OBSERVATORY of argentinean video game industry

UNRaf UNIVERSIDAD NACIONAL DE RAFAELA

VIDEOJUEGOS HECHOS EN ARGENTINA

ANNUAL SUMMARY

MAIN MARKETS

Small- and medium-sized studios

1st place

2nd place

3rd place

ESTIMATED INDUSTRY SIZE*

U$S 72.341.040

* Calculated as a projection of human resources hired by professional profile (employees and freelancers)

HR

1495 ACTIVE PROFESSIONALS

1077 Full-time

63 Part-time

355 Freelancers

MAIN PLATFORMS

PC/Mac **71%**

Mobile **61%**

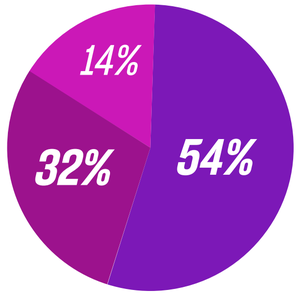
TYPES OF GAMES DEVELOPED

Casual **37%**

Adventure **34%**

Action **29%**

S&ME* distribution



Micro

Small

Medium

* According to S&ME AFIP classification-Services category by number of employees
Workers with employee status and full-time freelancers were counted

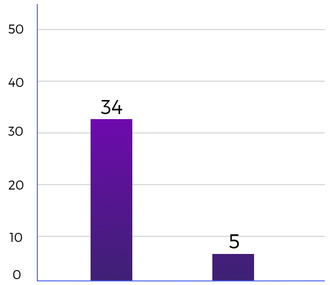
TARGET AUDIENCE

18-35 years **89%**

Percentage of female workers in relation to the total amount of workers with employee status **23%**

Female workers occupying STEM* positions in relation to the total amount of female workers **67%**

* science, technology, engineering and mathematics



QTY. OF VGS LAUNCHED IN 2021

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2022 EDITION*

* Survey conducted in 2022 on activities carried out in 2021

https://observatoriovj.unraf.edu.ar · Contact: hernanrevale@unraf.edu.ar

OBSERVATORY
of argentinean
video game industry

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VIDEOJUEGOS HECHOS EN ARGENTINA

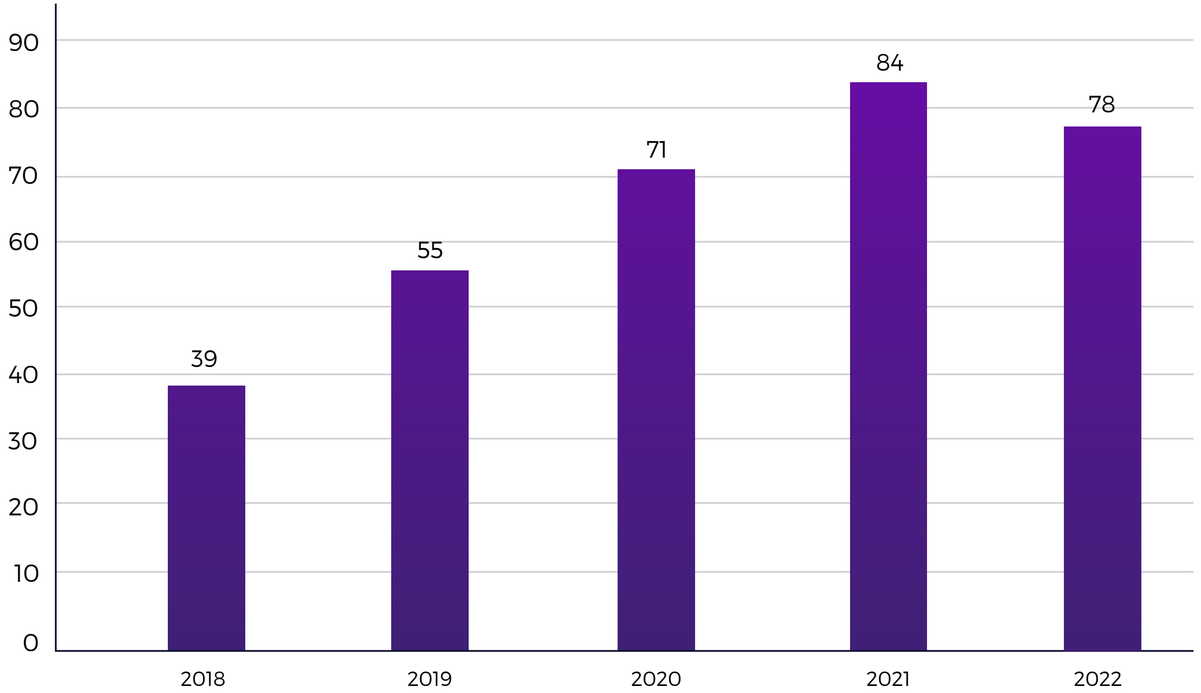
Mariano Obeid **-** *President*

Miguel Martín **-** *Executive Director*

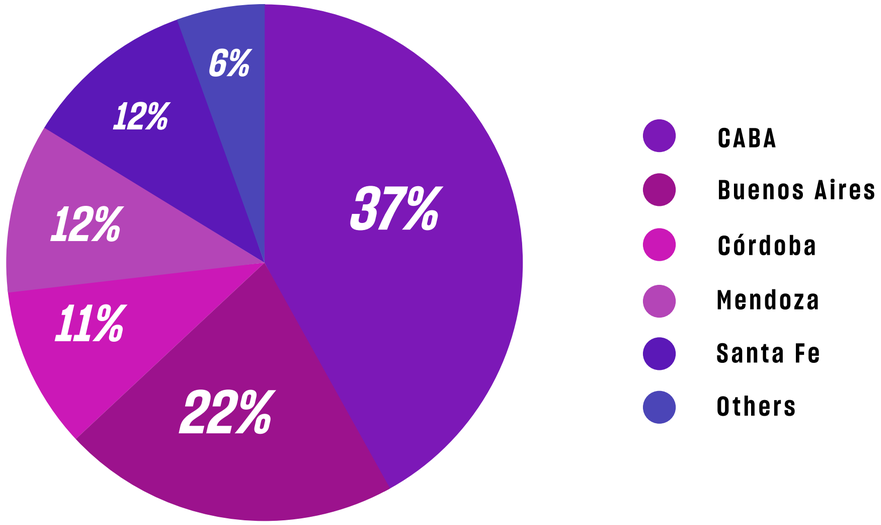
Report Production

Hernán Revale / Juan Ignacio Minotti / Octavio Cerutti

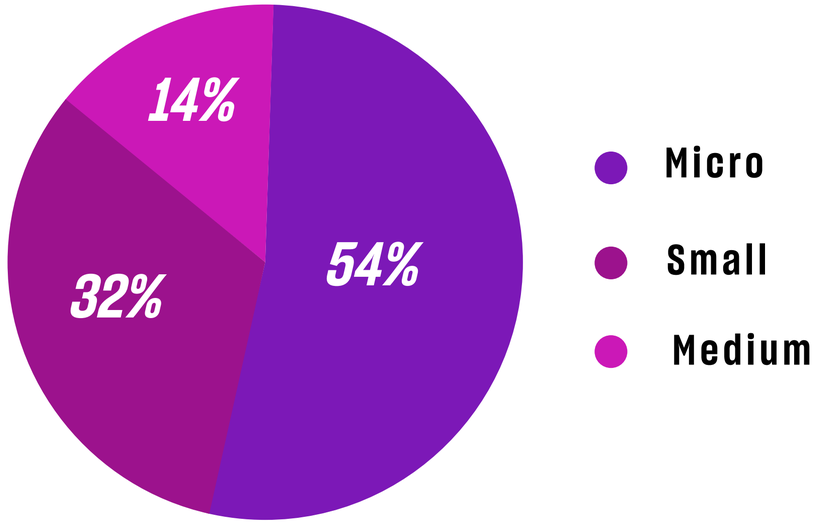
Number of responses to previous and current reports



Distribution of people surveyed by province and CABA

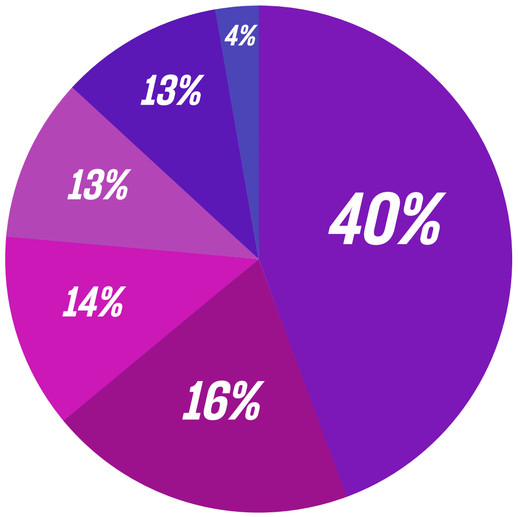


SIZE*



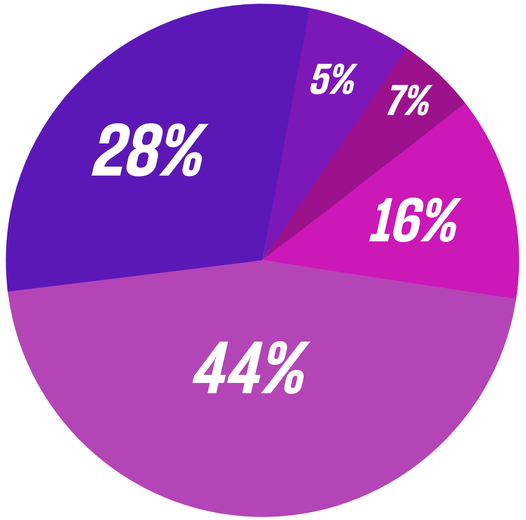
* According to S&ME AFIP classification–Services category by number of employees
Workers with employee status and full-time freelancers were counted

Legal structure



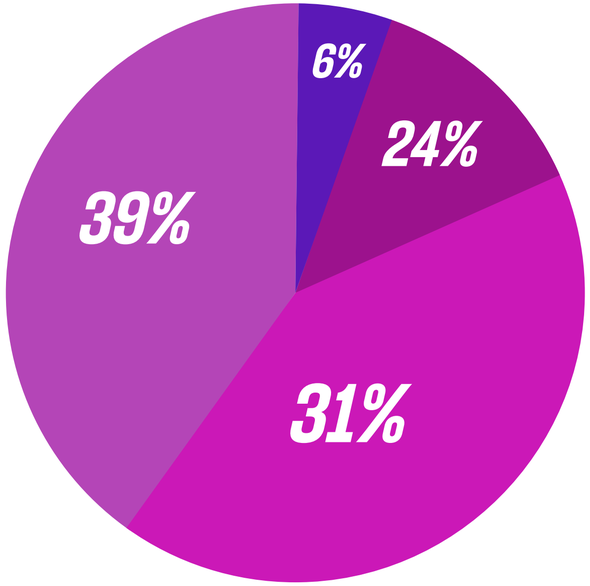
- Sole Proprietorship
- No registration
- Simplified Stock Corporation (S.A.S.)
- Corporation (S.A.)
- Limited Liability Company (S.R.L.)
- Registered Taxpayer

Seniority



- 2000 - 2004
- 2005 - 2009
- 2010- 2014
- 2015- 2019
- 2020- 2022

Year of 1st video game launched



- 2005 - 2009
- 2010 - 2014
- 2015 - 2019
- 2020 - 2022

Did the entrepreneurial team or partners have past experience in creating another business/company in the field of video games?

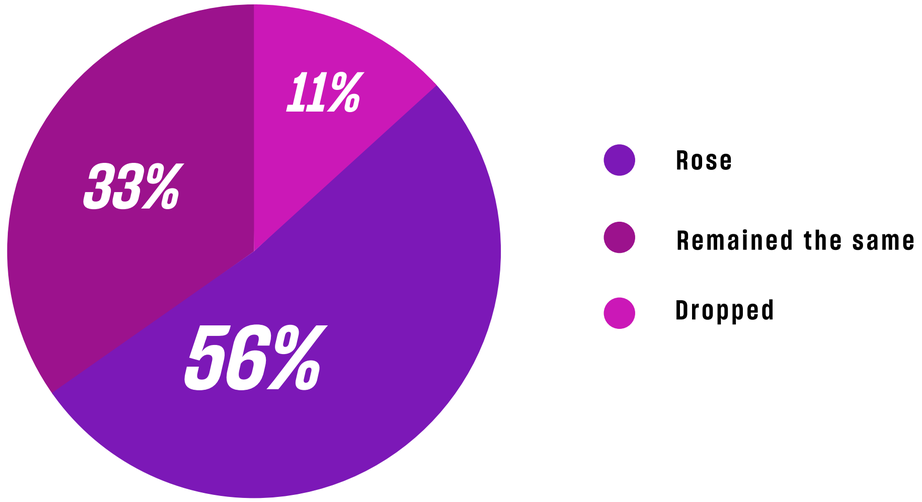
YES	NO
43%	57%

Estimated industry size by employee projection*

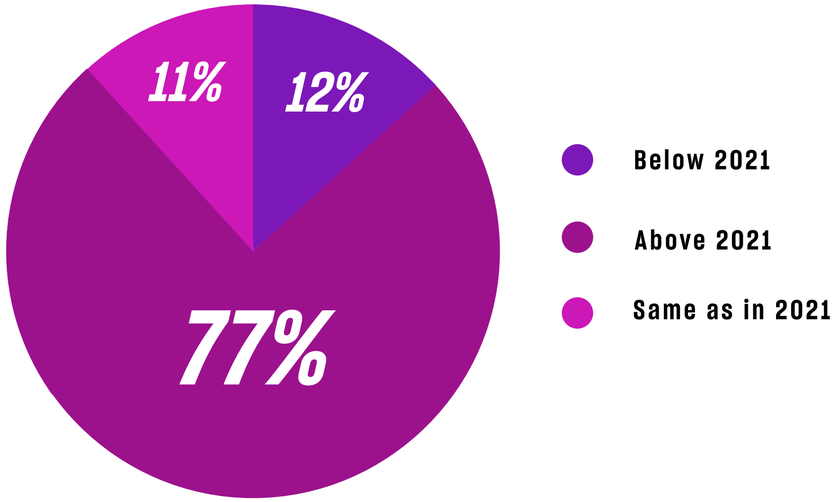
U$S 72.341.040

* Calculated as a projection of human resources hired by professional profile (employees and freelancers).

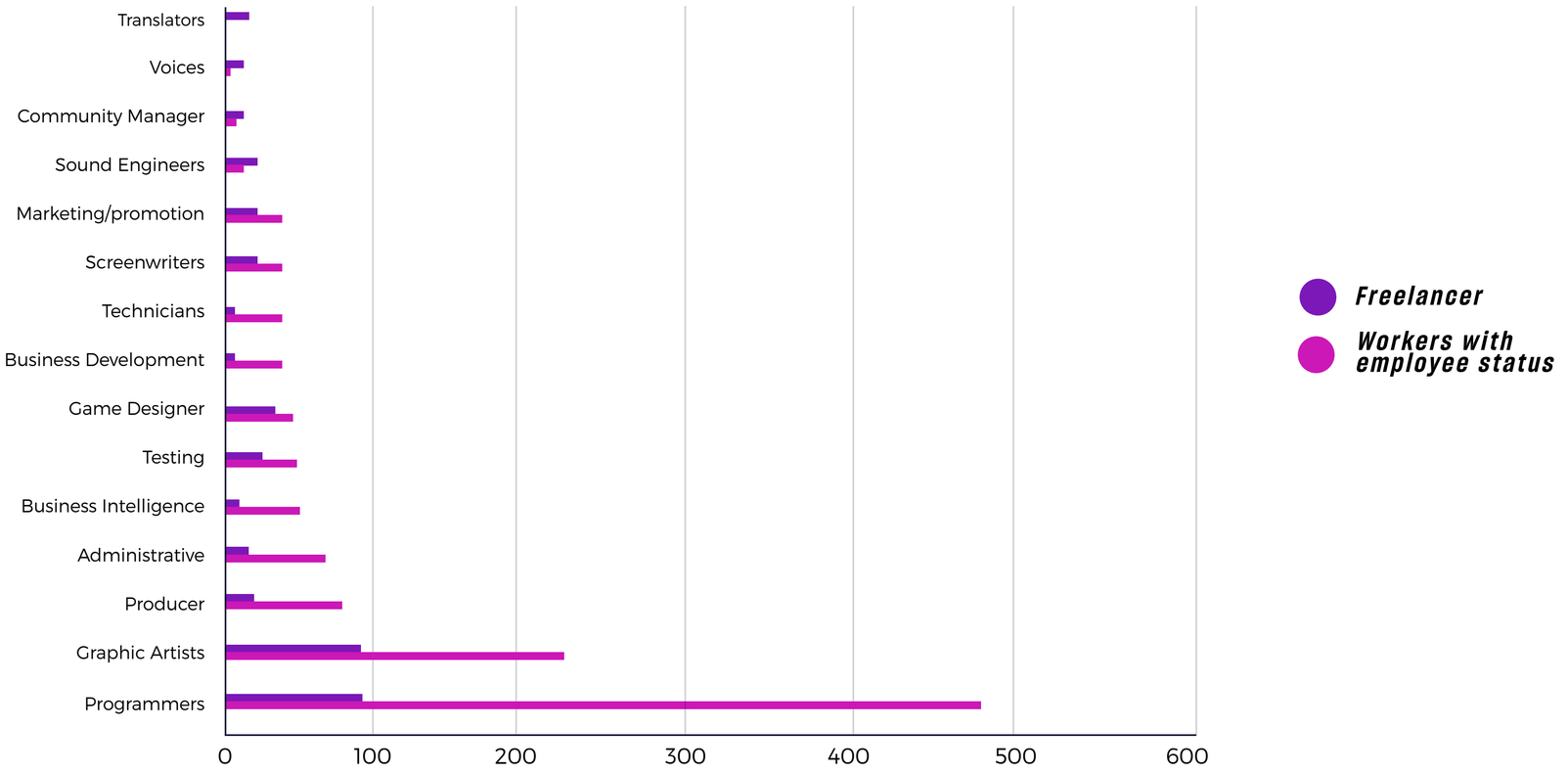
Turnover in 2021 vs. 2020



Turnover projection for 2022



Number of workers in professional roles



GENDER

Average number of director/managerial positions held by women

27%

Female workers occupying STEM* positions in relation to the total amount of female workers

67%

* science, technology, engineering and mathematics

Percentage of female workers in relation to the total amount of workers with employee status

23%

Proportion of studios/companies that have taken actions reflecting on diversity and gender issues in 2021.

30%

Percentage of transgender and non-binary people in the industry

0,3%

Examples of some actions carried out

“Campaigns during Pride Day”

“Formation of teams with a gender perspective”

“Cycle of network conversations to reflect, discuss and debate on gender and stereotypes”

“Developments for the LGBTIQA+ community”

“Talks on gender topics and consultancy with national communities (WINGAR)”

“Talks on the role of women and their growth in the e-sports industry”

“We shared reports and webinars on gender and inclusive work cultures, as well as recommended readings, series and movies that address these issues”

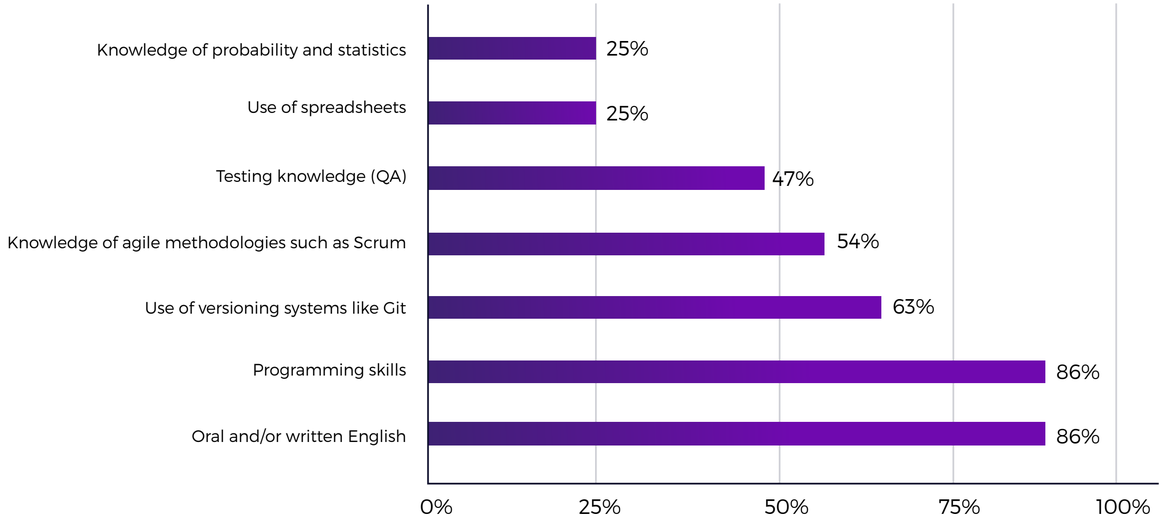
“Design of video games with gender perspective”

“Development of a non-binary avatar and inclusive language generation system in all communication”

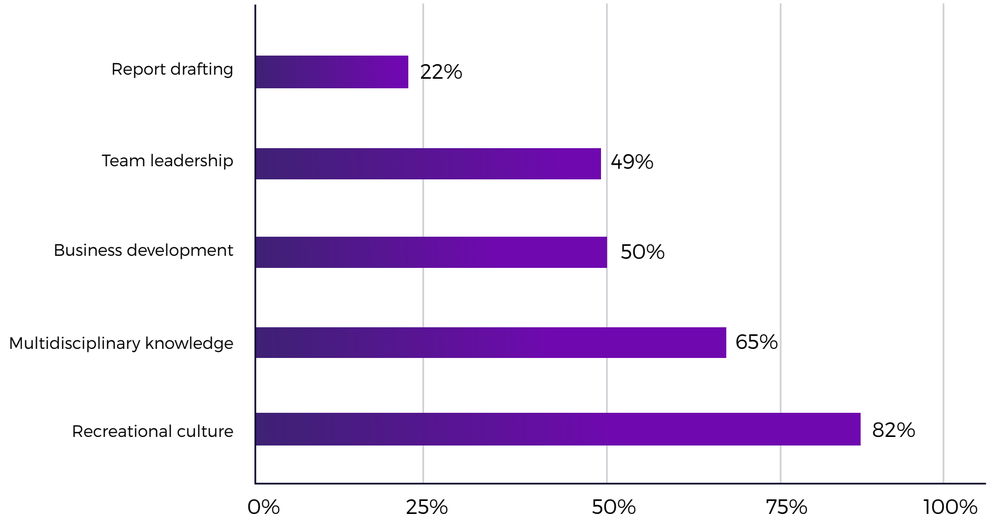
“Development of a game that addresses disability issues”

“Participation in the ‘Crear Juegos en Argentina - N3 Videojuegos con perspectiva de género y diversidad’ [Creating Games in Argentina - N3 Video games with a gender and diversity perspective] call”

Technical skills needed for the industry



Other skills needed for the industry

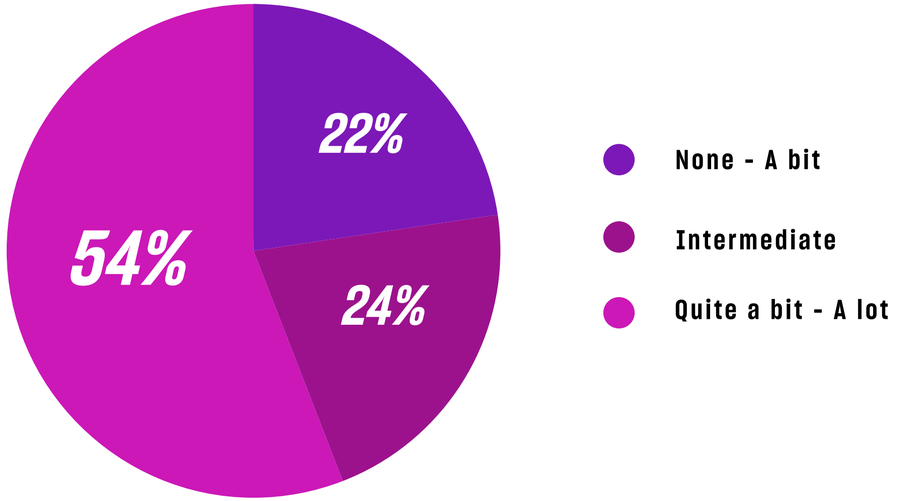


Proportion of employees with a university degree **58%**

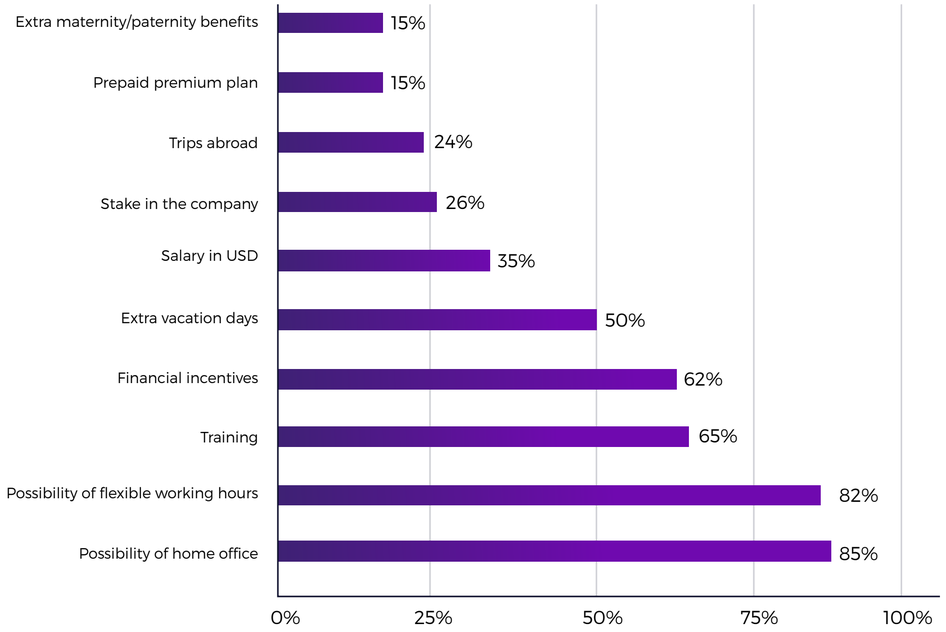
Ranking of the hardest to find profiles

1º	Commercialization
2º	Development
3º	Game Design
4º	Production
5º	Art

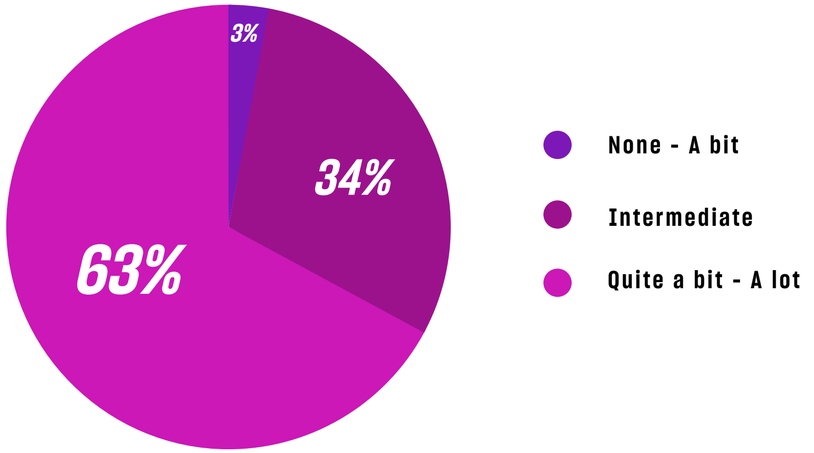
To what extent do you consider that the outsourcing of personnel abroad makes it hard to find personnel for your own company/business?



Actions for personnel retention



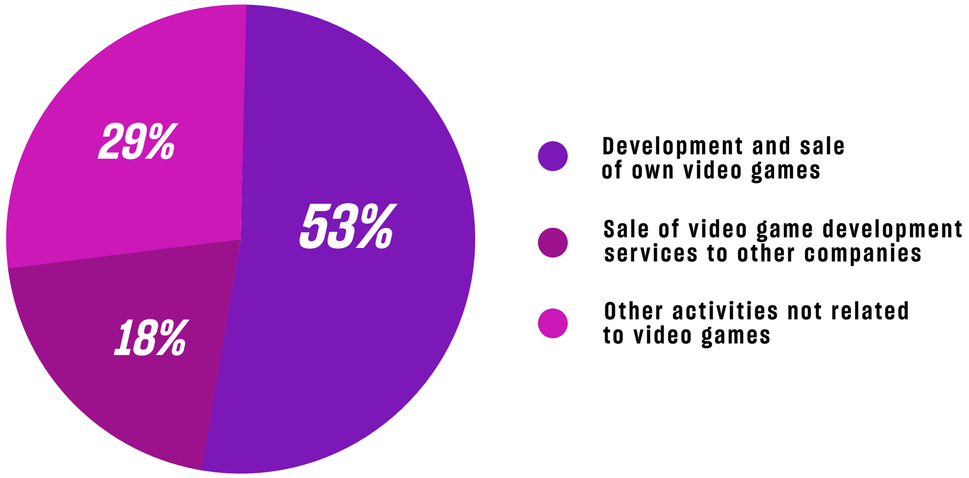
To what extent do you consider that the actions implemented for personnel retention were effective?



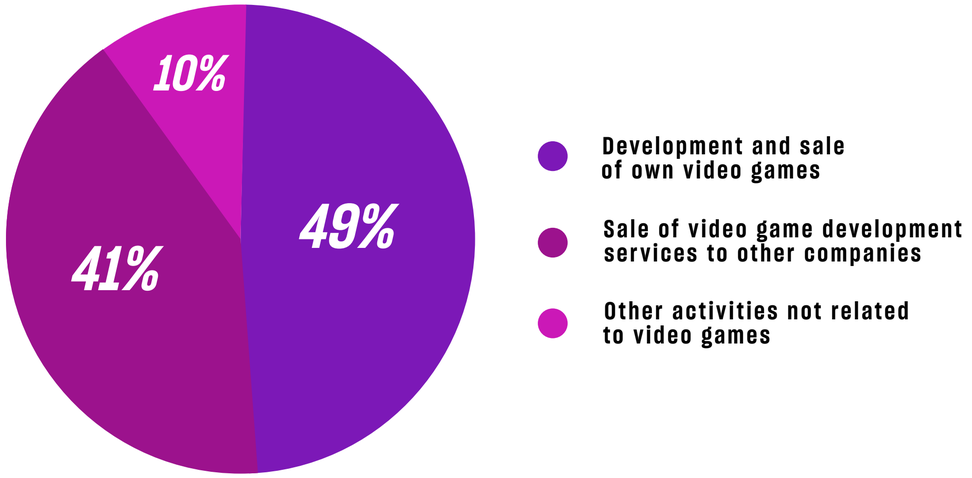
Proportion of studios with employees who have carried out personnel retention activities

78%

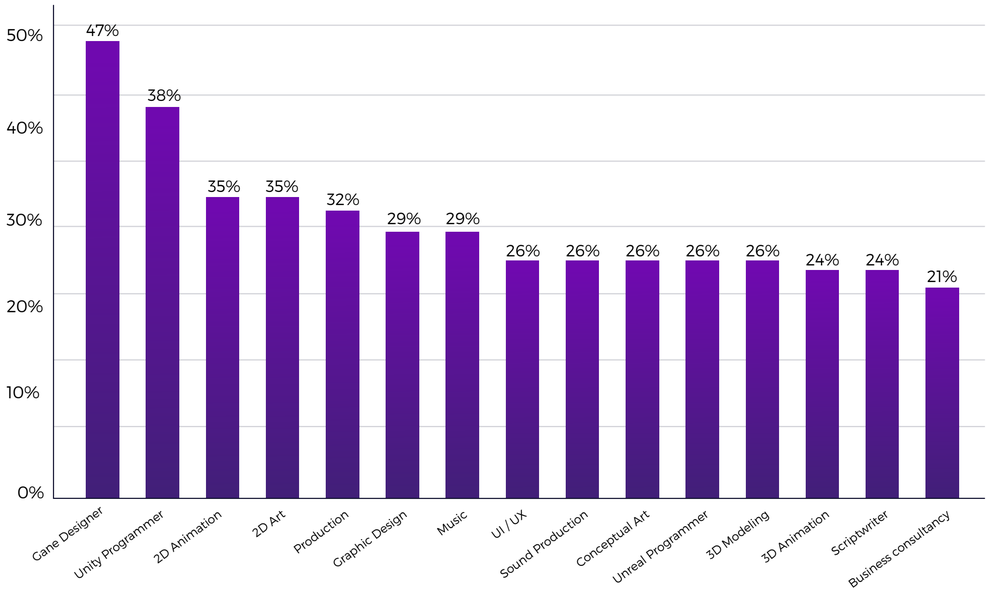
Distribution of activities carried out by micro-sized studios



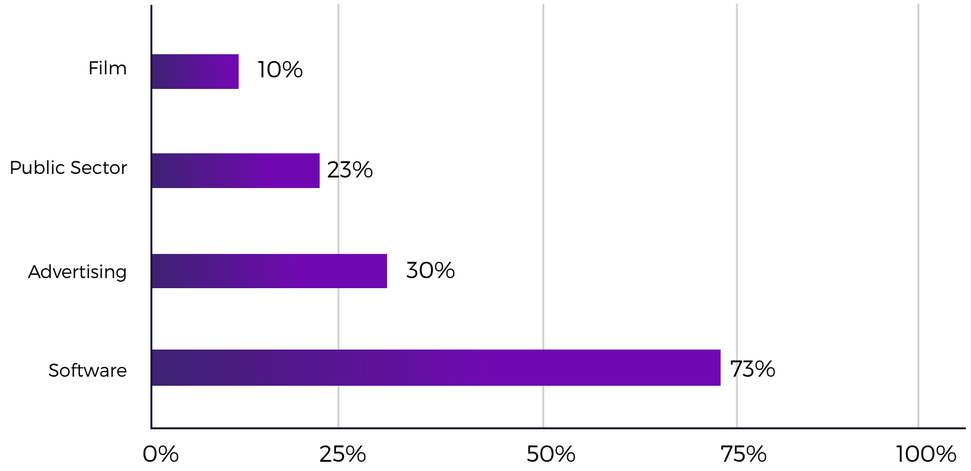
Distribution of activities carried out by small- and medium-sized studios



Activities that are secondary to video game production

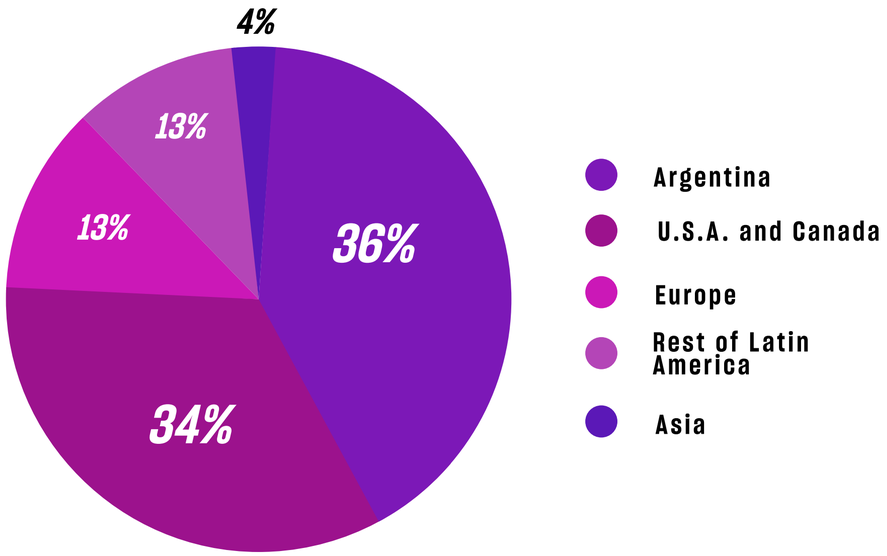


Sectors or industries outside of video games for which your company works

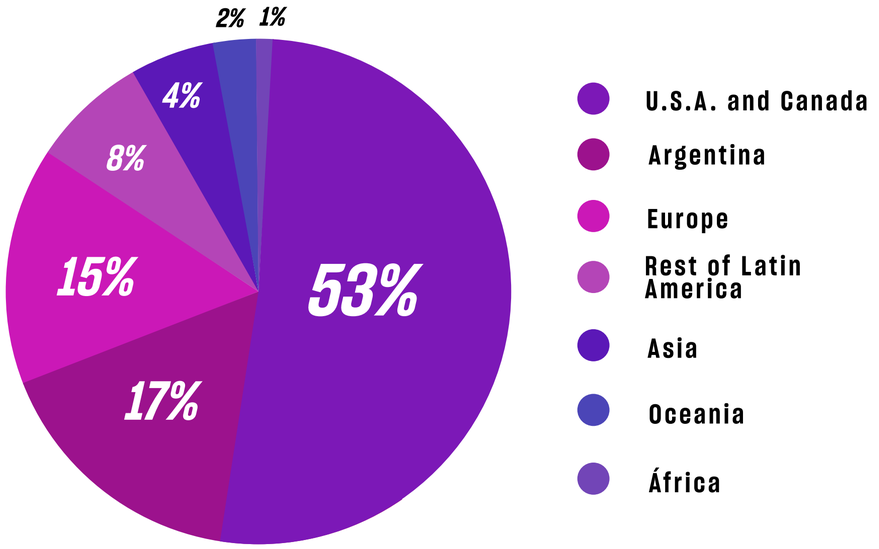


Own video game marketing destinations (B2C)

Micro

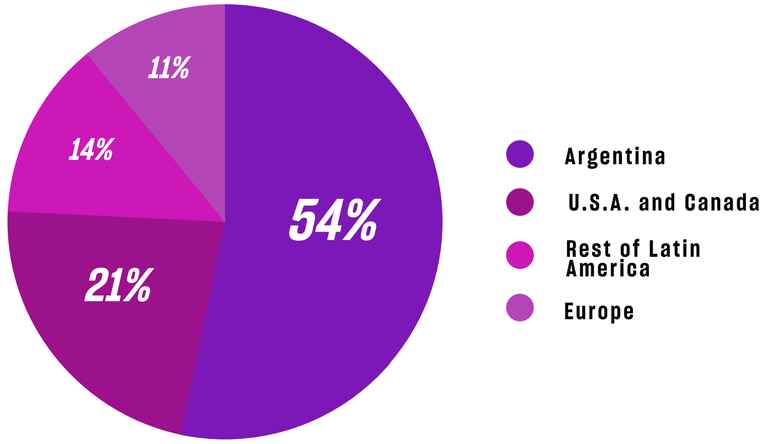


Small- and medium-sized

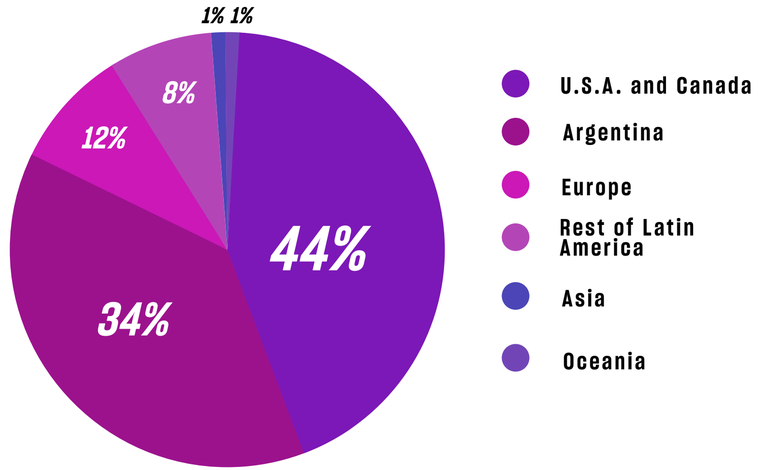


Service marketing destinations (B2B)

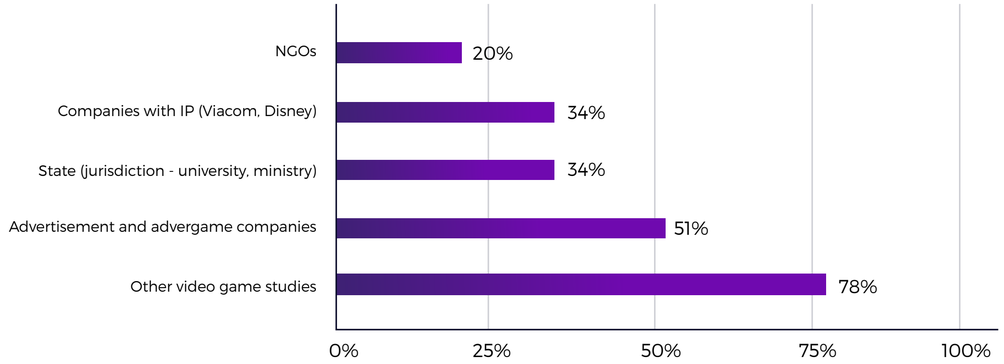
Micro



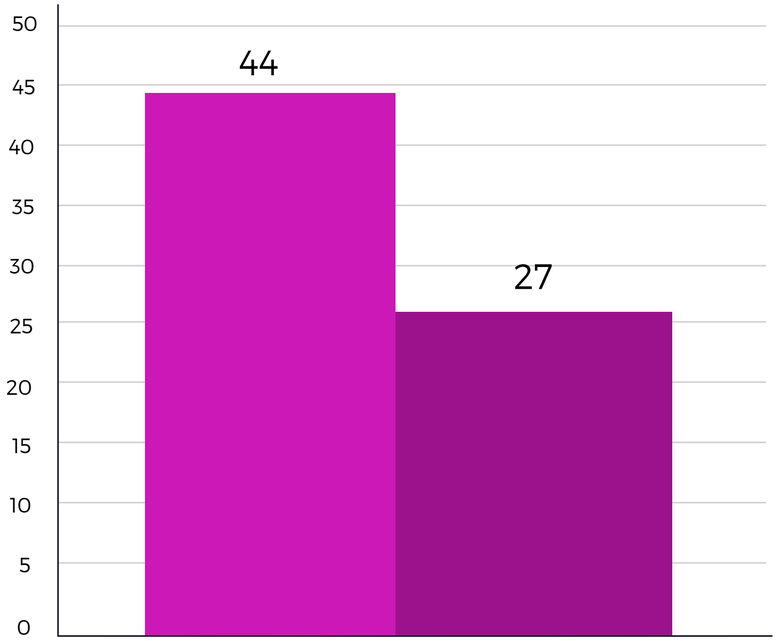
Small- and medium-sized



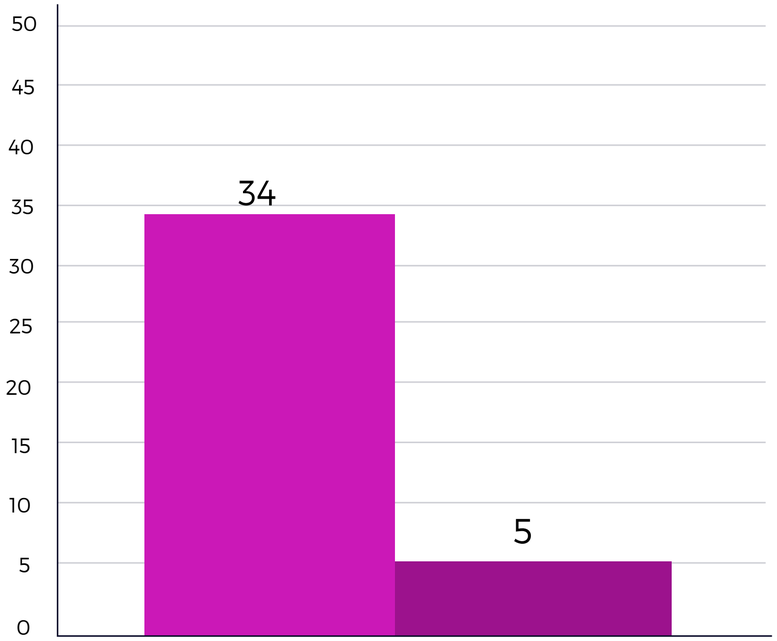
Type of customer to whom your company/business offers services



Number of games being developed and launched by size



Development started in 2021 and not launched yet

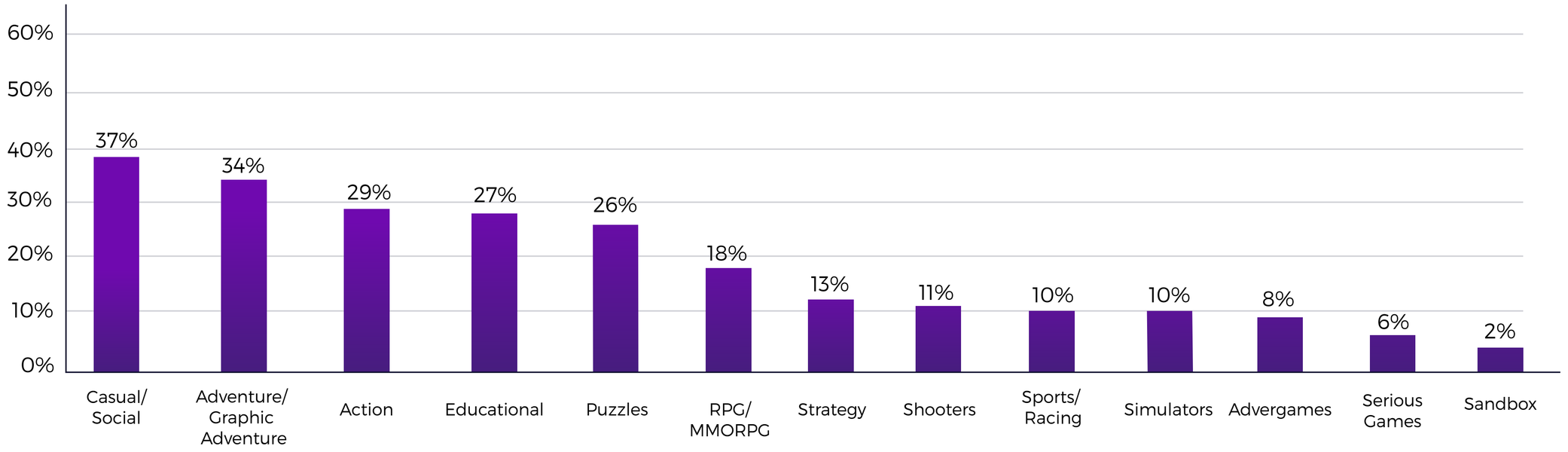


Launched only in 2021

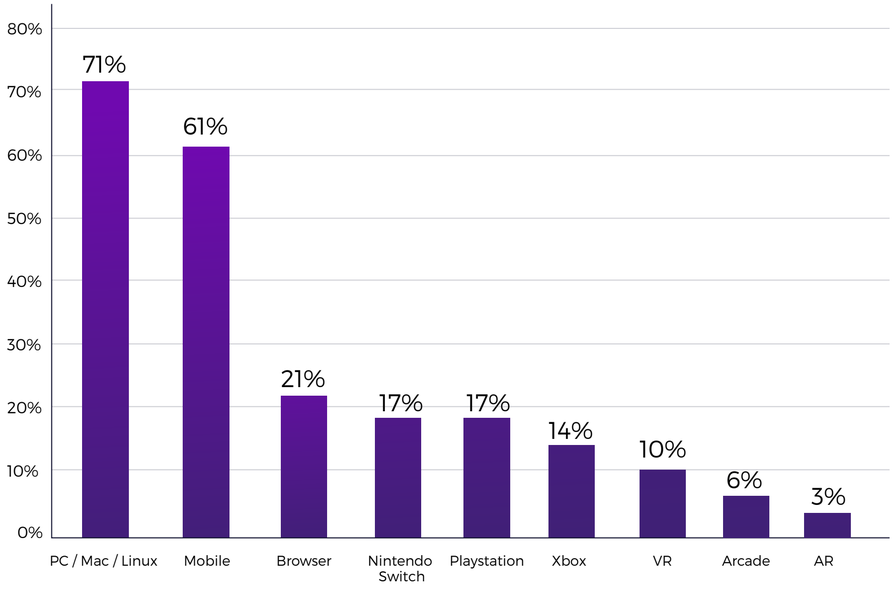
Small VGs (up to 6 months of development)

Large VGs (6+ months of development)

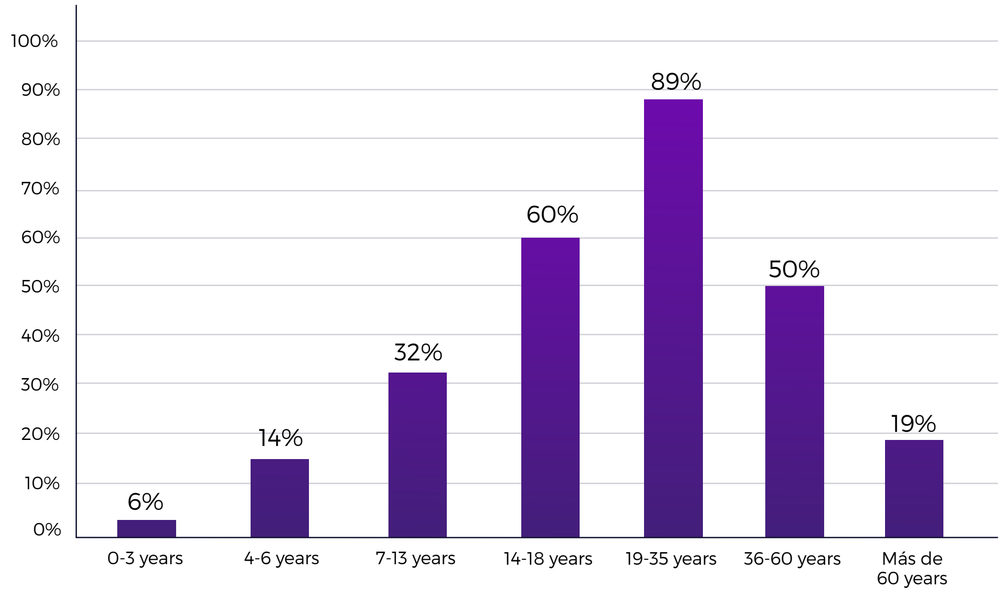
Types of video games developed



Target platforms for video games

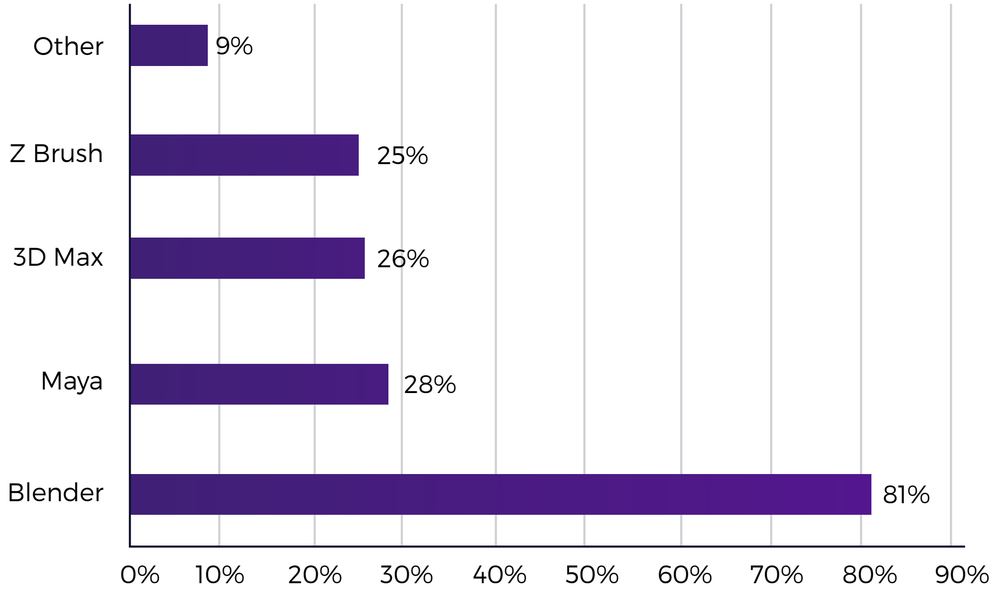


Target age for video games

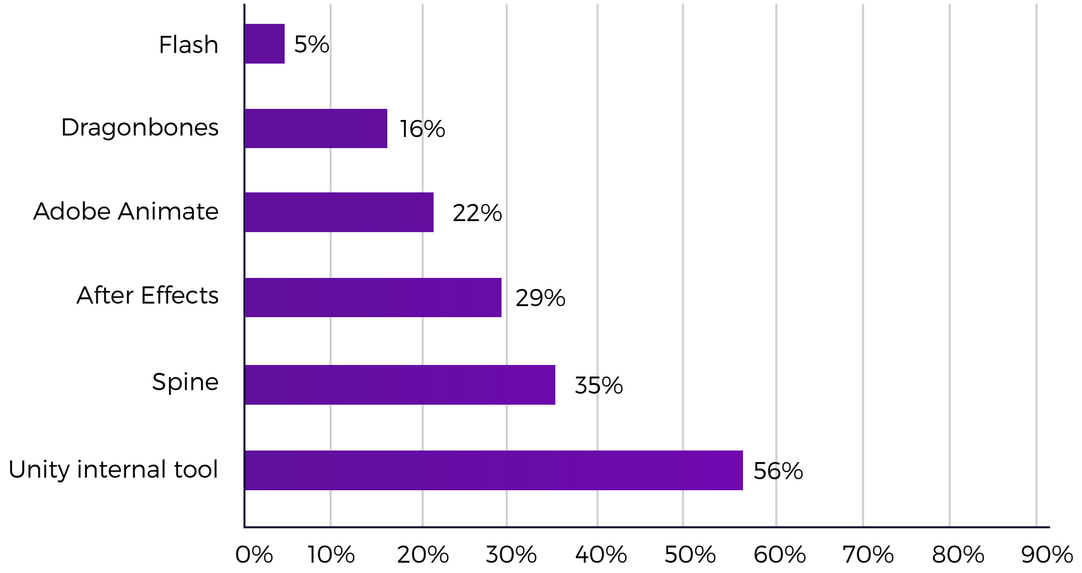


Video game development tools

3D Programs

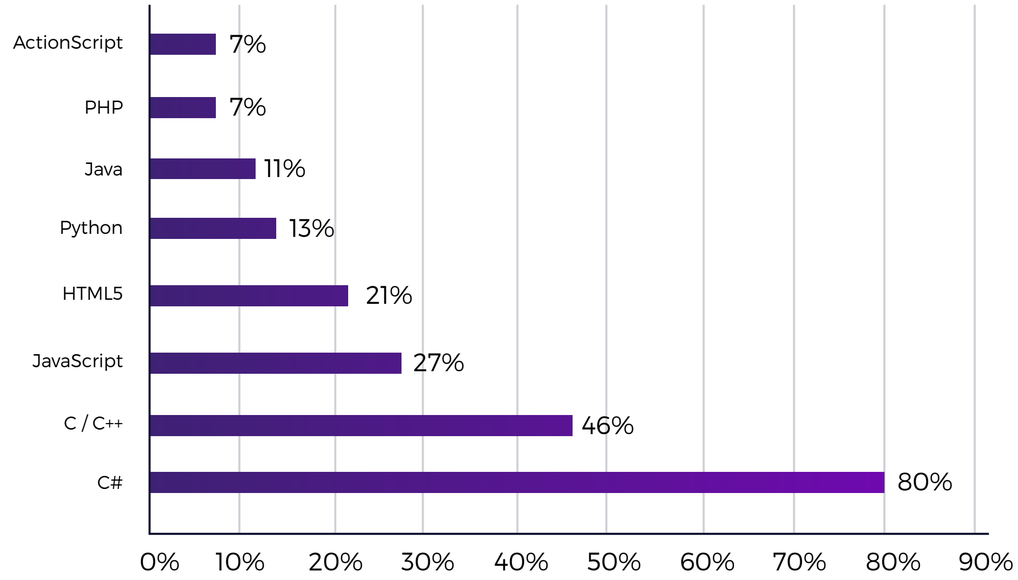


Animation software used

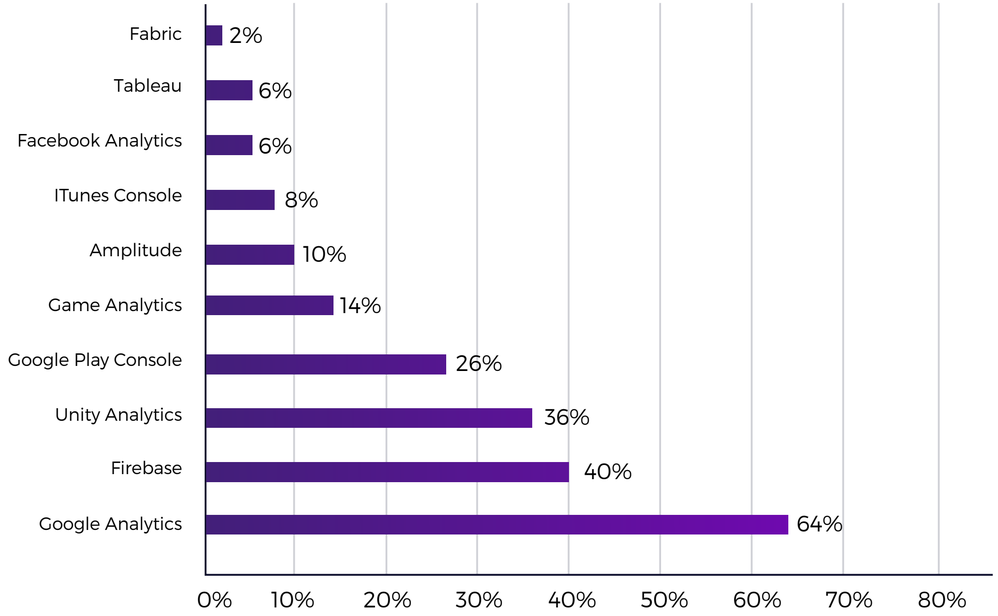


Video game development tools

Programming language used

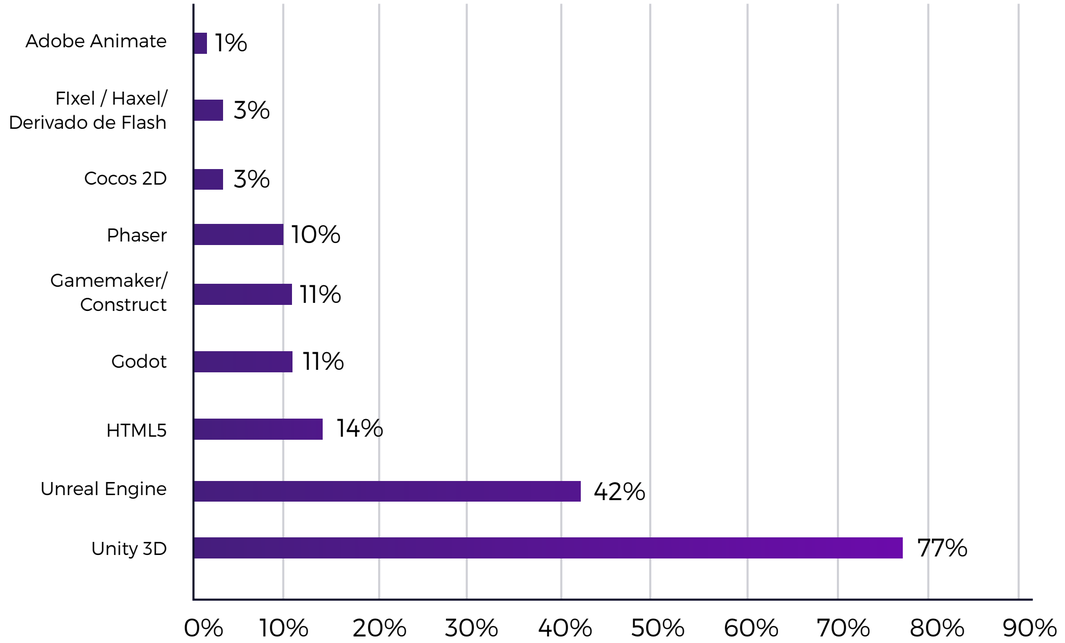


Engine for data analysis

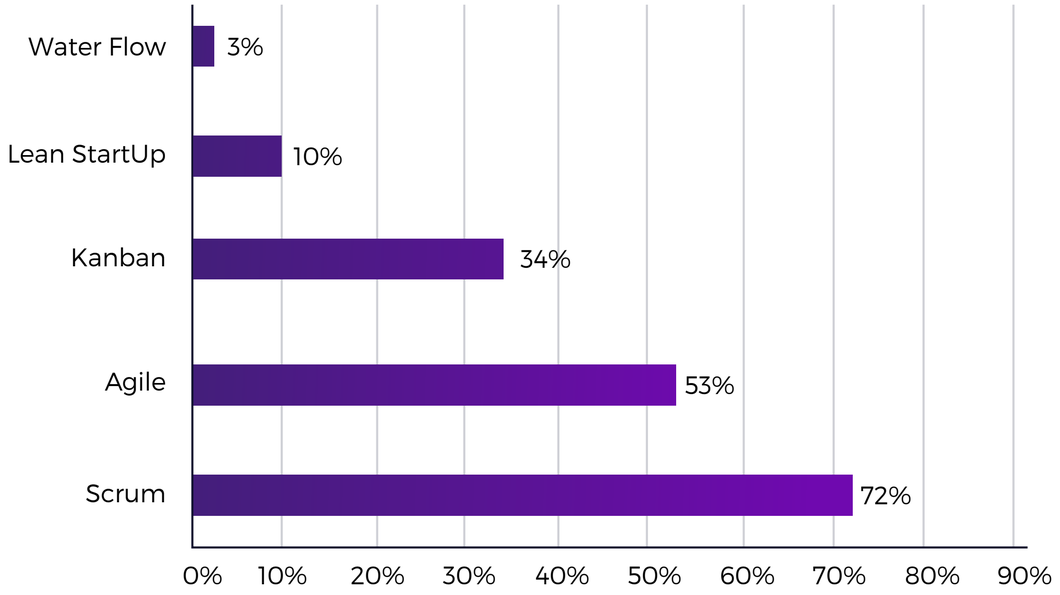


Video game development tools

Frameworks and engines

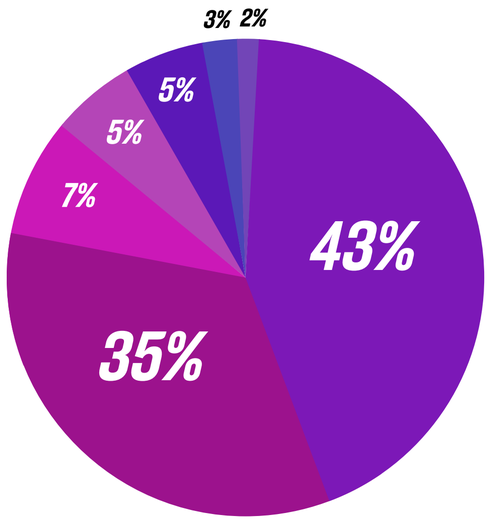


Production methodologies



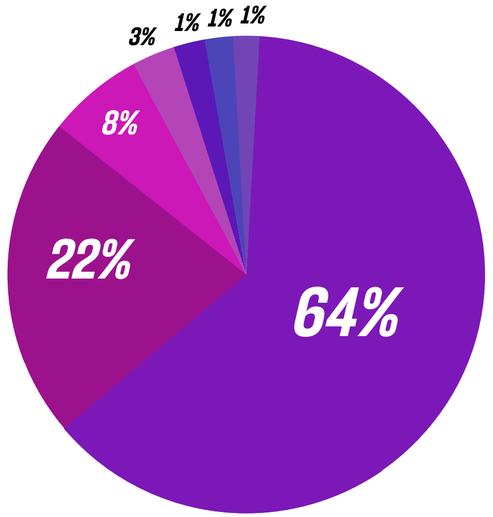
Proportion of financial sources used

Micro



- Contributions by the entrepreneur / owner / partner
- Cash flow of the company / business
- Contests / awards
- Publishers
- Others
- Loans from family/friends/acquaintances
- Public sector grants

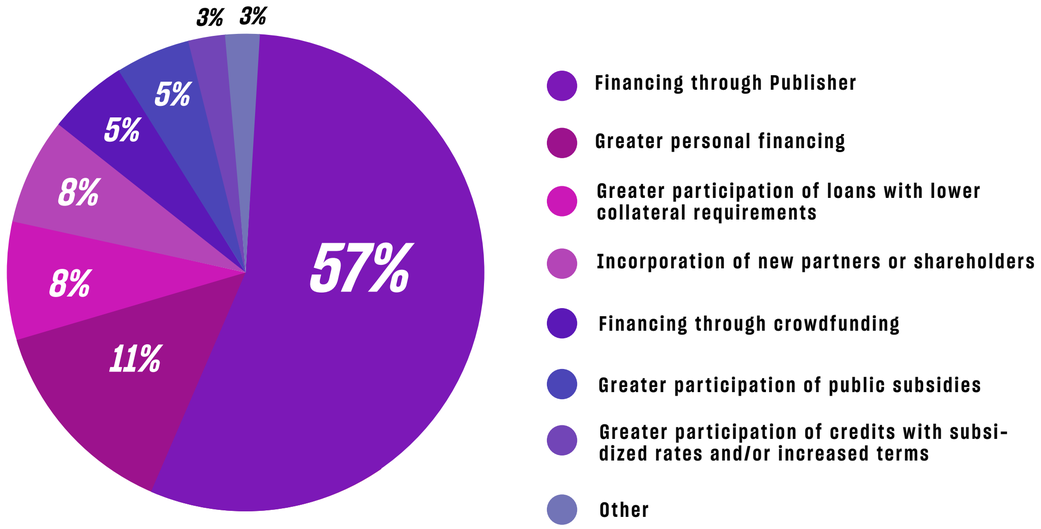
Small- and medium-sized



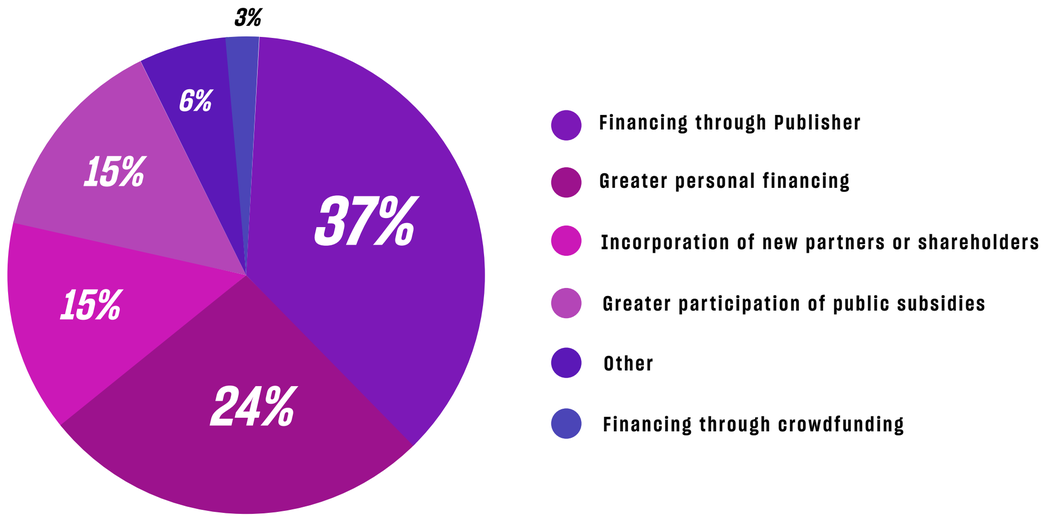
- Cash flow of the company / business
- Contributions by the entrepreneur / owner / partner
- Publishers
- Public sector grants
- Loans from family/friends/acquaintances
- Contests / awards
- Others

Main financial sources DESIRED

Micro



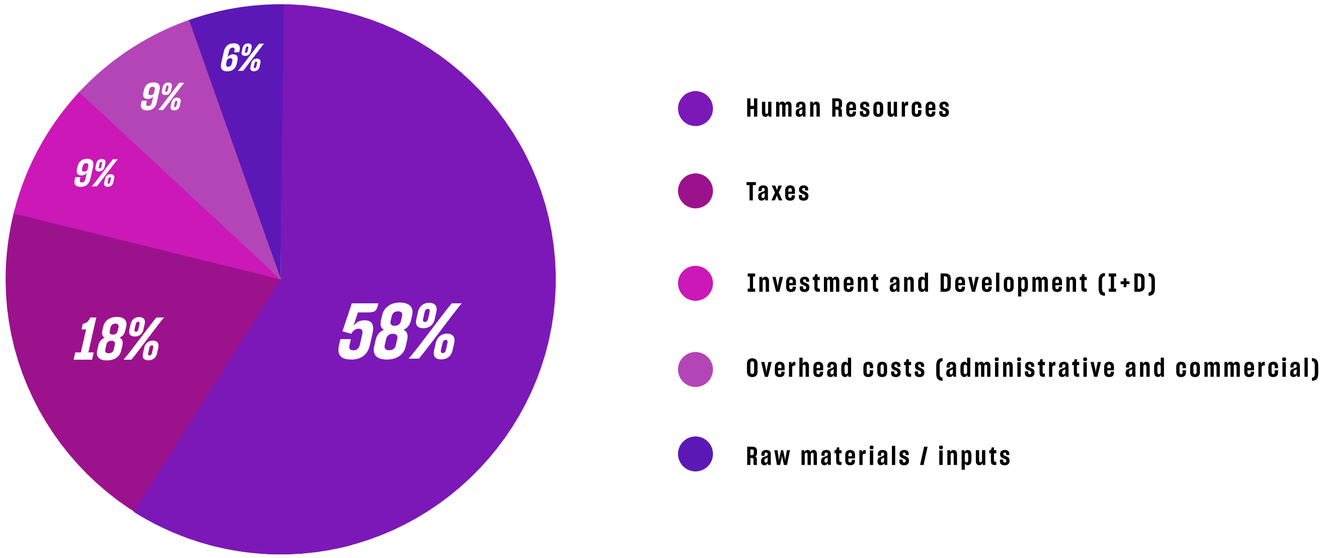
Small- and medium-sized



- 58% of micro studios claim to have missed the opportunity to make investments or carry out projects due to lack of funds
- 45% of small- and medium-sized studios claim to have missed the opportunity to make investments or carry out projects due to lack of funds

Average reinvested earnings of small- and medium-sized studios: **69%**

Average cost structure of small- and medium-sized studios



Ranking of main obstacles in their activity

1º	Economic instability
2º	Difficulty with payments and collections abroad
3º	Political uncertainty
4º	Increased tax pressure in relation to salaries
5º	Access to financing
6º	Lack of qualified personnel/lack of proper salary
7º	Legal certainty
8º	Market dominated by established companies
9º	High cost of development
10º	Uncertainty regarding the demand for my product