Swiss Esports Map

Report about the active Esports Organisations in Switzerland

2021

Swiss Esports Federation
Schweizerischer Esports Verband
Fédération Suisse d'Esports
Federazione Svizzera di Esports

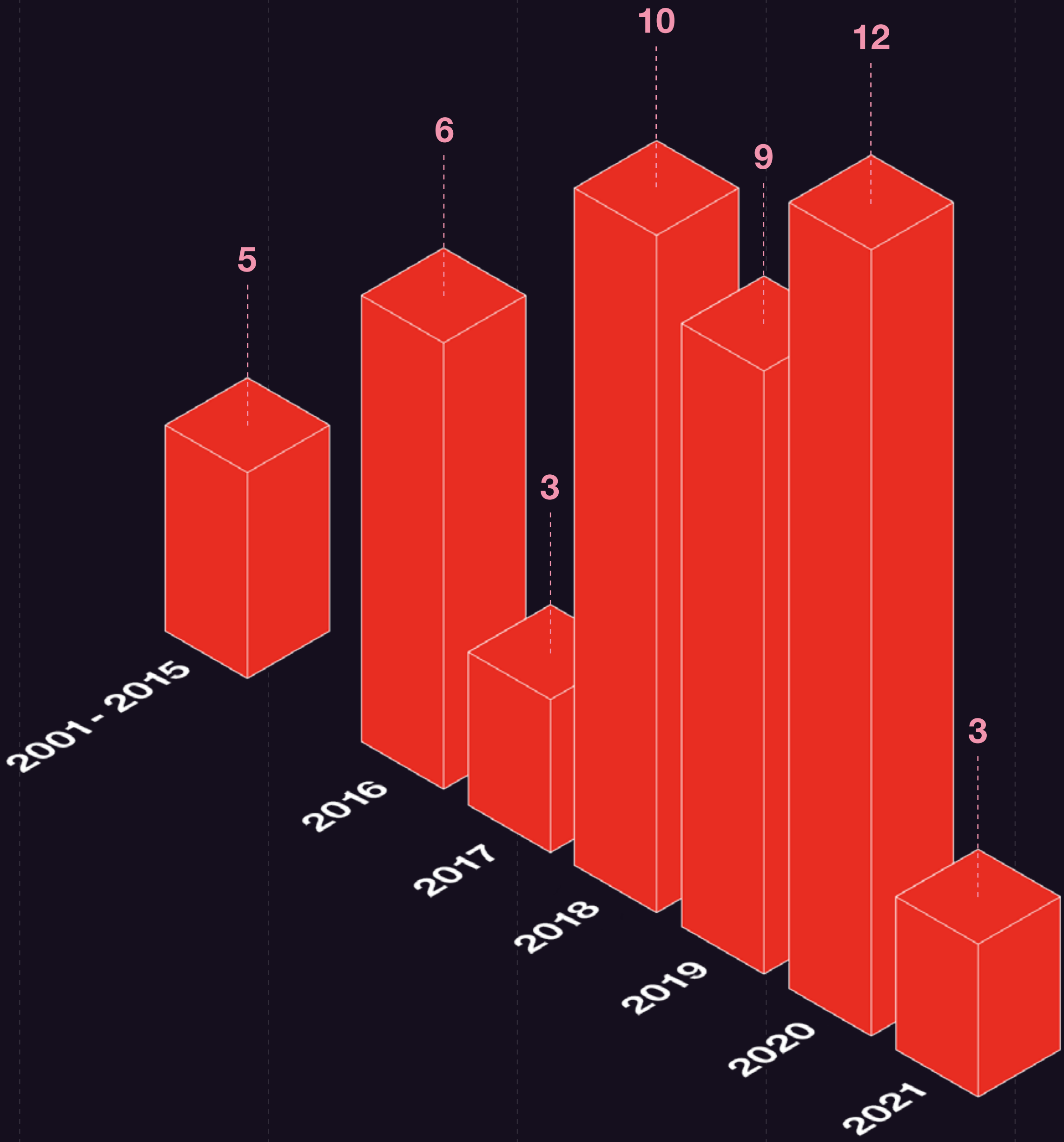
Designed by WIDE

Fact Sheets

FACT #1

Founding Year of the Organisations

70% of the Swiss esports organisations were founded between 2018 and 2021. In 2020, a record of new foundations was established.



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FACT #2

Most Popular Competitions

Swiss competitions are the most important competitions for Swiss esports organisations. Over half of the Swiss organisations participate in the SwitzerLan and the Swiss Esports League.

57%
SwitzerLAN

55%
Swiss Esports League

38%
Swisscom Hero League

31%
PolyLAN

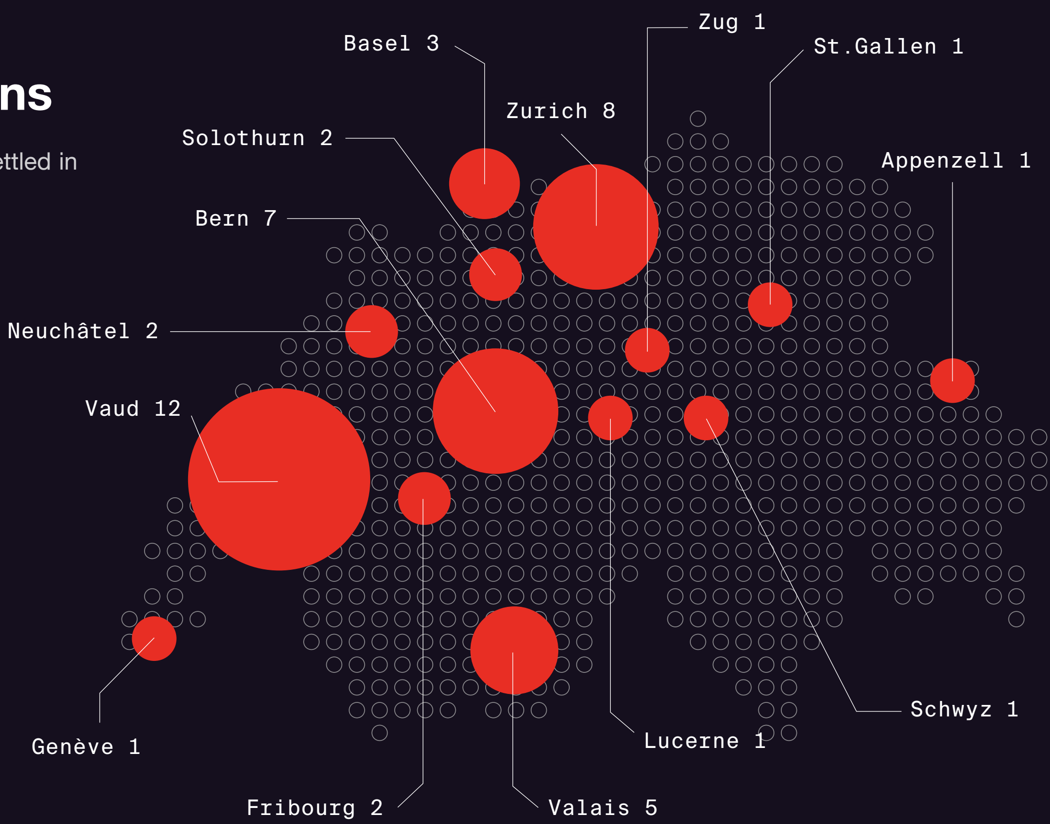
31%
E Event

21%
TCS eSport League

FACT #3

Headquarters of the Organisations

Most esports organisations (12) are settled in the canton Vaud.



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FACT #4

Player's Residence

Slightly more than half of the organisations stated that they have esports players in the canton of Zurich.

FACT #5

48 Swiss esports organisations are competing in national or international competitions. The average organisation in Switzerland has about 20 players, 4 teams, 210 community members, and 8 staff/employees who do 30 hours of volunteer work per week, and participate in 4 different games.

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FACT #6

Most Popular Esports Titles

League of Legends, Rocket League and Super Smash Bros are the most popular esports titles in Switzerland. Over 40% of the organisations are competing in League of Legends.

43%
01_League of Legends

39%
02_Rocket League

36%
03_Super Smash Bros

30%
04_CS:GO

28%
05_FIFA

28%
06_Hearthstone

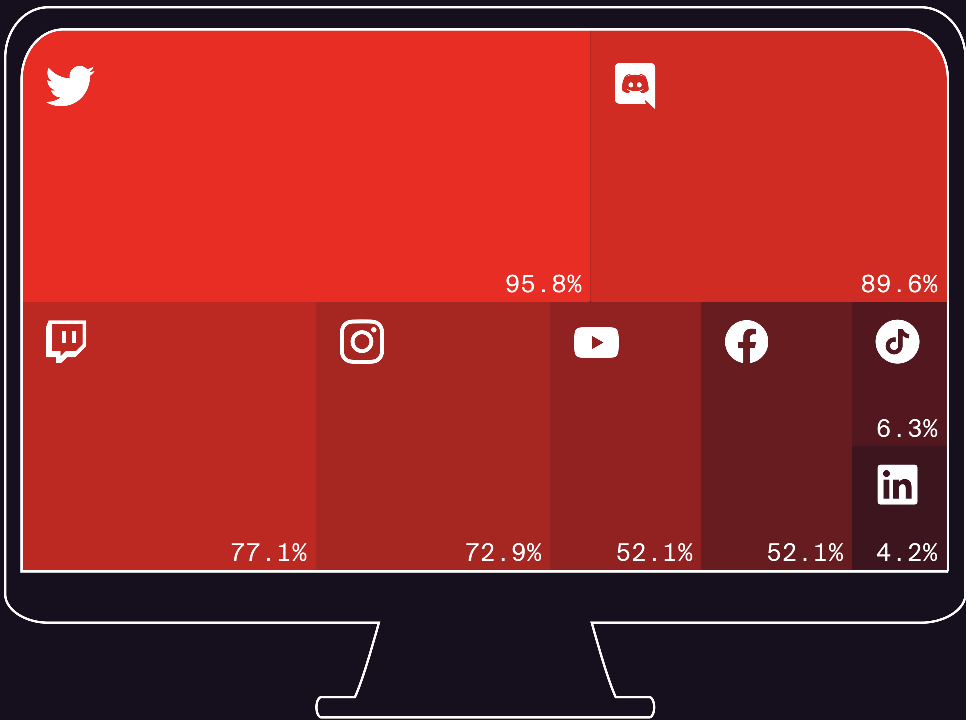
26%
07_Fortnite

26%
08_Rainbow Six

19%
09_Call of Duty

17%
10_Valorant

Fact Sheets



FACT #7

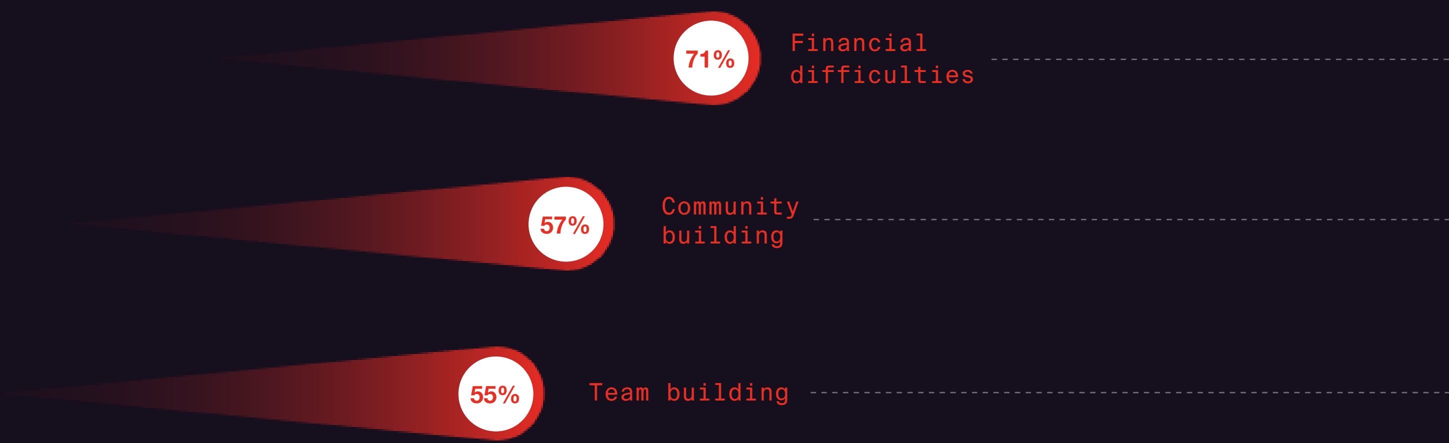
Social Media Platforms

To stay connected with the community, over 95% of Swiss esports organisations make use of Twitter and nearly 90% have a Discord server.

FACT #8

Top three Challenges

Top three challenges Swiss esports organisations are facing: financial difficulties, community building and team building.



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1. Introduction

«Fighting is about being better than the other » wrote the Greek poet Homer in the epos Ilias (Krüger & Güllich, 2013, p. 535). Competitions are also about determining the better athlete or team under a set of rules (Röthig & Prohl, 2013). Sports look back on a tradition of more than 2000 years, up to the Olympic Games of antiquity. During the development of universal computing machines, it was only a matter of time before sporting competitions were also held in the digital space.

Today, gaming-capable electronic devices are part of many people's everyday lives, and esports - sports competition on digital platforms - has been gaining momentum in the last few years, all around the world. During the COVID-19 pandemic, the popularity of digital competitions seems to have increased even further (see Newzoo, 2021).

Thus, new records were also established in Switzerland last year, e.g., in the number of spectators in the Swisscom Hero League or in the number of newly founded organisations.

Nevertheless, concrete data on esports in the Swiss context is a rarity. The esports ecosystem is naturally fragmented and internationally orientated. In contrast to conventional sports, esports competitions are rarely held by national or international federations, which leads to the situation that esports protagonists operate in isolated areas. The lack of competitions under the direction of national federations makes it difficult to determine concrete data (i.e., the number of organisations). This slows down a discourse in both the political and social spheres and reduces the general visibility of the scene.

With the project «Swiss Esports Map», the Swiss Esports Federation (SESF) has taken a first step to address this problem. So far, no studies have been conducted in Switzerland on the setup and structures of active esports organisations and teams. Based on the online survey «Swiss Esports Map», corresponding data could be collected for the first time. In this way the organisations were displayed on a map and in an interactive directory.

In addition, the data was used for this report. Consequently, for the first time in the still young Swiss esports history, solid numbers are presented by the federation and the status quo is mapped as well as interpreted. The SESF hopes to take the next step towards a binding entity, community networking and raising awareness.

This report refers exclusively to Swiss esports organisations that participate in national or international competitions. In the future, the SESF plans to conduct further surveys to ask other stakeholders of Swiss esports. Meanwhile, the «Swiss Esports Map» directory has been opened to all organisations.

“

A short Foreword
by the President of SESF

Making Swiss esports visible, showing what’s there: This is the goal that SESF wants to pursue more strongly. Who are the key protagonists? How are they structured? What does this mean for society? The federation wants to ask these questions more and systematically collect figures on this.

I am very pleased that an important step towards this goal has been taken with the «Swiss Esports Map». This way, we can show that Swiss esports is relevant - on many levels. This way we can show that it is worthwhile to support the scene and community. Be it as an individual who wants to get involved with an organisation in some way, or as a sponsor who lends a hand to the local team. We strongly hope that the numbers we have collected will go some way to helping.

We are aware that we could only capture a fragment of the diverse Swiss ecosystem with this survey. But as we all know, even the longest journey begins with the first step. In this sense, to be continued...

Jon Baumann, SESF President

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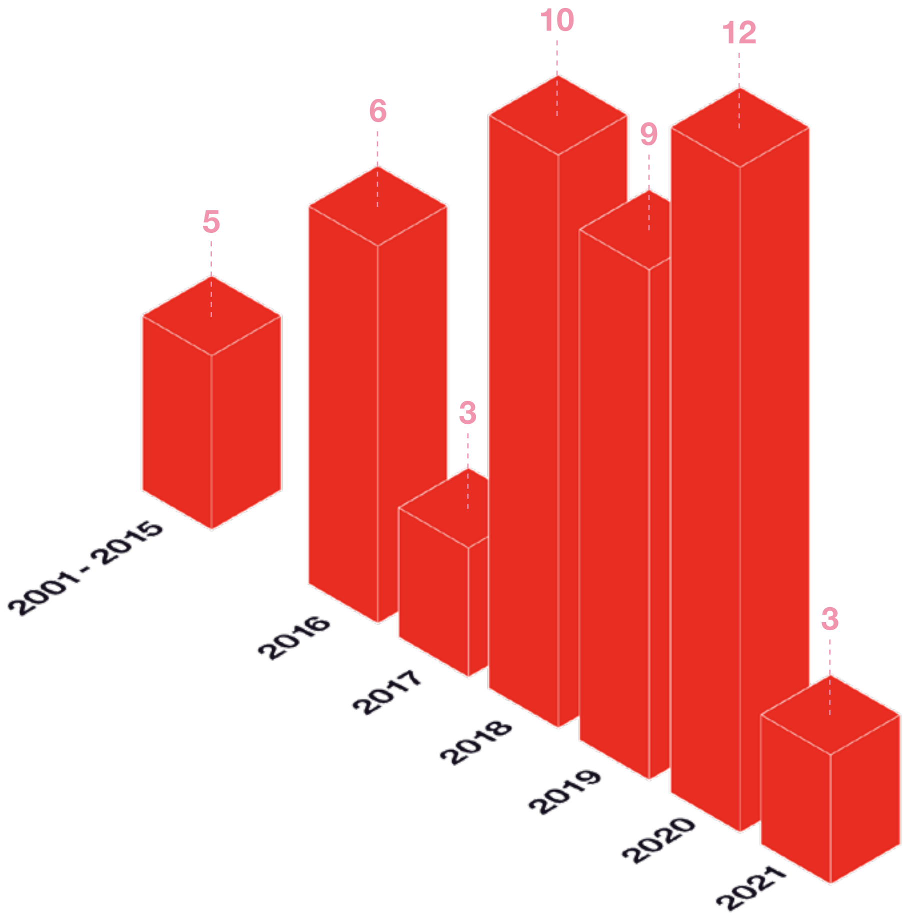
2. Swiss Esports Organisations

Foundation Years : Swiss Esports is BOOMing!



At the end of the 1990s already, the international development of esports progressed steadily. The first national and international competitions took place, i.e., the ClanBase (1998), the Electronic Sports League (2000) and the World Cyber Games (2000) (Schöber, 2018, pp. 36 - 40). With the increasing spread of internet flat rates, interest in esports increased continuously from the 2000s onwards: Since the last five years, esports has been booming on an international level (cf. Newzoo, 2018, 2021). Millions in prize money are now paid out in international tournaments. Esports has gone from a peripheral to a mass phenomenon.

This boom also spilled over into the Swiss esports scene. In the figure above, the founding of new esports organisations has increased constantly from 2016 onwards. In 2018, a growth of 71% and in 2019 of another 38% can be recorded. This is probably due to the emergence and professionalisation of the first Swiss online leagues, such as the Swiss Esports League (2017, started as «the Prefire League») and the Swisscom Hero League (2018). This trend has continued over the past year and a half.

Since then, the Swiss esports landscape has grown by another 15 organisations. In the year 2020, 12 new organisations have been formed: a new record in Swiss esports! As mentioned in the introduction, the COVID-19 pandemic may have had an impact on the formation of new esports organisations.

However, this cannot be assessed conclusively, because against the background of the previous development, the number of new creations in 2020 would have been possible even without the pandemic.

Rather, the number of newly established organisations follows the global trend that esports is becoming more and more popular. A growing market, advancing media exploitation and the popularity of specific esports titles are fostering this development. Esports is increasingly gaining attention and moving closer to the mainstream.

A total of 48 Swiss esports organisations were recorded by the survey. How many organisations are present in Switzerland can only be estimated. If we include those organisations that did not complete the survey respectively are known to the SESF, the number of organisations is estimated to be 70.

It can be assumed that some newcomers are also trying their hand at esports and that the number of unreported cases is higher. For this reason, the «Swiss Esports Map» does not claim to be complete now and will be continuously supplemented and further developed.

Legal Form of the Organisations

29% None

67% Association

2% LLC

2% Ltd. Co

Three types of organisation are distinguished in esports: clans, associations, and clubs. Of the 48 organisations founded, 29% currently have no formal organisational form (clans). Overall, 71% have constituted themselves into a formal organisation. The most frequently chosen organisational form is that of an association. These associations are the bedrock on which Swiss esports is built. Other legal forms such as the limited liability company or the limited company occur much less frequently (clubs).

Distribution by Language Region and Settlement Type

Language Region

46% Romandie

54% German Part

Settlement Type

55% City

27% Agglomeration

18% Rural Region

68% City

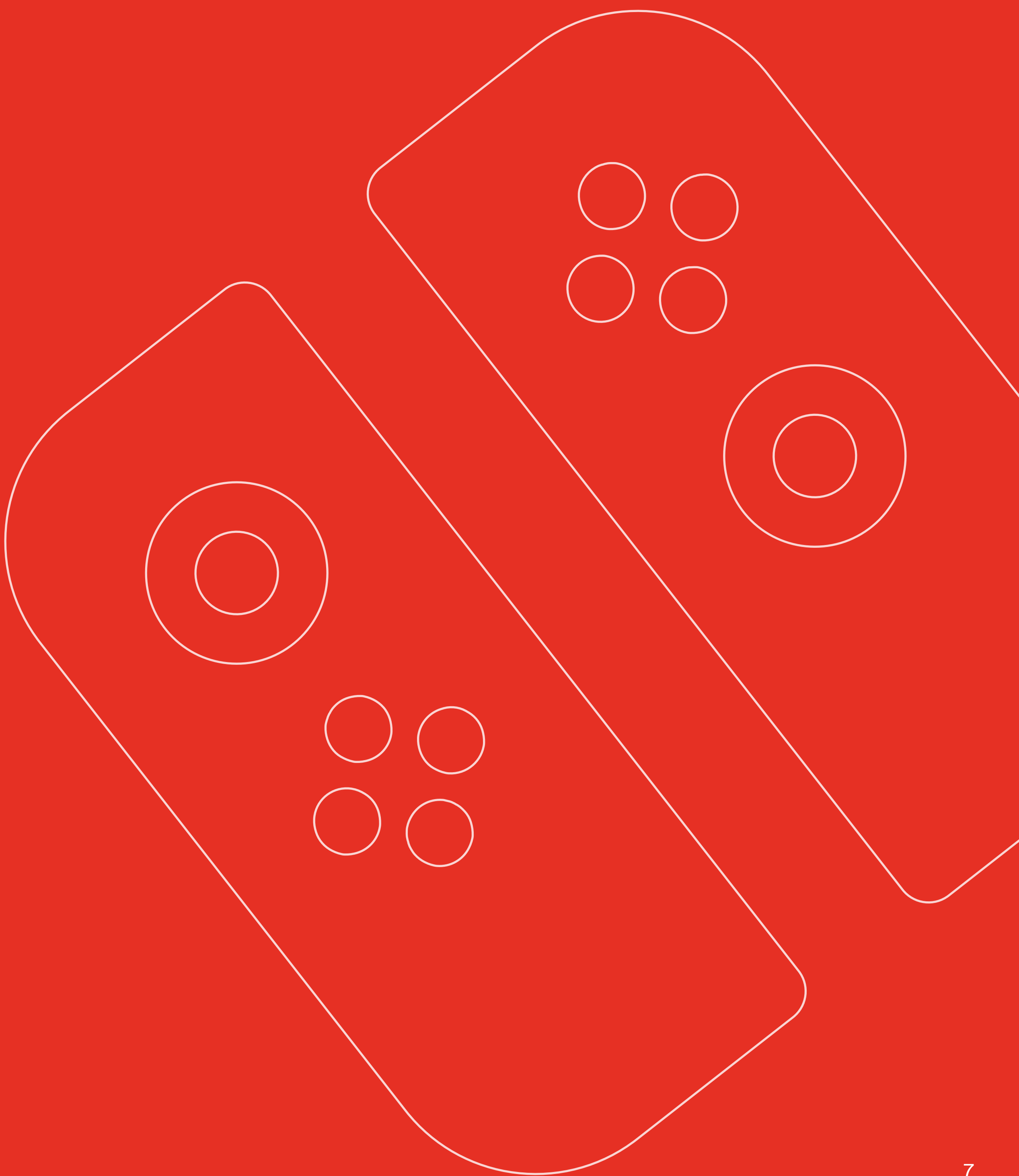
32% Village

If one looks at the distribution according to the language regions in Switzerland, linguistic-regional differences become apparent. 54% of the organisations are in the German-speaking part of Switzerland and 46% in the French-speaking part (Romandie). No organisations could be recorded in the Italian and Romansh-speaking parts of Switzerland.

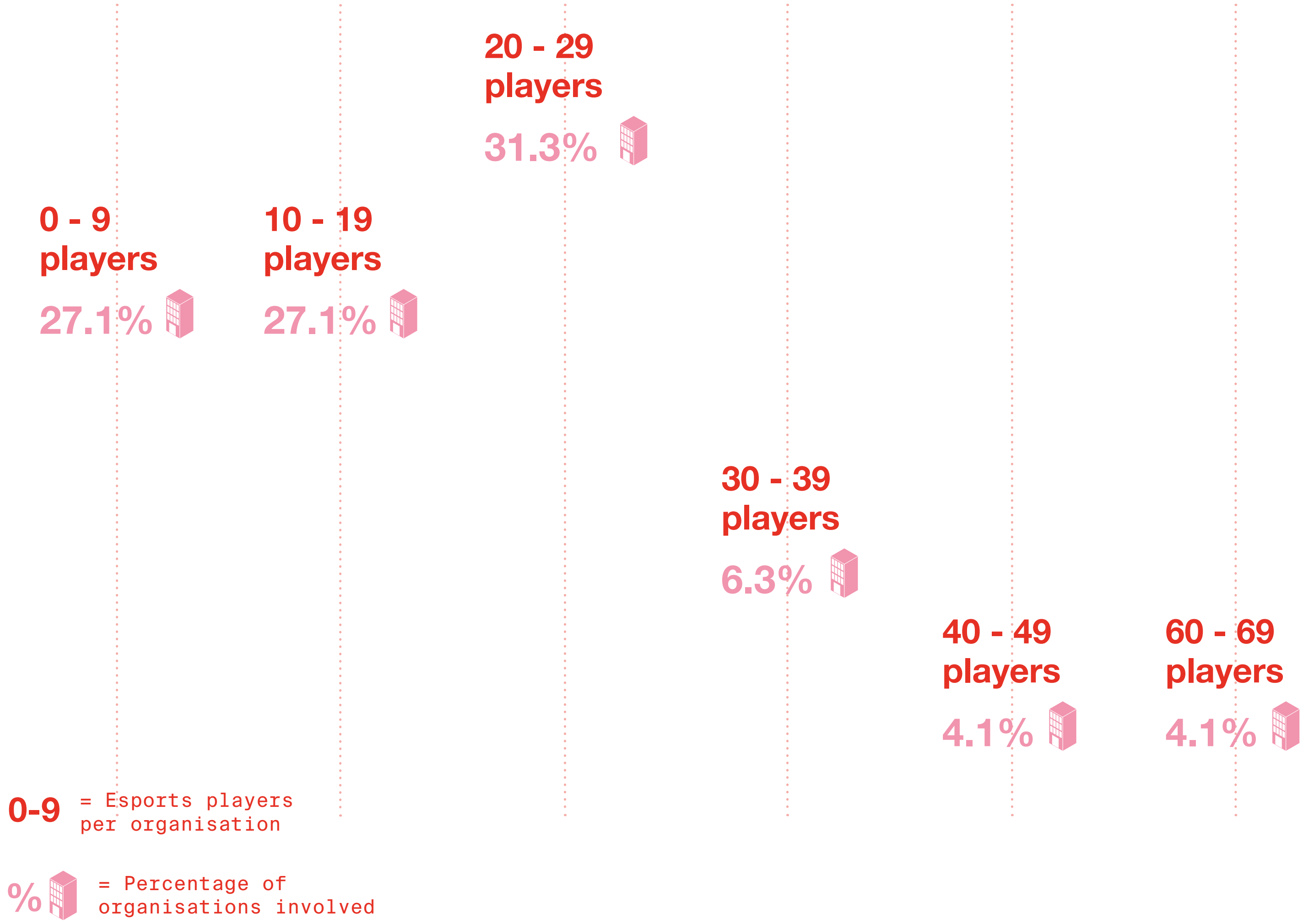
Considering the number of inhabitants in the respective language areas, the popularity of esports is significantly higher in French-speaking Switzerland: French-speaking Switzerland forms the centre of the Swiss esports movement. Therefore, the results from the «Swiss Esports Map» are consistent with those from the ZHAW study by Hüttermann (2019), which found a higher acceptance of esports and a higher level of gaming and esports activity in French-speaking Switzerland.

Differences are also apparent in the distribution of settlement types: Esports is mainly a city phenomenon. Around 68% have their headquarters/main location in a city, the other 32% in a village. If the localities are further subdivided by settlement type, 55% can be assigned to cities, 27% to agglomerations and 18% to rural regions.

2.1 Structure of Organisations



Cyberathletes, but not only...

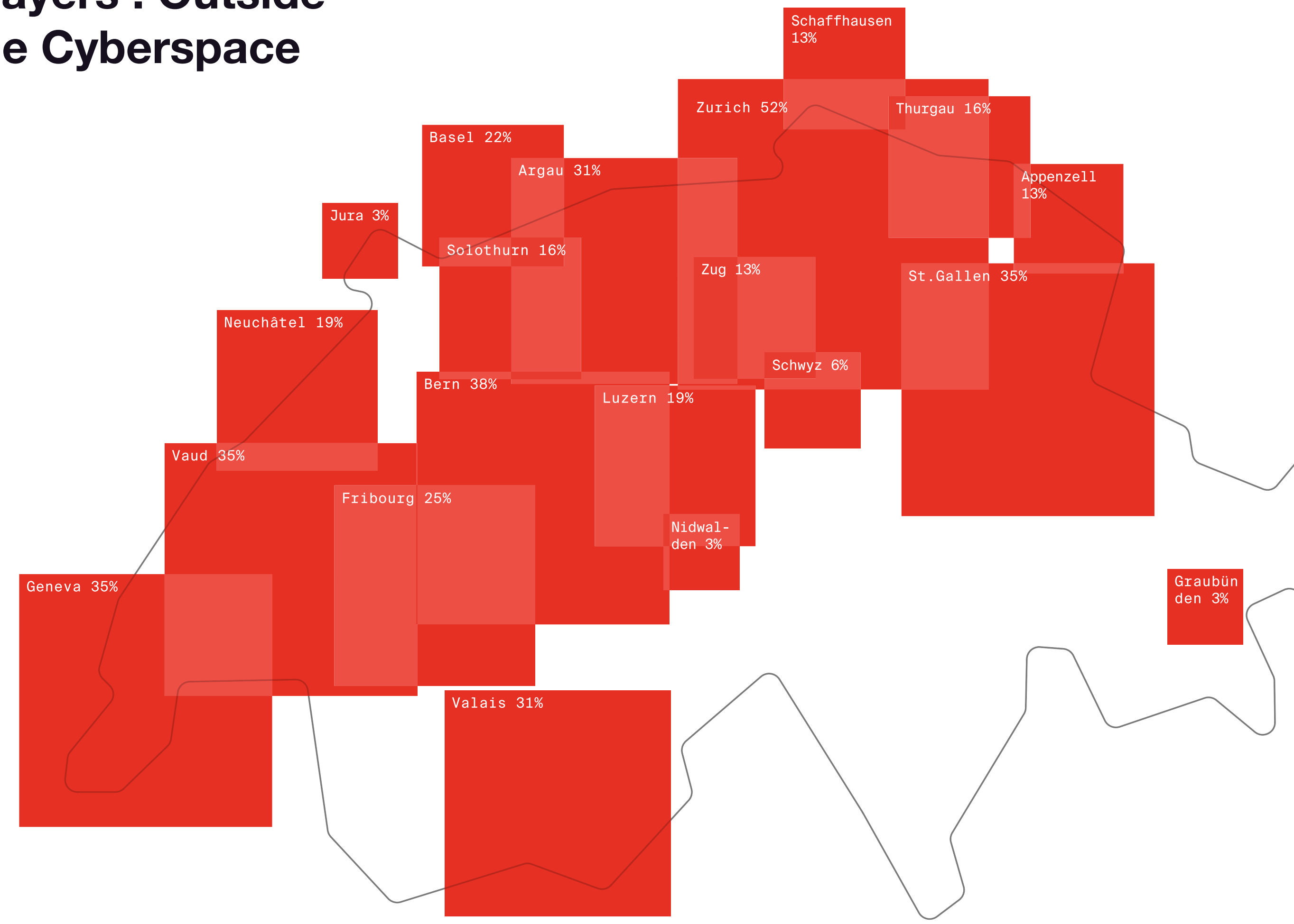


Once, an esports player was asked if he pursued any other hobbies besides esports. His answer was that he now bought a plant as a hobby and waters it every day. This example may show the ambition with which many esports players fulfil their training obligations. But that training concept is now outdated.

Professional athletes consider not only mental health and fitness, but also physical fitness, and pay attention to systematic training breaks. Step by step, this principle is also gaining acceptance in Swiss esports (Schneckenburger, 2020). Swiss esports organisations have started to offer fitness training plans and mental coaching to their cyberathletes. The survey for the «Swiss Esports Map" only asked about the number and place of residence of the esports players; other characteristics were not considered. Most organisations (85.5%) have under 30 players in their ranks, only a few organisations (14.5%) consist of more players. On average, organisations have 20 esports players.

Esports is a dynamic sport and fluctuations occur often, therefore the indication of an absolute number of esports players in Switzerland by a minimum and maximum value is quite appropriate. All organisations together have between 720 and 1152 active esports players. This makes Swiss esports comparable to sports such as minigolf or skateboarding (Swiss Olympic, 2020).

Place of Residence of Players : Outside of the Cyberspace



Esports organisations usually include players from all over Switzerland. The reasons for this lie in the easy accessibility and lack of locality of virtual competitions. Thus, esports players are not bound to local conditions.

The map in the figure represents the places of residence of the Swiss esports players. The exact number of players per canton was not collected in the survey.

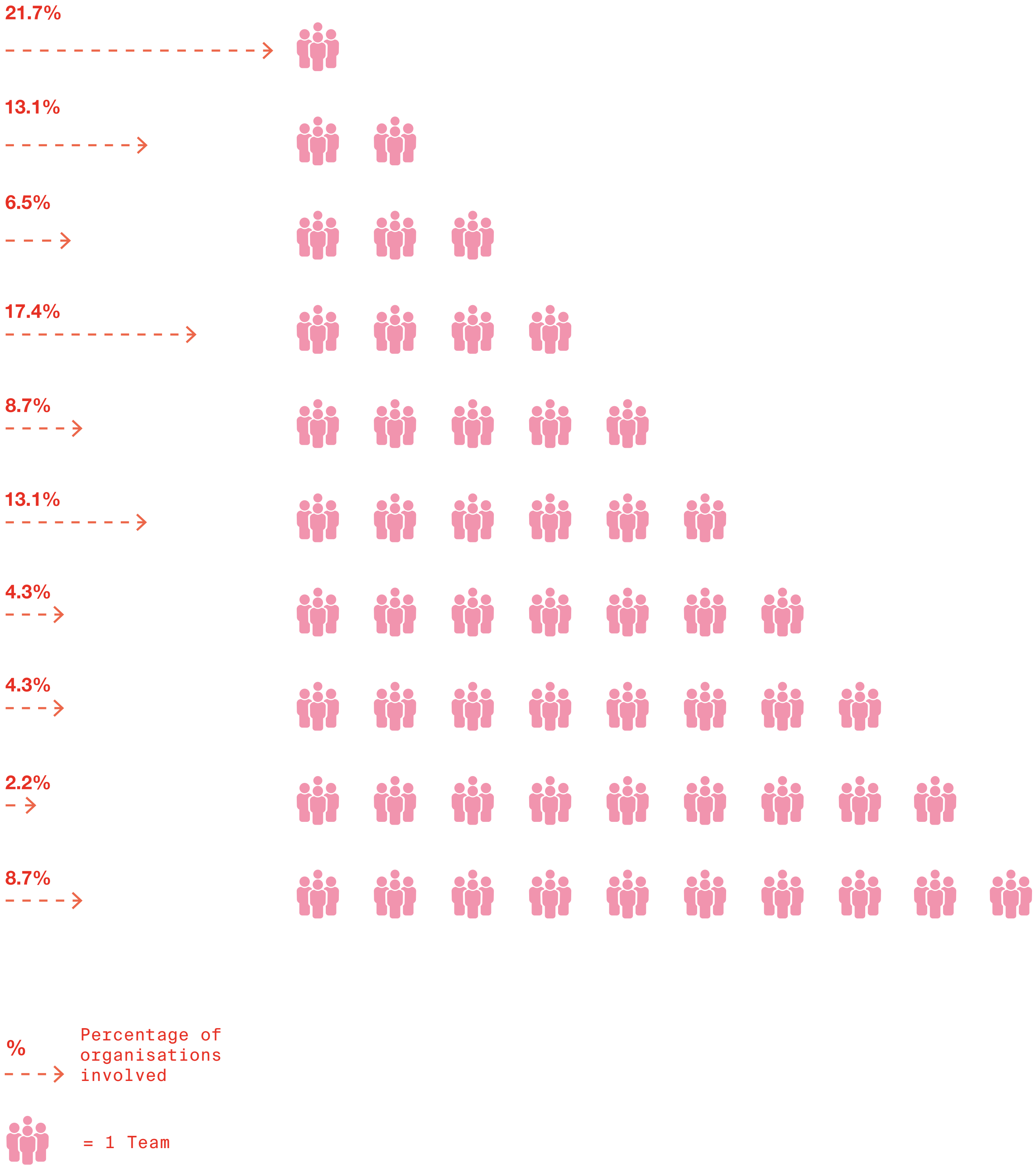
The different sizes of the squares characterize the number of cantonal mentions, but they do not reflect the actual number of esports players per canton. Nevertheless, the map provides initial indicators of where most esports players in Switzerland might be located.

Slightly more than a half of the organisations stated that they have esports players in the canton of Zürich. With 52%, the canton of Zürich is in the lead, followed by the cantons of Bern (38%), Geneva (35%), Vaud (35%), St.Gallen (35%) and next in line are Wallis and Aargau (31% each).

Around one third of all organisations are made up of players who reside exclusively in Switzerland. Two thirds of the organisations also have players from abroad.

The most frequently mentioned countries include - with one exception - three neighbouring countries of Switzerland: France (43%), Germany (36%), Belgium (17%) and Austria (11%). Italy is clearly behind the other neighbouring countries with 2%.

Teams per Organisations



Most often, organisations consist of a single team, but the majority (78.3%) are made up of two or more teams. In contrast to the number of esports players, the number of teams does not necessarily depend on the size of the organisation, but on the esports titles in which it is active.

In the survey, games played in single-player mode were a team if there was only one person playing. If organisations are active in different esports titles, which require small team sizes, this can result in a higher number of teams (despite a low number of esports players).

The average number of teams per organisation is 4. It is quite possible that organisations have several teams in a single game, but in principle they are active in different esports titles (see chapter 2.2).

In esports, many games are characterized by a high level of complexity. Developing an understanding of the game and learning common game tactics takes a lot of time and stamina. «Team: Together everyone achieves more» is a saying that applies even more to teams in electronic sports. The more complex the games become, the more important it is for the team to work and communicate together.

Staff/Employees :
Not all Heroes wear Capes

78%
0 - 9
employees

14.6%
10 - 19
employees

4.9%
20 - 29
employees

0%
30 - 39
employees

2.4%
40 - 49
employees

0%
50
employees
or more

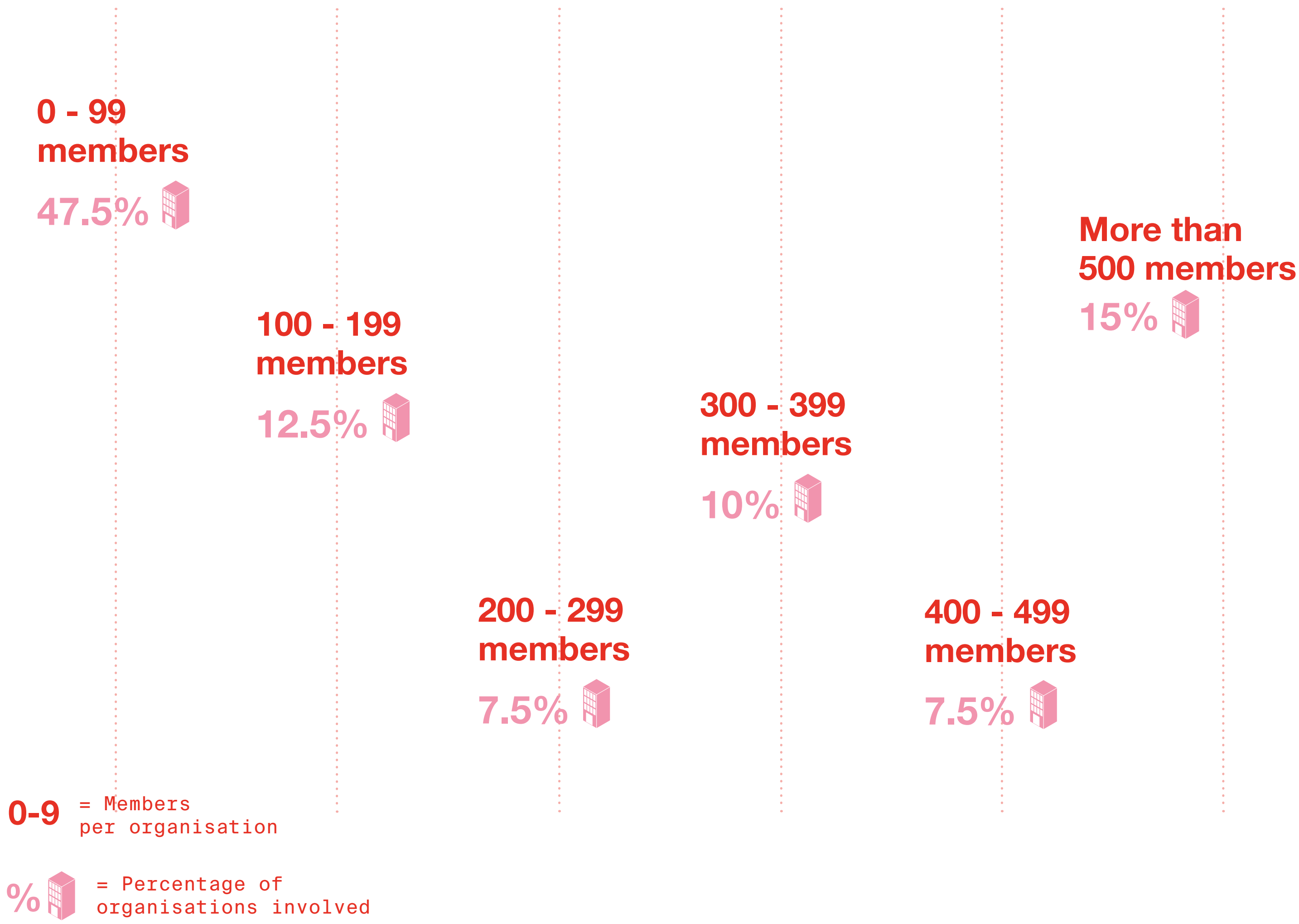
% = Percentage of organisations involved

22% of organisations have more than 10 staff members who coordinate the processes within their organisations. 78% of Swiss esports organisations have less than 10 employees. On average, they have 8 employees.

Volunteers play a key role. Almost three quarters of the organisations work 100% on a voluntary basis. 12.5% of the organisations work between 80 to 99% on a voluntary basis, and another 12.5% work less than 80% on a voluntary basis. On average, 27 hours of volunteering are done per week in an organisation.

Extrapolated over a year, this amounts to the equivalent of CHF 1.37 million, which is provided for free every year (at rate of CHF 20 per hour).

Community Members : The Microcosm



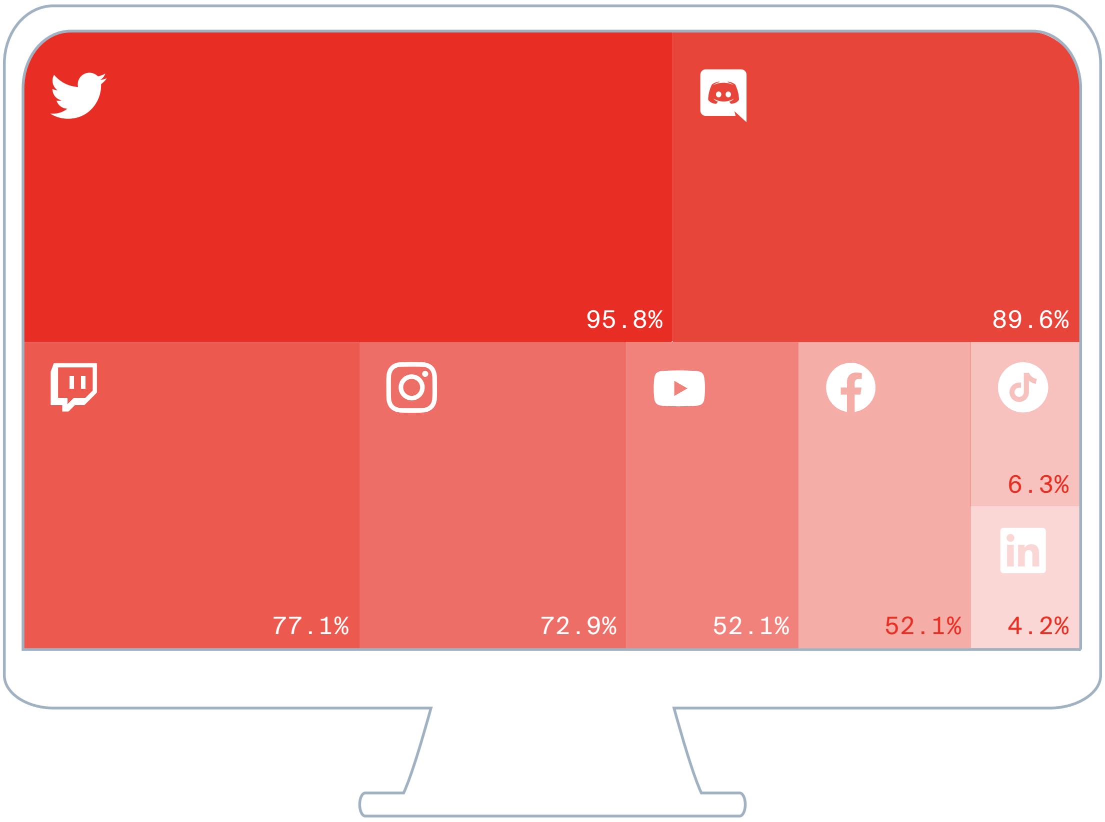
Almost half of all organisations have between 0 and 99 community members. 20% of the organisations consist of 100 to 399 community members. 22.5% have a community size of over 400 people. On average, an organisation has 208 community members (multiple memberships possible).

Being active in esports does not just mean taking part in competitions. Esports also includes various side-line activities such as ongoing interaction with the communities.

Esports organisations use social media channels to connect with their community and other people or organisations interested in esports. They report, for example, on their current competitions, events, esports players or sponsoring partners. Organisations often run their own server on the platform Discord. This gives everyone the opportunity to get in touch with them, chat, talk, share content such as memes, and game together with other community members.

Association members refers to members who pay a membership to an organisation, whereas community members are more loosely associated to an organisation. Some organisations hold events that are open to both association members and community members. Together they are an important component in esports and form their own microcosm. They can be described as a haven for socialising: online and offline (cf. Lamprecht et al., 2017, p. 17).

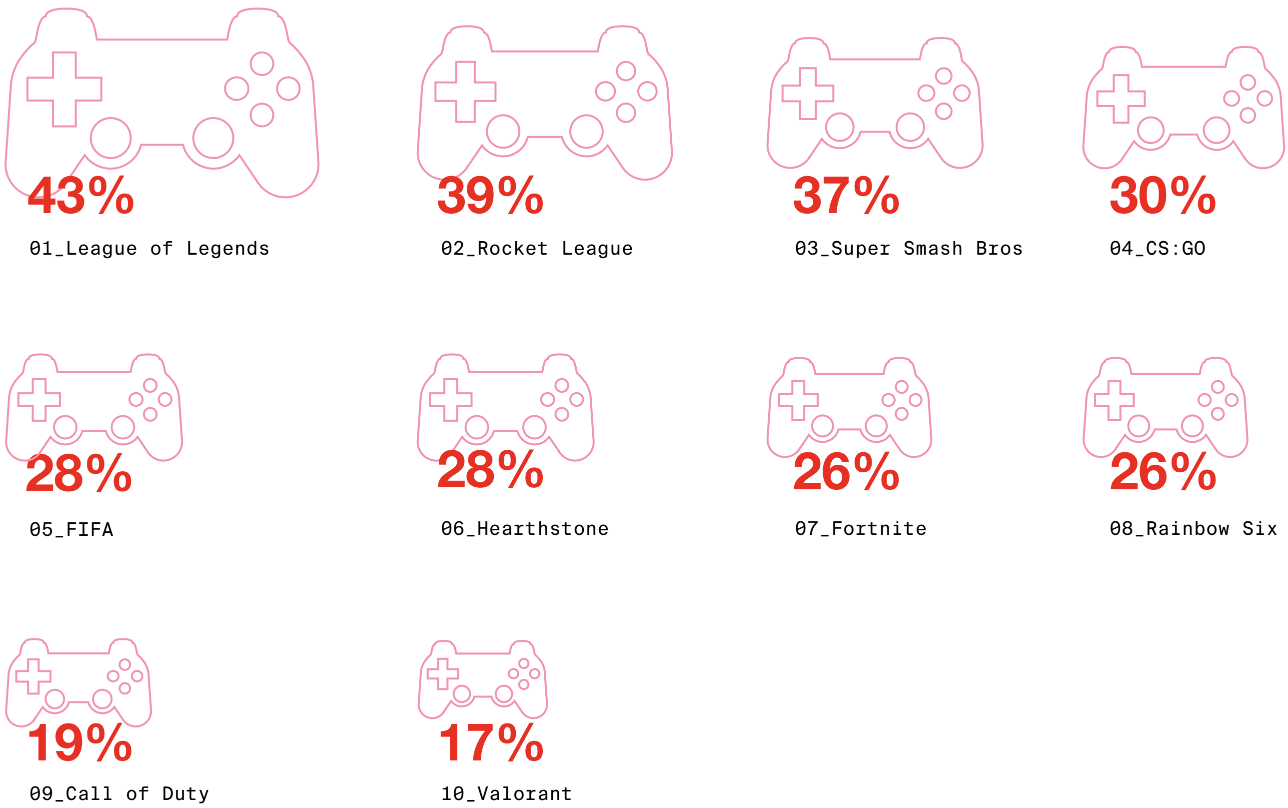
Social Media Platforms



The figure shows the social media that organisations use to connect with their community. Twitter and Discord are among the most popular platforms. Over 95% of all organisations use Twitter and nearly 90% have a Discord server. Twitch and Instagram are used by over 70% of Swiss esports organisations, Youtube and Facebook by over 50%. TikTok and LinkedIn are not so popular in Swiss Esports.

2.2 Offers and Services of the Organisations

Top 10 Esports Titles played



Swiss esports organisations feature a diverse range of different esports titles (sports) and genres (disciplines). The figure lists the top 10 titles played according to frequency. In total, about 30 different games were recorded with the survey.

43.5% of all organisations are active in the game League of Legends. League of Legends, Rocket League and Super Smash Bros are the three frontrunners in Swiss Esports. They are followed by CounterStrike: Global Offensive and FIFA. Together, they form the Swiss esports top list of the most popular esports titles in Switzerland.

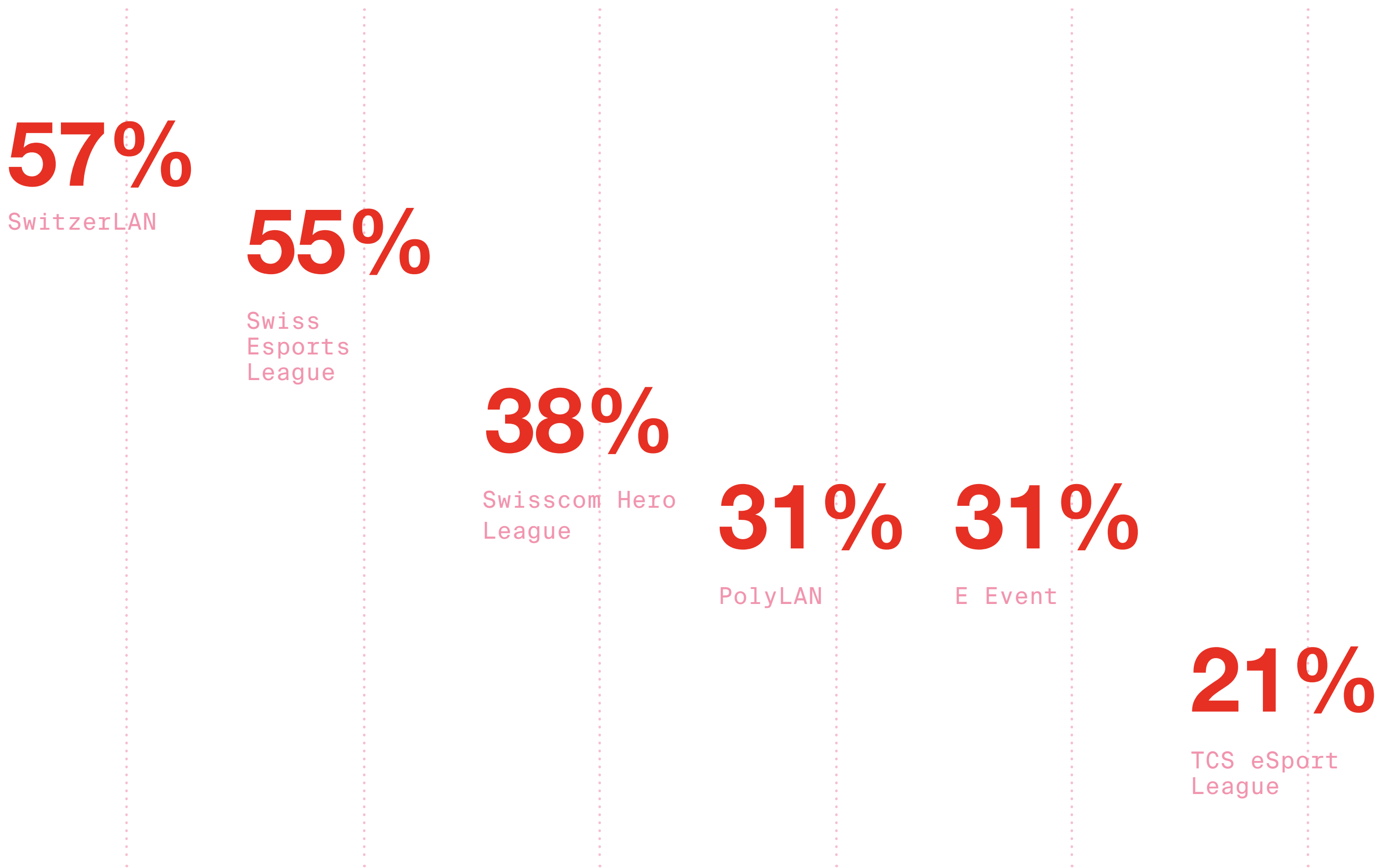
Certainly, the popularity of individual titles is also largely determined by the range of Swiss esports leagues. Without national leagues or cups, popular titles also lose importance in esports. The same does not necessarily apply to gaming, as it is not dependent on tournaments. On average, an organisation is active in nearly 4 games. This means that an organisation basically has one team per game.

Genres played

39%	28%	20%	12%	1%
Shooter	Strategy	Sports Simulations and Games	Fighting Games	Speedruns and others

When they are grouped into their respective genres, shooters are the most popular games in Switzerland. Strategy games are the second most popular, while sports simulators, fighting games and speed runs are played less frequently overall.

Most Popular Competitions : Esports ≠ Online Leagues



% = Percentage of organisations involved

Even though esports events take place online in many cases, this figure illustrates the importance of offline competitions (unfortunately not feasible due to the pandemic).

LAN parties are not only a place to compete, but also a place for social meetings and a contact point with the community. LAN parties have had the most spectators in recent years, making them an attractive competition venue.

As a result, many LAN parties enjoy great popularity. SwitzerLAN, as the largest LAN event, leads the ranking of the most popular competitions in Switzerland. Over half of all organisations also compete in online competitions of the Swiss Esports League and almost 40% in the Swisscom Hero League.

57.5% of all organisations participate exclusively in national and 17.5% in international competitions. The remaining 25% compete in both national and international competitions. In total, almost 60 different competition platforms were registered around the globe. Only the top 6 are listed in the upper figure. All these 6 are from Switzerland.

Further Activities : Multitasking

74%

Events

66.6%

Association Activities

48.1%

Educational or Youth Work

48.1%

Tournaments, Cups or League

25.9%

Reporting

14.8%

Consulting

% = Percentage of organisations involved

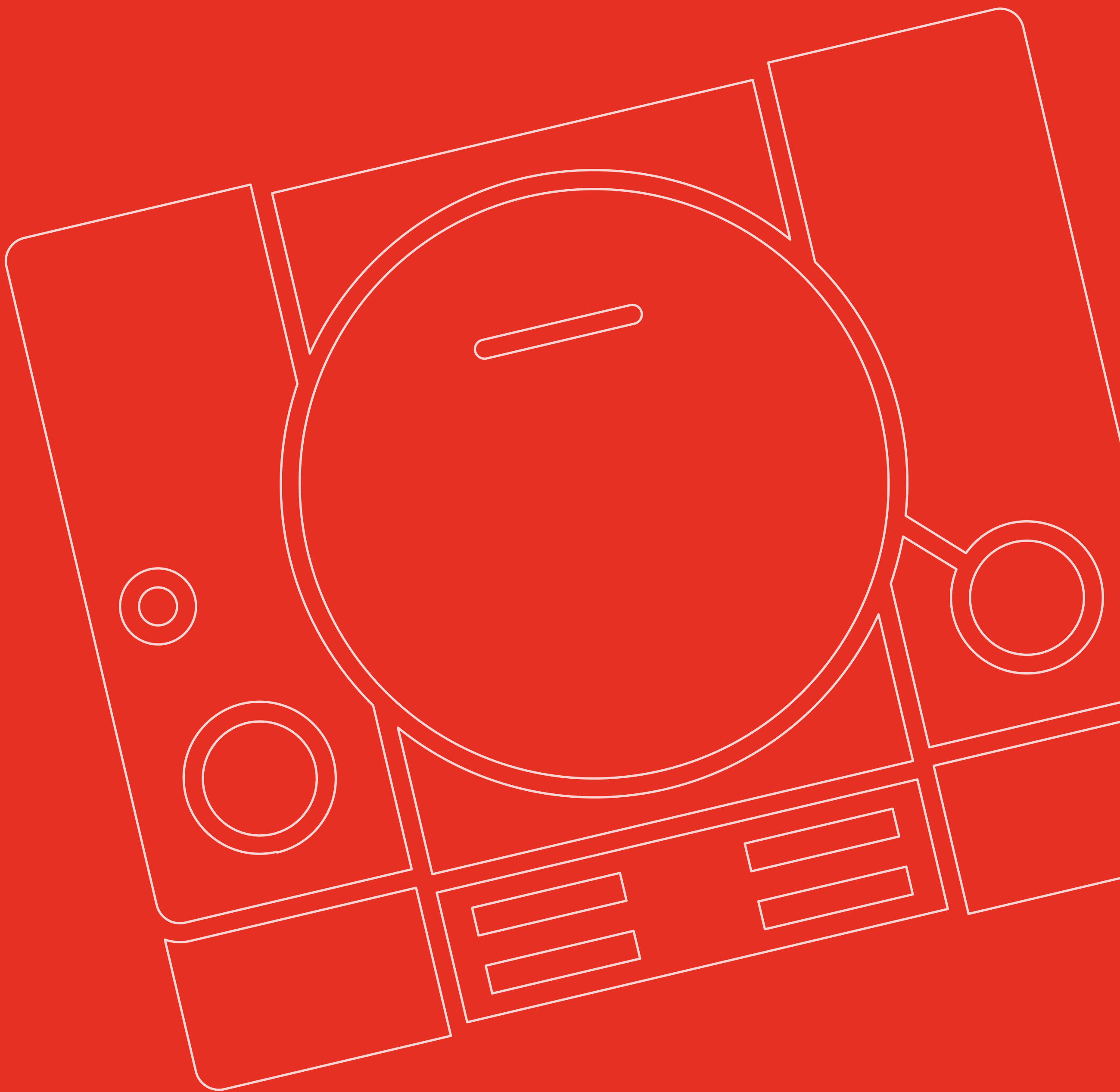
More than half of the Swiss Esports organisations are multitasking: Around 60% pursue other esports-related activities in addition to participating in competitions.

Of these, 74% run events, and around 67% run association activities. Almost half organise competitions on their own and just as many are involved in youth work/education in esports. Far less organisations are active in consulting and the media. Overall, 37% have developed their own brands under which they organise other activities.

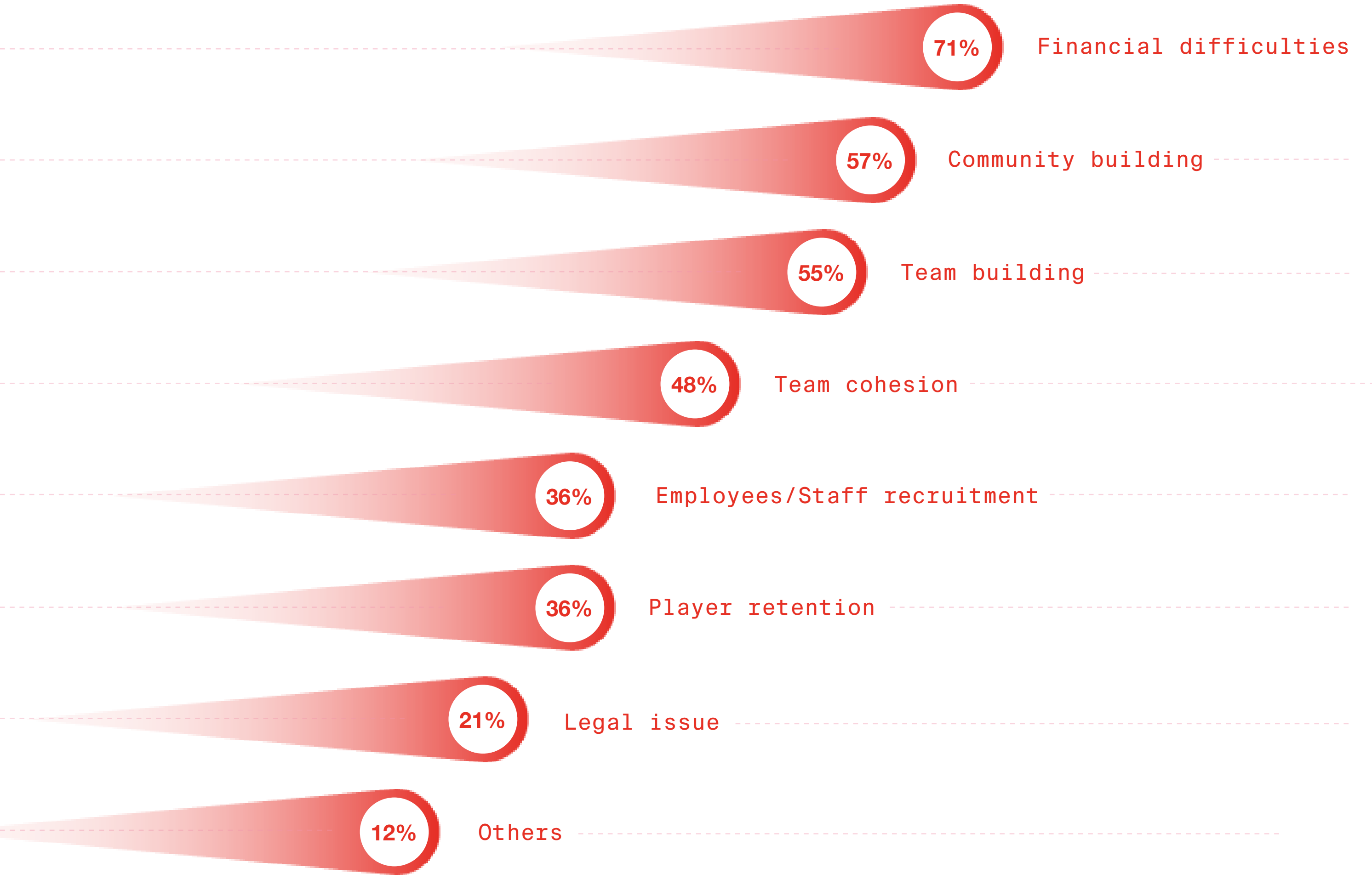
The activities in the figure above are not clearly separable from each other. Events can also be association activities or competitions.

Some examples of other activities - besides participating in competitions - are LAN parties, bowling nights, running competitions or a VR arena/gaming bar, producing an esports show, boot camps or educational work regarding online addiction/responsible gaming.

2.3 Challenges



Challenges :
Hold my Energy Drink!



The challenges faced by Swiss esports organisations are shown in the figure. Around 71% of organisations are struggling with financial difficulties. The (often) lack of regional anchoring, the small organisation sizes and spectator numbers present the organisations with a Herculean task in their search for sponsors and supporters. Despite this difficult starting position, organisations have, on average, one sponsor.

In fact, about 60% of all organisations have no sponsors and the remaining 40% have more than two sponsors, creating a slight disadvantage for some Swiss esports organisations.

As already presented, most organisations have smaller communities. The development of larger communities is therefore one of the central problems for many organisations. The situation is similar with team building.

The more community members and teams esports organisations have, the farther their reach. By having a far reach, esports organisations increase their attention, which is attractive for sponsors. As a result, organisations are interested in recruiting more players and building more teams, though over half said they struggle to do so. Further complicating matters, team cohesion is sometimes difficult, and some organisations are faced with the issue of not being able to keep players for a longer period of time.

3. Conclusion

With the project «Swiss Esports Map», a snapshot of Swiss esports became possible. The first key figures were determined and could be presented in the report. Many positive developments can be noted. In summary, it can be stated that Swiss esports has recorded constant, strong growth over the last five years. In general, the growth is due to the increasing popularity of esports and, in particular, to the professionalisation of Swiss leagues.

The number of organisations is continuously growing, and, with it, involved parties such as players and employees. Already today, there are many protagonists in Swiss esports, who day after day, week after week and year after year do passionate work and are committed to its development. The communities of the existing organisations have several 100 members and signal that there is a clear interest in esports in Switzerland.

Shooter represents the most popular discipline and League of Legends the most popular game in Swiss esports. In addition, titles for smartphones have also found their way into Swiss esports. The global leader, DotA 2, plays a rather subordinate role in Switzerland, which is not least due to a lack of league offerings and the size of the entire Swiss esports landscape.

Currently, esports in Switzerland is still on a small scale compared to other sports. On average, a Swiss esports organisation has around 20 players, 4 teams, 8 employees, 210 community members and is competing in 4 games. The Swiss esports scene is still young and in an early stage of development. This is also evident in the challenges faced by the organisations. The different problem areas cannot be considered separately from each other - they are causally related. They address the fact that Swiss esports lacks resources: financial, structural, and human (Schneckenburger, 2020). On one hand, there is no opportunity for many well-known esports titles to compete in Switzerland because there are still too few esports players in our country. On the other hand, high fluctuations in organisations and players prevail because esports does not have the same retention as conventional sports. You can easily quit a Swiss esports organisation due to lack of local conditions and easy accessibility of virtual competitions.

Accordingly, organisations struggle with player recruitment, team building and building a larger community, which in the end results in financial difficulties. And this is doubly the case: Esports is still not attractive enough for sponsors. In addition, players in associations are often not willing to pay membership fees; on the contrary, they want to be paid. All the above factors lead to difficulties in the formation of a national esports scene.

We, at SESF, remain firmly convinced that Swiss esports will continue to gain a foothold as digitisation progresses and global popularity increases. In the future, Swiss esports will have to bridge the gap between national and international development and not miss the connection to the international top. For this, energies must be bundled, and synergies created - or in the words of Schmidberger: «Success is a mosaic in which many participate.»

4. Method

The Swiss Esports Map was conducted as an online survey open to all organisations in Swiss esports. The survey was distributed several times via the SESF's social media channels and was open for a period of two weeks. It was not completed by all of the esports organisations known to the SESF. Furthermore, this survey was limited in the way that only organisations were surveyed.

However, in many cases esports is played as a single sport, because various esports titles can be played alone. Including the number of individual players and the number of unknown organisations, we can most likely assume a higher number of esports players and organisations. Another difficulty was to define esports.

In the Swiss Esports Map, the view of Hüttermann (2019) was followed, namely that esports is characterised by participation in online or offline competitions. With a broader understanding of esports, the number of esports players would automatically increase. In this case, gaming in quick play mode or a FIFA night with friends would already be part of esports.

After data collection, a review of the organisations took place via social media channels and homepage (if available). In total, 58 organisations completed the survey. Some of these were esports retailers, organisations from abroad and competition organisers that do not have standalone teams competing in national or international competitions.

The data was cleaned after verification. In case of irregularities, the organisations were contacted by mail to ask any follow-up questions. The total, 48 organisations participated in the survey.

The survey was divided into three parts. The first part included a brief introduction to the relevant survey points and objectives. The second part included general information that was used to map the organisations. The third part could be completed optionally and contained more in-depth questions. Of the 48 organisations, 44 responded to Part 3 of the survey.

Since the questions in Part 3 could be filled out optionally, the number of participants per question varied between 40 and 44. This was considered in the analysis by giving the results in the report partly as average and percentage values.

It should be noted at this point that the exact number of players, staff/employees and community members was not recorded in the survey. The answer options for these questions were written as categories (i.e., 0 - 9, 10 - 19, 20 - 29, etc.), as esports are subject to greater fluctuations. The average values were calculated using minima and maxima. Therefore, the values of this data should be taken with a certain degree of caution. In addition, this study represents only the current state of Swiss esports. Some of the organisations may have been formed and dissolved in the past.

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