

NEWZOO & ESPORTS BAR

# ESPORTS IN BRAZIL: KEY FACTS, FIGURES, AND FACES





# CONTENTS

**01**

**THE ESPORTS  
AUDIENCE & MARKET**

**5**

**02**

**BIGGEST EVENTS  
AND HEROES**

**12**

**03**

**VIEWING AND  
STREAMING**

**15**



Brazil is

**#3**

in the world in terms of  
Esports Enthusiasts

# BRAZIL: THE WORLD'S MOST PASSIONATE ESPORTS FANS

## FOREWORD

The passion that Brazil is renowned for in the sporting world is clearly visible in its thriving esports scene. It boasts a huge esports audience, with fans known for their dedication to their games and teams. In fact, Brazil has the third-most Esports Enthusiasts in the world with 7.6 million Brazilians watching professional content more than once per month.

On top of that, Brazil has given rise to many globally successful teams and strong local influencers. Many top-tier international teams have highly skilled Brazilian players in their roster, especially in Counter-Strike: Global Offensive. Local heroes such as Gabriel "FalleN" Toledo have hundreds of thousands of followers on social media and Brazilian broadcasters are racking up millions of viewing hours on Twitch.

This whitepaper, brought to you by the Esports Bar and Newzoo, offers insights into the thriving esports scene in Brazil, including a detailed overview of the esports audience, key players in the industry, most popular esports content, and top events.



### BRAZIL: KEY STATS

POPULATION	210.9M
GAMERS	75.7M
GAME REVENUES	\$1.5BN
ANNUAL SPEND/PAYER	\$37.22
ESPORTS ENTHUSIASTS	7.6M



**NEXT EDITION:**  
September 24th-26th  
Miami

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Senior Market Analyst

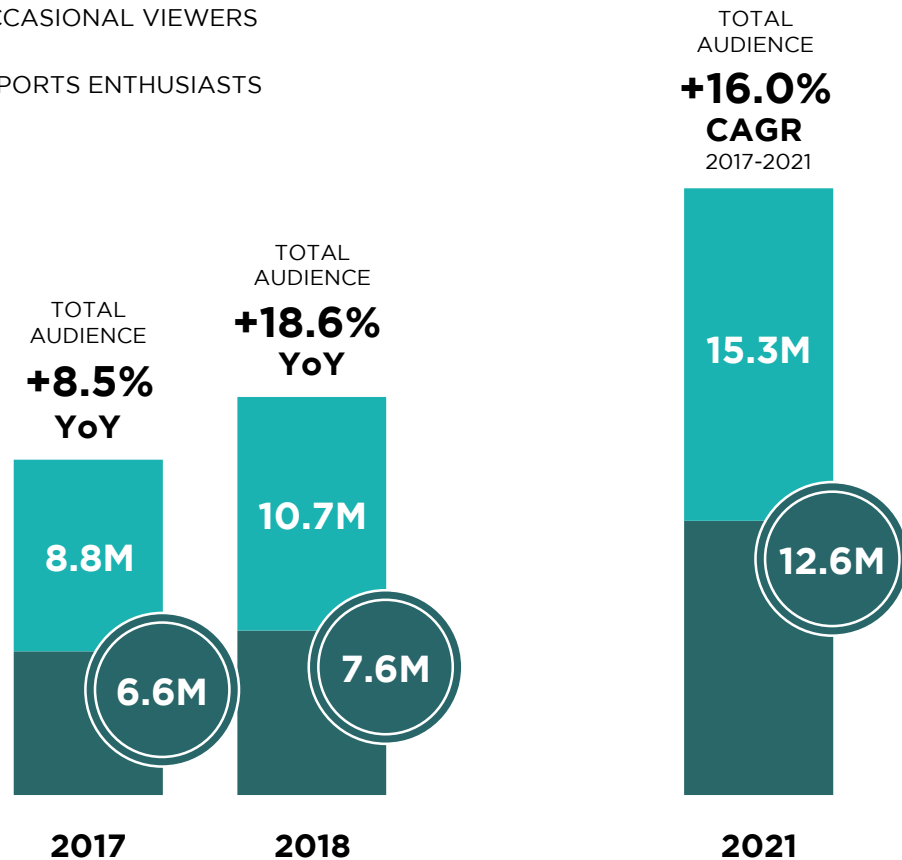


# THE BRAZILIAN ESPORTS AUDIENCE BOOMS

ESPORTS AUDIENCE GROWTH PER TYPE | 2016-2021



- OCCASIONAL VIEWERS
- ESPORTS ENTHUSIASTS



## 5.3%

of the online population is an Esports Enthusiast, lower than in China (7.9%) and the U.S. (7.7%). This means there are 7.6 million Brazilian Esports Enthusiasts in 2018.

Esports awareness is also lower, at 47% of the online population. This leaves plenty of room for the audience to grow as esports becomes more mainstream, IT infrastructure improves, and new titles gain popularity. By 2020, there will be almost 30 million Brazilians watching esports in some capacity.

# ESPORTS TAPS INTO A YOUNGER AUDIENCE THAN SOCCER

OVERLAP BETWEEN SOCCER FANS AND ENTHUSIASTIC ESPORTS VIEWERS | BRAZIL | 2018



## ALL SOCCER FANS

ALL FREQUENT BRAZILIAN  
SOCCER FANS



42.9M



## ESPORTS & SOCCER FANS

BRAZILIAN ENTHUSIASTIC  
ESPORTS VIEWERS\* THAT **ALSO**  
WATCH SOCCER



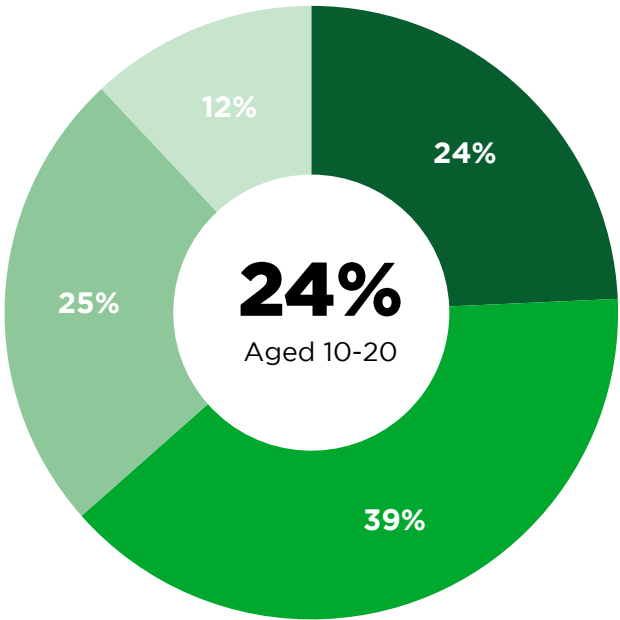
4.3M

## ESPORTS ONLY FANS

BRAZILIAN ENTHUSIASTIC ESPORTS  
VIEWERS\* THAT DO  
**NOT** WATCH SOCCER



1.2M

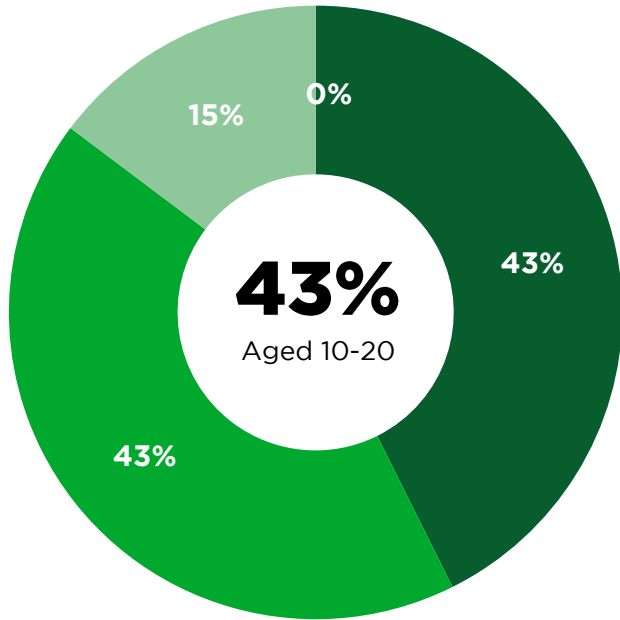


10-20

21-35

36-50

51-65



\*Enthusiastic Esports  
Viewers defined by viewing  
professional esports at least  
once a month.

# LEADING TO MORE INVOLVEMENT FROM THE SPORTS WORLD

POPULARITY OF PROFESSIONAL GAMING DRIVES TRADITIONAL SPORTS CLUBS TO ENTER ESPORTS



**FLAMENGO**  
TEAMS: LEAGUE OF LEGENDS  
FOUNDED: 2017  
CLUB'S MAIN SPORT: SOCCER



Responding to the growing interest in esports in Brazil, historic sports club Flamengo launched its esports division in 2017. Flamengo announced a League of Legends roster and a dedicated training facility, with plans to expand to other games.



**RONALDO**  
TEAMS: FIFA, LEAGUE OF LEGENDS, ARENA OF VALOR  
FOUNDED: 2001  
INVESTOR'S MAIN SPORT: SOCCER



The prominent Brazilian soccer player Ronaldo invested in CNB e-Sports Club, alongside poker players André Akkari and Igor Trafane. The team, founded in 2001, currently competes in FIFA, League of Legends, and Arena of Valor.

# ACTIVE AND OCCASIONAL VIEWERS DIFFER

A PROFILE OF OCCASIONAL VIEWERS AND ENTHUSIASTIC VIEWERS IN BRAZIL



## OCCASIONAL VIEWERS

WATCH ESPORTS < ONCE/MONTH

**26%** consider themselves core gamers vs. **55%** of enthusiastic viewers

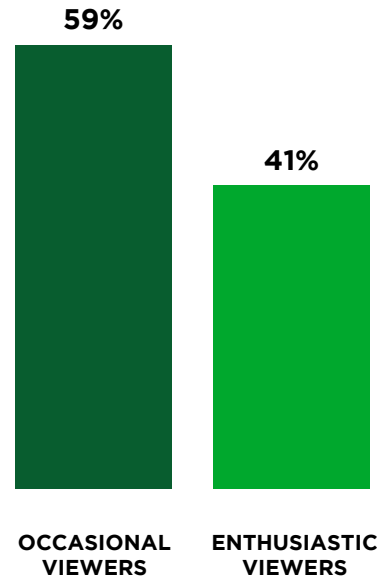
**31%** are women vs. **38%** of enthusiastic viewers

**78%** actively watch and/or follow soccer vs. **78%** of enthusiastic viewers

**30%** have a current subscription to Spotify vs. **47%** of enthusiastic viewers



## BRAZILIAN ESPORTS AUDIENCE IN 2018, SPLIT PER TYPE



## ENTHUSIASTIC VIEWERS

WATCH ESPORTS > ONCE/MONTH

**53%** are aged between 10 and 25 vs. **40%** of occasional viewers

**78%** own a gaming-specific headset vs. **53%** of occasional viewers

**72%** use Instagram vs. **68%** of occasional viewers



**52%** have a very positive brand attitude of Coca Cola vs. **36%** of occasional viewers





# \$2.8M

Total prize money for the  
Brazilian team since it was  
founded in 2015

# SPONSORS FOLLOW THE GLOBAL SUCCESS OF TEAMS

ESPORTS SPONSORSHIPS DEALS ACTIVE IN 2018 IN BRAZIL



In October 2017, Vivo and Keyd Stars renewed their sponsorship agreement for another two years, leading to a prominent rebranding of the team's name to Vivo Keyd.

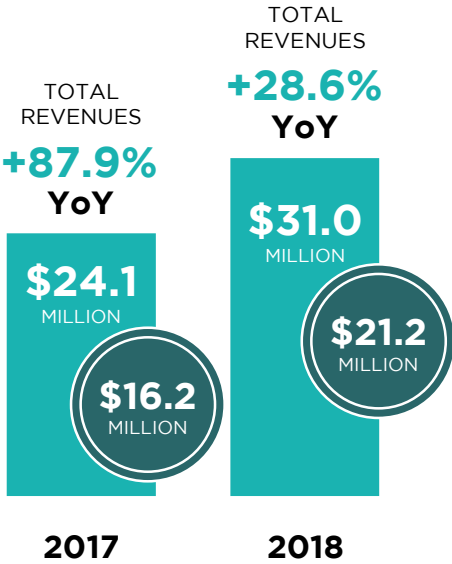
The deal covers four teams, including the addition of Clash Royale players to the Vivo Keyd roster and a women's CS:GO team. The sponsorship is one of Vivo's esports pillars for 2018, along with the creation of Vivo Games4U, a new games and esports content app, and Game Changers, a sequel to the documentary series focusing on the Brazilian gaming scene.



# REVENUES IN LATIN AMERICA ARE GROWING FAST

LATIN AMERICAN ESPORTS REVENUES | 2015, 2016, 2017, 2020

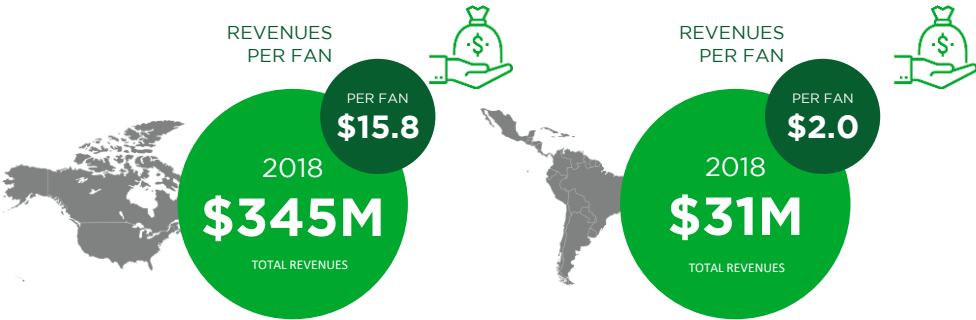
- TOTAL REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP, MERCHANDISE & TICKETS, GAME PUBLISHER FEES)
- BRAND INVESTMENT REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP)



28%

of revenues in LATAM come from advertising, making this the largest revenue stream. This is different from North America and Western Europe. where sponsorship brings in the most money.

As the Latin American market develops and Brazilian teams and events establish themselves, more sponsors will enter the market and drive sponsorship revenues to become biggest revenue stream in 2019. Revenue per fan remains relatively low at \$2.0 per year.





# 35K

people attended Riot's 2017  
Mid-Season Invitational  
in Sao Paulo

# BIGGEST EVENTS IN BRAZIL IN 2018 TO DATE

IN CBLOL 2018 SUMMER PLAY OFFS AND ESL ONE: BELO HORIZONTE



**CBLOL 2018 SUMMER PLAYOFFS**  
**GAME:** LEAGUE OF LEGENDS  
**PRIZE POOL:** \$59,100  
**ORGANIZER:** RIOT GAMES



Introduced in 2015, the CBLOL league lets the 10 best Brazilian League of Legends teams compete for the title of national League of Legends champion. The league has two seasons per year where the top performing teams qualify for LoL's international tournaments. In 2018, the spring playoffs were in Sao Paulo and generated close to a million viewership hours. The winners, KaBuM! e-Sports, brought home \$20,000 out of a total prize pool of **\$59,100**.

## 1.6K

Attendees at the  
CBLol Studio in  
Sao Paulo



**ESL ONE: BELO HORIZONTE**  
**GAME:** CS:GO  
**PRIZE POOL:** \$200,000  
**ORGANIZER:** ESL



ESL One: Belo Horizonte is the first ESL One event organized in Latin America. The event featured CS:GO, one of the most popular games in Brazil. The eight best CS:GO teams competed for the **\$200,000** prize. The event generated more than a million viewership hours. American team FaZe Clan was crowned in front of the 15,000 fans who attended the event at Mineirinho Arena in Belo Horizonte.















## 15K

Attendees at the  
Mineirinho  
Stadium in Belo  
Horizonte

# WHO ARE THE BRAZILIAN ESPORTS HEROES?

LOCAL FAN-FAVORITE PLAYERS' SOCIAL MEDIA POPULARITY | PRIZE MONEY EARNED AND PRO PLAYERS



<div><b>Gabriel "FalleN" Toledo</b></div> <div><b>\$781K</b> TOTAL PRIZE MONEY EARNED AT EVENTS</div> <div><div>GAME</div><div>CS GO</div><div>TEAM</div><div>mibr</div><div></div></div> <div><div><b>850K</b> FOLLOWERS</div><div><b>497K</b> FOLLOWERS</div></div>	<div><b>Epitacio "TACO" Pessoa</b></div> <div><b>\$770K</b> TOTAL PRIZE MONEY EARNED AT EVENTS</div> <div><div>GAME</div><div>CS GO</div><div>TEAM</div><div></div><div></div></div> <div><div><b>371K</b> FOLLOWERS</div><div><b>197K</b> FOLLOWERS</div></div>	<div><b>Felipe "brTT" Gonçalves</b></div> <div><b>\$41K</b> TOTAL PRIZE MONEY EARNED AT EVENTS</div> <div><div>GAME</div><div>LEAGUE LEGENDS</div><div>TEAM</div><div>eSports</div><div></div></div> <div><div><b>767K</b> FOLLOWERS</div><div><b>670K</b> FOLLOWERS</div></div>	<div><b>Leo "ziG" Duarte</b></div> <div><b>\$27K</b> TOTAL PRIZE MONEY EARNED AT EVENTS</div> <div><div>GAME</div><div>RAINFLOW SIEGE</div><div>TEAM</div><div></div><div></div></div> <div><div><b>157K</b> FOLLOWERS</div><div><b>247K</b> FOLLOWERS</div></div>
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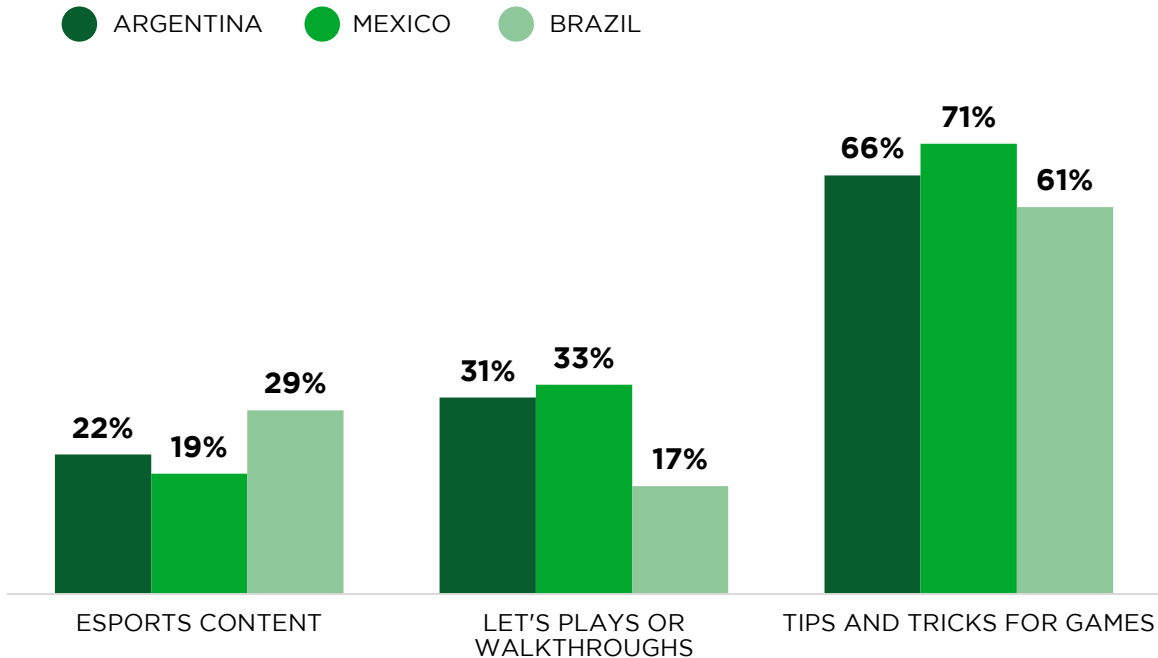


**13%**

of the online population  
in Brazil watches game-  
related video content

# ESPORTS CONTENT PERFORMS RELATIVELY WELL

TYPES OF VIDEO GAME CONTENT WATCHED | SPLIT PER COUNTRY IN 2017



29%

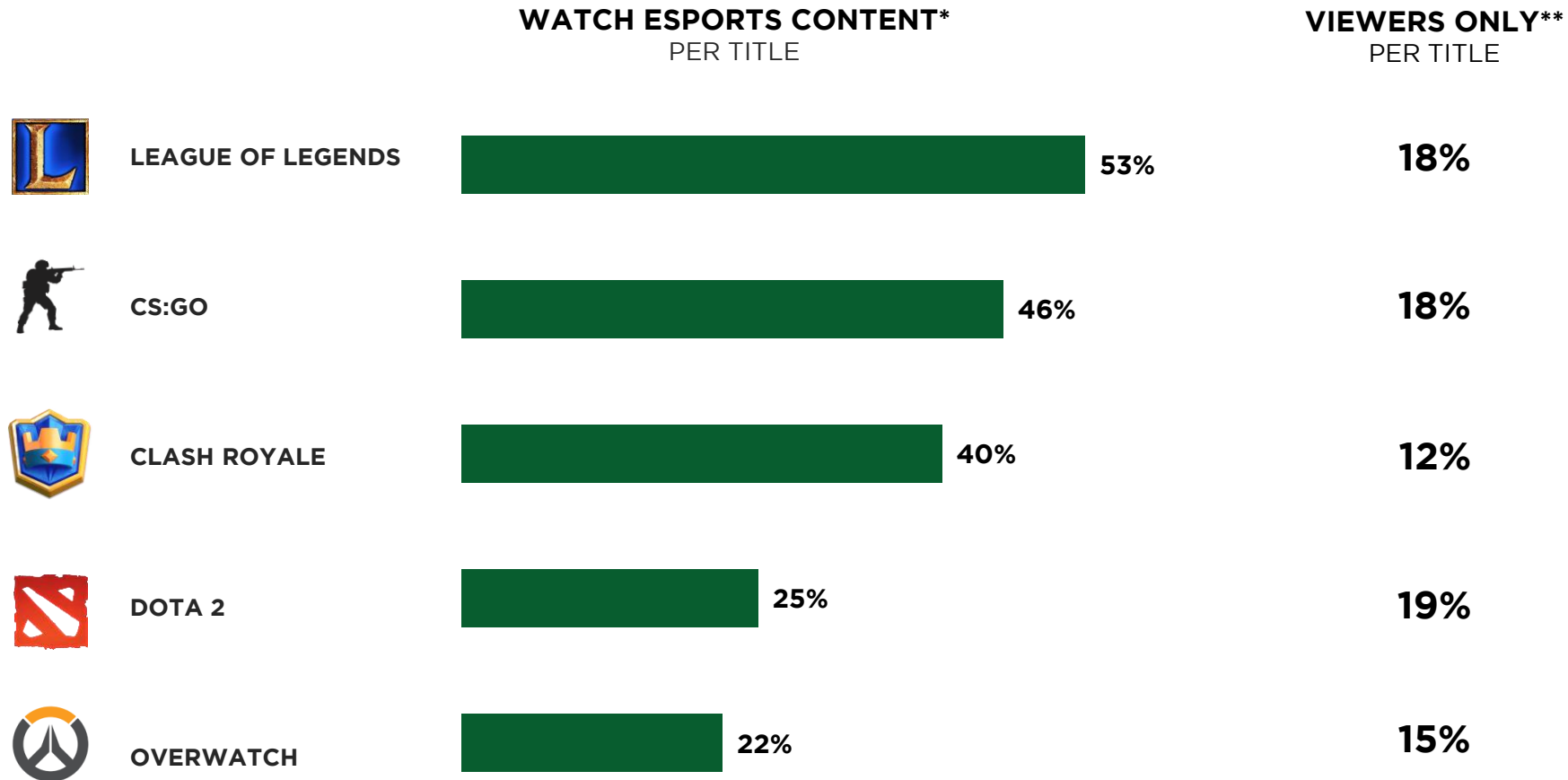
of people who watch video game content in Brazil watch esports content. This is much higher than in Mexico (19%) and Argentina (22%).

Other types of content are noticeably less popular in Brazil. Only 17% of Brazilian's who watch video game content watch let's plays or walkthroughs, compared to more than 30% of those in Argentina and Mexico.



# MANY VIEWERS DO NOT PLAY THE GAMES THEY WATCH

SHARE OF VIEWERS THAT WATCHES ESPORTS CONTENT PER TITLE VS. SHARE OF VIEWERS ONLY



\*Base: Enthusiastic Esports Viewers

\*\* The share of people that watches esports content of a title but does not play that title

# YODA IS THE TOP BRAZILIAN STREAMER WITH 14 MILLION HOURS

TOP STREAMERS WHO SPEAK PORTUGUESE ON STREAM | TWITCH | JANUARY-JUNE 2018

RANK	STREAMER	HOURS WATCHED	TOP GAME
1	YoDa	14.0M	League of Legends
2	alanzoka	11.2M	Fortnite
3	jukes	7.3M	League of Legends
4	SkipNhO	6.3M	PUBG
5	jovirone	4.9M	League of Legends
6	Th3D4rkness	3.1M	PUBG
7	gratis150ml	3.0M	League of Legends
8	yeTz	2.8M	League of Legends
9	sheviiiioficial	2.6M	PUBG
10	pimpimentalol	2.3M	League of Legends



YoDa

FOLLOWERS ON TWITCH

1.1M

TOP GAME



alanzoka

FOLLOWERS ON TWITCH

1.0M

TOP GAME

FORTNITE

# RIOTGAMESBRAZIL IS THE TOP PORTUGUESE ESPORTS CHANNEL

TOP ESPORTS CHANNELS THAT BROADCAST IN PORTUGUESE ON TWITCH | JAN-JUNE 2018

RANK	CHANNEL	HOURS WATCHED	TOP GAME
1	riotgamesbrazil	5.7M	League of Legends
2	beyondthesummit_pt	2.8M	Dota 2
3	gamersclubcs	2.6M	CS:GO
4	starladder_cs_pt	1.4M	CS:GO
5	promoarenatv	1.3M	League of Legends
6	copaamerica_pt1	1.0M	Hearthstone
7	bidado	.8M	CS:GO
8	seucreysonreborn	.7M	Dota 2
9	esl_brazil	.5M	CS:GO
10	rtparenacsgo	.4M	CS:GO



FOLLOWERS ON TWITCH  
FOR RIOTGAMESBRAZIL

**531K**

PRIZE MONEY 2018 YTD  
EVENTS IN BRAZIL

**\$119K**



FOLLOWERS ON TWITCH  
FOR ESL\_BRAZIL

**214K**

PRIZE MONEY 2018 YTD  
EVENTS IN BRAZIL

**\$211K**

# MANY MAJOR MEDIA DEALS INCLUDE PORTUGUESE STREAMS

KEY MEDIA DEALS THAT INCLUDE PORTUGUESE LANGUAGE BROADCASTS | 2018 TO DATE

EVENT	MEDIA BUYER	GAME	TYPE
<b>CBLOL</b>	<b>Spor TV</b>	<b>League of Legends</b>	<b>Linear</b>
Bucharest Major	Twitch	Dota 2	Digital
ELEAGUE Major Boston	Twitch	CS:GO	Digital
DreamHack Global Tour	Twitch	Various	Digital
CS Summit	Twitch	CS:GO	Digital
ESL One Genting	Facebook	Dota 2	Digital
ESL One New York	Facebook	Dota 2	Digital
WCS Global Finals 2018	Twitch	StarCraft II	Digital
Bucharest Major	Twitch	Dota 2	Digital



SporTV is one of the biggest sports channels on Brazilian's cable TV, owned by the biggest Latin America media group (Globo). It first started with a CBLOL broadcast in 2016 for the finals and then proceeded to acquire rights for the full league afterwards.

The 2016 finals were viewed more on TV than on digital channels.

# IN-DEPTH SEGMENTING AND PROFILING OF GAME ENTHUSIASTS

TO MATCH YOUR TARGET GROUP AND OPPORTUNITIES IN ESPORTS

## 200+ VARIABLES



Newzoo's esports consumer insights allows you to profile your audience on 200+ variables including demographics, media behavior, esports participation and viewership, favorite franchises, spending habits, and brand attitude. Find a factsheet with topic list [here](#).

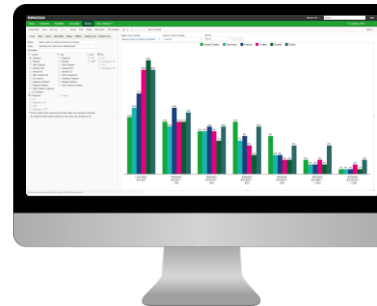
## 28 COUNTRIES/MARKETS



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Reed MIDEM's Esports BAR is the first-of-its-kind networking event dedicated to bringing together esports professionals and commercial partners in one place to develop esports into the entertainment of the future.

Esports BAR Miami is back to unite the world's best business minds in esports, actively hunting for new collaboration opportunities. But wait, there's more: on top of our 1-to-1 pre-scheduled meetings, Esports BAR Miami will include The Forum, a full-day programme of educational content, business insights and mentoring sessions. Join us at the crossroads of the global esports community.

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