developers and the community.

**Interviewer**

They convey a message through the streamer?

**Interviewee**

Yes, the streamer plays a new update or a new instalment in a game. He can say "right now I'm playing I am not feeling this and that.." The game is more fast paced fast paced or slow paced than before you know. And yeah, it's a great way I think for the developers to communicate things with the community while making it entertaining. Because before that when developers wanted to share something, they wrote something on their website, and you had to read like four or five paragraphs to have the new information and it was just boring.

**Interviewer**

Okay.

**Interviewee**

Also, watching famous streamer or good player from a specific game, helps me buy the best materials.

**Interviewer**

Do you mean like you get inspired by the material they promote?

**Interviewee**

Yeah. Yeah. Because you know sometimes you can see them play and you can see the materials they have. So then you can go and search what kind of material they have and buy the same stuff than them and try to play in the same condition than them because if they are the best players maybe it's thanks to that and also many times they are also being sponsored by the brand manufacturers. So if you go in a specific shop and you enter a specific code, a promotional code concerning the specific streamer you can have a discount on price on stuff so that's also you know for example it can be very interesting when you have a 30 percent discount on a new mouse or a new keyboard. It can be really interesting if the keyboard is better than the one you have and you can pay it cheaper than what it really is it's always a good occasion. I really appreciate this.

**Interviewer**

Okay well thank you very much for your answers. Maybe a last question.

**Interviewee**

Okay.

**Interviewer**

Why would you recommend to someone to buy video game accessories video game accessories?

**Interviewee**

In general? or one specific?

**Interviewer**

Just in general like buying mouse keyboards headsets, just accessories for the whole purpose of enhancing the video game experience. Would you recommend that?

**Interviewee**

I would totally recommend that because it's much more comfortable to play with a good keyboard, good mouse, good headset, good screen. You know. I mean you're just more comfortable and you play in the best condition and it makes the whole experience much much more entertaining. Way funnier you know. You're playing with something that make it so easy to play so it's so much more fun. Because yeah, it's just good quality equipment. You can really find the one you really like. The one that really suits your need. You know and it makes a difference. And also, it's beautiful. You know it's beautiful it's always a very modern design a very cool modern design. Oh, sometimes you can you can even find a brand that have partnership with a famous franchise like Star Wars, stuff like that and for example you can have a Dark Vader headset.

**Interviewer**

Do you mean limited editions?

**Interviewee**

Yeah. Or a Jurassic Park keyboard. Maybe this one does not exist particularly but it's just an example. You know there's a lot of franchise that... I mean a lot of very famous brands that make very good product, good material: headsets, keyboards that have partnerships with a very famous franchise. Yeah you know it's also something that is very beautiful to watch. You know you play with something beautiful and personal too.

**Interviewer**

Okay. Okay. Thank you very much for your answers and thank you for taking the time to participate to the interview.

**Interviewee**

Thanks to you for inviting me.

**Interviewer**

And just a reminder that your responses will be treated confidentially. And I wish you all the best for your gaming experience. Thank you, and goodbye.

**Interviewee**

Thank you. Bye.