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Haute école de gestion  
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# **In which context can eSport find its place in Switzerland**

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

by

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## **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.

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Geneva the 3<sup>rd</sup> June of 2020

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# Executive Summary

eSport is an activity that, although almost as old as video games, is much less popular. However, in recent times, the popularity of this activity has been steadily increasing. Indeed, events related to eSport are becoming more numerous and their audience continues to increase. We are here talking about an economy that generates billions of dollars in revenue per year.

The literature review brings valuable information about how this industry works, so that people who do not know eSport can familiarize themselves with the different actors in this industry. They will also discover that the eSport industry have much more in common with traditional sport that we might think.

When writing this work, we sought to determine "in which context can eSport find its place in Switzerland" in order to compete at an international level. For this we have therefore, during the literature review, identified the success and failure factors that the eSports industry could encounter in a country.

The results of the research carried out during the literature review therefore enabled us to identify six success factors as well as six barriers, which have helped to formulate hypotheses regarding the development of eSports in Switzerland.

Once these different factors of success and failure have been identified, the objective was to compare them with the situation in Switzerland, therefore interviews were conducted with different active actors within the eSport industry in Switzerland. In addition to that, a survey has been conducted on the local population.

The results obtained therefore allowed us to determine that Switzerland is a good market to practice eSport as an amateur or semi-pro, because there is a growing interest from the public and the industry is rising locally, but in terms of professional eSport the result is different. Indeed, even though the identified barrier did not seem to be a major problem, none of the main success factor are present in Switzerland, which will make it complicated to catch up with the most eSport developed countries.

However, if one day the concerned actors would decide to act on the promotion of eSport locally, things could evolve in the country and Switzerland could become one of the main eSport nation.

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# 1. Introduction

In the 1950s, the first video games appeared in laboratories; they often came from research programs and, therefore, were not distributed to the public(The Strong 2016).

What would Willy Higinbotham have thought when he created a tennis game that works with an oscilloscope and an analog computer in 1958 if he had been told that later on someone would be inspired by his research to create a game like "Pong" In 1972. It not only revolutionized the video game industry but also allowed its creator to generate millions of dollars in revenue. It was also at this time that the home consoles began to appear in homes(Barton and Logudicie Bill 2020).

During the late 1970s and early 1980s, home consoles and arcade games continued to grow in popularity, prompting more and more people to develop their products. The industry has therefore experienced an increasing number of new consoles that have failed to offer quality content to the public, which has consequently led to the "Great Video Game Crash of 1983", thus leading to the bankruptcy of many of these companies(Gailloreto 2020).

It was from Japan, where the video game industry was not affected by the crash that the solution came in 1985, with the commercialization of the popular Nintendo Entertainment System (NES) in the United States. It was in 1991 that the console war began with the launch of "Sonic Hedgehog Game" by Sega, the two companies have released some of their most popular franchises in the following years with titles such as "Super Mario Bros" or "Street Fighter" (Editors 2017).

Subsequently, new players such as Sony and Microsoft have appeared with their respective consoles, computers and consoles became more and more powerful, the graphics have evolved to offer more realistic content, and this has led us therefore to an industry that generates 152.1 billion USD in revenue and plans to create 196 by 2022(Anderton 2019).

The subject of this work will not directly cover the video game industry, but there will be a relation to it as the industry we are going to covers would not exist without the video game. Indeed, we are going to talk here about eSport, which is a form of competition using video games. Although video games are trendy these days, eSports is much more recent, and its existence is mostly overlooked.

To start with, eSport which is also called electronic sport is a general term used to describe video game competitions(Techterms 2012). The first eSport competition happened 10 years after the release of Spacewar, the October 19, 1972 at Stanford University. This tournament was organized by students and the prize was a year of Rolling Stone magazine subscription(Phillips 2020). This is in the 1980 that first official video game competition was organized, as the Space Invaders Championship reached an attendance of 10,000 participants and received a consequent attention from medias. But this is in 1990 and with the rise of internet and the world wide web that the eSport industry went through a turning point, competition as the Cyberathlete Professional League (CPL) made their appearance in 1997, distributing prize monies of 15,000 USD but also games as Starcraft got released which became a reference in eSport gaming(Bountie Gaming 2018).

Yet the figures are just as promising, knowing that this industry has generated 950.6 million USD in 2019 and should, therefore, exceed one billion this year, we are also announcing a CAGR market of 9% until 2022(Pannekeet 2019). We can also retain that the eSport industry has registered an audience of 453 million people in 2019 as well as a record of 64.4 million USD Cash Prize in 2019 only for the video game "Fortnite"(Forsans 2020).

New generation consoles, as well as increasingly powerful computers, allowed to surpass the limit that people imagined decades ago. Current technology allows players from all around the world to compete in online game modes and, therefore, players to participate in competition while being seated on a chair at home. This can consequently lead us to believe that the number of people present on these platforms could reach peaks in the coming years.

Although the esports audience comes mainly from the Asia Pacific with a large amount of 57% worldwide viewership, Europe (16%) as well as North America (12%) have joined the battle of that promising market. Dedicated eSports arenas are appearing all around the world, and local teams are fighting to get the best players by their side to reign as the supreme leader in their field(Gough 2019).

Much remains to be done within this young industry; it thus seems legitimate to wonder who the leading players in the long term will be. We can also ask ourselves whether the eSport scene will, therefore, be dominated mainly by teams from large countries such as China and the United States, or whether a country such as Switzerland could come and

claim its due by setting up competitive teams on the international scene. We, therefore, intend to provide you with a clear and precise answer at the end of this research work.

We will, therefore, through this research work, discover the string of this industry, which is perhaps still utterly unknown to you. And for those who think they are unbeatable on the subject, they will also learn a lot of exciting things about it.

This work will, therefore, be divided into several parts, first, we will have the Literature Review, in which we will furnish relevant information about this industry in general, elements will be given about the main actors of the industry. The purpose of this maneuver is to provide as much information as possible about how the industry works.

To facilitate understanding, this part of the work will often be compared to so-called "traditional" sports to demonstrate that the differences between eSports and sports are not as significant as some people might think.

Then we will identify and discuss the barrier which will help us to determine the main difficulties encountered for any country seeking to develop this industry locally. In parallel, we will also classify what a country needs to be successful in eSport. That would help us to define why a country performs better in this market than another.

But the main subject remains to determine if Switzerland has the potential to develop on the national level to become competitive on the international level. The various barriers and qualities identified above will, therefore, help to get an idea of the current potential of eSport in Switzerland.

This is where we are going to the next step of the research, which is the analysis. Within this part, we are going to interview a few local actors in order to gather data which will be useful to answer our questions.

In addition to this, we are going to conduct a study on the Swiss population, which will aim to see if the public has an interest in eSport and what is their perception of this activity.

After that, we will discuss the results obtained, then finalize this research work by concluding.

## 2. Research objectives

Today, we can see a significant increase in interest for the eSport, like any "emerging" industry, it is legitimate to ask ourselves which direction it will take in the coming years. The purpose of this analysis will, therefore, be to define "in which context can eSport find its place in Switzerland." Since the Swiss have purchasing power above average and a rather high standard of living, this represents an attractive market for any new industry, provided that the country adopts it.

To be able to define the subject of our research, we will, therefore, look at the different success factors that allow a country to be competitive on the eSport scene. The main factors have been identified in the literature review. The objective from that part will be to define what are the main strengths of Switzerland regarding eSport. Below are examples of some strength from the countries that might help the industry locally. We might also mention we have identified a strength for a country that is not present in Switzerland.

We think that as with any industry, there will be a need for funds in order to develop, and Switzerland is a country where the economy is very prosperous, it should, therefore, be possible for the various actors in this industry to find the necessary funds to develop their activities.

On top of that, we think that such a promising economy could bring a lot of money back to the country's economy, which is why the government could enforce laws going in the direction of this industry, they might as well unlock aid funds for the actors in this industry.

Regarding the public, Switzerland is a country with excellent access to technology and a not so old population, that is why we think that the interest from the public will be consequent for the eSport even though it will not be comparable to Asian countries or the USA.

On the contrary, we think that it might be difficult to find players that are strong enough to shine on the international stage. Indeed, it took time before we could have some good Football players, the reaction from the country has been slow, and we do not think it will be different for the eSport. But we believe that it could be possible to attract some of the top players into Switzerland.

For the National organism, this is getting developed around the world since recently; we do not see Switzerland being ahead of other leading European countries for that.

And finally, we think that we might find some infrastructures dedicated to eSport, but that will never reach what happens in Asia and in the USA.

While success is an important indicator, it is equally important to consider the barriers that the industry may face in its development. The steps are the same that previously, we aim to define what is the main barrier that the industry's main encounter in Switzerland from those we have identified within the Literature Review.

First, we think that Switzerland is a multicultural country where people have learned to accept things they might not understand; therefore, we do not feel that the perception people have about eSport will be a problem.

For the violence, we think that the population is used to video games and that they will not see eSport as a violent activity.

We also think that the government will not try to stop the progression of the industry within the country.

### **3. Literature review**

#### ***3.1 The eSport ecosystem***

The idea here is to give a better general view of how eSport works. Even though it starts to be more and more famous across the world, a lot of people still ignore everything about its ecosystem. This is the reason why this research paper is going to bring as much information as possible to the public regarding the main actors present within this ecosystem.

We can see, below, a compound of the eSport ecosystem.

**Figure 1 - The eSport ecosystem**



### 3.1.1 Teams/eSport Organization

ESport organizations are in the business of brand development, as would be a popular football team. They create eSport teams, sign a new player to perform well, and distribute content to the public, all of it with one goal, growing their brand. Being at the beginning of a new era, only a few of them have stepped up from the rest of the crowd, becoming famous worldwide. We will have the opportunity in the next few years to see how these teams manage to keep growing and what will be the strategy for the smallest organizations in order to reduce the gap(Cheeseman 2019).

One of the specificities of eSport organization is that tend to be present on multiple fields, as they often do own several teams that play different games, if we take the example of Team Liquid which is one of the most reliable squad worldwide, their banner is represented within competitions of more than 15 different games(Wikipedia 2020b). This diversification allows them to reach a much broader audience, which creates more value for their sponsor and is also useful to protect them against the risk of losing value, as even though they perform poorly on a game, they will still have 14 others games to perform on to promote the team organization("Deloitte-The-Rise-of-Esports-Investments.Pdf" n.d.).

### 3.1.2 Composition of a team

E-sport teams are represented by an amount of player which depend on the game being played. If we take the example of League of legends, games are played between teams of five people, each group having an extra player on its bench of substitutes. However, in games such as Hearthstone, there is only one player(Krinsky n.d.).

Each game developer will set its own rules concerning the prerequisites of a team during a competition. If we take as an example, the regulations imposed on the different teams participating in the most important league of the game "League of Legends." Each team must appear with 1 or 2 substitute players, in addition to this, these teams must respect a certain quota for foreign players, namely that they must align 4 resident players in their teams("2019-World-Championship-Rule-Set\_20SEP19\_FINAL\_tkkqbyhth6wrfze9db2l.Pdf" n.d.).

If we now take another prestigious league of eSport which is the Dota 2 league, we do not find any rule that indicates a quota of foreign players in a team. This is why it is not possible to make a generalization when we are talking about team composition in eSport(Wikipedia 2020).

### **3.1.3 Revenue stream**

As for any other sports team, they need revenue to attract the best team member and thus be competitive; those revenues come some various channels.

Sponsorship is the largest revenue channel within the industry, with around 40% of the revenue for a team. The sponsorship model is the same as in any other industry, brand pay to have their name visible on their shirt or on their equipment(Maloney 2020).

Advertising is the second biggest revenue stream in terms of market percentage, with an estimate of 19% of the revenue. As an example of how advertising works with Team Organization, we can talk about the French team "Solary." They own their channel in Twitch, and while they are presenting eSport content to their viewers, they touch a percentage of the revenue made by the platform from advertising.

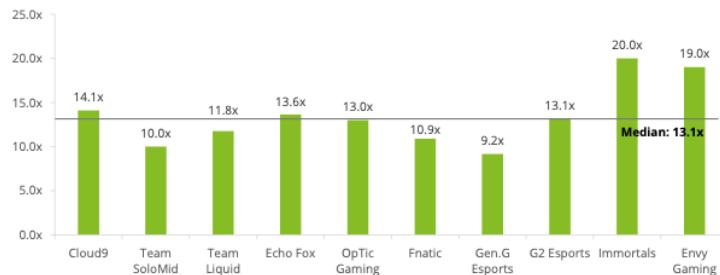
Teams also create shirts or goodies at their effigy, which allows them to add more revenue through selling merchandise. The income coming from this channel within eSport is still far from having the same success as traditional sports, but the potential is tremendous(Miyakoshi 2019).

And last but not least, every official competition gives a price for the competitors; for example, Fortnite has distributed 64,42 million USD cash prize during the year 2019. This revenue stream can be considered as more volatile knowing that the amount earned depends on the team's results(Hitt 2019).

There might be other revenue streams, but those are the one worth mentioning and that help to understand how this market works.

It is now interesting to have a look at the revenue of the best team in the industry, below, you can see a revenue estimation for the top 10 eSport organizations.

**Figure 2 - Team Organizations income growth**



As we can see from this graph, the top 10 Team organizations had known a tremendous growth in their income last year. However, there is a big gap existing between these top 10 organizations and the rest of the basket, and this gap might only increase. As we have seen previously, their result has a direct impact on their revenue, and these teams are the best in the world in terms of competitive results, earning all of the biggest cash prizes.

### **3.2 Games**

While we are talking about eSport, there are multiple games, the same way there are numerous types of sport. The difference is that everyone knows what football is and how you play it. But when you start talking about "League of Legends" which is a type of "MOBA" game, people might have heard of the game but not about the kind of game. That is why it is interesting to give as a matter of information's a few types of games and their specific gameplay.

*FPS: "also known as a first-person shooter, is a video game that is played from the point of view of the protagonist. FPS games typically map the gamer's movements and provide a view of what an actual person would see and do in game." (Unknown 2011)*

*MOBA: « The term is a video game genre that stands for Multiplayer Online Battle Arena (MOBA). The game is played between two teams of several players who choose a character from a roster of playable characters to level up and battle on a map with certain objectives." (Karu 2017)*

Battle Royal: *"A battle royale game is an online multiplayer video game genre that blends the survival, exploration, and scavenging elements of a survival game with last-man-standing gameplay."* (Wikipedia 2020c)

MMORPG: *"massively multiplayer online role-playing game: any story-driven online video game in which a player, taking on the persona of a character in a virtual or fantasy world, interacts with a large number of other players."* (Dictionary n.d.)

Sport: *"We think this one speaks for itself. Popular games currently are Madden, NBA 2K and Rocket League (Something about driving cars around a huge soccer field and pushing a giant soccer ball into the net makes us think we could put it here?)."* (Krinsky n.d.)

There are many more types of game and gameplay within the industry, but these examples are here to demonstrate that eSport is compounded of a large variety of games, the same way traditional sport can be subdivided into many types of sports.

Among those different types of gameplay cited, we can find some of the most successful games, like League of Legends (MOBA), Fortnite (BATTLEGROUND), Dota 2 (MOBA), or CS: GO (FPS).

To get a better insight of the impact that these video games have on the eSport scene, different data can be used, but the two mains being to compare audience and cash price, which helps to compare an eSport event with any other type of sportive events. And for that we have, for example, games as League of legends that distribute within their competition around 9 million USD for the year 2019, in addition to that, their most-watched event has reached 3,9 million people(Bates 2020).

If we want to compare with "casual" sports events, the final of Roland Garros has been watched by around 3,3 million people for prize money of 42,6 million for this simple event in 2019(Bailleul 2019). We can thus see that even though eSport games attract as many viewers than a very popular sport event, they are still quite far in terms of prize money, even though an amount of 34 million USD of cash prize has been distributed for "The international 2019" which is a gaming competition(Hitt 2019), if we compare it to the UEFA Euro Prize which is around 250 million, there is still a big gap(Season 2020).

It would now be interesting to have a closer look at these eSport league and tournaments within the next point.

### **3.3 Leagues/Tournaments**

We have seen before some of the types of games and gameplay and compared the audience and cash prize of eSport events with traditional sports events. It would now be interesting to see how tournaments and leagues are organized within the industry.

#### **3.3.1 eSport Leagues:**

For the organization of the leagues, we can find multiple "third party" companies that run their competition, and the size and level of these league can differ depending on the objective of these organizers, or the size of the local market. For example, we can take Switzerland, where we have an organism call SESL (Swiss eSports League) that organizes local leagues in the country, they offer content for six different games(SES� 2020). On the other hand, we have a much larger "third party" such as the Electronic Sport League (ESL), which one of the leaders in the industry for the league organizations. They are active in around 30 eSport games and present within multiple areas around the world(Takahasi 2020). These leagues are most of the time broadcast on one of the numerous streaming platforms, depending on the agreement between the organized and the streamer.

There are no specific rules when it comes to decide on the format of these leagues as they can very well be as football in Europe, for example, with teams that get promoted and relegated at the end of the season. It can also be as in the USA, with the franchised model, where teams are almost always the same, and at the end of the seasons, they are facing each other with playoffs to decide who will be the yearly winner of the competition(Krinsky n.d.).

#### **3.3.2 eSport tournaments:**

Just like for leagues, we can find multiple types of tournaments, the most popular being displayed once per year in principle. As an eSport player, they are an excellent way to promote their competences to the public as they are often attracting a broad audience. Within the most famous tournaments, most of the best players and teams are here to face each other. If we take the example of the game League of Legends and its world championship, which is displayed yearly. In order to be qualified for this tournament, the teams have to perform during the season within their respective leagues, as they obtain

their qualifications by being the best of the season within their area of the world (Europe, North America, China, South Korea, etc.)(Wiki 2020).

We have discussed previously about the game "Dota 2" and given the numbers of their tournament called "The international" which is, for now, one of the biggest tournaments within the eSport industry. In 2018, their competition occurred in the Rogers Arena in Vancouver, which is where the Vancouver Canucks hockey team plays. Even though the amount was smaller than for 2019, with 20 million USD redistributed to the actors, the fans that went to see the tournament within the arena were 20'000, and the people that watched the competition through streaming platforms were more than 15 million(Stewart 2018).

From year to year, we can see an increase in interest from the public for this kind of tournament. The rise in the audience is attracting more actors, and thus increasing the cash prize of these competitions. Although it is impossible to predict the future, it is possible to imagine that some of the most famous eSport tournaments could one day overtake the main sporting events.





### **3.4 Platforms**

The leading eSport broadcasting platforms are online streaming platforms. Their goal is to create a place where the offer can meet the demand meaning that anyone that has content to offer can broadcast it within one of the platforms available in the market. On the other hand, the public can find any type of content to distract them within these platforms.

It is not an easy deal to compare the different actors that offer streaming services, knowing that some of these platforms are simply active in different areas of the world. But if we make the decision to exclude Asia from our data, which has its streaming platforms that are only dedicated to the area. Twitch seems to be the leader, with more than 70% of the market share.

**Figure 3 - Streaming platforms hours watched: 2018 vs 2019**

Streaming platform hours watched: 2018 vs 2019

Platform	2018	2019	YoY Growth
 twitch	7,777,879,411	9,340,229,175	20%
 YouTube GAMING	2,310,000,000	2,681,436,455	16%
 facebook gaming	114,754,621	356,242,965	210%
 mixer	142,223,690	353,777,685	149%



As we can see in the image above, even though Twitch is largely dominating, we still have two major actors with YouTube GAMING. In addition to that, two newcomers have consequently increased their audience in between 2018 and 2019. They are all fighting to gain more audience, for that they are ready to spend a lot of money, as did Mixer to attract the famous streamer named Ninja, which joined their platform in 2019(Nedelec 2019). Behind those streaming platforms, we can find some of the biggest tech companies in the world that are fighting for a promising new market. (Twitch: Amazon; YouTube GAMING: Google; Facebook gaming: Facebook; Mixer: Microsoft)(Hasson 2019).

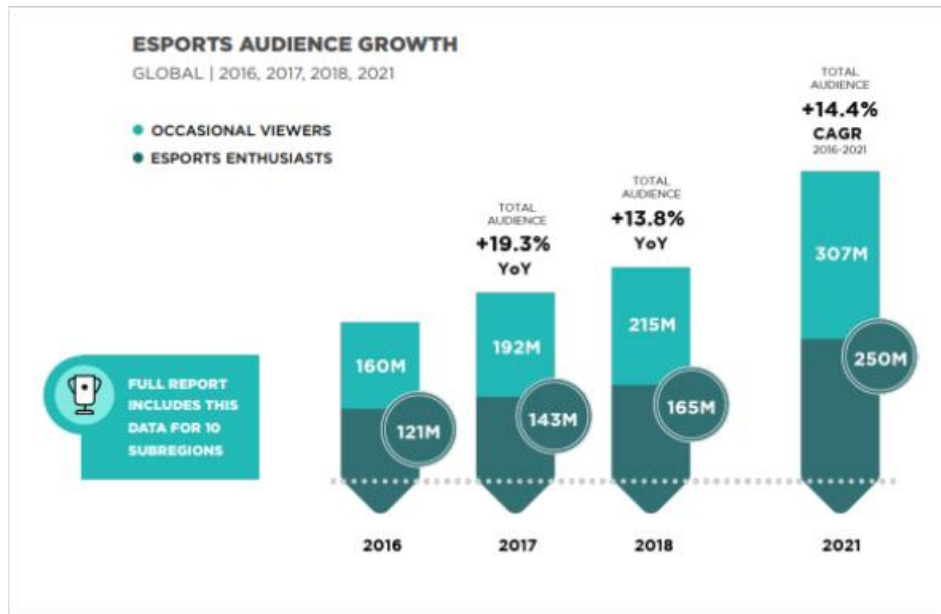
The means of generating revenues for these companies are quite similar for all of them as they retain a percentage of the streamer's income. There are no rules for that, as streamers can negotiate with the companies which percentage they have to give to them. This is another way for these platforms to attract streamers. In addition to that, the viewers have the option to subscribe to their favorite streamer channel to gain some advantages like the use of personalized icons in the chat or simply to remove advertising. To subscribe, the viewers have to pay monthly fees; these fees are also shared between the streamer and the platform. Lastly, for the viewer that does not pay a subscription, there are some advertising that pop-up from time to time, the revenues from these advertising are also shared between both parts.

### **3.5 Fans**

Fans are an essential link within the ecosystem of eSport, namely that without them, this ecosystem would not exist because it would not be profitable enough, and thus not beneficial for anyone to invest time and money.

We can see two categories of fans as for any sport; there are the "occasional viewers" and the "eSport enthusiasts" which are classified regarding their interest in eSport. And as we can see below, both categories have not stopped to increase in recent years.

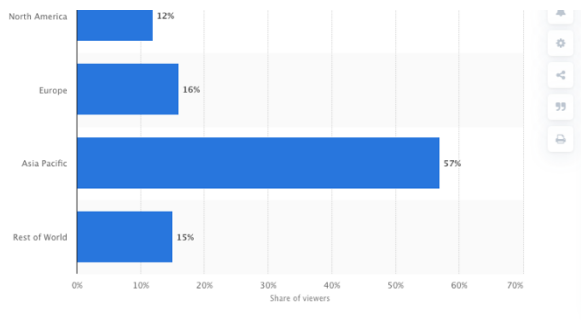
**Figure 4 - eSports audience growth**



The viewer forecast is planning on an audience that double in between 2016 and 2021, which is a good indicator of success for the industry. What these data tell us is also that we have around the same proportion of "eSport enthusiasts" and "occasional viewers" and that they are growing at the same rate.

A Survey that was conducted in the United States gives us more information about who these eSport enthusiasts are. The results demonstrate that the most represented group in terms of age are the millennials (between 18 and 34 years old), with 65% of the population of enthusiasts. We also find in this group a majority of viewers (60%) between 25 and 39 years old, which therefore shows that watching an e-sport competition is not reserved for adolescents and young adults. And contrary to what people might think, 38% of these enthusiasts are women(Gomstyn 2016).

**Figure 5 - viewers distribution around the world**



We can see, on the left, the distribution of viewers around the world, and it is therefore not surprising that the Asia Pacific is in front of the rest of the world. This graph also shows us that Europe is 2nd, ahead of the North America region, contrary to what one might think.

### **3.6 Game developers + publishers**

Game developers are those that own the rights to the games that eSport professionals play at; for example, the game League of Legends belongs to Riot Games and Counterstrike to Valve, which is both game developers.

Unlike traditional sports, which are regulated by separate entities, within the eSport industry, game developers have total control over everything related to their content; this means that the whole ecosystem relate on them(Chapman n.d.).

Despite everything, there are two types of models applied by game developers regarding the rights to use their games. These are the franchisee or the non-franchisee models, and it is though interesting to gather more information to understand these models work.

Franchised: in this model, the "Game Developer" has control over the structure, the rules, the organization, or even the profits related to eSport competition. This model is similar to what can be found in America with, for example, the NHL or the NBA. This model brings a kind of stability for investors knowing that it works very well with traditional sports.

Concretely, the teams must buy a "franchise slot" to participate in the various tournaments and championships, these slots can also be offered to participants according to the goodwill of the developer. The different revenues are then redistributed between the owners of the franchises and the game developers(Cheeseman 2019).

Non-Franchised: This model is currently the most used within the eSport industry, although we can find more franchised league now than a few years back. Within the big lines, the principle here is that if a company wishes to organize a tournament or any type

of competition, they need to contact the game developers to have their approval. Again, the rules to be applied during these competitions are set by the game developer.

Once the authorizations have been obtained, the organizer takes care of the whole organization as well as the choice of the teams which will participate in the events, and the cash prizes are fixed with the sponsors.

The control from the game developers as to the organization of any event related to their game, therefore, shows us the power that these companies have on the eSport market in general(Cheeseman 2019).

### **3.7 Brands + advertisers**

As we have seen previously, sponsorship and advertising represent alone more than 50% of eSport revenues, that is why brands and advertisers have an important place within this ecosystem.

Brands can use different ways to promote their products. For equipment manufacturers, just like in traditional sport, they will ask teams to use their brand to make it visible to the eyes of the public.

Brands will also have the opportunity to promote their products using ads on streaming platforms. However, this method is not the most effective because of the number of people using ad blockers, or simply paying monthly fees to the streamer in order not to have any advertising. Another possibility for the brands is to promote their product using billboards that are set during events or by sponsoring an event.

In addition to this, some brands create their tournament to promote their product, as we can see with Coca-Cola, which organized an EA Sports FIFA 18 tournament, this tournament is called the Coca-Cola eCOPA(Hale 2018).

We can find here the same ways to promote a brand than in traditional sport, except that this market is not as regulated as conventional sports and, therefore, much more open to competition between brands.

## **3.8 Investors**

### **3.8.1 What is the situation**

To attract investors, it is crucial becoming as attractive as possible. Namely, when a person or entity considers an industry in which to invest, that person or entity is looking for a way to gain money in the medium or long term. That is why the whole ecosystem must work together to promote this industry.

The eSport ecosystem has grown recently, and nothing indicates that this growth is going to slow down in the near future, that is why the industry is going to need more equity to expand nationally and internationally. In addition to that, the industry still being young. There is a need for experimented people that can bring added value to the industry. This is the reason why investors have an essential role to play regarding the development of this industry. Indeed, there are multiple ways to invest in an economy, investing money, and sharing competences being some of them.

First, as we mentioned earlier, the different entities present within this ecosystem need funds to be able to develop on a whole new level. These funds will not only allow the players that are already implemented within the industry to increase in size, but also give a chance for newcomers to enter the market, resulting in the all-sector to grow in volume.

Then, it is equally, or even more important, to obtain strategic partners. These strategic partners offer an external view of the market, but above all, they benefit from more experience in terms of market development than certain inexperienced players present in this new industry. This being useful to promote eSport to the eyes of everyone else correctly.

Although investment in the industry shows great potential at first glance, it is essential that the different players within this ecosystem "educate" investors to gain their curiosity and to motivate them to take the risk of sharing their knowledge and their funds. Namely, few of them have advanced knowledge regarding this industry.

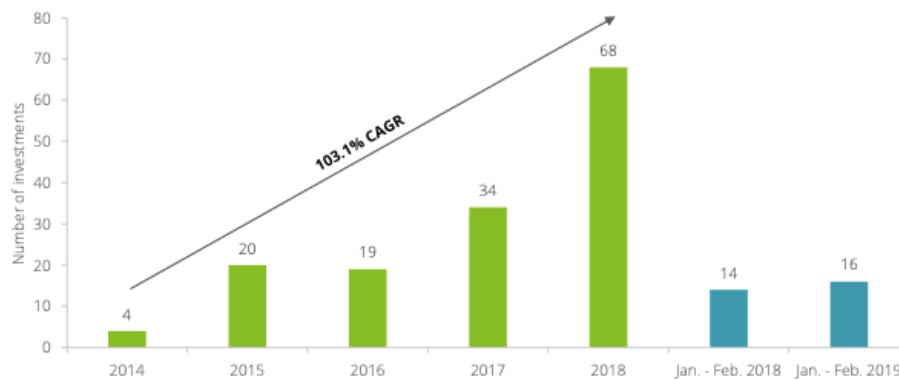
As we will see in the next point, "Who are the investors?" The eSport industry has gained credibility in recent years, attracting more and more investors, some of whom are well known in the sports industry and worldwide such as Michael Jordan or DJ like Steve Aoki (Spaenlé 2019). These investors, more than the others, help to promote this industry

to an entire audience. While this is encouraging, there is still a long way to go before eSport can earn the same respect as traditional sports industries.

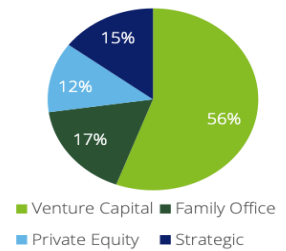
### 3.8.2 Who are the investors

This ecosystem is vast and therefore offers multiple possibilities for any investor. The fact that this industry is new certainly makes investments riskier, but also more open. It is also important to notice that the industry is not as regulated as could be some older markets and that there is less competition as well. That said, according to a study made by "the esport observer," we can see that the number of investments has increased a lot lately. In terms of the number of investments as it went from 34 in 2017 to 68 in 2018, which is the double, this is also visible when we look at the amounts invested, as 490 million USD has been invested in 2017 and 4,5 billion USD in 2018. Even though we might think that 2019 has known a recession with its 2 billion of investment, this is not precisely the case. As within the 4.5 billion USD invested in 2018, 1.25 billion USD were raised by a single company which is "Epic Game" and 1.5 billion were invested by the company "Tencent", these two companies having done "extraordinary" transaction this year(Hana 2020).

**Figure 6 - Number of investments through the years**



**Figure 7 - Who are the investors**



It would, therefore, be interesting to obtain information about these investors and their specific investments, for this, a Deloitte report tells us that 56% came from venture capital, 17% from family office, 15% from strategic and 12% from private equity as we can see on the right side("Deloitte-The-Rise-of-Esports-Investments.Pdf" n.d.).

As expected in an emerging industry, most of the investments come from venture capital, their investments being mainly made among media platforms & advertising (45%), developers (31%), and team organizations (18%).

Came after, family offices that have some freedom regarding the investments made and can thus take risks and therefore invest in new industries. Their investments were distributed to Team Organizations (33%) and Developers (27%).

For the first time, investments from private equity have grown in this industry, namely that during 2018 they have invested more than during the period going from 2014 to 2017. Unlike the two mentioned above, private equity investors prefer to spend when there are limited risks, the fact that their investment is starting to demonstrate that the eSport industry is getting more reliable to the eyes of the investors. Private equity investments were distributed as follows: Media Platforms & advertising (36%), Event Coordinators (27%) and Team Organizations (18%).

As we'll see, the eSport ecosystem offers a variety of opportunities for investors. Some of them being specific to this industry, and others being very similar to those that we can find in traditional sport.

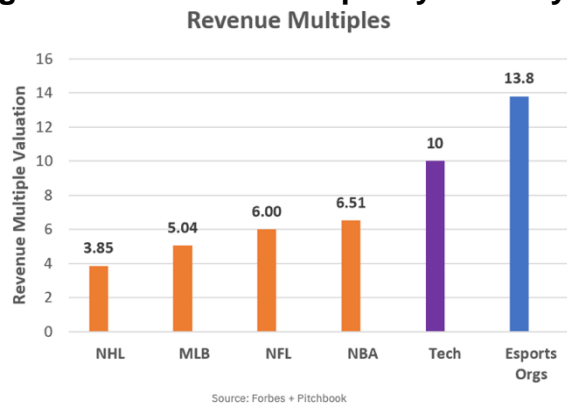
### **3.8.3 What are the investment categories?**

Now that we have more information about the groups of people that invests in this industry, it may be interesting to provide information about the categories they are investing their money in. Some of them are already mentioned previously as the most popular categories for investors as for "media platforms & advertising," "developers," "team organizations" or "event coordinators." In addition to this, we will discuss "consumer products." These information's will help understand the eSport industry.

### 3.8.3.1 Team Organization

First, we have the Team Organization; as we saw earlier, they bring together teams/players who compete during the various competitions. The graph below shows the "Revenue Multiples" of several industries in recent years.

**Figure 8 - Revenue multiple by industry**



As we can see, the team organizations have experienced a very large increase in their revenues lately, largely exceeding various traditional sports League, but especially the technology companies, a market which is being promised to a significant expansion.

Investments in team organizations can take several forms:

Initially, an investor can finance an already existing organization; they can get a share of those organizations, for example. What investors will be looking for in that situation is a successful team because if a team wants to increase its revenue, they need to perform on the stage and gain public appreciation, as for any traditional sports team. For now, investments within existing Organizations remains the most common form of investments, as on the 258M USD invested in this specific category, 50% have been for the top 10 organization within the last two years("Deloitte-The-Rise-of-Esports-Investments.Pdf" n.d.).

Another opportunity for investors is to create their team; it is riskier and it demands more investments or knowledge of the market. But as we can see in Switzerland with Postfinance, it is possible as they have taken advantages on the growth of this industry to create their competitive team, which allows them to be shy on the eSport scene, but also to promote their banking product to an all-new public(Möri 2018).

Although not without risk, investing in a team organization can be profitable for any investor with knowledge of the eSport market.

That said, with the current growth of the market that brings to the development of franchised leagues league, for example, or bigger salaries to pay for the staff and the players. Team organizations will need more external investments to develop and

prosper. It is thus up to these teams to do everything to keep attracting new investors to thrive.

### **3.8.3.2 Developers**

Games developers or publishers, as we have called them before, do not operate like for traditional sports. If we want to compare eSport to any other competition, the game "League of Legends" would be basketball, DOTA 2, Football. But in eSport, unlike traditional sports, game developers must invest continuously in their game.

For example, if the NHL (National Hockey League) were to be dissolved, people could still get together to play Hockey with friends whenever they want to. A new group of people could even decide to create a new Hockey League. The success or failure of this game, therefore, has no connection with the entity that governs this sport.

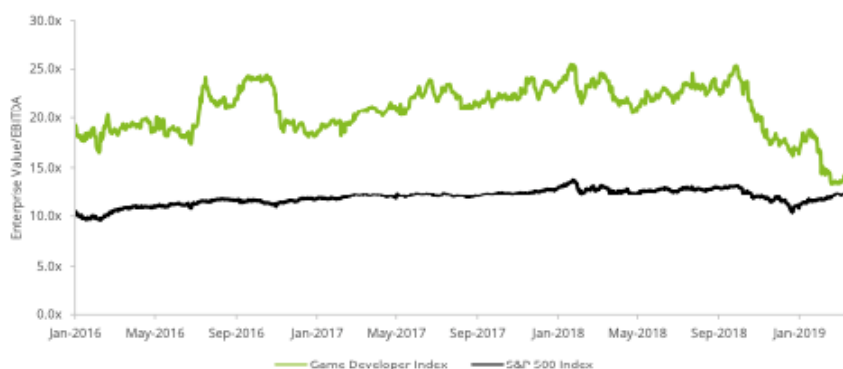
This is not the case in eSport, namely that even if someone wishes to play League of Legends from home, the entity to which this game belongs must continually invest resources so that this game can last. If the company were to shut down all of its servers, any entity related to this game would come to an end as they could not offer any content to their public.

Therefore, they need to be able not only to generate profits but also to be able to count on investors to develop their activities.

Unlike the other categories of investment that we can find within this ecosystem, developers can be considered as more "mature" namely that video games have been around longer than eSport, and these companies are therefore larger and financially more stable.

According to a survey run by Deloitte, we can see below, that in comparison with the S&P 500, which is a stock market index based on 500 large companies listed on the stock exchanges in the United States(Davis 2020). The various game developers present on the market perform very well as they do better than these companies.

**Figure 9 Enterprise value Game Developer vs S&P 500**



Indeed, since January 2016, these companies have always performed better than the S & P500 by comparing "the enterprise value and the EBITDA (profit before interest, taxes, depreciation, and amortization)." Please note that some game developers are not yet part of the esports industry, as they do not offer any content that can be played in a competition.

Investments are more "limited" than in the other categories, namely that there are not many competitive actors that we can consider as game developers within the market. This is due to the time and cost of developing a new video game that requires a substantial investment but does not give any insurance that the game will be a success.

However, there are still some exceptions, as with Epic Game, which by releasing the globally successful game "Fortnite" managed to move from small development company to a company that made a capital raise of 1.25 billion in 2018 (Shieber and Crook 2018).

It is thus up to investors to be on the lookout so they can identify the next big hit game.

### **3.8.3.3 Third-party event coordinators**

Although the developers manage the main eSport events, we can find a whole set of third-party, even coordinators that operate around the world. These people organize international tournaments, high school leagues, or even national league. They, therefore, play a critical role in this industry, namely that not everyone can have the level to play with the best players of the moment, and thus participate in the most prestigious tournaments.

That said, Game Developers still need to work with these companies whenever they organize a big event, or for many other tasks because they do not have the time or

qualifications to handle it. They are here to promote the eSport and diverse events to keep attracting the public but also to keep their interest.

There are all sizes of businesses at this level, with companies like ESL and DreamHack that hosts events for thousands of people around the world. But also, small local companies that focus on weekly events. That said, the forms of income are roughly similar for each of them, namely that they will come from ticket sales, sponsored, media rights, and merchandising(Paresh 2015).

The advantage from an investor's perspective is that these companies if they want to and have the skills to grow, can do it without limits if they have the funds. Note that these companies can initially offer a wide variety of "tournaments products and organizations services." But also work with a multitude of different game developers and especially in multiple countries.

#### **3.8.3.4 Media platforms & advertising**

Media platforms & advertising take into account a variety of activities that all have in common to be focused on fan engagement. We can, therefore, find agencies that will aim to support non-endemic brands wishing to use eSport to promote their products. But they will also have to work with companies that are already well implemented within the industry that just want to increase or retain their audience.

As we have seen previously, esports is experiencing growth in terms of audience, and this market is set to continue to grow in the future. That is, though, an opportunity for companies to promote their products, which the public that follows eSport. Something to take into consideration is that the esports audience is mainly made up of millennials that have a certain quality of life. For example, according to a study made by "esportobserver," 61% of eSport fans that are over 18 years old earn more than 50,000 USD per year. This is also something important to notice for the brands, as it would be less interesting to target an industry within which people have no purchasing power(Bathurst 2017).

Brands can engage within the industry in multiple ways; for example, Audi Denmark signed a \$ 1,000,000 deal in 2019 with a local team to display their logo on their shirts(Hayward 2019). Another form of sponsorship which is a little bit more specific to eSport is what KFC did by setting up a partnership with the popular streaming platforms Twitch during a special event for that lasted three days, and involved four streamers, the

principle being that when those streamers won a round on these specific days, the viewers had to blast their chat using the KFC emote to win a 5 USD KFC gift card (Sheehan 2018).

As we can see, below, investments in this category experienced strong growth during 2018, in terms of the number of investments, but also in amounts.

**Figure 10 – Investments in eSport**



Namely, two important transactions were excluded from the data, the acquisition of Twitch by Amazon in 2014 (970M), and the acquisition by Tencent's of two streaming platforms in 2018 for the amount of 1 Billion.

We can thus see that in Media platforms & advertising, there are various investment possibilities and that the doors are open to new players and investors. The constant growth regarding the number of spectators leads us to believe that investments will multiply for the years to come.

### 3.8.3.5 Consumer products

The last investment category is consumer products, an essential group, knowing that some of them furnish the diverse equipment with which the practice eSport. For example, computer brands, technological equipment brands and so on.

This investment category is attractive because some of the dominant companies are reliable companies that have been in the market for decades, as we can see with Logitech or Dell.

Below, we have five companies with their EV / Revenue, which is a metric valuation used to evaluate a business by dividing its value business (equity + debt-cash) by its annual revenue. This is useful for new companies that do not yet have positive earnings. What this graph tells us is the potential of these companies (CFI n.d.).

Although these companies have all been bought by companies that have been on the market for a longer time (Logitech, Turtle Beach) or investment funds (EagleTree Capital)

and taking into account that most of these companies provide gaming equipment, this, therefore, demonstrates a public interest in this industry.

Along with the expansion of this industry, we also have new consumer product opportunities, with, for example, streetwear brands that are created around eSport, just as with traditional sport. The teams, in partnership with clothing brands, want to create their clothing brand to have an impact on the perception of their brands, but also to align themselves with a juicy market. According to a survey conducted by "global industry analysts, Inc." the sportswear and fitness market is expected to reach 231,7 billion USD by 2024. With sportswear mostly booming in Asia, which is also one of the primary eSport markets. It is, therefore, up to the diverse actors in the eSport market to take their share of the market(Moylan 2018).

### **3.9 What do we learn from this ecosystem?**

What we learn from this research about the eSport ecosystem, is first of all, that we have here a promising industry, the figures demonstrate to us that we are at the beginning of a sector which could become as strong as the most famous traditional sports.

Indeed, the fact that eSport has experienced an increase in audience of around 16% YoY, going from 281 M in 2016 to 380 M in 2018, shows that this industry is gaining public interest, which is something essential in the world of sport. In addition to this, that fact that investors are paying more attention to the market, knowing that they are more numerous (34 in 2017 against 68 in 2018) but also invest more massive amounts (490 Million in 2017 against 4,5 million in 2018) leaves up think that the ecosystem has the necessary tools to grow.

That said, eSports still has a long way to go before it can be as popular as football, for example. If we take as an example the event that has known the largest audience, which happens to be the Classico FC Barcelona vs Real Madrid, in one game, we get the number of 650 million viewers, which represents almost twice the annual audience of eSport(Houeix 2019). Then if we now compare revenues, FC Barcelona recorded an income of 840.4M in 2019(Dalleres 2020), while the annual income of the most esports-oriented team revolves around 25 M(Owler n.d.).

We can still find a lot of similarities between eSport and traditional sports, namely that teams or players compete to win, but also to distract an audience. So that's why the

business model turns out to be very similar. Teams must be competitive; for this, they must attract or train the best players and therefore generate income to be able to remunerate the players.

This ecosystem should, therefore, grow in harmony so that one day we can compare the figures of eSports and those of the most popular traditional sports on an equal footing. For this, it is, therefore, up to the various actors to continue to promote eSport, so that the number of spectators increases. It is also up to these actors to make this industry attractive enough for investors to keep increasing investors' interests, thus allowing this industry to develop.

That said, actions such as the creation of a franchised League demonstrate the desire on the part of developers to earn their place among so-called traditional sports. They will, therefore, have to struggle with the various barriers that could slow down eSport in its expansion.

### **3.10 What are the main barriers for the eSport expansion?**

Some of the barriers have been identified during the research; they are the following:

1. Violent content
2. Perception
3. Regulatory bodies
4. Government legislation
5. Access to technology
6. Young market

So, it's now interesting to look at these various barriers that could prevent eSports from gaining momentum, or simply from taking part in some areas of the world.

At first, although the "International Olympics Committee (IOC) has publicly said that eSports could be officially recognized as a sporting activity and admitting that implementing eSport within the Olympic games could benefit them by increasing the popularity of their games by attracting a younger population(Porkch0p 2019). This industry remains far from being able to be recognized as such. This was demonstrated in 2018 during "The eSport forum," which was organized at the Olympic Museum in Lausanne, on July 20 and 21, 2018(Espinosa, Correia, and Freitas 2019).

It emerges from this forum that the most popular games in eSport are all closely related to **violent acts**, which constitutes a barrier for Thomas Bach, the president of the IOC. He, therefore, underlines the fact that we are faced with an ethical problem, namely that the values of this organization are contrary to those promoted by these games, which are the glorification of violence and discrimination. And it is difficult to contradict Mr. Bach when we see that the four games with the highest total amount of Prize money are games that demand to eliminate your opponents to win the game(Ford 2020).

That said, the organizers remain open to any proposal coming from the various actors in eSport. What they want them to do is to offer content free of the violence which could be broadcast during the Olympic Games. The problem here is that it is not complicated to offer free violence content, but these games need to have a relevant audience to attract people. If we take as an example the various sports games, they are still far from attracting as many people, the most popular one being the football game FIFA, which is the only sports game within the top 50 regarding the Prize cash distributed(Esports Earning 2020).

Violent content can also pose sponsorship concerns, knowing that some entities may be afraid that their name could be associated with violence. We have seen politicians in the United States blaming video games for explaining individual acts of barbarism on their territory. This kind of discourses can only degrade the perception people can have about eSports(Stern 2019).

Although it has all the elements of sport, another problem that eSports encounters are linked to the **perception** that a part of the population has of it, in fact, eSport does not benefit from the positive image that people have regarding other sports activities. It is still very often associated with a lack of lifestyle or as anti-social behavior, contrary to a traditional sport that has the reputation of creating socialization and improving the lifestyle. In popular thought, it is conceivable that someone spends a lot of time playing sports, even at the expense of their studies. In contrast, if this time is invested to progress in video games, it will be considered a waste of time in the eyes of many people(Batchelor 2017).

In addition to this, states find it difficult to recognize these players as professional athletes, proof of this is for countries within which the army is still compulsory. Even though all professional athletes are exempt from service to be able to focus 100% on

their performance, this does not apply to eSports players. Knowing that what he practices is not perceived as being a real sport(Ashton 2019).

What also emerged from this discussion is a lack of clarity regarding the global **regulatory bodies**, unlike football, for example, where each championship must obey the rules set by FIFA. In case they do not respect the rules, they risk being penalized the FIFA. As seen previously, game developers define the rules that are applied while you are linked to the content they have created. The problem with it is that the interests of these companies are to make profits; this poses a challenge from an ethical point of view. Although more and more countries are creating their federation with the example of France and its league, "France esport." Internationally, several entities are trying to regulate this by obtaining the agreement of as many countries as possible, but this has not yet been put in place(Ashton 2020).

These entities have as purpose to regulate tournaments, but also to ensure that each player in the industry is adequately treated. Because even if for the players that play "top tier" games, the conditions are well regulated, it is far from the same for the whole industry. As it has been told by an anonymous player of PUBG mobile, who finds himself bonded to his contract, being, for example, obliged to leave for another team, even though this team is on the other side of the world if its contractors decide to(Fitch 2019).

We also find among the barriers the various **government legislation** such as those related to immigration. For example, in the United States, although they have recognized some eSport player as professional sportive, by giving them the same type of visa as professional sportsmen from traditional sports. The reality is different in most cases if you are not part of the "elite" of the players, you must, as everyone else, fill out a standard business visa which can require a lot of paperwork and discourage some people(Winkie 2020).

As a barrier, we can also quote access to **technology**, which restricts the Geographic expansion of leagues. At first, 4.54 billion people have access to the internet in 2020, which represents 59% of the population. Therefore 41% of the world population can neither play nor even watch eSport, knowing that the eSport events are mainly diffuse on streaming platforms(Statista 2020).

On average, to be able to enjoy the experience of playing an online game without encountering a lag, the power of the internet connection needs to reach a download

speed of 3 Mbps and an upload speed of 1Mbps. As a result, out of the 51% of the population with internet access, we can count everyone as a potential spectator, but the list reduces when we want to take into consideration those that can play. Knowing that in some countries and cities around the world, even though they have access to the internet, the connection might be not powerful enough(Zen 2019).

The youth of the market does not allow us to define the life cycle of the different games which are practiced at a professional level. We can, in no case, ensure that games like League of Legends will always be current in 10 years because we do not have the necessary perspective for that.

It is, therefore, more difficult to predict the future than for a traditional sport. It also requires players to be more versatile, namely that it is complicated these days to train a 14-year-old teenager for a specific game without knowing if this one will always be on the front of the stage when he gets the age to play professionally(Partin 2019).

Most of the barriers we have talked about are surmountable. However, the ecosystem cannot have an impact on the number of people connected in the world or on the quality of internet connections. It is also complicated to have a direct effect on people's perception, although it is possible to alternate it by using the divers' means of communication correctly.

However, it is necessary that the different entities work hand in hand to be able, not only to regulate this discipline from the point of view of a federation, but also that the respective governments play the game and facilitate all administrative procedures, just as it would be made for a basketball player.

### **3.11 What does a country need to be successful?**

#### **3.11.1 Government support**

Government support has a significant role to play in the development of eSports within their countries as they have the power to ease eSport acceptance or to block its progress.

We can quote, as an example, how the German government reacted to this new industry. They are the first country that has approved the creation of a new VISA category that has as a purpose to ease the procedures for the eSport actors. With this new VISA, it is

easier to ask for a permanent residence is they do not come from the European Union(Unknown 2019).

This will allow, for example, the various German teams to be able to facilitate the recruitment of foreign players and, therefore potentially strengthen the Team Organizations of the country. In addition to this, this new law will promote the organization of tournaments and thus give more work to German companies present in this industry, allowing them to become more significant. By doing so, Germany has sent a message to the rest of the world about their will to become one of the leading players in eSports.

Government assistance can also come from a financial point of view, by injecting money into the industry, for example. As we can see with what the Chinese government has done. To promote Chinese eSport, they decided to support the largest local gaming and digital company present in the country to help them become a world leader.

In addition to this, they have planned to invest around 700 million USD over the next three years to help local eSport companies. These aids aim to offer grants for several team organizations, companies, streaming platforms, or event organizers. They also planned to finance the renovation of several eSport arenas already existing in the country(Hassan 2018).

Countries like the United States have decided to attack this from yet another angle, by implementing eSports to the education of young people. With the creation of the National Association of Collegiate Esports (NACE) in 2016, which aims to help member colleges and universities deliver an eSports program that benefits students. They currently have more than 170 member schools, 5,000 student-athletes, and distribute 16 million eSport scholarship and aid each year. However, just like traditional sports, these scholarships are reserved for the more talented players(NACE 2020).

In addition to this, some schools have decided to organize eSports lessons as an extra-curricular activity, this initially serving to avoid the isolation of young people, but also to develop multiple skills such as teamwork, decision making, and many more. It can also be used to teach lessons to students, for example, learning them to accept the defeat. Some schools have taken this concept a step further by organizing inter-school tournaments, as this has happened between several schools in the Orange county region. The finals of this tournament took place in an eSport arena in front of all the students and their families(Steinkuehler n.d.).

As seen above, government support to promote eSports can come in many forms and no matter what form it takes, it can be beneficial for the development of the industry to have this support from their government.

### **3.11.2 National organism**

Each country needs to have an entity that regulates the eSport industry to ensure that everyone is judged on the same scale. Although "Game Developers » control the rules applied to the diverse tournament or the behavior that must be respected during a game, and entity need to be there to protect all of the actors present within the ecosystem.

Although this kind of organization has started to appear everywhere in recent years, it is interesting to take as an example South Korea and its organization called KeSPA, which is the link between game developers, eSport organizations, and the government in the country(Wikipedia 2020a).

This non-governmental organization was created in 2000 to ensure the proper development of eSports in South Korea. They have multiple roles, such as organizing tournaments, registering professional players in the country, or setting the rules that must be followed by the various players in this industry(Popova 2018).

They also have the role of enforcing professionalism and ethical behavior. They do not hesitate to penalize any player who has inappropriate behavior, such as the use of inadequate vocabulary, whether during or outside officials matches. These kinds of regulations can be found in traditional sport as for the NBA or the NFL, where the player have to adapt a perfect behavior on and outside of the field(Wolf and Kang 2019).

Although, as we have seen before, there is a lack of a global regulatory entity, some countries are doing their best to regulate this industry, as we can see with Europe, which created its General Body in February 2020 called " EsportsInEurope." In addition to the 23 member countries that have signed the agreement, three major players in eSport have decided to be part of the deal as well, ESL, ESFORCE, and Burson Cohn and Wolfe(Manscup 2020).

This organization aims to represent the players of eSport as well as the Team Organizations at the level of European politics, media, society, and sport. On top of that,

they want to build a platform so that its members can promote and develop eSports in a responsible, sustainable, healthy, and value-based way(Esportseurope 2020).

Here are some examples of national organisms (Besombes 2020).

**Table 1 - National organisms**

Country	Organism name	Creation year
France	France eSport	2016
Germany	ESBD	2017
Sweden	SESF	2008
Denmark	ESD	2007
Italy	FIES	2017
Switzerland	SeSF	2008
Indonesia	leSPA	2013

As seen before, all these organisms have different power within their country depending on the recognition from local actors and government. For most of them, they cannot impose their rules, which they can gain by working side by side with the main actors of the ecosystem. An example would be to have an agreement with the best teams of the country and organize tournaments that are only for the organism members, which would result in increasing the motivation for the smaller player to respect the rules to participate in these tournaments.

### **3.11.3 Dedicated infrastructures**

Although one might think that the only thing players need to participate in or watch a competition, is a computer and an internet connection, the reality is very different, and many other infrastructures can be used for the benefits of eSports.

For example, more and more teams are building their training center, which is a bigfoot forward knowing that for a long time, players of the same team lived in a so-called "gaming house," a place where they were sleeping, eating and also training. The alternative of having a training center offers the benefit of being able to separate work from private life for the team members, which is beneficial for their performances(Alex 2019).

In addition to that, these facilities offer everything that a high-level sportsman needs to be in the best condition for training, but also to be in top form during competitions as we can see with the eSport Gen.G Esport team who built 13,000 square foot eSport training facility in Los Angeles. On-site, there are soundproof rooms for training, sleeping pods, and many staff, such as nutritionists or physical trainers(Takahashi 2019).

We can also find more and more latest generation gaming rooms, which are more intended for the amateur public, who comes to share their passion between these walls. An example of this kind of establishment is located in Paris; it is called the E-SPORT stadium, and the offer to their customer access to last generations consoles, a high-speed internet, and especially the possibility of organizing open video games tournament both amateurs and professionals. These rooms are essential to promote eSport, but also to allow talented amateur players to stand out from the crowd(GomeWars 2018).

Another type of infrastructure that seems vital for this industry is the establishment or construction of infrastructures such as stadiums or stages.

As for the traditional sport, eSport actors seek to get closer to their public, and building facilities as arenas or creating infrastructures that can transform a spectacle room in an eSport stadium can be a solution to that problem.

At first, these facilities offer better conditions for fans to follow their favorite sport. Still, it also allows to attract a new audience of curious people that just want to live the experience of watching an eSport game within an arena. In addition to that, some fan simply wants to feel closer to their favorite players and are thus more interested by watching games in an arena than from their computer(Malone 2018).

Although the most common way is to rent a room and set it up for major competitions, just like for the DOTA 2 World Game Championships in Seattle. The organizers of the tournament take over the "KeyArena" sports hall to transform it into a giant esports arena. It is also common to transform football stadiums into esports arenas as it happened in London (Wembley) or Frankfurt (Commerzbank Arena)(De Guzman 2019).

We can also find teams that build their infrastructure to be able to receive their opponents, just like in the United States with the team Philadelphia Fusion which is a team present in the franchise league of esports "Overwatch league." This stadium, which is planned to be built for the beginning of 2021, will have a capacity of 3,500 seats and

an area of 65,000 square feet. The cost of such an infrastructure will be over 50 million USD(Gross 2019).

However, this is a rather rare case, because although some Team Organizations have the financial means to build arenas, this remains reserved for the elite, mainly because it is impossible to know what return on investment will provide such an infrastructure for such a new industry.

#### **3.11.4 Team Organization**

As mentioned before, Team Organizations have a crucial role within the industry, namely that they are the main players in the entertainment offered to the public. However, this is not possible without help from the rest of the actors.

As we saw earlier, the top 10 eSports teams have shared between them 50% of the investments made in the past two years. Therefore, it is interesting to see what would be the assets that can bring teams to the highest level.

At first, it is important to set the ambition of the team to know if the goal of this new project creation is to evolve at an amateur, semi-professional, or simply professional level. The investments that will be required will depend on the ambition of the Team Organization.

Either way, to be successful, what a Team Organizations need is to perform well in the competitions, for that they need a good team (coach, trainers, players). These people can come from training or recruitment, depending on the chosen strategy and the funds available.

Speaking of funds, this is also a necessity for these Organizations; we can consider that the means to collect them are diverse and varied, as we have seen with the case of China, where the state can provide funds. They can also come from private funds, the derivatives sold to fans across the world, or by winning competitions, of course.

Building and nurturing a relationship with the public is also crucial for a team, knowing that a team which has a big fan base will not only generate more revenues, but that will also motivate the member of the team to do their best at every game.

### 3.11.5 Players

To be successful, a team needs to have good players as well as competent staff. What will interest us here is how it is possible to have good players on a team.

We saw earlier that the rules are not the same for all games when it comes to team composition. This does not prevent the recruitment system from being similar for each organization; it also has some similarities from what happens within traditional sports industries.

The industry being still young, we saw a lot of players teaming up together to become competitive a few years ago, but it is becoming increasingly rare at the top level. It is now common to see teams use transfers to form a competitive team, just as we can see with PSG eSport, which managed to create a competitive team in DOTA 2 despite the young age of this team. organization(PSG eSports 2020).

But it is equally important to think about the future of the industry, and for that, to train professional players. The question of training these new players over the long term is, therefore, a problem that is facing this industry. The problem is, therefore, the following, as for all kinds of competences, mastery of a sport reveals two pillars, talent, and skills.

Although talent is given as a gift, people need to work to improve their skills. Namely, that work is rarely financially rewarded for young players, so if improving skills requires work and it is not profitable, who should finance the formation of young talents? (Partin 2019)

For someone that wants to be successful in eSport, things are not the same as they would be for someone that wants to succeed as a lawyer; for example, that person that wants to be a lawyer needs to validate its bar exam and therefore becomes a lawyer. In all these sports industries, the aim is different because being good is not enough; you need to be better than the rest.

Now, what is going to happen is that to find or train the top 0.01 players that will shine on the eSports scene, a kind of pyramid must, therefore, be created, which is made up of millions of players who play for fun, thousands of players who play for competition, hundreds who play at the elite level and finally some superstars(Partin 2019).

It is not difficult to manage the top and bottom of the pyramid, namely that amateurs will be happy with their few games during the week and that the elite will earn largely enough income to live from that. The most complicated part is to handle the middle of the pyramid, where we can find all of those that are training hard in the hope of one day finishing professional but that produce little value for teams and tournaments. Finding a way to support them is therefore vital for this industry, but where does that support should come from? Players, teams, tournaments, or game publishers?

Here we have the example of certain specific training models because they are linked to cultural behavior as we can find in South Korea, which produces some of the greatest international players for games as League of Legends. This may be because more than half of the population plays video games, or that the stars of eSport are idolized as are the singers of K-pop. ESport is simply part of their culture, just like football is part of the English culture, so many young people dream therefore of becoming professional, and they train hard for that, even if it means making tremendous sacrifices in other fields of their life(Popova 2018).

But since cultural behavior is proper to a population, they cannot be replicated to another one. Some entrepreneurs have learned it the hard way by trying to implement products that were successful in a country and failed to reach the market within another country. Knowing that in a middle term period, it is thus impossible to replicate their formation means, the industry has thus put into place diverse strategies to ensure that talented players will still be there to take the seat from actual ones.

We can also find the American model, which is used by the most significant franchised leagues (NHL, NBA, NFL) that consists of promoting the sport by offering the possibility to the most talented young players to have access to the most prominent schools in the country. This creates a sub league where all the talents are playing together or facing each other waiting to join professional teams at the end of their cursus. Although this is very popular for traditional sports, this is only recently that American colleges and universities have started offering scholarships to talented eSport players. This not only allows players to be able to continue training but also to be able to secure their backs by validating studies if their dream does not come true. That said, it's hard to imagine that it could take shape outside of the United States(Partin 2019).

According to an interview with the vice president of ESL product and content and the vice president of Turtle Entertainment Online, which are dominant companies in eSport. They

see several recruiting systems that differ according to the type of League, the first system of recruitment being in the so-called “closed” or franchised League where they see a recruitment system which would be similar as what we have seen previously with the example of the United States, where franchised teams come to draft the academics player (Partin 2019).

Regarding open ecosystems, they see three methods that could help this industry to produce enough professional players.

The first being simply to let the players develop their skill on their own by playing at home and demonstrate their talent within the different amateur leagues or tournaments. Their respective companies being concerned about the future of this industry, they have decided to create a league called “ESEA,” which offers the guarantee that the player will not face and cheater while gaming on their platform. In addition to that, they organize multiple tournaments with a cash prize that can help some of the player to start earning money, but also simply permit the player to train. What the players must do to have access to the platform is to pay a monthly fee of around 5 USD (ESEA 2020).

Another option would be to create an amateur or semi-professional league, just as we can see with the traditional sport. The risk here is that a third-party organizer should create the league and must take the financial risk as there might be no support from any other actors within the industry. This was the case in the USA, where a professional DOTA 2 player created a new league aimed at propelling players onto the elite. The condition to participate at his tournament is that the players do not have sponsors or are not being paid to play eSport at any level. The main challenge for these leagues is to find the necessary funds to finance them (Dotabuff 2020).

The last way, according to them, to produce talent, would be to involve the publisher so that they pay third-party companies such as ESL to organize leagues and tournaments. This is already taking place with, for example, Blizzard, which finances certain regional competitions for its Starcraft 2 video games (Trushlyakov 2019).

So here we have four methods that can be used for the industry to keep producing talents, knowing that these are certainly not the only ones available. We could very well imagine eSport schools to be recognized by the government and even worldwide, or also see the status evolve so that these players can adapt their schedules at school when they are young as it is already done for those that practice traditional sport at a high level.

### **3.11.6 Fan basis**

As we have seen before, the eSports industry needs to have a fan basis. As with traditional sports, the audience does not only fill up stadiums and allow various teams to sell their derivative products. But it also attracts investors, which are very important to develop the ecosystem.

As for traditional sports, the audience for eSport is divided into several "disciplines" which we can also call video games. As we saw during this reading, some games are much more successful than others, which is why despite the multitude of games that are offered to the public, only a certain number of them attract crowds.

The advantage of the actual technology is that there is no longer barrier for the fan, as someone can live in India and follow its favorite team through communication means that are at his disposal. This is something exciting for the multiple teams within the market, although it is always easier to get closer to the fan if they are not too far geographically.

The link between traditional sports fans and eSport fans is getting stronger nowadays, knowing that there are more and more sports clubs that create their eSport team, as with PSG, Manchester City, and many more. This is a double win strategy for these industries, as the club can gain new fans through their eSport team, and some of the football fans can discover this new industry and join the actual audience(Clancy 2019).

Even though we cannot compare the number of fans between the strongest eSport team and those from the football club, we might think that this growing interest will not only keep increasing the audience but also grow the fan basis of the eSport Organizations.

## **4. Analysis**

### **4.1 Research Methodology :**

To realize the objective of this project, we are going to determine if our hypothesis right, for that we will perform an analysis to collect new data.

Several research methods are available to analyze data; it is thus important to choose wisely which method is most likely to answer the questions that are asked within this research. The preferred method will, therefore, vary depending on the data we are seeking to collect. Here are the two types of research that will interest us.

On the one hand, we have the so-called "quantitative" method, which can be described as follows: *"Quantitative research is expressed in numbers and graphs. It is used to test or confirm theories and assumptions. This method is best to measure, rank, categorize, identify patterns, and make generalizations"* (Streefkerk 2019).

We also have the so-called "qualitative" method, which can be described in this way: *"Qualitative research is expressed in words. It is used to understand concepts, thoughts, or experiences. This method is best to describe, interpret, contextualize, and gain in-depth insight into specific concepts or phenomena"*(Streefkerk 2019).

As seen previously within the Research Objective section, we have two main topics, which are to determine the barrier et the success factor of the eSport industry within Switzerland. Within these two topics, we have multiple hypotheses which we are going to prove right or wrong using interview and survey. For the interviews, we will use the qualitative method, and for the survey the quantitative approach.

With the help of these two methods, we will, therefore, be able to carry out our research.

## **4.2 Data collection:**

Within this section, we are going to explain what method has been used for the data collection. First, this has to be separated into two main parts, which are the "Qualitative" and the "Quantitative" section. It is also important to specify that all the data which will be used in this analysis are "Primary data," which were collected during our research.

### **4.2.1 Qualitative :**

To gather the necessary information that allowed us to define the success factors but also the barriers which the actors of this industry were going to face in Switzerland, we have decided to conduct a series of semi-structured interviews. We did, however, prepare questions that were intended to help us compare the information we have obtained during our preliminary research concerning the industry overall with data that are specific to Switzerland. When we deemed it necessary, the questionnaire was sent two days before the interview with the candidate.

For the benefits of this research, four people were interviewed, these people are all active players in this industry. The methods we have used to find these people are diverse, namely that certain names emerged during the writing of the Literature Review. They

were, therefore, contacted through Facebook, and others are people coming from our intimate circle.

We have chosen to interview people with different activities to broaden our field of research and to obtain opinions that are not influenced by the same biases. We have contacted someone that works as a journalist specializing in Swiss eSport, another person who is the president of an eSport team. We also interviewed a student who practices eSport as well as an entrepreneur that is also a player.

As the journalist and the president of the Team Organization had more knowledge about the local industry, we have decided to create three distinct groups which will be the "journalist," the "president of the eSport team" and finally a group with the two last people interviewed which will be named the "players."

Here are more details about the people that were interviewed:

Reto Canova; interviewed the 20.04.2020

Reto Canova lives in Zurich, Switzerland. He works as an eSport journalist specialized in the Swiss market for the site "eSport.ch," his work as an eSport expert, therefore, leads him to make presentations or produce videos in which he gives news about international and Swiss eSport. Mr. Canova is a former competitive player on the game "Counter-Strike," he participated between 2005 and 2010 to several international competitions.

His employer, eSport.ch is a platform which was created to treat Swiss eSport in general, the scene of eSport in Switzerland being too small, they decided after that to enlarge their fields of activity by offering articles devoted to gaming in general. They propose a variety of content such as streaming, articles where they test video games, or even interviews. In terms of journalism, eSport.ch is the main eSport platform in Switzerland.

Tufan Nergiz; interviewed the 28.04.2020

Tufan Nergiz lives in Fribourg, Switzerland. He works as a freelance within the fast-food market and is the president of a Team Organization called "Noetic" which is also a non-profit association. He started playing video games at the age of 10, reached the biggest Swiss competitions, and played against European teams on the game "Counter-Strike" between 2006 and 2016.

Regarding the Team Organization that he presides, it all started in 2006 with a group of close friends of his own with whom he assembled this team to compete. It was in 2016 when they retired from the competition that they decide to transform this small team of friends into a non-profit association with as an objective to share their knowledge.

Noetic's business sectors are based on four pillars which are: the academy, where they offer support in the practice of video games. ESport, with the presence of their teams in official competitions. Events with activities such as tournament organization or as a commentator on Twitch. And finally, the gaming part, which is a grouping of several types of non-video games like board games, for example.

#### Lucas Argentini; interviewed the 03.05.2020.

Lucas Argentini was born and lives in Geneva, Switzerland. He obtained a CFC as a socio-educational assistant and is currently doing a bachelor's degree in the same field. He started high-level video games at the age of 12 and is a big fan of the game World of Warcraft. He also had the opportunity to have an eSports experience in a team for the time of a summer three years ago. Although he likes what he is doing in its life, he dreams of being able to live from this passion by becoming a streamer or offering content that people can enjoy.

#### Vanessa Do; interviewed the 03.05.2020.

Vanessa Do was born and lives in Geneva, Switzerland. She is a young entrepreneur who owns an e-commerce store and is even in the process of opening a second one. She started playing video games very early, at the age of 3 when she was on her father's lap. She then played multiple console games during her teenage years, mainly racing and fighting games. It is at the age of 14 that Ms. Do has participated in her first's competitions. These competitions were in places such as cyber cafes or shopping centers. In addition to her professional activity, Ms. Do tries to climb in the world ranking of the game APEX Legends and hosts a Twitch channel.

These interviews have been conducted on Skype and were recorded using a telephone and the application "Voice Recorder." The duration of these interviews varied slightly depending on the individual interview, but an average of 45 minutes is to be noted.

### **4.2.2 Quantitative :**

For our quantitative research, we have targeted the Swiss population; we, therefore, constructed a survey consisting of a total of 19 questions. We can find in this survey

different types of questions as multiple-choice types or questions that are open and leaves the person answer whatever he wants. The last kind of questions are those where the persons can choose one or more answer to the same question. The purpose of this survey was to help us in understanding trends in Switzerland, gaining valuable information about what they think about eSport, and if they enjoy practicing or watching it.

This survey, therefore, helps us to determine a profile for the consumer by asking the gender of the person or their income, for example. Their knowledge of the industry will also be tested, through questions such as "Select the gaming platform you heard of," we will also try to determine what are perception about eSport with questions such as " Would you let a 14-year-old kid watch eSport?"

A test was carried out with several relatives to ensure that the questions were understandable for all audiences. Therefore, the majority of these people were chosen to do this test because they had little affinity with technology as well as limited knowledge of the eSports industry. Questions that were not clear enough have been modified or deleted.

The target population is anyone living/studying or working in Switzerland. The data were collected between Monday 20.04.2020 and Saturday 02.05.2020, and we obtained a total of "111" responses.

This survey, firstly written in English, was then translated into French to receive more answers from the Swiss population. The link of the survey was shared on communication platforms like WhatsApp. It was asked to every person to share this survey with their friends and family to split it randomly.

### **4.3 Analysis of the interviews.**

We will now analyze the responses that were given by the speakers during these interviews. This section will be divided into two distinct parts; first, we will examine the interviews individually, then we will perform a collective analysis with the results obtained.

### **4.3.1 Individual**

Within this section we will analyze the groups set previously separately from each other, starting with the journalist, the player and finally the president of the team organization.

#### **4.3.1.1 Journalist**

Reto Canova is not only an eSport journalist specialized in the Swiss market, but he is also a former competitive eSport player; he has thus a lot of knowledge about the eSport industry in Switzerland.

We started the discussion by talking about the barriers that this industry is facing in Switzerland, and Mr. Canova thinks that one of the main barriers happens to be the cost of living in the country. Indeed, if we compare the cost of living in Switzerland with a country like Russia, we realize that the barrier is substantial. He took the example of a player to whom a Russian team offered to earn 600 euros, which could be double the amount he would earn by doing another job in Russia, this player would even be ready to temporarily interrupt these studies if necessary to play for that team. In Switzerland, if an organization wishes to recruit a player and offers him 1,200 euros, which is twice the Russian salary, it will not even be possible for the player to meet its basic needs.

This situation does not only complicate recruitment for teams but also pushes Swiss players to relocate. Swiss players that have the level of being able to join a French or German team will all leave because they will have a better life standard there. Although we cannot say that many Swiss players are professional, as we only have around ten of them that are Swiss, 99% of the other players are semi-pro, that is to say, that they have to work beside from their eSport activity and therefore cannot train as much as they should to compete with professional players. Players that want to stay in Switzerland by living from their passion are not living from eSport itself but from their side activities, such as streaming or being the muse of a brand.

Another barrier identified by Mr. Canova is the language; we are in a country where we speak four languages , and we have cultures that are influenced by our neighboring countries and, therefore, different from each other. Therefore, there are communication problems between different parts of the country; it results in dividing the local industry into several fragments.

Although the situation is not yet perfect for the eSport players in Switzerland, Mr. Canova nonetheless points out that it is better than it was when he tried to break into eSport.

Back in the day, the number of professional players in the world was reduced to a few very talented people. According to him, the perception of people has evolved, 15 years ago when someone said that he was playing everyone he was getting judge by the other, nowadays, many people know games such as "League of Legends" and it has become more common to talk about eSport.

The market is quite open because it is possible for everyone to create their team, for that you just need the be the correct amount of player required for the specific game, many organizations start small by creating a club with their friends, and try to improve their results to find sponsors and investors. Regarding the investments that could benefit the Swiss eSport teams, according to Mr. Canova, it depends on an investor to another one. Still, he said that even though it might be easy for a team to find small investors that are ready to pay for t-shirts, for example, it is way more complicated to find big investors that remain discrete for the moment. Mr. Canova still noticed an increase in the number of investors in Switzerland, with, for example, TCS and PostFinance that have started to invest. According to him, we are still five years behind our neighboring countries, but things are slowly beginning to move.

Speaking of PostFinance, they did much more than investing in eSports; they set themselves the objective of hiring five players with a high level and putting them in the best possible conditions during a year to build a team that at the European level. A gaming house, a trainer, as well as a nutritionist and a physical trainer, were put at their disposal, but despite this, the results were not conclusive, and the experience will not be repeated. That said, you still must consider that they have trained in these conditions for one year while others have been doing it for years.

It must be said that on the international scene Switzerland does not shine by their results, except for a team from Geneva, the BDS eSport, which has the means to finance 5 of the best French players in their category and has obtained more than respectable results in the international league "Rainbow six pro-League." The disappointing results from Swiss teams on the international scene are not only due to the lack of funding, but also a lack of professionalism on the part of both players and teams.

One way that could help to increase the level of the teams would be to train the future players of tomorrow, but unlike sports such as football, where you can easily enroll your child in a club which will help him to progress, it is more complicated for eSports. Even though teams do what they can, most of the team managers are volunteers and do not

have time to devote to each young talent. As vice-president of his team, Mr. Canova allows these young people to take part in training and then gives them honest feedback, which enables them to improve themselves after that. The best way for players is, therefore, to train at home and chain good results online to be spotted by a team.

In terms of infrastructure, only a few teams are lucky enough to have the necessary support, such as gaming houses. However, we can still boast of having excellent infrastructures such as good internet speed and an efficient public transport system that is why we could increase the number of events related to eSport in Switzerland, which are not numerous for the moment. Interest for eSport in Switzerland is growing knowing that a multitude of activities is organized regularly across the country, such as with the Servette Geneva eSport that hosts events such as summer camps dedicated to eSports or simply a multitude of tournaments throughout the year. We can also find more and more establishments dedicated to eSport, such for example, "eSport bar." In addition to that, the Swiss market is made up of many League; this shows that the Swiss population is active in the world of eSports.

The government, meanwhile, is not at all interested in eSports. This is not entirely a problem, according to Mr. Canova, because the industry is doing very well without their intervention, although at a societal level, being recognized would help to regulate the industry by tackling the problem of doping and cheating for example. Recognition would also help influence the public's perception of eSport.

Even though the government is not doing anything, we have a regulatory entity in Switzerland called the SeSF, which obliges anyone that commits with them to respect their rule, the objective of this body is to unite the players in this industry and above all regulate her so that there is no more abuse. The problem is that the community, if not taking the SeSF seriously, as they accuse them of not doing enough for the community. Since the government does not recognize eSport players as professional sportsmen, no help is given to them when they have to go to competitions, this is then the SeSF that tries to help these players, but their financial means being limited they can only help a handful of them.

#### **4.3.1.2 Players**

Lucas Argentini has been a fan of video games since his adolescence, although his favorite game is World of Warcraft, game for which there is no eSport competition, he had the opportunity to have an eSport experience for three months a few years ago.

Mr. Argentini is a self-taught player who trained a lot alone at home. For him, it is possible to maintain a high level while practicing another professional activity apart. For that, however, it must be the main game we are involved in.

His short experience in eSports began when he was approached by people that were part of a Swiss league in the eSport games "Overwatch" that offered him the possibility to join a team. What made him stand out is an annual Swiss event dedicated to pop culture, video games, and manga. This event is called Polymanga. Although he did everything so that his screen was broadcast to the public, Mr. Argentini did not particularly look to be recruited by any team this day. That said, he still wanted to live this experience as long as it was not binding for its other activities. It was, therefore, at the end of the summer, and with the resumption of classes and soccer that he decided to end this experience.

The people who contacted him gave him a website upon which he had to register; unfortunately, he does not remember the name of that website. This website was used by a team to contact him to plan a date to test his level on a test server. It was, therefore, after a day of testing that he joined his new team. During his eSport adventure, he regularly trained with his team to develop a certain synergy between them, he was also asked to train on its own to build its skills. The revenues generated during his short eSport experience were minimal, namely that they had to win tournaments to receive 100 CHF.

This team was renting a room in Neuchatel, Switzerland; this room was a gaming room for the players that want to train together. However, Mr. Argentini does not think that these rooms are useful at their level, although they can add a little spirit of competition. He still believes that this kind of infrastructure is essential for professional players.

Although Mr. Argentini dreams of being able to live from this passion, he believes that it is almost impossible to achieve this by doing eSports. Everyone he trained with was more experienced than him but still had to work alongside to pay the bills. The only person that could make a living from eSport was their captain, who was also a journalist for "eSport.ch," it was thus not properly her personal activity in the world of eSport that enabled her to live from that.

According to Mr. Argentini, eSports is a growing industry; he thinks that the fact that there is more and more money to be won will attract people who are going to want to have

their share of the pie. The fact that it is not considered as a sport by the countries, therefore, constitutes an obstacle to its development for the moment. He also thinks that one-day sport/study eSport classes will be offered to students as more and more people play video games.

Mr. Argentini also thinks that it would be a good idea to have an entity similar to SF for football, which would itself be governed by a larger entity such as UEFA and FIFA to secure eSports practice. This would be beneficial to impose much more specific regulations and rules, as well as a protocol. However, he has never heard of the SeSF, which is the Swiss regulatory body for eSport.

Ms. Do, has, if we can say it, grown with a video game controller in her hands, she has played to multiple video game consoles and especially to numerous types of video games such as "Counter-Strike," game at which she was playing with friends after classes in cyber cafes, "Ragnarok Online," a game for which she was a server moderator or "Tekken" where she was not only ranked worldwide but also a member of a team made up of friends.

She made her first video game competitions when she was 14. These tournaments were organized in local cybercafes or shopping malls. In addition to that, she and the members of her team held friendly competitions where they were facing each other. They have spent whole weekends facing each other, meeting all together at one of the team members' places.

Ms. Do developed her skills as an autodidact. She spent a lot of time training alone at home, but also in cyber cafes because she had access to a better computer there. Although she no longer participates in any competitions, when she plays a video game, it is the "classified" mode that she chooses each time to compete with other players.

Currently, Ms. Do is playing to the game Apex Legends and is streaming on Twitch in addition to her professional activity. She would like to participate in official competitions on APEX, but they are very selective and reserved for the best players. To define who the best players are, there is a ranking system in the game, and for the biggest competitions, they will contact the first 500 players. Therefore, she would like to climb the ranking and access these competitions.

Despite this, Ms. Do thinks that in Switzerland the eSport is not accessible and that it is frowned upon to play video games, people still have a negative thought, seeing video game player as a person that eats poorly and never leave their house. She also thinks that eSport is less promoted than in certain other countries because we only have a few video game conventions in Switzerland.

Another problem concerning eSports in Switzerland comes from the cost of living, Ms. Do knows players that earn 1800 euros in France and manage to live from their passion, which is not possible in Switzerland with a similar salary. Ms. Do would have been ready to invest more of her time in eSport if she could gain enough money from it.

According to Ms. Do, the government should take its responsibilities to support players wishing to play as professionals; she used the example of the Olympic Games and the advantages for sportspeople at school, such as being able to miss classes to show up for a competition. She thinks that it should be the same for eSport and that the government should encourage people to get into it.

When we talked about a regulatory body in Switzerland, Ms. Do thought it would be a good idea because it would mean that people take eSport seriously. Still, she was unaware that such an organization already existed.

#### **4.3.1.3 Team Owner**

Tufan Nergiz started playing video games at the age of 10 and used to play at a European level on the game "Counter-Strike," he started a team with a group of friends in 2006. It was in 2016 when they stopped the competition that they decided to transform this small team of friends into a non-profit association with the interest of sharing their knowledge.

It is on a voluntary basis that he chairs this association and he wishes to leave a mark on Swiss eSport, with this nonprofit association, not by performing in competitions but by bringing something more significant to the industry.

The association in question is called Noetic and is in the canton of Fribourg, Switzerland. Their activities are based on several pillars which are:

An academy where they offer support in the practice of video games. This is to promote a healthy practice of video games. They, therefore, support young players, not only by giving them advice on how to progress but also by teaching them a healthy lifestyle. In

addition to that, they educate these young people about issues such as sexism and financial debt.

Mr. Nergiz is particularly proud of this academy, which required a lot of work from all Noetic employees, but also third parties such as psychologists, for example, to refine their courses as best as possible. Although having only one semester of seniority at the moment, feedbacks are excellent, namely that these young people have learned to manage their gaming time and therefore find themselves less stressed, and according to some parents, the situation with their parents has improved at home. They want consequently firstly set up everything to fill the classrooms, and then offer their program elsewhere in Switzerland.

Another pillar happens to be the eSport, which is the competitive part of their association. They have teams and players that represent their color through multiple tournaments. Although some of their team are performing well, this is not the priority of this Team Organization, as mentioned by Mr. Nergiz. However, as president, he would dream of having a team that he can encourage them from his living room while watching games, he will not personally focus on it. he remains however open if someone wishes to join the staff with the ambition to take Noetic further on the eSport scene.

This is the reason why their recruitment is open more or less to everyone and that the levels of the player are not tested, what Noetic seeks is instead to assess the motivation as well as the objectives set by the players. They are, therefore, more interested in maturity and in what the players plan for the long term, this is especially valid games that are played in solo. For those playing in a team, they will have two different situations. The first being if the player of a team leaves, to replace him, messages are sent on social networks indicating that they are missing a player, and they will do their best to recruit a player that has a similar level than the rest of the team. The other situation is if they do not yet have a team for a specific game or wish to create an additional club in this case, applicants must present themselves with an already formed team. Noetic has already been represented by up to 4 different teams for the same game. Although their recruitment criteria are not based on the level of the players, they have good teams, which makes it possible to attract more good players and to maintain good results.

Regarding the remuneration of players, although it has happened to bring a player from abroad and to help him financially, they currently cannot afford to pay their players. Although in some situation there are trying their best to help their members. For example,

is a member of a team cannot afford some fees, and none of the other members can help him they would and have already given financial support. However, their objective for the eSports sector is to be able to pay fees such as travel costs to their member because they do not want people to quit their passion because of a lack of money. They would also like to distribute bonuses based on results, but that is not a priority at this time.

The 3rd pillar happens to be the events sector, which is in charge of all the events they organize. What we can retain from this pillar is that they have a certain number of commentators that have their own identity but remain linked to the association by their graphic identity as well as by a particular collective spirit. There is also a team working on events organized by the association. For the events, it is similar to the commentator, for example, they are working on the organization of an eSport event in Fribourg which will not bear the name of Noetic, but they will still apply the value they believe in for this event.

It is a will from Noetic to divide these activities into several parts as much as possible in order not to create a conflict of interest, namely that the objectives are not the same depending on the pillars. This also works for the sponsors who could correspond to a particular branch but not to another.

Regarding the funding of Noetic, they come from contributions, donations, partnerships, sponsorship as well as city subsidies such as that which they receive from the city of Fribourg. They also have funds which come from of the "loterie romande" which is an entity linked to the state.

According to Mr. Nergiz, it remains complicated to find investors in this industry because the gain of interest in video games is recent in Switzerland. Still, the perception of people is changing, and more and more people are playing in the country, which will surely help to find more partners. Mr. Nergiz has noticed an increase in interest in the past three years, but especially in recent months, but does not know if this is simply due to confinement or not.

However, according to Mr. Nergiz, their statute of association allows them to benefit from aid given by the government, which would surely not be accessible to a Team Organization which only seeks to perform. Namely that they have the support of the city of Fribourg, and are in discussion with the canton of Fribourg as well as the confederation

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to obtain more financial support, things which would probably be unthinkable by opening a private company which is seeking to generate profit according to him.

Noetic is very fortunate, according to Mr. Nergiz, as they are renting premises which are located in the city center of Fribourg and are therefore accessible for everyone by bus. These premises have enabled them to set up projects such as the academy, namely that all the lessons are given in their building, which has an area of 200 m<sup>2</sup>. In their premises, we can find a room dedicated to computers with 12 setups available. There is also a space reserved for staff as well as for commentators, a room for console games, and a multipurpose room reserved for games such as games roles, card games.

When we bring up the topic of a national entity with Mr. Nergiz, he told us that they were a member of the SeSF and that they sometimes called on them for help. And that they had always responded present, either when they asked them to relay information about crowdfunding that they organized or when they held a tournament in Fribourg and that the SeSF helped them to put in place the arbitration, the rules, the format of the competition and gave them their support for this tournament. All this was done without claiming anything in return from the SeSF.

#### **4.3.2 Collective Analysis**

The data were collected using actors with different roles in this industry. This is why during this part, we will assemble the key principle which we have been told by the people who were interviewed while keeping this idea that what mainly interests us is to identify the barriers but also the success factor present in Switzerland for the eSport industry.

We had initially identified as a local barrier the lack of a local entity to regulate the industry, and what we can, therefore, learn from this analysis is that this is not the strong point of Switzerland. However, Mr. Nergiz and his Team Organization had the opportunity to obtain their help on several occasions, when we interviewed players none of them knew about the existence of such an entity in Switzerland, which demonstrates a gap at this level. The fact that the actors have no obligation to join this entity and are not trusting them thinking they are not doing enough for the community indicates that the SeSF still has work to do before it can be recognized by the industry.

As we have seen previously, this problem is not specific to Switzerland, even though there are some exception as for Korea with the KeSpa, this kind of entity are getting developed around countries since recently, as we can see in “Table 1 – National

organisms”<sup>1</sup>. Some of these countries are even trying to regulate at a bigger scale as we have seen with “EsportsInEurope” that want to become the main regulatory entity in Europe.

Another barrier being identified is the perception that people have of eSports, whether it is an individual, an entity, or even the government.

Mr. Nergiz and Mr. Canova have more or less of the same opinion at this level, things have changed for the better in recent years, this not only allows players to live their passion more freely but also help the different actors to have more support from external entities. From a player like Ms. Do, eSport is not popular in Switzerland and is wrongly perceived by other the population.

This change in perception could be linked with the increase of eSport audience which is close to 16% YoY<sup>2</sup>. Nevertheless, it is not possible to determine if the audiences increase because the perception is evolving or if it is because it becomes more popular that people have a different point of view.

At the government level, the various players agree that eSport is not currently recognized as a sport by the government. This is blocking the development of this industry because players will not benefit from the same support as a football player, for example. Although no laws have been created to slow the progress of eSports, the government has not done anything to promote it either.

An example of what the Swiss government would do for local traditional sport has been shown during the Covid-19 crisis as they have pledged 500 million CHF to support sports clubs and associations([swissinfo.ch/gw 2020](https://www.swissinfo.ch/gw/2020)).

We have also been able to identify barriers that are specific to Switzerland, such as the cost of living, which according to Ms. Do and Mr. Canova, is a significant obstacle for the development of eSports in Switzerland. Indeed, as Team Organizations cannot offer a salary which is consequent enough for an eSports player to live comfortably in the country, the local player is leaving, and it is complicated to attract foreign players.

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<sup>1</sup> Page 30 – National organism

<sup>2</sup> Page 12 – Fans

The last barrier, which was only mentioned by Mr. Canova happens to be the language barrier as well as a difference of mentality between the different parts of Switzerland which does not help to unite the country and pushes, for example, the Romans to get closer to France eSport and German-speaking to Germany.

While speaking of language barrier we can quote the “Röstigraben” which is a Swiss expression used to describe the boarder in between the Swiss French and the Swiss German. This invisible boarder appeared during the first world war, when French speakers mainly supported France and German speaker Germany. It is also used to emphasize behavioral disparities in national votes(Eichenberger 2014).

These are the barrier we can identify using the interview; we might gain additional information while we will analyze the survey.

Now that we have identified the various barriers present in Switzerland, we can, therefore, focus on the success factors that are present in the country. Previously, we had identified during the literature review certain primordial elements for a country to be successful, we will thus verify if Switzerland has some of these qualities.

#### **4.3.2.1 Government support**

We saw earlier that the government could be a barrier for the eSport industry, but depending on their decision, they can also help the industry to develop within the country.

We have obtained different opinions concerning the people interviewed. Mr. Canova, the journalist, thinks that the government is not at all interested in eSports, but that despite this, the industry is doing very well without their intervention. However, state intervention would not only regulate the sector but also influence the public about their perception of eSports.

The players we interviewed agree that eSport is not seen as a sport in itself and that it is a problem for its evolution. Recognizing it as such would allow players to enjoy the same benefits as a talented young sports player, which have specialized classes and school-friendly schedules.

This treatment is already in place within USA, as we have seen previously, millions are distributed in eSport scholarship each year, and with the creation of the NACE in 2016, they started to replicate what is in place for traditional sport as American football<sup>3</sup>.

Mr. Nergiz, who is the president of a Team Organization under the form of an association, has access to aid from the state. Still, as he tells us, this is more since they are an association seeking to educate youth than a competitive eSport team. He thinks that if they had another status, they probably would not have access to these aids.

#### **4.3.2.2 National Organism**

As we saw previously in the possible barriers, Switzerland does have its eSport regulatory entity, although the whole community does not recognize it at the moment, they still have the objective of regulating this industry in Switzerland.

As Mr. Canova tells us, although it is not compulsory to engage with the SeSF, anyone who does so undertakes to respect the rules they set to reduce abuse and protect the actors. In addition to this, although the community accuses them of not doing enough for the moment, they sometimes help teams to participate in international tournaments by providing them with the necessary funds, thus helping to promote Swiss eSport internationally. However, they have limited funds and cannot help everyone.

The players interviewed meanwhile, were not aware of the existence of such an entity. However, both think that it would be an excellent idea to have a regulatory body as for traditional sports, which would put more security in the practice of eSport but would also increase public recognition.

As for Mr. Nergiz and his Team Organization, they work in relation with the SeSF, and they have been very helpful to them in certain situations. Hence, it is a positive opinion that he and his associates have about this organization.

#### **4.3.2.3 Dedicated infrastructures**

We have also noticed a difference in opinions between the interviewee for this topic. As Mr. Canova tells us that only a few teams are lucky enough to have the necessary infrastructure such as gaming houses, however, the internet speed offered and the quality of our public transport could allow the country to host more international eSports events. Summer courses organized by teams such as Servette Geneva eSport or the

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<sup>3</sup> Page 28 – Government support

opening of a bar dedicated to eSport across Switzerland, therefore, demonstrates that more resources are being put in place to organize events or create sites dedicated to eSport in Switzerland. Mr. Canova has also noticed an increase in the number of leagues and events held in connection with eSport these recent years.

It is good to recognize that Switzerland has a good potential in terms of infrastructures, but it is also important to recognize that in terms of actual infrastructure, the country is still far from countries where the first arena specially dedicated to eSport made their appearance<sup>4</sup>.

As for Mr. Argenti, we can use his own experience to gain more information about the infrastructures present in Switzerland. Indeed, he went to a Swiss event which is linked to eSport activities, although it is not the main subject. During this event, a unique scene dedicated to eSport was set up so that people from the public could face each other, this is how he was spotted by team members, as we have seen previously. The team by which he was recruited had a training room for its members, which also indicate that there might be another team in the same situation.

For Ms. Do, she discovered competition during events organized in cyber cafes or shopping centers, which shows that this kind of event exists in Switzerland.

Finally, Mr. Nergiz and his team have premises of 200m<sup>2</sup> in the center of Fribourg. In their local, we can find the material and space to practice eSport, organize live Twitch, and even give lessons. This shows that it is possible to develop infrastructures dedicated to eSport in Switzerland.

#### **4.3.2.4 Team Organization**

For Team Organizations, the market is quite open; it is easy for everyone to create their team, informs us, Mr. Canova. Therefore, many teams start from the bottom by creating a club with people they know and then try to perform to stand out and be able to find sponsors as well as investors. For the moment, the investments enjoyed by most of the teams are minor, large investors being discreet on the market.

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<sup>4</sup> Page 31 – Dedicated infrastructures

But, Recently, events have shaken up the Swiss eSport circuit, notably with major investors that have invested in local Team Organizations. As with the project led by Postfinance, which we talked about earlier during the interview with Mr. Canova, or even this investor that has assembled a competitive team in Geneva by bringing some of the best French players of the game, "Rainbow Six." Despite this, the level of the Swiss squad remains very low on the international scene. Due to a lack of professionalism from both players and teams, according to Mr. Canova.

We have seen previously that the KeSPA in South Korea had as a responsibility to enforce professionalism and ethical behavior, which demonstrates that there is more professionalism and that their teams and players have to respect some rules, as it would be within traditional sports<sup>5</sup>.

We learn more about the recruitment methods of specific Team Organizations with the testimony of Mr. Argentini. He had to register on a platform to enter in contact with the team that recruited him after a trial. This kind of platform facilitates meetings between players of similar levels.

Some are even going further as we can see in France, with entrepreneur that created a platform used for both player and teams to find what they are looking for. In June 2020, around 111,623 player and 77,205 teams were registered on their platforms(Seekteam 2020).

We can also find simple teams that are created with friends to compete and progress together, as evidenced by the interview of Ms. Do.

For Mr. Nergiz and his Team Organization, the story is different. Their association status allows them to have access to funding more easily than if they were a simple team. Their role is also much more important, namely that having this type of association in Switzerland is a significant asset for the country. Not only do they invest in the education and health of young players, but they also transmit their passion and help to convey a positive image of video games to a whole new audience. Although results are not the goal of the Noetic team, these types of teams make a considerable contribution to the Swiss eSports industry.

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<sup>5</sup> Page 29 – National organism

#### **4.3.2.5 Players**

Regarding the level of players in Switzerland, as explained by Mr. Canova, the cost of living pushes the most talented players to leave Switzerland for neighboring countries if they want to live by practicing their passion, although these professional players only represent 1% of the active players on the market.

Most of the active players in Switzerland are considered semi-professional, and therefore must work to earn enough money. This does not allow them to train as much as a professional, and consequently, it is more complicated for these players to compete with them, according to Mr. Canova. On the other hand, these players can live from their passion by becoming the muse of a brand or by streaming in parallel, which would give them more time to train.

As for any sportive, they have to consider the price to pay in order to try being successful, this demands a lot of sacrifices without any insurance to be one day professional. This price is more elevated in countries such as Switzerland than in South Korea for example. As eSport is part of their culture and becoming a professional player in South Korea represents more than in Switzerland<sup>6</sup>.

We can see this with the two players we interviewed, Mr. Argenti said he received 100 CHF per competition won, which remains a small spoil, on the side of Ms. Do, she does not generate income by practicing her passion. These players are having a good level but not finding themselves in the 1%.

For Mr. Nergiz and his Organization Noetic, there were times when they brought in a player from abroad and paid him his fees, but this was an extraordinary situation. Currently, they cannot afford to pay their players, although they have also been able to participate in certain team costs if the other team members could not help. They still wish to be able, in the future, to share in certain costs of their members so that they do not have to miss an event because they cannot afford a train ticket to Lausanne. They would also like to distribute bonuses based on results, but that is not a priority at this time.

As for the training of players, this is not the clearest in Switzerland, as mentioned by Mr. Canova, when a child is good at football, it is enough to place him in a club so that he can train and be supervised by a professional. Things are different for eSport, despite the

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<sup>6</sup> Page 34 - Players

organization of camps and events, the promotion of children in eSport does not yet exist in the country. One place that could be favorable to them is the Team Organization and their premises, but the leaders are often volunteers, and places are limited. That said, Mr. Canova and his team are doing their best to assist these young players, letting them take up training and giving them honest feedback that helps them improve.

But according to Mr. Canova, the best way to get noticed is to train at home and chain good results online. He adds that to become an eSports professional, it requires a lot of self-work, you must know how to learn and progress with tutorials.

When have seen previously that one of the ways of training young talent would be to create league within which the player face people that are not cheating and where rules are the same for everyone<sup>7</sup>. For that, Switzerland is a good place, as we have mentioned that many official leagues are present within the country.

This theory is confirmed with the players we interviewed, namely that the two of them trained without any particular framework with the ambition to improve their level, in the case of Ms. Do, she trains to climb in the ranking of APEX to be spotted.

Noetic, for his part, decided not to gauge the level of a player to recruit them, but rather his state of mind and his motivation. Their goal is, above all, to support these players in their passion and to do everything so that their passion does not become a danger to themselves. They, therefore, advocate a healthy practice of video games, which is just as important as having a good level. The players who are recruited by Noetic, therefore, have a healthy environment as well as mentors who accompany them during their practice.

#### **4.4 Analysis of the Survey**

During this analysis, we will not only learn more about the last point that we mentioned during the literature review, which is the "Fan basis," but we will also complete aspects such as people's perception of eSport by example.

The means of diffusion of this questionnaire have already been mentioned above. However, it is essential to repeat that the target population is anyone living/studying or

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<sup>7</sup> Page 35 - Players

working in Switzerland and that the data were collected between Monday 20.04.2020 and Saturday 02.05.2020, and we obtained a total of "111" responses.

### 4.4.1 Population

About the number of people interviewed, we can find the following data concerning the gender and the age of the population:

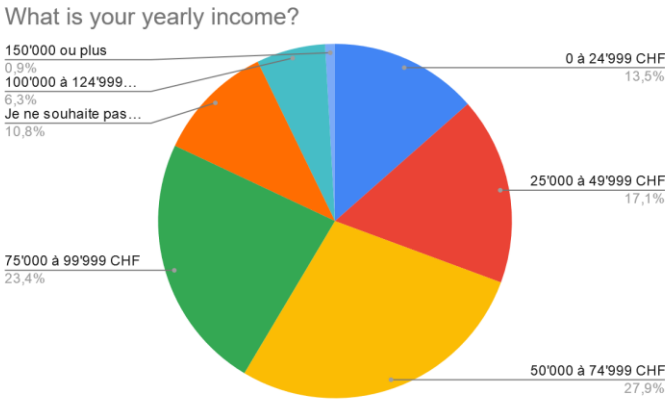
**Table 2 - Interviewed population by gender and age**

Men	47.70%	Woman	52.30%
Less than 18	1.90%	Less than 18	0
18 - 24	13.20%	18 - 24	10.30%
25 - 34	66%	25 - 34	63.80%
35 - 44	1.90%	35 - 44	12.10%
45 - 54	9.40%	45 - 54	8.60%
55 - 64	5.70%	55 - 64	5.20%
65 +	1.90%	65 +	0

As we can, therefore, see, we have a good parity of response between men and women. On the other hand, for the ages, 64.9% of the people that answered the questionnaire are between the 25-34-year-old, the second age group happens to be 18-24 with 11.7%.

In terms of income, this is much more varied, as we can see below.

**Figure 11 - Yearly income**



Indeed, the majority being 27.9% for incomes ranging from 50,000 to 74,999 CHF, we can still observe that the fork is mainly between 50,000 and 99,999 CHF, with 51,3% of respondents. It is also important to note that 10.8% did not wish to disclose this information.

We then looked at the consumption of video games by our audience to know how often they played all types of games (consoles, mobile phone, computer, etc.).

**Table 3 - Consumption of video game**

	Men	Woman	Both
No, never	18.9%	50%	35.1%
From time to time	26.4%	43.1%	35.1%
Yes, often	54.7%	6.9%	29,7%

We can see here a clear difference between men and women regarding the regular consumption of video games with 54.7% for men and 6.9% for women. However, 43.1% of them play from time to time. When we take the average, we find the right balance regarding video game consumption with 29.7% regularly, and 35.1% from time to time and never.

#### 4.4.2 Knowledge about eSport

We then asked people to select the streaming platform they knew; they had, of course, the choice to select several of them. We obtained the following results.

**Table 4 - Popularity of streaming platforms**

	People	Percentage
Twitch	31	27.9%
Youtube Gaming	42	37.8%
Facebook Gaming	15	13.5%
Mixer	8	7.2%
None of them	51	45.9%

Here we have a majority of people who do not know any of these platforms with 45.9% of the respondents. The two most popular platforms for the others being Youtube Gaming (37.8%) as well as Twitch (27.9%).

The following question concerns respondents' knowledge about games that are played in eSport competitions. Of the 111 respondents, 29 people did not answer the question, 26.1% of the participants. The answer was open, so candidates could write whatever they wanted. Here are the responses of those who responded.

**Table 5 - Game popularity - eSport**

Game	People	Game	People
League of Legends	26	Hearthstone	7
FIFA	25	PES	3
Fortnite	17	Rainbow six	2
Counter-Strike	11	Rocket League	2
Dota 2	10	NBA 2K	2
Overwatch	9	APEX Legends	1
Call of duty	8	Don't know any	15

The most popular games are, therefore, League of Legends with 23.42% and FIFA with 22.5%. There were 15 people (13.5%) who were unable to answer, that we can add to the 26.1% that did not answer the question.

We then questioned the familiarity of the people questioned with eSport; for this, they had to indicate on a scale of 1 to 5 what their familiarity with eSport was.

**Table 6 - Familiarity with eSport**

1 – Extremely familiar	4.5%
2 – Very familiar	5.4%
3 – Familiar	17.1%
4 – Somewhat familiar	43.2%
5 – Never heard of it	29.7%

As we can see, the majority is less than familiar with eSport (72.9%), so there are 27.1% of people who know eSport well or very well.

We will, therefore, investigate on these persons that are familiar and more to define their profile.

We have a total of 30 people that are familiar with eSport or more, so we will first determine their gender and age.

**Table 7 - Profile population (familiar with eSport)**

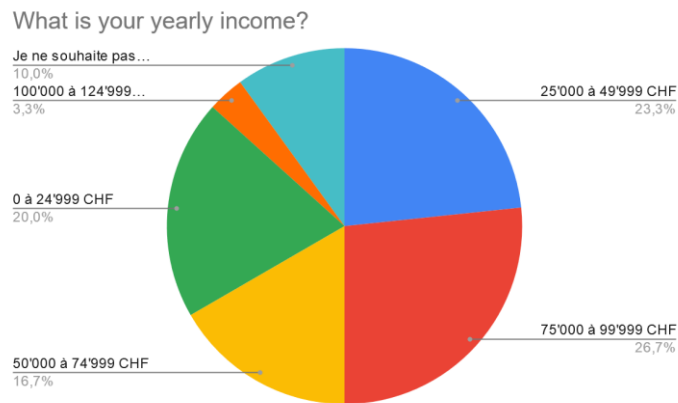
Men	76.70%	Woman	23.30%
Less than 18	4.30%	Less than 18	0
18 - 24	26.10%	18 - 24	0
25 - 34	65.20%	25 - 34	85.70%
35 - 44	4.30%	35 - 44	14.30%
45 - 54	0	45 - 54	0
55 - 64	0	55 - 64	0
65 +	0	65 +	0

We have a vast majority of men this time, with 76.7%, for the age we once again have a majority of people that are between 25 and 34 years old.

On these 30 persons, 23.3% answered playing video games from time to time while 76.7% said they often play.

We thus also looked at the income of this group of people.

**Figure 12 - Yearly income (familiar with eSport)**



As we can see, the income is more dispersed than when we did this research for the entire population, although we still have 43.4%, which is between 50,000 and 99,999 CHF.

### 4.4.3 eSport public

We are now going to look more specifically at the eSport audience. The first question that was asked for this was how often they watched eSport.

**Table 8 - How often they watch eSport**

Never	64%
Once in my life	14.4%
A couple of time in my life	13.5%
I only watch big events	6.3%
Weekly	0
Daily	1.8%

The vast majority of people answered never having watched eSport or having done it only once in their life, with 78.4%, we can then find a non-regular public who has already viewed eSport a few times, with 19.8% and finally we have those who watch regularly and who are 1.8%.

If we look at the non-regular as well as the regular audience, we have 24 people.

Among these people, we have 83.3% men and 16.7% women. As for their age, 66.7% are between 25 and 34, 29.2% are between 18 and 24, and 4.2% are less than 18 years old.

The next question was to ask what was the probability that people would participate in an eSports event.

**Table 9 - Probability to participate in an eSport event**

1 – Extremely likely	0
2 – Very likely	1.1%
3 – Somewhat likely	8.8%
4 – Not so likely	35.2%
5 – Not at all likely	54.9%

Here we have a vast majority who do not intend to participate in an eSports event, with 90.1% and no one who is delighted to participate in one of these events. However, we have 8.8% of mitigated people and 1.1% who would like to attend.

If we consider mitigated people as well as those who would like to participate, we have a total of 12 people.

Of these 12 people, we have 75% men and 25% women. For ages, we have 58.3% between 25 - 34, 25% between 18 - 24, and 16.7% between 35 - 44.

We then sought to know if the people who participated in this questionnaire knew eSport in Switzerland (teams, players, competitions).

**Table 10 - Knowledge about Swiss eSport**

I know everything about Swiss eSport	0.9%
I have some knowledge about Swiss eSport	19.1%
I don't have any knowledge about Swiss eSport	80%

80% of people do not know the Swiss eSports scene, compared to 0.9% who know the local eSports scene very well. In between, we have 19.1% of people that have some knowledge.

#### 4.4.4 Perception

We are now going to look at what perception about the eSport these people have, to start this, we asked them if they considered eSport being a sport.

**Table 11 - Does eSport is a sport**

Strongly agree	10.8%
Agree	11.7%
Undecided	34.2%
Disagree	32.4%
Strongly disagree	10.8%

43.2% disagree with this; however, 22.5% agree, and 34.2% are unsure about this.

For the people who agree, they are 25, represented by 52% of men and 48% of women; they have for 72% of them between 25 - 34, 8% between 18 - 24, 8% between 35 - 44, 4% between 45 - 54 and 4% over 65.

As for the undecided, they are 38 and represented by 60.5% of women and 39.5% of men. 76.3% of them are between 25 - 34, 10.5% between 45 -54, 2.6% between 18 -24 and 2.6% between 35 – 44.

48 people disagree, represented by 60.4% of women and 39.6% of men. They account for 58.3% of them between 25 - 34, 16.7% between 18 - 24, 12.5% between 45 - 54, 8.3% between 35 - 44 and 4.2% between 55 - 64.

We then asked people if they thought that the content offered in eSports was considered violent for them. We have had the following answers:

**Table 12 - Does eSport content is violent**

Yes	6.3%
Neutral	56.8%
No	36.9%

A majority of people responded that they were neutral, with 56.8%, and only a small portion of the population answered that they considered them to be violent (6.3%) versus 36.9% who thought that the content is violent.

The next question is about asking people if they would let a 14-year-old child play eSport games.

**Table 13 - Would you let a 14-year-old child play eSport game**

Yes	45%
I don't know	45.9%
No	9%

45% of people would have no problem having a 14-year-old play esports games, and 45.9% don't know what to think. For 9%, which represents ten people who are against it, we allowed them to provide the reason why they did not want this.

Two of these people declined to give more details. Three said they were afraid of the effect and the addiction this virtual world might have on their child. Another person thinks that these games are too violent for a child of this age. Three people think their child should play real sport and get out of his house, and ultimately one person does not find it instructive.

The next question asks them whether these people would let a child watch eSport content.

**Table 14 - Would you let a 14-year-old child watch eSport content**

Yes	51.4%
I don't know	43.2%
No	5.4%

Here we have 51.4% who would have no problem with this, 43.2% who do not know what to think about it, and finally, 5.4% who are against it. As with the previous question, those who answered “no” were asked why they did not want it.

Of the six people, two did not wish to give more details; 1 person said that violence is the problem. Another person does not find this instructive; one person mentions the temptation that the child may have, and finally, one person is afraid that his child becomes dependent.

## **5. Discussion**

To continue our research, we will now describe and interpret the discoveries made during our study on the research subject. Now that we have the necessary information in our possession, we can, therefore, determine whether the hypotheses put forward during the preliminary research are correct or not.

We will, therefore, keep the logic used until now and regroup the different points, which will be classified as barriers or success factors.

### **5.1 Barriers**

We believed that none of the barriers identified previously would be a brake for the expansion of eSport in Switzerland. Indeed, with the knowledge we have about the country, we do not see any of them being a problem for the development of a new industry. The barriers identified being, the violence of eSport content, people's perception, a lack of clarity as to the regulatory bodies, restrictions fixed by the government as well as a lack of technological access. In addition to this, during our analysis we were able to identify two new barriers that have not been mentioned before, these barriers are the cost of living in Switzerland as well as the language barrier in the country.

#### **5.1.1 Violence**

What we can observe with our research, is that initially, although Tomas Bach, president of the IOC has judged the eSport activity too violent to be diffused at the Olympic Games,

the Swiss population does not mostly agree with this, because when we asked them if they thought that the eSport content was violent, only 6.3% of them answered positively, against 56.8% that were neutral and 36.9% who answered in the negative. What we can think is that this, therefore, does not constitute a barrier per se for the eSport in Switzerland.

### **5.1.2 Perception**

As for the perception that people have about eSport, contrary to what we thought, this could be a barrier, although some of the people interviewed said that it has evolved in the right direction in recent years, others still feel judged when they talk about video games with people that do not play. When we asked in our survey if people considered eSport being a sport, a majority answered no (43.2%) or being undecided (34.2%). This is not entirely negative but indicates that we are still far from countries like Korea, where eSport players are idolized by young people (“The Development of South Korean ESport Empire” n.d.). The perception of the Swiss people could, therefore, be a barrier as to the development of eSport in Switzerland, at least the difference in culture with countries such as Korea suggests that the people will not be as excited about eSport in Switzerland as in Korea.

During the analysis, we also asked people if they would let a 14-year-old child play to or watch an eSports event. And the answers were that 45% of the population would let them play and 51.3% would let their children watch an eSport competition. In both cases, we had around 40% of the population that could not decide and between 5% and 9% who did not want to let their children play or watch an eSport event. Even though it is not tremendous, we see a difference between the act of playing video games or simply watching an event. But it is complicated to conclude as many people have given a neutral answer.

Those that answered that they did not want their children to play video games gave the following reasons: a fear of addiction, the violence of the content, and that they do not perceive this as a sporting and educational activity, which gives us as information that, for some people, a video game is still a harmful activity for children.

### **5.1.3 Regulatory body**

For regulatory bodies, although we have such an entity in Switzerland, the various interviews demonstrate that they do not have any weight on the industry, indeed, if we

compare them with the KeSPA which is the Korean entity, they have a considerable impact on their local industry<sup>8</sup>. In Switzerland, the entity seems only to be figurant within the framework of the local eSport, when we have interviewed the two players, they were not aware of such an entity. However, we can not consider this as a barrier, namely that there is an entity present within the country, and they are actively working to help teams and protect players.

#### **5.1.4 Government legislation**

The fact that eSports is not recognized as a sport by the government is a brake on its development, as the interviewees have mentioned it. We have seen during the literature review that in Germany, they promote a VISA which is dedicated for eSport actors<sup>9</sup>. This kind of action helps a country to be able to become one of the main places for eSport. Not being recognized as a sport also means that all the privileges reserved for athletes are taken away from them, as it has been mentioned by some of the interviewees. This is then more complicated to compete with teams of a country where schools are adapted to eSport and where young people are therefore more likely to progress.

#### **5.1.5 Technology**

We have no problem to signal at this level, the person that we have interviewed confirmed that there was no barrier in terms of technology, first by affirming that the internet connections in Switzerland was fast and also because they could all play video games from home, but also from places as cyber cafés. In addition to that, we have seen in the Literature Review that to play video games, the players need a download speed of 3 Mbps and an upload speed of 1 Mbps. If we do additional research on the internet, we can see that Switzerland is the world 11th country in terms of connection quality, with a speed of 29.92 Mbps(Goya 2018). We can also notice that the internet user penetration rate is 78.52% in Switzerland(Johnson 2020).

#### **5.1.6 Cost of living**

During our research, two of the people that were interviewed mentioned that the cost of living in Switzerland was a barrier. And it is not surprising when we know that Switzerland is the most expensive country to live in, with a cost of living index of 122.4, if we compare to some of our neighbors, Germany has a cost of living index of 65.26 and France 74.14(GQ STAFF 2020). On top of that, the bonuses distributed during Swiss

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<sup>8</sup> Page 29 – National organism

<sup>9</sup> Page 28 – Government support

competitions are low, so it does not help. If we look at the rewards that will be awarded by the Swisscom Hero league, which is one of the leading leagues in Switzerland, a cash prize of 10'000 will be distributed for the winner of the game League of Legends(Baumann 2020). Although there are various leagues in Switzerland, the cumulated revenues cannot allow the teams to make profits while paying their players.

### **5.1.7 Language**

Another barrier that was mentioned during the interviews is the language barrier, in fact, in Switzerland, we speak four different languages, and this can be a problem for communication. The problem with this situation is that instead of finding a welded block, it divides the local market into several parts. Being already a small country, if, in addition, the country is divided into several parts according to the linguistic affiliation, it does nothing to help develop this industry.

### **5.1.8 Recommendations**

Regarding the barriers we talked about above, we think the government can affect some of them, like perception, regulatory body, and their own actions as well. And other barriers can be arranged by the actors themselves.

Initially, the government could force any Team Organization which takes part in an official tournament as well as the players who compose the teams to engage with the SeSF, just as we have to pay a License when we want to play official matches with a club of soccer. At first, this would allow the SeSF to earn more income and be able to be more active for its members, but it would also force everyone to respect the rules set by this entity and give a better image of the eSport industry for the population.

Then, by officially recognizing eSport as a sport in the same way as chess, for example, it would help to modify the perception that people have of eSport, namely that we cannot blame people for not perceiving this activity as a sport if their government does the same. It would also help set up a whole system around eSport so that players can live their passion without being held back by society.

For the language barrier, the different actors must play the game, for example, by systematically translating their content into English so that as many people as possible can understand. This would reduce the barrier between teams and players, for example.

## **5.2 Factor of success**

We will now talk about the success factors present in Switzerland. We had listed during the literature review the following elements: government support, national organization, dedicated infrastructures, team organizations, players, and fan basis.

We have issued hypotheses for each of these factors, and we will, therefore, verify whether they are correct or not.

### **5.2.1 Government support**

We thought that the government would intervene to regulate the market but also to help certain actors of the industry to help them promoting eSport in Switzerland.

We found out that we were partially wrong, that the government did not regulate the market, but for aid, it is different.

Although most of the people we interviewed think the government is completely ignoring eSports, we were lucky to find out that it was not the case thanks to one of the people questioned.

Indeed, we discovered that they were not totally against helping financially eSport structures because they did it with Noetic; however, the aids are mainly since the objective of this Team Organization is to educate before performing. However, we are still far from being able to consider this as a great help for the industry, in contrary to what we saw during the Literature Review, with the Chinese government that invested massively in the local eSport economy to develop it<sup>10</sup>.

We have seen before several concrete examples about how the government can help the industry, and we can say given the implication of the Swiss government that this will not be part of the forces to be mentioned.

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<sup>10</sup> Page 28 – Government support

### **5.2.2 National Organism**

During our preliminary research, we were not expecting much from the national body in Switzerland, and this turned out to be accurate. However, we could see that these are full of good intentions; their actions are still too weak for them to have an impact on the eSports industry in Switzerland.

Even though one of the interviewees and its Team Organization have received help from them multiple times, and that we can deduct that they have been working hard for their members, the fact that none of the players interviewed heard about this entity and that people blame them for not doing enough demonstrate that there is still work to improve before being recognized as the regulatory entity for eSport in Switzerland.

That is why we do not see this factor as being considered as a success factor for the country.

### **5.2.3 Dedicated infrastructures**

For the infrastructures dedicated to eSport, we were rather confident, although realistic, that we did not think that huge stadiums would be built as in the USA and China. However, we still felt that we could find infrastructures dedicated to eSports in Switzerland.

As we saw during our research, several teams have their premises, although these are in no way as impressive as those of professional teams such as Gen G eSport, they still allow teams to train together.

We have also seen that a multitude of places dedicated to eSports is present in Switzerland, from simple cyber cafes to significant events such as the "Zurich game show"(ZGS 2020).

What is interesting is that Switzerland has excellent infrastructures, as it has been mentioned by one of the interviewees, which leaves the possibility to organize world eSport events. The country could, therefore, host competitions such as the DOTA 2 World Championships, which would bring people from all over the world.

Although lagging behind some countries and not seeing arenas dedicated to eSports being built in Switzerland, we do see Switzerland exploiting its resources to organize more international events.

#### **5.2.4 Team Organizations**

For Team Organizations, we thought that a team, to develop, need financial funds. We, therefore, believe that in a country such as Switzerland, it would be possible and not too complicated for teams to find funds. What we observed during our analysis is that it is certainly not complicated to find funds, but these are not consistent. They would, therefore, allow an amateur team to finance t-shirts but, in no case, a professional team to pay its players as well as its staff.

We have had the opportunity to talk about some success stories, whether with the Geneva BDS team or Postfinance and their project, that said, that remains slim for an economy such as Switzerland. But this is not that surprising when we see that the top 10 global teams have had access to 50% of financial investments within the worldwide market.

Another way for teams to finance themselves would be to win competitions, but as the rewards are too low in Switzerland and an interviewee has taught us that the level was too high abroad for Swiss teams<sup>11</sup>. We, therefore, do not see the Swiss teams as being able to be a force for the eSports industry in the country.

#### **5.2.5 Players**

For the players, we hypothesized that it would be complicated to train players that would be strong enough to be able to shine on the international scene but that the team would have the means to bring them from other countries.

Our research, therefore, made us realize that our hypothesis was false. Indeed, it is true that there are not many Swiss players who have an international level; it was mentioned in the analysis that we could count them using our ten fingers. We also learned that the actors of the industry had difficulty finding a way to support and train young talents.

However, this industry is unique, and many young talents progress by training alone from home, but it remains impossible to compete with countries like China, which have set up schools within which players train hours per day (Afp 2018).

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<sup>11</sup> Page 42 - Journalist

To get back to the discussion about training in Switzerland, although the means for training young players are almost null, they can train on their console or their computer from home, that is why we can still hope to see more talent appear on the Swiss esports scene even though it would always be better if they had access to all of the necessary tools as a coach, and a specific frame for the training.

As for foreign players, we mentioned earlier that it would be too expensive to recruit international players, although a team in Switzerland did this.

Except for a few players, we do not see Swiss players storming the biggest championships in the world yet. Neither as any Swiss team is capable of bringing some of the best players in the world.

### **5.2.6 Fan basis**

For the fans, we thought that the population would be receptive to this industry, which is why we believe there would be an interested audience within the country.

Although the Swiss appreciate video games for 64.8% of people, more than 45.9% are unaware of any of the streaming platforms that offer eSports content. When we asked them to name games for which there are eSport competitions, the game with the most votes was League of Legends, with only 26 votes out of 111 people. This demonstrates that even though most of the people play video games, it does not affect the fact that they do not show a significant interest in the eSport industry.

When we asked them what their familiarity with eSport was, 72.9% of the individuals answered never having or rarely heard of it. Those that said they knew some about eSport are mainly men (76.7%), aged 25-34 (65.2%), who have incomes ranging from 50,000 to 99,999 CHF for 43.4% of them. These data give us insights about what profile has the person that is paying attention to the eSport industry. When we compare to a study made within the USA, which is a country within which eSport is popular, we see some similarities, as most of the fans in the USA are aged between 21 and 35, and 61% of them are earning more than 50'000 USD per year.

We then asked them how often they watched eSport, 78.4% of the individual answered that they have never watched it, or once in their life, we also asked them if they wanted to participate in an eSport event and 90.1% answer that they were not interested or uninterested.

They were finally asked if they had any knowledge about the Swiss eSport, and 80% of the respondents said no that they did not. What we can see is that we have fewer people that know the Swiss eSport than those that know eSport in general. It demonstrates that even though an individual might appreciate eSport, he might not pay attention to the local scene.

China is the country with the largest audience in “%,” namely that 40% of the 53% of people that have internet access in the country watch eSport, this is equivalent to around 300 million people. However, Europe, as well as the USA, reach an audience of less than 10% of internet users. We, therefore, obtain, in Switzerland, figures that are higher than the European average(Kemp 2019).

Therefore, although the figures may seem unconvincing, they are rather positive for the region of the world where Switzerland is located. It should rather be said that eSport is particularly popular in Asia, unlike the rest of the world.

Although the figures are given higher than the rest of Europe, given the size of the population, if we apply the results to the entire population, we get 1'851'120 people who watch eSport from time to time or frequently and 848'430 that would be interested in participating in an eSport event. These figures, in terms of percentage, are encouraging, but they represent a drop of water in the eSports market, which is why we do not see this as a strength for Switzerland either.

### **5.2.7 Recommendations**

For the success factors identified during our preliminary research, we only think that Switzerland can exploit one of them, indeed, if the various actors decide to focus on the organization of world events in Switzerland, the necessary infrastructure would already be ready to accommodate them.

As for the other factors, the fan base, for example, Switzerland is a small country; it is complicated, if not impossible, to have the slightest influence on what the public can bring to the local scene. Even if the percentage of people interested in eSports increases in Switzerland, it would still represent a very small part of the world population. This is even more important knowing that most of the audience is on the internet and there is no border for them to support their favorite team.

On the other hand, two forces could intervene to improve the other factors. The first one is once again the government if they would recognize eSport as a sport, and promote the activity, the young players would benefit from better conditions to train, and there would, therefore, have more good players on the Swiss market. On top of that, if they start to invest more money, the teams could grow in size and hire more people, which would not only result in creating more training facilities for young people, but it would also develop the industry in Switzerland.

The second point would be to succeed in getting more investment. This would unlock a lot of things because not only will the teams benefit from more means. But the tournament organizers too, which would allow them to distribute larger cash prizes and therefore that will motivate the player to train harder. It could perhaps even provide the opportunity for the player to stay in Switzerland because their income will increase.

### **5.3 Limitations**

For the limitations, we encountered different challenges for each of the methods we used, the qualitative, and the quantitative.

#### **5.3.1 Quantitative :**

The difficulty was to adapt the questions to each speaker because we knew that it would be impossible for some of the speakers to answer some of these questions. This is why, in the end, we had to compare interviews that did not have all the same questions and thus not the same data.

It is also challenging to apply the knowledge and experience of 4 people to understand the market better. Therefore, we have to keep in mind that if we had interviewed four other people, we could have had different data.

#### **5.3.2 Qualitative :**

For the survey, we obtained 111 responses, which corresponds to 0.0012% of the Swiss population. Note that some of the individuals that answered the questionnaire may live in France and work/study in Switzerland. This means that we can further lower this percentage. This small group of people may not be representative of the entire population.

In addition to that, 100% of the responses obtained were completed in French, which means that we did not receive responses from Swiss-Germans, for example. And as we mentioned that the culture could be different, it would have been interesting to have answers from all over Switzerland, and the results may have differed from those in this study.

As for the age of the people that answered the questionnaire, it is not very representative of the population since more than 60% of the respondents have between 25 and 34 years old, while in Switzerland, the median age is 41.5 years. Knowing that young people are, by definition, more attracted by video games, if the average age of the population would be older, we might have had different results.

## 6. Conclusion

Switzerland is a small country demographically. Still, a significant country economically, it is therefore legitimate to be curious about knowing within which context a new industry can find its place in Switzerland, we therefore during this work seek to determine if Switzerland could not only adopt eSport, but also compete with the biggest power present in this industry. Following research, we can, therefore, say that this is not possible, at least not soon.

In fact, during our research, we were able to identify the barriers that could encounter the industry to penetrate the market, but also the success factor that would help the eSport sector to take its marks in Switzerland.

In terms of barriers, we did not find any significant problem, except that the cost of living in Switzerland could prove a real obstacle for the local teams and the players.

Although Switzerland is a very beautiful market to practice eSport as an amateur or semi-pro because we can find a growing interest in this activity in the country, we have concluded that Switzerland does not have the necessary success factors to let eSport find its place and to be able to become a great power internationally. Indeed, when we compare the data collected with other countries, we can determine that a lot of work remains to be done to be able to catch up.

It would thus interesting to build a three-step plan which would help the country being successful internationally with the information gathered during this research.

The first step would concern the government, if they do recognize eSport as a sport and give more credit to regulatory entity, the industry would start to be more similar to others sport industries. After that, the second step come from these regulatory entities. They would have to create rules, leagues, tournaments in order to fulfill the local eSport stage. The objective would be, not to force, but to encourage Team Organization to sign an agreement with them, these would result in a more stable local ecosystem, that could attract more public and investors. And finally, Team Organization would have as a job, to distract the public, but also to form new player and ensure these players respect the rules. This would more or less result as being similar to the way operates traditional sports.

Apart from that, it remains interesting to observe the development of this industry in Switzerland in the coming years, because we could see during this particular period of confinement a gain of interest linked to eSport in Switzerland and abroad. With, for example, basketball teams who competed on consoles to offer a show to their fan. To push it even further, eSport might get even closer to traditional sport than we imagine, as we have seen with the "Tour de Romandie" where bikes were connected to consoles and the competitors were facing each other from home, but they were riding their bike and using the strengths of their legs (Le Nouvelliste 2020). We have also as an example, Charles Leclerc which is an F1 pilot, during this crisis he has started to play on an F1 simulator (L'équipe 2020). He did not only shine on competition by winning the two organized races, but also by its generosity as he participated with other pilots to some virtual race which had as an objective to gather money to help the WHO facing Covid-19 (Ouest-France 2020). These are example of competition that made their appearance during this specific period, but as it would easily be replicable for many sports it is interesting to keep an eye on these activities and see if in the future this would expand to other sportive activities.

These actions would be replicable for many sports and only the future would let us know if this would expand to many more of them or not.

It is also currently impossible to determine whether this enthusiasm for eSport is temporary or permanent, so it would be interesting to repeat this study in a while to determine whether the confinement has contributed to propel eSport to the fore.

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## Appendix 1 : Interview with Tufan Nergiz

NF : Pouvez-vous me parler un peu de vous, vous présenter ?

TN : Je m'appelle Tufan Nergiz j'ai 31 ans, professionnellement je suis indépendant dans la restauration rapide, et à côté je suis le Président de Noetic qui est une association à but non lucratif. Je jongle donc entre ces deux activités.

TN : J'ai commencé à jouer aux jeux vidéo à l'âge de 10 ans. J'ai atteint les plus grandes compétitions suisse et joué contre des équipes européennes.

NF : Avez-vous choisi ce travail afin de pouvoir au mieux gérer les deux activités ?

TN : Je n'ai pas choisi mon métier en fonction de cela, bien que ce soit un avantage car cela me permet d'être libre le matin et les après-midis afin de me consacrer à cette association durant mes pauses.

NF : Pouvez-vous me parler un peu de Noetic ?

TN : A la base nous sommes des amis d'enfance qui venons de Fribourg et nous avons décidé de monter une équipe compétitive. Nous avons joué pendant plus d'une dizaine d'année sur le jeu « Counter Strike », de 2006 à 2016. Lorsque nous avons arrêté la compétition en 2016, nous avons donc décidé de transformer cette petite équipe d'amis en une association à but non lucratif. L'intérêt étant de pouvoir partager nos connaissances.

NF : Quels ont été les principaux défis que vous avez rencontrés lors du lancement de Noetic ?

TN : En soit, administrativement, monter une Team Organization ne demande pas de démarches spécifiques. Cependant afin de donner un peu de légitimité à Noetic nous avons monté une association, ce qui nous permet donc de gagner en crédibilité à l'égard de futurs partenaires, de l'état ou même du public. Bien qu'il ne soit pas compliqué en Suisse de monter une association, cela demande certaines démarches tout de même tel que des statuts et un procès-verbal pour la création.

TN : Ensuite, au niveau de ce que nous voulions faire, cela a pris plus de temps à savoir que nous avons pensé à cela durant des années afin de définir ce que nous voulions transmettre au public ainsi que l'identité que nous voulions avoir. Le secteur du jeu

vidéo étant très vaste cela nous laissait donc énormément de possibilités, nous avons donc posé une base et aujourd'hui nos activités se reposent sur 4 piliers qui sont :

TN : L'académie, où nous proposons un accompagnement dans la pratique des jeux vidéo. Nous avons ensuite une filière eSport, qui est la partie compétitive avec nos joueurs qui vont représenter le club à des tournois. Nous avons aussi une filière événements qui s'occupe de tout ce qui est lié à l'évènementiel, que ce soit des événements liés aux jeux vidéo ou aussi des commentateurs qui ont créé leur propre chaîne sur Twitch.

NF : Est-ce que ces commentateurs sont indépendants ou liés à vous ?

TN : Au niveau de l'association ils sont liés à nous, mais nous leur avons donné une identité graphique qui n'est pas là notre comme si nous voulions créer une marque. Ils ne portent pas notre logo et leur nom est différent du nôtre (Born to Cast). Bien que ces casteurs soient indépendants, nous pouvons retrouver l'esprit de Noetic dans leur contenu.

TN : Nous avons aussi en ce moment un événement (une LAN) en cours d'organisation avec la ville de Fribourg. Celle LAN portera elle aussi un autre nom, mais nous pourrons tout comme pour les commentateurs y retrouver les principes des Noetic.

NF : Pourquoi cherchez-vous à différencier ces actions de Noetic et ne pas tout lier ensemble ?

TN : Dans un premier temps, cela nous permet d'éviter un conflit d'intérêt, les objectifs n'étant pas les mêmes. Par exemple, avec l'académie, nous essayons de promouvoir une pratique saine des jeux vidéo, quant à notre filiale eSport, le message ne sera pas le même.

TN : Au niveau des partenaires, nous pouvons aussi avoir par exemple une boisson énergisante pour la filiale eSport mais cela serait de mauvais goût de transmettre ça à l'académie.

TN : En plus d'éviter le conflit d'intérêt cela permet d'être plus clair quant aux messages que l'on souhaite transmettre.

NF : Pas quels moyens financez-vous cette Organization ?

TN : Nous avons différents moyens qui sont : les cotisations, les dons, les partenariats et sponsoring ainsi que les subventions étatiques tels que celle que nous recevons de la part de la ville de Fribourg. Nous avons aussi des fonds qui proviennent de la loterie romande qui fait partie de l'état.

NF : Rencontrez-vous des difficultés afin de trouver des investisseurs ?

TN : Oui, il est assez compliqué de trouver des investisseurs par ce que le gain d'intérêt pour les jeux vidéo est récent en Suisse. A l'époque les gens imaginaient le jeune dans sa chambre qui ne faisait pas attention à son hygiène mais aujourd'hui on voit que la mentalité des gens change et que tout le monde joue, nous avons maintenant en Suisse énormément de joueurs que ce soit compétitivement ou des joueurs occasionnels.

TN : Avec le changement de mentalité nous allons trouver de plus en plus de partenaires dans les jeux vidéo. Je pense qu'à l'époque ce n'était pas le bon moment et que les entreprises ne voyaient pas l'intérêt d'investir sans avoir de retour sur leurs investissements, ce qui est compréhensible.

TN : Le gain en intérêt a commencé à se faire il y'a à peu près 3 ans, nous le voyons dans les médias aujourd'hui avec une page dédiée au eSport dans le 20 minutes par exemple.

TN : Je ne sais pas si cela est dû au confinement, mais ces derniers temps j'ai dû accorder plusieurs interviews à des journalistes.

NF : Vous avez dit plus haut que vous étiez aidés par la ville de Fribourg, recevez-vous d'autres aides de la part du gouvernement ?

TN : En effet, actuellement nous avons le soutien de la ville de Fribourg ainsi que de la Loterie Romande et nous sommes en discussion avec le canton, donc l'état de Fribourg.

TN : Nous avons aussi commencé les démarches avec la confédération, bien que cela ne soit pas encore officiel.

NF : Pensez-vous que le gouvernement va commencer à investir plus sérieusement dans le eSport ?

TN : Je ne sais pas comment cela se passe dans les autres pays, mais en Suisse il est plus facile d'obtenir de l'aide de la part de l'état en étant une association qu'une SARL par exemple.

TN : La ville ainsi que l'état nous soutiennent principalement car nous sommes une association à but non lucratif et je ne pense pas que nous aurions eue accès à ces aides si notre objectif avait été de faire du chiffre.

TN : Si nous prenons l'exemple de la Team Organizations « Solary » en France, celle-ci est privée, du coup ils ne vont pas venir chercher l'aide de la même manière, les objectifs

n'étant pas les mêmes. Je ne pense pas que la ville de Tours aurait subventionné leur projet, bien qu'ils leur aient peut-être accordé des aides.

TN : Nous sommes aujourd'hui très dépendants de la ville et cela nous plaît car cela permet de mettre un cadre dans ce que nous faisons.

NF : Êtes-vous membre de la SeSF ? Si oui, quels sont les bénéfices que vous en tirez ?

Oui, nous sommes membres de la SeSF.

TN : Quant aux bénéfices que nous pouvons en tirer, cela est une question compliquée. Il nous est arrivé de demander leur aide pour certaines de nos projets, et nous l'avons toujours obtenue. Par exemple, l'année passée nous avons monté un Crowdfunding et ils ont pu relayer l'information sur la scène suisse, cela nous a été d'une grande aide afin de partager le message et nous avons avec leur aide atteints les objectifs fixés du Crowdfunding.

TN : Nous avons aussi mis en place un tournoi à Fribourg avec des jeunes et la SeSF nous a aidé à mettre en place l'arbitrage, les règlements, le format du tournoi et ils nous ont donné leur support pour ce tournoi.

NF : Demandent-ils quelque chose en retour ou est-ce leur façon de promouvoir le eSport en Suisse ?

TN : J'ai envie de vous dire que lorsque vous demandez un service à quelqu'un vous vous attendez à ce que derrière on vous demande quelque chose en retour, mais la SeSF n'impose pas de conditions de leur côté, c'est donc au bon vouloir des gens. Ils sont là pour nous et si un membre ne souhaite pas les aider dans l'autre sens cela n'est pas un problème en soit mais de notre côté nous aidons volontiers en retour.

NF : Avez-vous mis en place une stratégie afin de gagner en audience ?

TN : Il faut avouer que la communication est notre gros point faible, nous sommes très peu investi à ce niveau-là. Nous communiquons seulement lorsque nous sommes « obligés » parce que personne dans l'association ne s'occupe de ça. Ayant un staff réduits et vu le nombre de projet dans lesquels nous sommes investis nous nous contentons de communiquer le minimum nécessaire.

TN : Nous savons que nous devons être plus présent sur les réseaux sociaux ou sur la communication.

NF : Ce serait donc le petit point à améliorer.

TN : J'irais jusqu'à dire que ce serait le gros point à améliorer, c'est vrai qu'il est étrange pour une équipe qui joue aux jeux vidéo de ne pas être très présente sur internet. Mais nous commençons à nous pencher sur la question.

NF : Concernant les joueurs, comment est-ce que vous les recrutez ?

TN : Prenons l'exemple d'un jeu tel que Counter Strike, nous avons 2 manières de recruter.

TN : Soit, nous avons déjà une équipe et tout d'un coup il nous manque un joueur, dans ce cas nous mettons un message sur les réseaux sociaux en annonçant qu'il nous manque un joueur pour compléter une équipe.

TN : L'autre manière est si nous ne possédons pas encore d'équipe sur le jeu, nous demandons donc aux gens que l'équipe soit déjà formée avant qu'ils viennent postuler chez nous. Dans le sens où nous ne recrutons jamais des joueurs solitaires pour un jeu d'équipe.

TN : Ensuite nous évaluons leur motivation et objectifs fixés. Au niveau de la compétitivité et des résultats nous n'avons aucune attente de la part de nos équipes dans le sens où nous ne faisons pas de différence entre quelqu'un qui arrive tout le temps sur le podium et quelqu'un qui arrive tout le temps dernier. Ce qui nous importe est leur maturité et qu'ils visent le long terme.

TN : Jusqu'à maintenant nous avons eue beaucoup de chance car nous avons eue de très bons joueurs.

NF : Vous misez donc plus sur l'éducation et les valeurs que sur les résultats ?

TN : Oui cela est le plus important pour nous, mais du coup le fait que nous ayons de bonnes équipes, cela attire d'autres bons joueurs et nous permet d'obtenir de bons résultats tout de même.

NF : Comment allez-vous donc trier les candidats si vous ne regardez pas leur niveau ?

TN : Nous ne les trions pas, si nous prenons l'exemple d'un jeu comme Clash Royal, si quelqu'un souhaite nous rejoindre nous discutons avec cette personne et nous évaluons si cette personne est assez mature et si elle correspond avec nos valeurs et si la personne nous correspond elle sera automatiquement acceptée.

TN : La ou nous recevons le plus de postulations c'est pour les jeux en équipes et le critère est que les gens se présentent déjà en équipe de 5, donc nous n'acceptons pas ces candidatures.

NF : Donc vous pourriez avoir plusieurs équipes qui représente votre Organisation sur le même jeu ?

TN : Oui, il nous est arrivée d'avoir jusqu'à 4 équipes sur le même jeu.

NF : Participez-vous aux divers frais des joueurs ?

TN : Cela est arrivé une ou deux fois car nous avons fait venir un joueur de l'étranger et nous avons dû l'aider. Nous avons aussi aidé le joueur d'une équipe mais seulement car son équipe ne pouvait pas lui venir en aide mais ce n'est pas quelque chose de régulier, je dirais même que c'est plutôt extraordinaire.

TN : Pour l'instant nous n'arrivons pas encore à débloquer des fonds pour les joueurs mais cela reste un objectif pour la filière eSport. Le joueur ne devrait pas perdre d'argent en pratiquant sa passion.

NF : Lorsque nous parlons de ne pas perdre d'argent, compenseriez-vous le salaire de quelqu'un qui réduit son temps de travail afin d'augmenter ses heures de pratiques ?

TN : Cela est une étape encore plus loin, car nous parlons là de joueurs semi-professionnels. Mais les frais que nous aimerions prendre à notre charge sont plus les billets de trains pour les joueurs qui doivent se rendre à une compétition à Lausanne par exemple.

TN : Nous pensons aussi à distribuer des bonus aux gens qui ont de bons résultats mais cela est encore une autre étape.

NF : Avez-vous mis en place un système qui permet de former des jeunes joueurs ?

TN : Pour cela nous avons l'académie, bien que le but principal soit de transmettre ce que nous avons pu apprendre avec le temps à cette nouvelle génération et leur inculquer une pratique saine du jeu vidéo. Lorsque nous avons commencé, nous n'avions pas de « grands frères » qui nous disaient à quoi nous devons faire attention ou de quelle manière nous devons jouer. Nous avons donc dû apprendre de nous-même, nous offrons donc à ces jeunes la chance d'avoir une personne qui les conseille autant sur leur mécanique dans les jeux que sur leur hygiène de vie.

TN : Nous les sensibilisons aussi à des problématiques telles que le sexisme qui est présent dans les jeux vidéo ou même l'endettement financier. Nous faisons donc de l'éducation. Il est important de montrer à ces jeunes qu'il y'a quelqu'un derrière cet écran.

TN : Nous avons la chance d'avoir des locaux, nos altercations ne sont donc pas digitales cela permet d'avoir un certain aspect social.

NF : En parlant des locaux, comment avez-vous fait pour avoir ces locaux ? Sont-ils fournis par la ville de Fribourg ?

TN : Non, nous avons eu ces locaux avant d'obtenir le soutien de la part de la ville. À la suite de discussions que nous avons eue avec le comité, j'ai voulu remplacer les « si » par un acte concret en proposant à mon vice-président de tenter l'expérience en trouvant des locaux.

TN : Nous avons trouvé ces locaux au centre-ville de Fribourg et nous nous battons chaque jour pour ce projet. Cela nous a permis d'ouvrir plein de nouvelles portes, comme ce projet pour l'académie.

NF : A quoi ressemblent donc vos locaux ?

TN : Nous avons 200m<sup>2</sup> en ville de Fribourg, ils sont donc facilement accessibles par tout le monde en bus.

TN : Nous avons une pièce dédiée aux PC avec 12 setups disponibles, nous avons aussi une pièce dédiée au staff ainsi qu'au streaming et les commentateurs. Nous avons aussi une pièce qui est dédiée aux diverses consoles que nous allons modifier afin de lancer un nouveau projet secret. Nous avons aussi une salle d'accueil/attente/repos ainsi qu'une grande salle polyvalente qui sera pour une autre filière qui est la filières gaming / jeux de rôles, jeux de carte, jeux de figurines et qui servira aussi de salle de conférence.

NF : Sur le moyen / long terme, comment voyez-vous votre organization se développer ?

TN : Pour le moyen terme nous voulons peaufiner les différents modules disponibles pour l'académie, voir avec le retour des jeunes et des parents comment cela se passe pour eux. A savoir que nous avons eue de très bon retour quant au premier semestre, les jeunes géraient mieux leur temps de jeu et étaient moins stressés. Nous voulons aussi avoir une meilleure régularité niveau cours, à savoir qu'ils ne sont pas encore tous pleins pour le moment.

TN : Sur le long terme, nous aimerions proposer ça ailleurs qu'à Fribourg, la demande est là, avec beaucoup de parents qui sont confronté à la situation ne sachant pas ce que fait leurs enfants sur son ordinateur.

NF : Avez-vous des ambition niveau eSport ?

TN : Cela fait toujours plaisir d'avoir des résultats au niveau eSport, mais je préfère honnêtement avoir des joueurs qui comprennent tout ce que l'on fait dans l'association, qui partagent les mêmes valeurs et qui restent de nombreuses années dans l'association, comme c'est le cas de plusieurs de nos membres qui sont présents depuis 2016.

TN : Après il est vrai qu'en tant que président et ancien joueur compétitif je rêverais d'avoir une équipe que je puisse regarder jouer en criant dans mon salon pour les encourager mais je ne vais pas personnellement me focaliser là-dessus. Mais si un jour quelqu'un veut nous rejoindre dans le staff et a pour ambition de mener Noetic eSportivement plus loin je ne vais pas lui fermer la porte.

TN : Aujourd'hui de ce que j'ai vu et de l'expérience que j'ai pu tirer de la scène, ce que nous faisons dans nos locaux est bien plus important et plus percutant que d'avoir la meilleure équipe de Suisse. Malgré notre mauvaise communication, nous sommes quand même connus dans le milieu et obtenus pas mal de soutien financier c'est pour cela que je me dis que le chemin que j'ai emprunté qui est de miser sur le long terme est en train de payer aujourd'hui.

TN : J'aimerais laisser un futur, à savoir que je vais arrêter un jour cet investissement à 100% tout en restant spectateur et ce que j'aurais envie de voir devra être quelque chose de beau c'est pour cela qu'aujourd'hui je pose des bases et il faut qu'elles soient solides afin que quelqu'un puisse reprendre le flambeau sur ces bases-là. Mais je n'ai aucun doute que Noetic sera toujours là dans 20 ans.

## Appendix 2 : Interview with Lucas Argentini

NF : Peux-tu te présenter ?

Je m'appelle Lucas Argentini j'ai 24 ans et je suis en études de bachelor et j'ai un CFC d'assistant socio-éducatif. Je joue à des jeux tels que World of Warcraft à haut niveau depuis mes 12 ans.

NF : Quel est ton parcours dans le eSport ?

LA : Mon parcours de eSport a commencé il y'a 3 ans et duré le temps d'un été.

LA : Celui-ci est un peu bizarre, je suis allé à la poly manga comme chaque année, cette année-là ils avaient installé une scène avec le jeu Overwatch qui est un FPS un peu comme Call of Duty. Nous devions faire la queue afin de pouvoir monter sur scène et jouer au jeu. Les parties se déroulaient en 6 contre 6, donc ils prenaient 12 personnes qui faisaient la queue afin de s'affronter. Un seul des écrans était retransmis au public, c'est pourquoi j'ai tout mis en place afin de pouvoir jouer sur cet écran.

LA : Avec deux de mes amis, nous avons joué une partie, lors de laquelle j'ai très bien joué. Et juste avant de sortir de scène, les personnes qui s'occupaient de la scène sont venus me voir, ils m'ont dit qu'ils faisaient partis de la No Mercy League qui est la Swiss League eSport d'Overwatch et ils m'ont proposé de rejoindre une équipe.

LA : J'ai dû m'inscrire sur un site et le lendemain j'ai reçu un mail m'indiquant de me présenter à telle date et telle heure sur un serveur de test afin qu'une équipe puisse évaluer mon niveau.

LA : Cela a duré un été car lorsque les cours ont repris en septembre je n'avais plus le temps de m'entraîner étant en dernière années de CFC, car en plus de cela je fais du foot.

NF : Comment as-tu développé tes compétences ?

LA : Je m'entraînais à la maison tout seul.

NF : As-tu reçu la moindre aide extérieure (financière ou autre) ?

LA : Nous recevions l'argent des tournois que l'on gagnait, mais je n'en ai pas fait beaucoup et les montant étaient d'environ 100 CHF donc ce n'était pas grand-chose.

NF : Est-il, selon toi, possible de maintenir un haut niveau tout en pratiquant une autre activité professionnelle à part ?

LA : Je pense que oui, à condition que ce soit un jeu auquel nous jouons tout le temps, moi par exemple, mon jeu principal n'est pas Overwatch, je ne joue à ce jeu que pour le plaisir. Je joue déjà à haut niveau au jeu World of Warcraft, il était donc pas conciliable de briller dans un autre jeu sachant qu'il y avait aussi l'école et le foot.

NF : Comment se passaient les entrainements avec ton équipe ?

LA : La manière dont nous nous entraînions était simple car nous devions nous connecter à l'heure à laquelle nous avions nos entrainements et nous affrontions d'autres équipes afin de nous entraîner et développer de nouvelles techniques de jeu. Ces entrainements avaient pour but de nous faire essayer de nouvelles choses et aussi d'apprendre à jouer ensemble.

LA : Pour tout ce qui était d'améliorer nos connaissances personnelles et de mieux apprendre à maîtriser certains personnages, c'était à nous de jouer aussi souvent que possible de notre côté.

NF : Penses-tu qu'il est utile que les joueurs aient un endroit où se retrouver tous ensemble afin de s'entraîner ?

LA : Selon moi cela n'est pas très utile, mais mon équipe avait ce genre d'infrastructure à Neuchâtel, nous avions un local dans lequel nous pouvions nous entraîner tous ensemble.

LA : En revanche ce genre d'infrastructures sont bien afin de rajouter un peu d'esprit de compétition et ça peut tout de même avoir des impacts mineurs.

LA : Par contre à haut niveau je pense que cela est très important, mais je ne jouais pas à haut niveau.

NF : Quelles-ont été les principales barrières que tu as rencontrées ?

LA : Comme dit précédemment, j'avais mes études ainsi que le sport, mais c'est surtout car je jouais à ce jeu pour m'amuser plus qu'autre chose. Le jeu pour lequel je m'investissais le plus était World of Warcraft

NF : Fais-tu encore de la compétition ? si non, pourquoi ?

LA : Non, car les seuls jeux sur lesquels je pouvais faire de l'eSport étaient Overwatch et Hearthstone. Pour Hearthstone j'ai participé à une compétition Suisse qui s'appelle le G4 il y'a 3 ou 4 ans puis j'ai arrêté car ils ont sorti une nouvelle extension sur World of

Warcraft qui a demandé toute mon attention. Je suis dans une des meilleures guildes françaises de World of Warcraft mais il n'y a pas de eSport pour ce jeu.

NF : Si tu avais eu un soutien financier aurais-tu continuer ?

LA : Je ne pense pas qu'il soit possible de vivre de ça, par exemple, toutes les personnes avec lesquelles je m'entraînais étaient plus expérimentés que moi, mais devaient avoir un travail à côté afin de subvenir à leurs besoins.

LA : La seule qui pouvait vivre du eSport était ma capitaine, qui est aussi journaliste pour « eSport.ch », elle s'occupe des présentations sur Facebook. Je n'ai jamais discuté de ça avec elle, mais je pense qu'elle peut en vivre grâce à son activité de journaliste.

LA : Je rêverais de pouvoir vivre de cette passion un jour en devenant streamer ou en proposant du contenu que les gens puissent apprécier que ce soit à haut niveau ou pas.

NF : As-tu déjà essayé de faire du streaming ?

LA : Oui mais j'ai une toute petite communauté, ce sont surtout des potes ainsi que des gens avec qui je joue qui me suivent.

LA : Se faire connaître sans être dans une structure est vraiment compliqué selon moi

NF : Selon toi, qui devrait apporter leur soutien aux joueurs souhaitant devenir pro (équipes/gouvernement,etc) ?

LA : J'avais aussi réalisé un travail de recherche sur l'eSport durant ma scolarité, et il n'est pas encore reconnu tel qu'un sport et il est donc compliqué de le faire falloir auprès des associations et des gouvernements en tant que tel afin d'avoir la moindre aide en Europe.

LA : Après nous pouvons voir des pays tel que la Chine ou des écoles de gaming ont vu le jour, cela est déjà un bon début pour l'industrie même si je pense que cela ne fait pas tout parce que je pense que comme tous sports l'eSport est un sport ou plus tu t'entraînes plus tu apprends à jouer. Je pense donc qu'une classe sport/études eSport sera proposée aux étudiants un jour car de plus en plus de gens jouent aux jeux vidéo et les plateformes tels que Twitch et YouTube sont présentes dans plus en plus de secteurs.

LA : Comme nous pouvons le voir aujourd'hui, Fortnite qui est un jeu eSport organise d'immense évènements tels que le concert de Major Lazer qui réunissent un maximum de monde. Je pense donc qu'il y a de l'argent à gagner dans cette industrie et dès que cela est le cas plus de monde souhaite mettre la main dessus.

NF : Serais-tu pour une entité régulatrice obligatoire en Suisse ? (Comme pour le foot et le basket par exemple)

LA : Je pense que ce serait une bonne chose de créer une association un peu comme le SF pour le foot qui serait régit par une plus grosse entité telle que l'UEFA et la FIFA. Cela mettrait plus de sécurité au niveau de la pratique du eSport car tout le monde ne pourrait plus faire à sa sauce. Cela imposerait un règlement et des règles bien précises ainsi qu'un protocole.

NF : As-tu déjà entendu parler de la SeSF en Suisse ?

LA : Non pas du tout

## Appendix 3 : Interview with Vanessa Do

NF : Peux-tu te présenter ?

VD : Je m'appelle Vanessa Do, j'ai 25 ans et j'ai grandi à Genève. Je suis entrepreneur, je possède une boutique de e-commerce et je suis actuellement en train d'en créer une 2 -ème.

VD : Niveau jeux vidéo, j'ai commencé très très jeune, à 2 ans et demi – 3 ans. Je m'asseyais sur les genoux de mon père lorsqu'il jouait à Tom rider et lorsque qu'il fallait tuer des ennemis, il me laissait appuyer sur la touche « h ». Ensuite j'ai joué à beaucoup de jeux de combats tel que Soul Calibur ou Tekken, je passais mes soirées avec mon père et mon oncle à jouer. Ensuite j'ai beaucoup joué à la Gameboy ainsi que des jeux classiques tels que Sonic ou Mario.

VD : J'ai aussi beaucoup joué au jeu « Counter Strike », je me retrouvais avec mes amis après les cours dans un cyber café afin de jouer à ce jeu, tout mon argent de poche y passait. J'ai aussi découvert le jeu « Ragnarok Online » où je me suis liée d'amitié avec le créateur du serveur où je jouais, ce qui m'a permis de devenir « Game Master » (modérateur) sur ce serveur.

VD : Je faisais aussi parti d'une équipe à Genève pour le jeu « Tekken » nous organisions des tournois entre nous. Pour l'organisation nous ramenions tous nos consoles ainsi que nos TV chez quelqu'un et on passait des week-ends entiers comme ça. Cela remonte à peu près à 10 ans en arrière.

VD : Durant mes études je me suis arrêtée de jouer durant plus d'1 ans, sauf sur des petits jeux mobiles. J'ai repris les jeux vidéo à la sortie de la saison 2 du jeu « Fortnite » et j'ai joué pendant plus d'1 ans. Ensuite j'ai commencé le jeu APEX Legends, et maintenant je joue et fais des streaming Twitch sur ce jeu

NF : A quel âge as-tu commencé à jouer à haut niveau ?

VD : Vers 14 ans j'ai commencé mes premiers tournois dans des cyber café ou dans les centres commerciaux. Sur le jeu Tekken j'étais classé en mondial, en fait chaque fois qu'un jeu propose l'option « classé » je choisis cette option car j'aime la compétition

NF : Comment as-tu développé tes compétences ?

VD : De base je me suis beaucoup entraînée depuis la maison, mais vu que je ne possédais pas un très bon ordinateur portable, j'ai commencé à jouer dans des cybers café.

NF : As-tu reçu la moindre aide extérieure (financière ou autre) ?

VD : Non, je gagne un peu d'argent mais c'est avec la publicité sur Twitch, et je gagne quelques centimes donc vraiment pas grand-chose.

NF : Est-il, selon toi, possible de maintenir un haut niveau tout en pratiquant une autre activité professionnelle à part ?

VD : Oui, je pense que oui, mais cela dépend pour quel jeu, car dans certains jeux nous sommes obligés de jouer non-stop afin de ne pas tomber dans le classement

NF : Peux-tu nous parler de ton équipe ?

VD : Elle s'appelle la Rolling stars « RFZ », c'était une équipe amateur, nous faisons seulement de petites compétitions internes à Genève

NF : Comment as-tu rejoint cette équipe ?

VD : Ils m'ont demandé de les rejoindre, de base je connaissais un de membres de cette équipe, qui m'a présenté au reste du groupe

NF : Quelles-ont été les principales barrières que tu as rencontrées, qu'est-ce qui t'aurait bloqué si tu avais voulu devenir professionnelle ??

VD : En Suisse nous avons peu de convention de jeu vidéo, les gens parlent peu du eSport et c'est très mal vu. Quand les gens pensent à quelqu'un qui joue aux jeux vidéo ils ont le stéréotype d'un mec qui fait que de manger des Junk Food et qui ne fait rien de sa journée.

VD : je connais des gens en France qui gagnent 1800 euros pour jouer aux jeux vidéo, ce qui est suffisant pour subvenir à leurs besoins, alors qu'en Suisse nous avons très peu de joueurs qui peuvent vivre seulement de ça.

NF : Fais-tu encore de la compétition ? si non, pourquoi ?

VD : Oui je fais de la compétition sur le jeu APEX, mais cette saison les résultats ne sont pas super car j'ai commencé à faire du streaming le 30 janvier et je joue avec les gens qui me suivent et tous n'ont pas le même niveau que moi. Les autres saisons j'avais un bon classement.

VD : J'aimerais bien participer à des compétitions officielles, mais il y en a pas beaucoup pour le jeu APEX, et celles-ci sont réservés aux meilleurs. Lorsqu'ils organisent une compétition ils contactent automatiquement les 500 premiers du classement, je m'entraîne donc pour essayer d'améliorer mon classement

NF : Si tu avais eu un soutien financier aurais-tu continuer ?

VD : Cela dépend de l'aide, si c'est pour recevoir 400 CHF et juste pouvoir payer mon assurance maladie ce n'est pas intéressant. Mais si c'est une vraie aide et que ça pourrait remplacer l'argent que je gagne actuellement avec mon entreprise je serais rentrée en considération et j'aurais analysé tous les paramètres qui rentrent en compte et j'aurais sûrement accepté.

NF : Selon toi, qui devrait apporter leur soutien aux joueurs souhaitant devenir pro ?

VD : Je dirais qu'elle devrait venir de l'état, si nous prenons l'exemple des Jeux olympiques, tout ceux qui font du sport afin de pouvoir atteindre cet objectif ont le soutien de l'état, ils peuvent par exemple exceptionnellement rater des cours pour faire une compétition. Je considère les jeux vidéo à haut niveau comme du sport, l'état devrait donc aider et même encourager les gens à se lancer là-dedans.

NF : Serais-tu pour une entité régulatrice obligatoire en Suisse ? (Comme pour le foot et le basket par exemple)

VD : Ce serait une bonne chose, car cela voudrait dire que l'état prend le eSport au sérieux.

NF : As-tu déjà entendu parler d'une entité régulatrice appelée la SeSF en Suisse ?

VD : Non

## Appendix 3 : Interview with Reto Canova

NF : Reto Canova, peux-tu nous parler un peu de toi ?

RC : Je suis actuellement journaliste eSport suisse pour « eSport.ch », ou je travaille en tant qu'expert eSportif, je fais beaucoup de présentation, je fais des vidéos ou je raconte l'actualité du eSport en Suisse ainsi qu'à l'international. Je suis conscient de la chance que j'ai de pouvoir vivre de ma passion.

RC : Je suis un ancien joueur compétitif du jeu Counter Strike, j'ai participé entre 2005 et 2010 à différentes compétitions internationales. Mais malheureusement à l'époque le eSport avait encore moins d'impact que maintenant et mes parents ne me soutenaient pas dans cette activité. L'argent que nous pouvions gagner n'avait rien à voir avec ce que les joueurs gagnent maintenant, il n'y avait donc pas la possibilité de gagner sa vie en faisant du eSport.

RC : J'aurais bien aimé que ce soit comme ça quand moi j'étais jeune, mais malheureusement ce n'était pas le cas. Même dans un pays tel que l'Allemagne nous pouvions tout juste compter 10 joueurs professionnels, cela a bien évolué maintenant.

RC : La perception des gens à évoluer avec le temps, au jour d'aujourd'hui si tu dis à quelqu'un que tu joues à League of Legends par exemple, la plupart des gens savent ce que c'est, mais si tu avais sorti la même phrase il y'a 15 ans 90% des gens auraient demandé ce que c'était et t'auraient jugé du fait que tu perdes ton temps à jouer.

RC : J'ai donc très souvent du me défendre du fait que je jouais aux jeux vidéo, et c'est pour ça que la passion n'est jamais vraiment partie de mon côté.

NF : Peux-tu nous parler un peu du concept d'eSport.ch ?

RC : Cette plateforme a été créée afin de traiter du eSport suisse en général, la scène du eSport suisse n'étant pas très grande nous avons donc choisi d'agrandir nos environ afin d'aussi faire des articles consacrés au gaming en général, nous avons par exemple de temps en temps des news à propos du jeu animal crossing ou d'un Pokémon.

RC : Nous faisons du streaming, écrivons des articles ou testons des jeux vidéo, en gros nous proposons une multitude de contenus.

NF : Quelles sont selon toi les barrières principales quant à l'expansion du eSport en suisse ?

RC : Je pense que le coût de la vie est une barrière importante en Suisse, la Suisse étant un pays où les frais essentiels ont un coût très élevé en comparaison avec d'autres pays. Si nous prenons l'exemple d'une Team Organization russe. Celle-ci souhaite recruter un nouveau joueur en lui proposant un salaire de 600 euros par mois afin qu'ils jouent pour eux. Ce salaire peut représenter le double de ce qu'il gagnerait en effectuant un autre travail, c'est pour cela que les joueurs pourraient accepter de mettre leurs études en parenthèse durant une certaine période par exemple.

RC : Si nous prenons maintenant la même situation pour une équipe Suisse, si celle-ci souhaite recruter un joueur et lui propose 1200 euros, ce qui est le double du salaire proposé au joueur Russe. L'intérêt du joueur ne sera pas le même à savoir que ce salaire équivaut au revenu d'un apprenti en formation.

RC : Ceci pousse donc les joueurs professionnels suisses à se délocaliser, comme cela s'est produit avec le joueur Fribourgeois « Kinstaar », qui comme de nombreux autres joueurs Suisse, vit avec les membres de son équipe dans une gaming house située en France.

RC : Tout comme pour le Football par exemple, où les plus grandes stars Suisse partent à l'étranger, le milieu du eSport suisse n'arrive pas à garder les joueurs les plus talentueux.

RC : En plus de cela, nous pouvons retrouver des barrières internes liées non seulement à la langue, mais aussi à la différence de culture entre les francophones et les germanophones. Si nous prenons l'exemple du eSport Suisse francophone, celui-ci est plus proche du eSport français que Suisse allemand, et cela est la même chose pour les suisses allemands.

NF : Quel est le moyen de diffusion le plus populaire en Suisse pour le eSport ?

RC : Twitch est le moyen de diffusion le plus populaire pour le eSport, si une personne souhaite regarder une compétition de eSport suisse au même titre qu'il souhaiterait regarder du tennis, c'est sur cette plateforme qu'il doit se diriger.

RC : YouTube est lui aussi très populaire, mais plutôt pour de la rediffusion mais pas du live (highlight, compilations)

NF : Est-ce qu'il est facile pour une Team Organization suisse de trouver des investisseurs ?

RC : Il n'y pas de vraie réponse à cette question, cela va totalement dépendre d'un investisseur à un autre. Lorsque quelqu'un souhaite monter une Team Organization en Suisse, il commence tout petit en créant un club avec des connaissances, et essaie d'améliorer leurs résultats afin de trouver des sponsors et investisseurs.

RC : Les grands investisseurs sont encore timides et n'osent pas se lancer. Cependant, en 2019 il y'a eu 10 fois plus de marques connues qui sont rentrés dans le eSport suisse avec l'exemple de Postfinance elix ou encore le TCS.

RC : Le crédit suisse a aussi commencé à recommander aux gens d'investir dans l'eSport car c'est un sport qui va grandir dans les prochaines années. Il reste tout de même très difficile de trouver de grands investisseurs, malgré qu'il soit moins difficile de trouver des investisseurs qui soient d'accord de donner 500 CHF par année ou qui te paient les t-shirts.

RC : La suisse étant très conservatrice, ce genre de changement prennent plus de temps à arriver en suisse que dans d'autres pays. Si l'on compare le eSport Suisse à celui Allemand, Français ou italien, nous avons 5 ans de retard sur eux. Ceci dit, le eSport Suisse comment gentiment à se développer.

NF : Penses-tu que les team organization se doivent d'acquérir une fan base afin de pouvoir grandir et s'autofinancer ?

RC : En suisse nous n'avons pas plus d'une dizaine de joueur professionnels, qui peuvent vivre du eSport sans avoir à pratiquer d'autres activités que celles liées au développement de leur compétences dans ce domaine. A savoir donc que 99% des joueurs de eSport suisse sont des joueurs semi-professionnels, c'est-à-dire qu'ils travaillent en plus de cette pratique et ensuite jouent leurs compétitions durant le weekend, il leur est donc impossible de s'entraîner comme un professionnel, et donc de rivaliser avec eux. Le problème est que, malheureusement pour le eSport suisse, les joueurs professionnels partent jouer en France pour les francophones et en Allemagne pour les germanophones.

RC : Nous avons cependant l'exemple de la PostFinance qui a créé une équipe du jeu League of Legends, ils ont investi beaucoup d'argent durant 1 ans, logeant les joueurs dans une gaming house et en mettant à leur disposition un coach nutritionnel et mental et on même engagé un des meilleur coach League of Legends du marché, cela a coûté très cher. Le but de la Postfinance était de pouvoir déterminer s'il était possible de prendre 5 joueurs suisse qui sont bons et de les mettre dans les meilleures conditions possibles durant 1 ans afin de savoir s'il est possible de monter cette équipe au niveau

européen. Les résultats de cette expérience indiquent que non. Les résultats n'ont pas été à la hauteur, mais il faut prendre en compte qu'ils ont eu le droit à ce traitement de faveur durant 1 année alors que pour les plus grandes équipes européennes cela a lieu depuis plusieurs années déjà.

NF : Est-ce que Postfinance va renouveler cet investissement ou non ?

RC : Ils ont dit qu'ils allaient continuer avec l'eSport mais cette expérience ne sera pas renouvelée, à savoir qu'ils avaient aussi comme objectif de projeter les joueurs coachés sur la scène international en leur offrant de la visibilité. Et cela s'est aussi révélé non concluant parce que un seul de ces joueurs a réussi à rejoindre une équipe de haut niveau international, ayant rejoint Fnatic.

NF : Sait-tu s'il y'a une règle en Suisse concernant les joueurs étrangers ?

RC : Cela dépend du tournoi, nous pouvons prendre 2 exemples différent afin de démontrer ça. Le premier étant avec l'équipe Genevoise BDS eSport, cette organisation a été créée par un jeune entrepreneur, qui a construit une grande infrastructure afin que ces joueurs puissent se retrouver dans les meilleures conditions.

RC : L'équipe montée par cet entrepreneur a gagné un des tournois du jeu Rainbow six le plus prestigieux au monde qui s'appelle « Rainbow six pro League ». Afin de gagner cette compétition, son équipe était composée entièrement de joueurs Français talentueux.

RC : Une autre situation est pour les équipes qui souhaitent participer aux League suisse telles que la « Swiss eSport league » ou la « Swisscom hero League » qui sont un peu l'équivalent de la Super League au foot. Ici des règles sont imposées, tels que le devoir d'aligner 60% de joueurs Suisse lors d'une rencontre. Ce qui veut dire que sur une équipe de 5, 3 doivent être suisse. Pour les leagues internationales, cela dépend donc du règlement de la compétition en question.

NF : Quels sont les résultats des équipes Suisse sur le plan International ?

RC : D'un côté nous avons des équipes telles que BDS eSport qui ont réalisé le meilleur résultat de toute équipe suisse confondues ces 10 dernières années lors du tournoi « Rainbow six pro league » Mais en général, le résultat des équipes suisse sont plutôt mauvaise à l'international, à savoir que contrairement à des pays comme la France ou l'Allemagne ou une vingtaine de joueurs de chaque pays représenteront le pays. Pour la Suisse nous pourrons compter 2 ou 3 joueurs maximum à chaque fois.

RC : En Suisse nous n'avons pas encore le professionnalisme niveau joueurs et organisation que pourraient avoir d'autres pays tels que la France et l'Allemagne. Les joueurs suisses ne sont pas cadrés comme ils le seraient dans une organisation de grande envergure. Ils se permettent d'avoir des comportements non appropriés sur Twitter sans risquer la moindre pénalité, chose qui serait différente avec des équipes telles que Solary ou Vitality qui sont des équipes Françaises.

NF : Est-ce que les équipes de eSport Suisses investissent dans des infrastructures telles que des centres d'entraînement ?

RC : Aujourd'hui, une seule équipe a réellement investi dans ce genre d'infrastructure, nous en avons parlé avant et c'est l'équipe Genevoise BDS eSport.

NF : Sais-tu si la Suisse prévoit la construction ou l'aménagement d'infrastructure pour le eSport ?

RC : En Suisse nous avons de très bonnes infrastructures, avec un bon débit d'internet, et un bon réseau de transports public, nous avons donc le potentiel de créer de genre d'infrastructures. Cependant, cela n'est pas très courant pour le moment, bien qu'il y ait eu des tournois internationaux organisés durant des événements tels que le HeroFest qui se déroule chaque année à Berne et qui se trouve être un des événements principaux du eSport en Suisse.

RC : Lors de l'organisation des tournois internationaux en Suisse, les équipes suisses se font en principe tout le temps éliminer avant les quarts de finale. C'est comme pour le sport traditionnel, nous avons quelques disciplines ou nous sommes connus, mais pour la plupart des sports nous sommes plutôt discrets.

NF : Pouvons-nous trouver des établissements dédiés au eSport amateur ?

RC : Nous avons beaucoup d'événement eSport locaux, pour une personne intéressée il y'a par exemple des LAN (tournois locaux) une semaine sur deux. Nous aussi aussi des équipes comme le Servette Geneva eSport qui organisent des événements tels que des camps d'été ou des tournois tout le long de l'année. Par contre seuls 1 ou 2 événements internationaux par ans sont organisés en Suisse, bien que nous ayons les infrastructures pour en accueillir plus

RC : Il y'a aussi des établissements tel que des eSport bar, comme le Qwertz à Lausanne.

NF : Est-ce qu'une équipe Suisse doit obligatoirement s'engager avec l'organisme national local, qui est la SeSF en Suisse ?

RC : Le but est que chaque Organization ainsi que les organisateurs de tournois collaborent avec le SeSF mais pour le moment, elle n'est pas prise au sérieux de la part de la communauté qui leur reproche de ne pas en faire assez. Cependant, nous pouvons déjà trouver quelques tournois ou League qui ont un lien avec la SeSF, l'avantage de faire cela est que le tournoi est « certifié » à savoir que tout le monde s'engage à respecter les règles imposées par la SeSF. Les règles sont plus dirigées sur le bien être des joueurs que sur l'organisation des tournois. L'organisme tenant à s'assurer que les temps de pauses sont respectés et que les joueurs ne se retrouvent pas à jouer 12 heures d'affilé par exemple.

NF : Quelles sont les diverses Leagues présentes en Suisse ?

RC : Nous en avons plusieurs, comme la Swiss eSport League, la Swisscom Hero league, la TCS eSport league, ou encore la Swiss made game league qui ne propose que des jeux produits en Suisse. Nous pouvons aussi trouver une League dans laquelle se joue un jeu suisse qui se popularise. Le jeu s'appelle « Landwirtschafts-Simulator ». Qui est un simulateur dans lequel tu dois gérer ta propre ferme. Une cagnotte de 100'000 euros est distribuée dans cette league. Ce qui est intéressant c'est que bien que ce jeu connaisse le succès, le public est totalement différent, à savoir que certains fermiers jouent à ce jeu.

RC : Je pourrais citer d'autres Leagues, mais celle-ci sont celles qui me viennent et surtout les principales. Le fait que nous trouvions de nombreuses League en Suisse démontre donc que la population Suisse est active dans le milieu du eSport.

NF : Qui sont les organisateurs de ces leagues ?

RC : 99% des tournois sont organisés par des agences externes de eSport. Concernant la provenance de ces agences, 50% d'entre elles sont suisse alors que 50% viennent de l'étranger.

NF : Est-ce que le gouvernement Suisse à un plan afin de promouvoir le eSport ?

RC : S'ils ont un plan je n'en ai jamais entendu parler, à savoir que nous sommes la seule instance officielle de eSport en Suisse donc normalement ils auraient dû nous en parler si cela était prévu.

NF : Est-ce que le titre de sportif professionnel est reconnu en suisse ?

RC : Je ne peux pas te donner une réponse correcte là-dessus mais je vais te dire ce que je pense. Si tu es un joueur de FIFA qui part pour la Eworld CUP afin de représenter la Suisse cet été. La Eworld CUP étant un évènement organisé par la FIFA et toutes les fédérations de foot de chaque pays. Je peux donc m'imaginer que tu reçoives le support du gouvernement et que tu sois reconnu comme un sportif professionnel. Mais si tu es un joueur de Counter strike et que tu vas jouer un tournoi international en Corée du Sud par exemple, tu n'auras pas le moindre soutien de la part du gouvernement. Par contre dans ce cas-là, la SeSF assumera les frais sur place pour certains joueurs, bien qu'ils n'aient pas des fonds illimités et qu'ils ne puissent donc pas aider tout le monde.

RC : Je ne pense donc pas que nous ayons besoin d'être reconnu comme sport, à savoir que l'industrie fonctionne déjà très bien comme cela, comme nous pouvons le voir avec le montant des Prizes cash qui sont redistribués. Il y'a peu d'évènements sportifs pour lesquels les Prizes cash atteignent des 100 millions, tout comme nous pouvons le voir dans le eSport.

RC : Mais au niveau de la société il serait toujours bien d'être reconnu afin que certaines choses puissent être régulées, tel que le dopage, la triche. Et le fait d'être reconnu comme sport aiderait donc à réguler l'industrie en créant des lois. Cela pourrait aussi aider les gens à accepter le eSport comme un sport.

NF : Est-ce que l'accès est facilité pour les résidents hors UE si ceux-ci sont joueurs pro eSport ?

RC : Pour cela nous pouvons encore attendre 10 années en tout cas, en revanche, comme dit précédemment nous pouvons souvent trouver des équipes composées de 2 joueurs Européens.

NF : Comment se forment les joueurs professionnels Suisses ?

RC : Si un enfant est bon au Football il suffit de le placer dans un club afin qu'il puisse s'entraîner dans de bonnes conditions. Pour le eSport c'est différent, bien que nous organisons des camps ou des évènements, la promotion des enfants dans le eSport n'existe pas encore en Suisse. Les parents doivent aller chez les organisations afin de savoir s'il y'aurait une place pour leur enfant mais cela reste très limité à savoir que seuls les meilleurs seront gardés. Etant vice-président d'une organisation, ce que nous faisons c'est que nous donnons la possibilité aux enfants de prendre part aux entraînements et nous donnons ensuite un feedback honnête qui leur permet de s'améliorer par la suite.

RC : Dans la plupart des organisations les responsables sont bénévoles et doivent donc gagner leur vie à côté c'est aussi pour cela qu'ils n'ont pas spécialement le temps de se consacrer à chaque personne souhaitant être juger.

RC : La meilleure façon de se faire repérer étant de s'entraîner à la maison et d'enchaîner les bons résultats en ligne afin de se faire repérer par une organisation. Devenir professionnel de eSport demande beaucoup de self work, c'est-à-dire qu'il faut savoir se débrouiller et apprendre avec des tutoriels par exemple.

RC : La différence entre les Semi-pro qui vont s'entraîner après le travail et auront donc beaucoup moins de temps à consacrer que les pro qui peuvent se permettre de jouer 8 à 10h par jour et sont entourés de coach professionnel est énorme et il est difficile de pouvoir égaliser ces gens en niveau avec des conditions pareilles

NF : Peuvent-ils subvenir à leur besoin sur le long terme avec leurs salaires ?

RC : Il est actuellement très difficile de vivre du eSport en Suisse. Nous pouvons prendre exemple de Luca Boller qui est un joueur de eSport pour le FC Basel. Ces principaux revenus viennent de ses live Twitch ainsi que de son rôle de dans diverses activités marketing pour le FC Basel plus que de son activité dans le eSport.

RC : La nouvelle génération aura plus de chance de pouvoir se démarquer, cela même en suisse. A savoir qu'avec la popularisation du streaming et des plateformes tel que Twitch, les joueurs gagnent plus facilement en visibilité et sont aussi plus influencé par la culture du eSport que l'est notre génération.

RC : Il leur est aussi plus facile de se repérer avec tous les outils tels que les réseaux sociaux ou YouTube, qui permettent à une personne motivée de pouvoir se faire repérer sur internet

NF : Est-ce que la suisse a un plan afin de former de nouveaux joueurs professionnels ?

RC : Le gouvernement non, mais les Organisations ont toutes comme but de trouver le prochain Roger Federer de l'eSport.

## Appendix 4 : Survey in French

Rubrique 1 sur 3

**eSport**

Dans le cadre de ma thèse de bachelor à la Haute école de Genève (HEG) je dois réaliser un travail sur l'industrie du eSport en Suisse. Le questionnaire suivant a pour but de récolter des informations quant à la perception et les connaissances de l'industrie du eSport de la population Suisse. Toutes les données qui seront recueillies durant cette recherche resteront anonymes et seront utilisées seulement à des fins universitaire.

Votre participation à ce questionnaires me serait d'une grande aide pour l'avancée de ce travail. Remplir ce formulaire ne devrait pas vous prendre plus de 5 minutes de votre temps.

Je remercie d'avance toutes les personnes qui ont pris le temps de cliquer sur le lien qui leur a été envoyé.

As part of my bachelor thesis at the Haute École de Genève (HEG) I have to do a research work which is about the eSport industry in Switzerland. This survey aims to gather informations about the perception and awareness of the eSport industry for the Swiss population All data that will be collected during this research will remain anonymous and used only for academic purposes.

By filling this survey, you are helping me to gather important information for the achievement of my bachelor thesis. This should not take more than 5 minutes of your time.

I would like to thanks in advance all of those that took the time to click on the link that has been sent to them.

Langue de préférence / Preferred language

Français

English

Après la section 1 Passer à la section suivante

Est-ce que vous vivez ou travaillez/étudiez en Suisse ?

- Oui
- Non

Quel est votre sexe ?

- Femme
- Homme
- Je ne souhaite pas le préciser

Quel est votre âge ?

- Moins de 18 ans
- 18 – 24
- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65 +

Quel est votre revenu annuel

- 0 à 24'999 CHF
- 25'000 à 49'999 CHF
- 50'000 à 74'999 CHF
- 75'000 à 99'999 CHF
- 100'000 à 124'999 CHF
- 125'000 à 149'999 CHF
- 150'000 ou plus
- Je ne souhaite pas divulguer cette information

Est-ce que vous jouez aux jeux vidéo ? (Consoles, téléphone mobile, ordinateur, etc)

- Oui, souvent
- De temps en temps
- Non, jamais

Sélectionnez la plateforme de streaming dont vous avez déjà entendu parler

- YouTube Gaming
- Twitch
- Facebook Gaming
- Mixer
- Aucune d'entre elles

Pouvez-vous écrire le nom d'un ou plusieurs jeux de eSport ?

Sur une échelle de 1 à 5, comment êtes-vous familier avec le eSport.

- 1 - Extrêmement familier
- 2 - Très familier
- 3 – Familier
- 4 - Un peu familier
- 5 - Je n'en ai jamais entendu parler

A quelle fréquence regardez-vous le eSport ?

- Jamais
- Il m'est arrivé une fois de regarder du eSport
- De temps en temps
- Je regarde seulement les grands évènements
- Chaque semaine
- Tous les jours

Quelle est la probabilité que vous participiez à un évènement de eSport ?

- 1 - Extrêmement probable
- 2 - Très probable
- 3 - Un peu probable
- 4 - Pas très probable
- 5 – Improbable

Avez-vous des connaissances sur le eSport en Suisse ? (Equipes, joueurs, compétitions)

- Je connais tout sur le eSport en Suisse
- J'ai quelques connaissances à propos du eSport en Suisse
- Je n'ai pas la moindre connaissance à propos du eSport en Suisse

Considérez-vous le eSport comme étant un sport ?

- Tout à fait d'accord
- D'accord
- Non décis
- Pas d'accord
- Fortement en désaccord

Pensez-vous que le contenu proposé par le eSport est violent ?

- Oui
- Non
- Neutre

Laisseriez-vous un enfant de 14 ans jouer à des jeux de eSport ?

- Oui
- Non
- Je ne sais pas

Si non, pourquoi ?

Laisseriez-vous un enfant de 14 ans regarder du contenu de eSport ?

- Oui
- Non
- Je ne sais pas

Si non, pourquoi ?

## Appendix 5 : Survey in English

Rubrique 1 sur 3

### eSport

Dans le cadre de ma thèse de bachelor à la Haute école de Genève (HEG) je dois réaliser un travail sur l'industrie du eSport en Suisse. Le questionnaire suivant a pour but de récolter des informations quant à la perception et les connaissances de l'industrie du eSport de la population Suisse. Toutes les données qui seront recueillies durant cette recherche resteront anonymes et seront utilisées seulement à des fins universitaire.

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Langue de préférence / Preferred language

Français

English

Après la section 1 Passer à la section suivante

Do you live or work/study in Switzerland?

- Yes
- No

What is your gender ?

- Female
- Male
- Prefer not to say

What is your age ?

- Under 18
- 18 – 24
- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65 +

What is your yearly income?

- 0 to 24'999 CHF
- 25'000 to 49'999 CHF
- 50'000 to 74'999 CHF
- 75'000 to 99'999 CHF
- 100'000 to 124'999 CHF
- 125'000 to 149'999 CHF
- 150'000 or more
- I do not want to give this information

Do you play video games (gaming consoles, mobile phones, computers,etc..)?

- Yes, frequently
- Occasionally
- No, never

Select the gaming platform you heard of

- YouTube Gaming
- Twitch
- Facebook Gaming
- Mixer
- None of them

Can you write the name of a or some eSport game?

On a scale from 1 to 5, how familiar are you of eSports?

- 1 - Extremely familiar
- 2 - Very familiar
- 3 – Familiar
- 4 - Somewhat familiar
- 5 - Never heard of it

How often do you watch eSport?

- Never
- Once in my life
- A couple of time in my life
- I only watch big events
- Weekly
- Daily

How likely are you to attend an eSport event?

- 1 - Extremely likely
- 2 - Very likely
- 3 - Somewhat likely
- 4 - Not so likely
- 5 – Not at all likely

Do you have any knowledge about the eSport in Switzerland?  
(Team,player,competition)

- I know everything about Swiss eSport
- I have some knowledge about Swiss eSport
- I don't have any knowledge about Swiss eSport

Do you consider eSport a sport?

- Strongly agree
- Agree
- Undecided
- Disagree
- Strongly Disagree

Do you consider eSport content being violent?

- Yes
- No
- Neutral

Would you let a 14-year-old play eSport games?

- Yes
- No
- I do not know

If not, why?

Would you let a 14-year-old kid watch eSport?

- Yes
- No
- I do not know

If not, why ?