INTRODUCTION

Pesquisa Game Brasil 2016 is the new wave research focused on Brazilian gamer profile.

In this third edition, Sioux, Blend and ESPM bring new insights of consumer behavior from the main market platforms: mobile (smartphones e tablets), videogames e PCs.
ABOUT US

Sioux is an interactive technology agency, renowned as a reference for gamification, advergame and game development in Brazil. Founded in 2001, the company features four business branches: Tech (developer), Play (game publisher), Comm (digital communication) and IP (intelectual property – own products). We have thousands of projects executed and our applications reached millions of downloads. Our objective is to create the bond between people and brands, engaging them through technology.

“For us, interaction is not only pressing a bottom. Is create connections between people and brands, have fun, educate and simplify duties thru technology. We do gamification from beginning.”
ABOUT US

Blend is a market research company formed by innovative professionals at a senior level. Innovation for Blend is about simplicity. It is about finding opportunities that are aligned to the timing and culture of each company.

We think of people, not projects. Understanding the vision and goals of each client is critical to “mixing” the knowledge of both sides and thus maximize growth opportunities.
ABOUT US

Founded in 1951 with the name “Escola de Propaganda do MASP” and the slogan “Who does, teaches”, ESPM sought to gather professionals from the industry to teach its courses, associating the exercise of the profession to the theory. Soon it was already known as one of the main academics institutes in Brazil. From 1974 and onwards, it has opened new units in Rio de Janeiro and Porto Alegre, plus opening post-grad education courses.

Considered a center of excellency on the subjects of Communication, Marketing and Management, ESPM now also has in its portfolio new programs for Administration (1991); Design (2004); International Relations (2006); Journalism (2011); Communication and Management Information Systems (2014); Cinema and Audiovisual Arts (2015) and Social and Consumer Sciences (2015); and new Masters and Doctorate degrees programs.
The methodology aims to achieve higher quality of information and depth of responses.

The panel also allows project partners to interact again, anytime, with the respondents, in order to gain deeper analysis.
RESEARCH TARGET

The study was conducted within online population from all over Brazil, according to the map.

São Paulo is the state with the biggest share of participants (36.5%).

2016 Survey
- Upper Class - 5%
- Upper Middle Class - 32.5%
- Middle Class - 33.1%
- Working and Lower Classes - 29.4%

Brazil
- Upper Class - 5%
- Upper Middle Class - 24%
- Middle Class - 43%
- Working Class - 25%
- Lower Class - 3%
RESEARCH TARGET

What do you play?

- Electronic/Digital games: 74.7%
- Board games: 34.1%
- No, I don’t usually play games: 11.7%
- Sports (soccer, volleyball, basketball): 32.4%
GAMER PROFILE
People that play any type of electronic / digital game

2016
52.6%  47.4%

2015
47.1%  52.9%

2013
41%    59%

...are women

WOMEN are the majority

...are men
GAMER PROFILE

Most gamers are from 25 to 34 years old

- 25 to 34 years: 34.8%
- 16 to 24 years: 31.5%
- 35 to 54 years: 27.2%
- 15 years or less: 2.3%
- Over 54 years: 4.2%
33.2% of gamers live with their children

33.6% of gamers live with their parents
**Gamers Profile**

What type of game do you play?

<table>
<thead>
<tr>
<th>Type</th>
<th>Total Average</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>54.7%</td>
<td>55.3%</td>
<td>55%</td>
</tr>
<tr>
<td>Adventure</td>
<td>49%</td>
<td>47.2%</td>
<td>54.8%</td>
</tr>
<tr>
<td>Racing</td>
<td>43.9%</td>
<td>40.8%</td>
<td>54%</td>
</tr>
<tr>
<td>Action</td>
<td>42.3%</td>
<td></td>
<td>51%</td>
</tr>
<tr>
<td>Card games</td>
<td>37.8%</td>
<td></td>
<td>49.2%</td>
</tr>
</tbody>
</table>
78.6% of Brazilians play on more than one platform.
**GAMERS PROFILE**

**Favorite platform**

- **43%** of men prefer playing on videogames
- **48.2%** of women prefer playing on smartphones

**Pie Chart**

- **Smartphones** 34.4%
- **PC** 30.1%
- **Tablet** 4.3%
- **Videogames** 29.9%
- **Others** 1.3%

**SMARTPHONES TAKE THE LEAD**
GAMERS PROFILE

Do you consider yourself a (hardcore) gamer?

Despite all game popularity, only 11% consider themselves hardcore gamers.

95.6% enjoy playing games as entertainment

11% consider themselves "gamers"
MOBILE: SMARTPHONE
**SMARTPHONE**

Internet access

- No, my phone doesn't have Internet access: 3.2%
- Wi-fi only: 48.9%
- 3G and/or 4G (data plans from MNOs): 47.9%
What do you use in your smartphone?

DOWNLOADING APPLICATIONS DRIVES THE RISE OF OTHER ACTIVITIES IN THE SMARTPHONE

<table>
<thead>
<tr>
<th>Activity</th>
<th>2013</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download Apps</td>
<td>56%</td>
<td>87.3%</td>
<td>91.5%</td>
</tr>
<tr>
<td>Social Media</td>
<td>84%</td>
<td>88.8%</td>
<td>93.6%</td>
</tr>
<tr>
<td>Games</td>
<td>81%</td>
<td>91.9%</td>
<td>93%</td>
</tr>
<tr>
<td>Listen to Music</td>
<td>81%</td>
<td>84.6%</td>
<td>88.6%</td>
</tr>
<tr>
<td>Watch Videos</td>
<td>63%</td>
<td>85.5%</td>
<td>92.3%</td>
</tr>
<tr>
<td>Work</td>
<td>52%</td>
<td>66.4%</td>
<td>67.4%</td>
</tr>
</tbody>
</table>
What do you use in your smartphone?

**Take Pictures**
- 2015: 96.4%
- 2016: 95.1%

**Instant Messaging**
- 2015: 93%
- 2016: 94.9%

**SMS Text Messages**
- 2015: 77.5%
- 2016: 72.1%

**Street Map Apps**
- 2015: 82.4%
- 2016: 76.6%

The smartphone usage for photos and instant messaging remain a basic need among users.
What type of apps do you download?

- GAMES: 71.9%
- ENTERTAINMENT: 56.8%
- PHOTOGRAPHY: 42.3%
- COMMUNICATION: 37.9%
- PRODUCTIVITY (WORK): 24%
- FINANCES: 21.3%
- HEALTH: 21.2%
- I DON'T DOWNLOAD APPS: 6%
- OTHERS: 2.9%
SMARTPHONE
Favorite game categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Average</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>49.4%</td>
<td>52.8%</td>
<td>49.5%</td>
</tr>
<tr>
<td>Action</td>
<td>43.8%</td>
<td>44.8%</td>
<td>46.5%</td>
</tr>
<tr>
<td>Racing</td>
<td>40.4%</td>
<td>41.3%</td>
<td>45.9%</td>
</tr>
<tr>
<td>Pastimes</td>
<td>33.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simulation</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trivia games</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Card games</td>
<td>34.4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports</td>
<td></td>
<td></td>
<td>40.8%</td>
</tr>
<tr>
<td>Shooter</td>
<td></td>
<td></td>
<td>39.8%</td>
</tr>
</tbody>
</table>
SMARTPHONE
How consume apps?

71.9%
downloads game apps regularly

28.6%
28.6% download weekly
SMARTPHONE

How consume apps?

- **78.2%** download only free-to-play games
- **50.7%** say they do not pay for a game because there’s always other free-to-play options
- **37%** say they don’t pay for a game because it’s too expensive
SMARTPHONE
Opinions from payers

36.8%
- pay for premium games because of their superior quality compared to free-to-play options

26.8%
- dislike seeing advertisements in a game

42.7%
- think paying for a premium game is worthwhile
**SMARTPHONE**

**About Ads**

**ARE YOU OKAY WITH SEEING ADS IN A FREE-TO-PLAY GAME?**

- **Yes**: 68.2%
- **No**: 31.8%

In 2015, 66.4% said **YES**

In 2013, 77% said **YES**

**DO ADS DISRUPT THE GAME?**

- **Yes**: 64.9%
- **No**: 35.1%

In 2015, 64.4% said **YES**

In 2013, 62% said **YES**
WHERE DO YOU LOOK FOR **NEWS**?

- **INTERNET**: 51.7%
- **FRIENDS**: 45.1%
- **SOCIAL MEDIA**: 41.2%
- **YOUTUBE**: 30.6%
- **MARKETPLACE**: 30.1%
- **OTHERS**: 2.8%
SMARTPHONE
Brands connected

2015
Samsung 33.2%
LG 4.7%
Nokia 11.1%
Sony 2.7%
Motorola 13.6%

2016
Samsung 32.2%
Apple 28.8%
Motorola 14%
LG 7.8%
Sony 6.3%
Blackberry 0.5%
Others 2.1%
Microsoft 2.9%
Nokia 5.5%

SAMSUNG COMES OUT ON TOP FOR CONSUMER'S PREFERENCE
MOBILE: TABLET
**TABLET**

Internet access

- 3G and/or 4G (data plans from MNOs) **30.2%**
- Wi-fi only **68.8%**
- No, my tablet doesn’t have Internet access **1%**
TABLET
Operational system

Android is also the leader in the tablet segment.

2015
- Android: 78.8%
- iOS: 16.4%
- Windows 8: 1.6%
- I don't know: 3.2%

2016
- Android: 79.1%
- iOS: 12.9%
- Windows Phone: 4.1%
- Others/I don't know: 3.7%
SMARTPHONE
What do you use in your tablet?

- Download Apps
  - 2015: 90.3%
  - 2016: 92.7%
- Social Media
  - 2015: 90.8%
  - 2016: 88.8%
- Games
  - 2015: 96%
  - 2016: 95.4%
- Listen to Music
  - 2015: 67.9%
  - 2016: 75.2%
- Watch Videos
  - 2015: 89.6%
  - 2016: 93.4%
- Work
  - 2015: 57.4%
  - 2016: 61.6%
- Take Pictures
  - 2015: 72.3%
  - 2016: 73.7%
- Street Maps Apps
  - 2015: 58.7%
  - 2016: 59.1%
TABLET

What type of apps do you download?

- **Games**: 81.5%
- **Entertainment**: 54.7%
- **Communication**: 36.3%
- **Photography**: 36.3%
- **Productivity (Work)**: 26%
- **Finances**: 25.1%
- **Health**: 19.5%
- **I do not download apps**: 5.4%
- **Others**: 6.3%
What are the videogames that you have?

The Brazilian gamer usually owns more than one videogame.
Purchasing videogames

WHERE DO YOU BUY YOUR VIDEOGAME?

68.5%

- OFFICIAL RETAIL RESELLERS IN BRASIL (PHYSICAL AND/OR ONLINE STORES)

14.5%

- GREY MARKETS (NO WARRANTIES)

10.2%

- DURING AN INTERNATIONAL TRIP

6.8%

- OTHERS

70.3%

- chose to buy at a official retailer for the warranty

85.5%

- chose to buy abroad for the price
WHERE DO YOU BUY YOUR GAMES?

- **52%** Physical Retail Shops
- **30.8%** E-Tailers
- **12%** Videogames’ Marketplace (Xbox Live, PlayStation Store, Nintendo eShop)
- **2%** International E-Tailers
- **3.2%** Others

- **46.1%** buy used games
- **77.4%** bought used games for the attractive price
VIDEOGAME

Purchasing games

WHAT CONvinces YOU TO BUY A GAME?

64.8%

buy up to three games per year

1. PRICE

2. FRANCHISE

3. PRESS REVIEWS

4. LOCALIZATION

5. MY FRIENDS ALSO LIKE IT
Brazilian localization

77.8% have already bought a full localized game

56.4% say that localizations are good or excellent
VIDEOGAME
Preferred type of game

TOTAL AVERAGE

Sports: 14.8%
Shooter: 13.9%
Action: 10.3%
Racing: 9.8%
RPG: 9.5%

WOMEN

Adventure: 13.1%
Strategy: 11.7%
Action: 9%
Racing: 8.6%
RPG: 8.6%

MEN

Sports: 20.3%
Shooter: 18.1%
Action: 11.1%
Racing: 10.5%
RPG: 10%
55.3% often play online

34.1% play between 1 to 3 hours weekly

Xbox Live 50.2%

PlayStation Network 49.8%
VIDEOGAME
Preferred brand

- Sony (PlayStation) 52.9%
- Microsoft (Xbox) 42.6%
- Nintendo (Wii) 4.6%

PLAYSTATION TAKES THE LEAD AS THE GAMER'S FAVORITE
Where do you play?

- Notebook: 68.6%
- Desktop: 35.7%
- I don’t play on my PC: 8.2%

91% use only one monitor.
PC Main advantages

Better control and precision: 20.6%
Lower game prices: 19%
My favorite games are on this platform: 18.6%
PC
Where do you buy games?

- Online retail store: 37.2%
- Physical retail store: 27.8%
- In-game micro transactions: 15%
- STEAM: 9.4%
- Others: 10.7%
PC
Channel information

- Internet: 42.3%
- Friends: 16.9%
- Social Media: 16.7%
- YouTube: 16.7%
- Steam: 5.1%
- Others: 2.4%
PARENTS, KIDS & GAMES
PARENTS, KIDS & GAMES

Age of the respondents’ children

- **44.3%** up to 5 years old
- **27.4%** up to 10 years old
- **25.0%** up to 15 years old
- **17.5%** up to 20 years old
- **10.1%** over 20 years old
PARENTS, KIDS & GAMES

Do your children usually play electronic/digital games?

88% of the respondent’s children played electronic/digital games.
What is your opinion related with your kid(s) playing games?

- 65.8% are fine with it, but with restrictions set up
- 17.5% are completely for it
- 9.5% don’t like it, but allow it
- 6.8% are indifferent
- 0.5% are completely against it
PARENTS, KIDS & GAMES
Do you play with your children?

85.6%
of parents play games with their children
PARENTS, KIDS & GAMES

Parental control over gaming

- Control Genres: 62.2%
- Control How Long: 52.8%
- Control Time: 39.9%
- Control With Whom: 24.6%
- No Restrictions: 9.2%
ESPORTS

Have you ever participated in a gaming competition?

- No: 63%
- Yes, among my friends: 33.6%
- Yes, at a large scale event: 3.4%
ESPORTS
Have you ever participated in a gaming competition?

Only 18.6% of gamers who participated in a competition are part of a professional team.

27.5% have won money as professional players.
ESPORTS

Have you ever participated in a gaming competition?

- 26% have watched professional gaming competitions
- 71.2% have watched these competitions online
ESPORTS
Playing with friends

59.4%
often play with friends at home

31.3%
organize amateur competitions at their place
IN CONCLUSION
The majority of gamer’s population are women with 52.6%. The Brazilian gamer is multiple platform with 70.8% playing on more than one device. The smartphone continues the most popular gaming platform with 77.2% followed by computers (66.9%) and videogames (45.7%). Despite the games popularity, only 11% consider themselves “hardcore gamers”. Most people are casual consumers and play digital games as an entertainment option.

The preferred gaming platform is the smartphone, with 34.4% seconded by computer (30.1%) and videogames (29.9%). The top three game categories are Strategy (54.7%) Adventure (49%) and Action (42.3%). It is interesting to note while both genders enjoy Strategy, women also enjoy categories that men usually do not, such as Trivia games (Crosswords, Puzzles, etc.).

Regarding smartphone’s mobility, 87.6% of the respondents said to play while are in transit (riding the bus, subway or car). People also seem to play during work hours (74.5%), a state that remained consistent with preview’s research edition.
Out of the respondents, 71.9% said they would often download apps in their smartphones. Every day, 71.3% send text messages (WhatsApp, Viber and others) and 61.4% access social media. Downloading games is a daily habit of 37.9% of the sample.

The same habits are common sense with the tablets, but with a higher emphasis on gaming: 81.5% downloads game apps weekly (33.1%).

Downloading free-to-play games is still the consumer behavior of the majority of gamers (78.2%). The presence of similar free-to-play options alongside the paid ones was mentioned as the main reason (50.7%) for they never buy any. Only 16.5% of respondents say in-game advertisements do not disrupt their experience.

For a Brazilian gamer, the fair price for a paid mobile game is R$ 13.63.
Despite the 8th console generation completed more than two years since launch (Xbox One, PlayStation 4 and Wii U), Xbox 360 (7th gen) is the most popular videogame with 40.9%, followed by the PlayStation 2 (35.3%) and PlayStation 3 (29.5%). Xbox 360 also remains the favorite videogame at 31.9%, followed by the PlayStation 4 with 24.7%.

Consumer behavior from videogame category has some highlights: 68.5% buy their products at official retail stores in the country, 14.5% from the gray market and 10.2% during international travels. The main reason to buy on an official reseller is the warranty (70.3%) and most respondents buy up to three games per year (64.8%). 46.1% of the respondents buy used games.

Game full Portuguese localization tend to be well-regarded by consumers, with 40.9% saying it’s good, 37.7% saying it’s regular and 15.5% excellent. Their favorite game category is Sports (14.8%), Shooter (13.9%) and Action (10.3%).
Even after 7 years after its launch, Windows 7 is the main operational system among gamers (39.1%), followed by Windows 10 (31.5%). Notebooks are the preferred gaming device (68.6%) and respondents say they enjoy playing on the PC for its higher controls and precision (20.6%), followed by the lower cost of games (19%).

Online retail is most popular channel for PC games purchases (37.2%), followed by physical retail stores (27.8%) and in-game revenue transactions (15%). The service provider STEAM was mentioned by 9.4%.
For the second consecutive year, the survey brought up questions about the relationship between gaming and parenting, demystifying any barriers of this kind of entertainment. The majority of parents (88%) said their children do play digital games.

Keeping the same trend of last year, 17% of the parents are completely in favor of their children playing games, while 65.8% are ok with that under some kind of control as restricting game categories (62.2%) and time spent playing (52.8%). Many parents even play together with their children (85.6%).
As predicted in 2015, women are now on “equal term” with men regarding gaming habits. The smartphone remains the platform of choice for casual entertainment. The relationship between parents, their children and gaming remains close. There are no barriers and gaming moments are often shared between them. E-Sports also deserves highlight, especially for its high potential growth.

This converge to the universalizing of gaming with huge potential of engagement. It is time to stop seeing gaming as a niche, but as an important strategy for companies regarding, communication, experience management and engagement.
Thank you.