VIDEOGAMES MADE IN ARGENTINA

UNRaf
UNIVERSIDAD NACIONAL DE RAFAELA

OBSVj
OBSERVATORIO de la industria argentina de Videojuegos

Argentina Game Dev Ecosystem Observatory

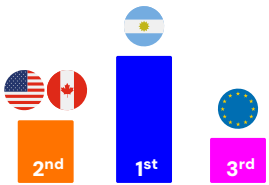
2023

* Survey and report conducted in 2023 on activities carried out in 2022

SUMMARY 2023

UNRaf Universidad Nacional de Rafaela | OBS//Vj Observatorio de la Industria Argentina de Videojuegos | ADVA Videogames made in Argentina

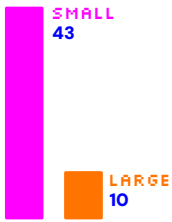
Main Markets



Developed Games Genres

- CASUAL 40%
- PUZZLE 33%
- ACTION 29%

Number of Published VG IN 2022

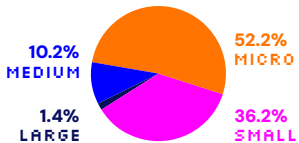


Industry estimated size*

USD 91,545,600

*Calculated based on the total number of active HR

Enterprise size*



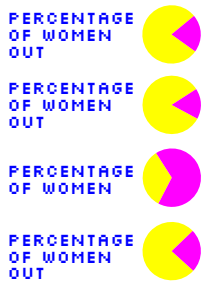
*Micro ≤7 // Small 8-35 // Medium 36-345 // Large ≥ 346

Main Platforms

H. R.

1646 Active professionals

WOMEN IN THE INDUSTRY



*science, technology, engineering and mathematics

Target Audience

95%	78%	57%
19-35 years old	14-18 years old	36-60 years old

We are

Guadalupe de la Iglesia
Director

Andrés Rossi
Director, Bachelor's degree in Video Game Development and Digital Entertainment

Florencia Fole
President

Miguel Martín
Executive Director

Report Production

Guadalupe de la Iglesia
Gimena Bruno

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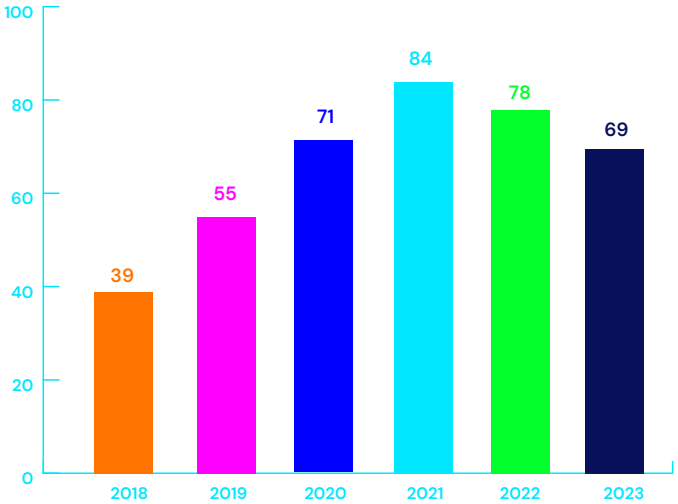
For more info please visit: https://www.unraf.edu.ar/index.php/secretarias/investigacion/observatorio-videojuegos

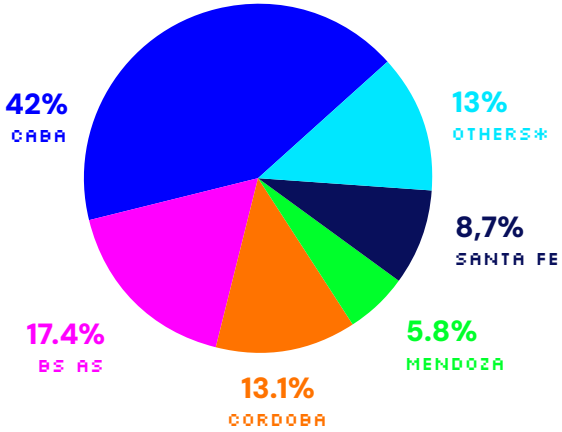
This document was translated by arkonestudios

2023 Assesment

Responses to previous reports and the current report



Geographic distribution of respondents



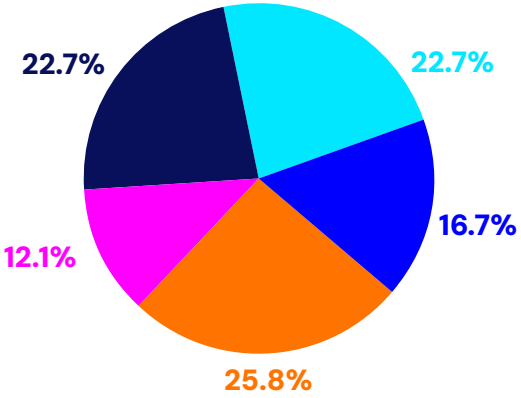
*Others: Entre Ríos, Misiones, Salta, Tucumán, foreign countries.

Main aspects of argentine's video game industry businesses and enterprises

Size*

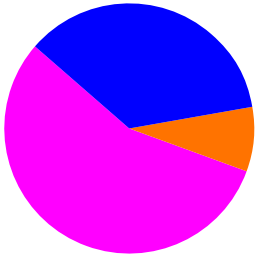
*Micro ≤7 // Small 8-35 // Medium 36-345 // Large ≥ 346

Type of Corporation



What do enterprises do?

Micro



36.1%
Video game development and other related services

8.3%
Video game development support services

55.6%
Video game development exclusively

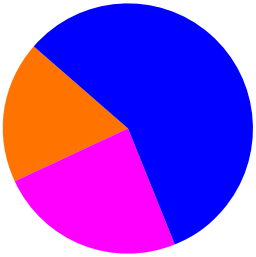
What percentage do these activities represent for micro enterprises?

57.50%
Development and sales of their own games

25.97%
Other activities, non-related to video games

16.53%
Sales of support services for video game development to other enterprises

Small, Medium and Large



57.6%
Video game development and other related services

18.2%
Video game development support services

24.2%
Video game development exclusively

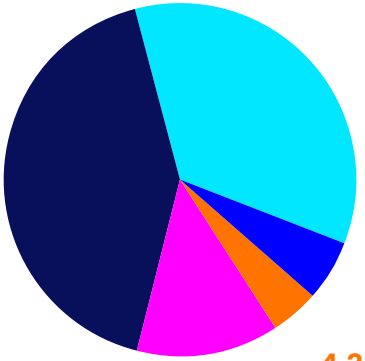
What percentage do these activities represent for small, medium and large enterprises?

48.03%
Sales of support services for video game development to other enterprises

41.67%
Development and sales of their own games

10.30%
Other activities, non-related to video games

Established in *



Businesses were established, in average,
6.32 years ago

Most of them were established between
1 and 12 years ago

How long does it take for a business to be formally incorporated?

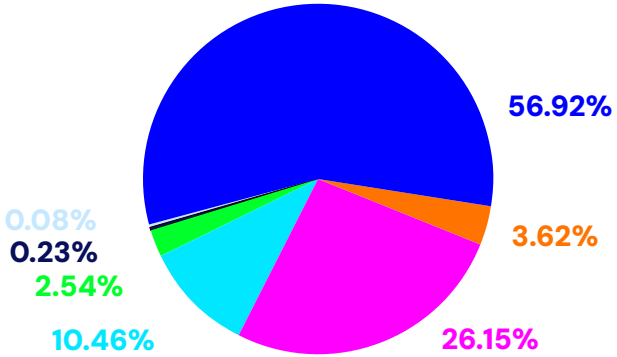
To be formally incorporated, businesses take, in average
2 years

Most businesses take between
0 and 4 years

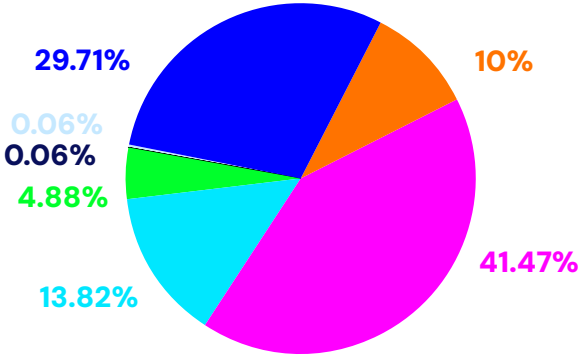
*Based on the initial year, regardless of formal incorporation.

Marketing target regions for in-house developed games (B2C)

Micro



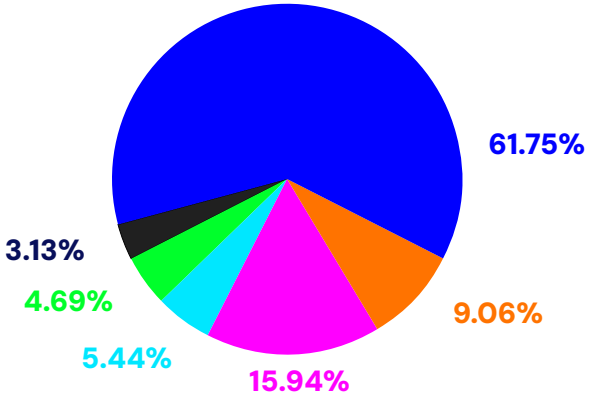
Small, Medium and Large



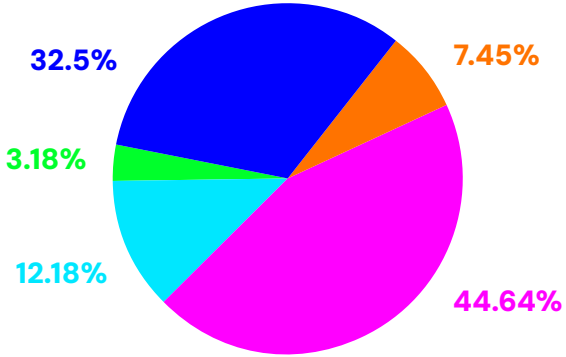
Argentina · Rest of Latin America · EEUU and Canada · Europe · Asia · Oceania · Africa

Service marketing target regions (B2B)

Micro



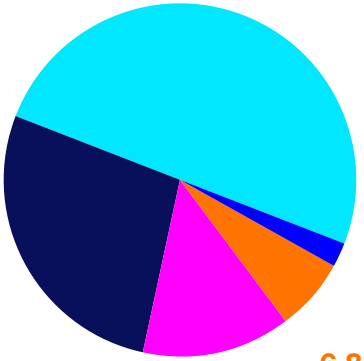
Small, Medium and Large



Argentina · Rest of Latin America · EEUU and Canada · Europe · Asia · Oceania · Africa

Video Game Development

Release year of the first video game



*Basada en el año de inicio sin considerar el registro formal

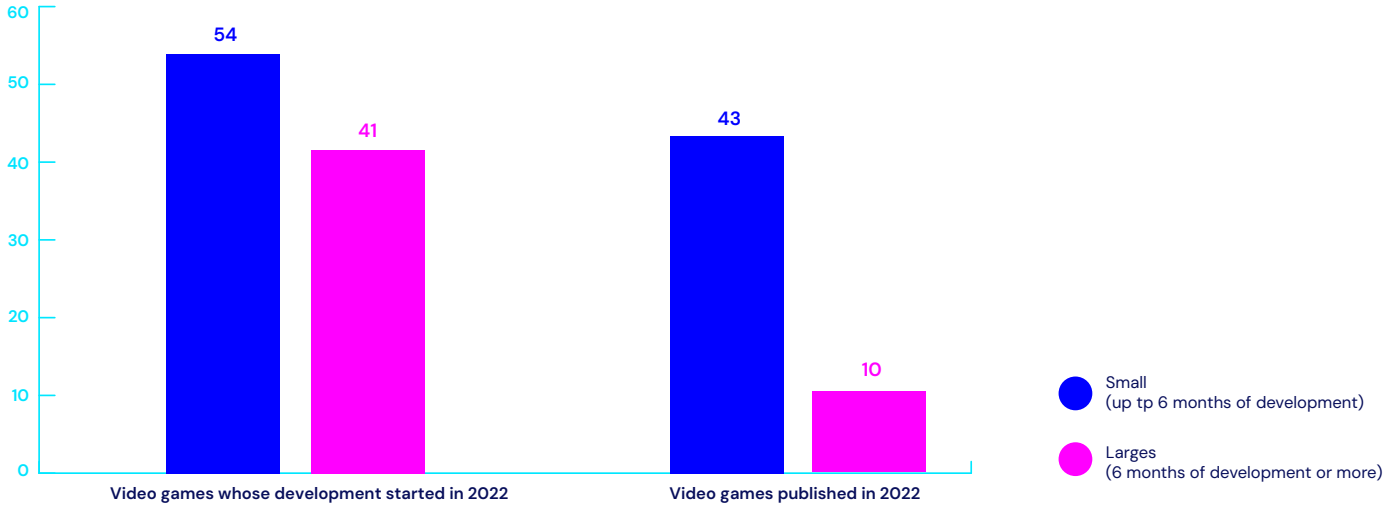
The 39.1%
had previous experience in creating a different video game-related business/enterprise

How long does it take for a business to release their first video game?

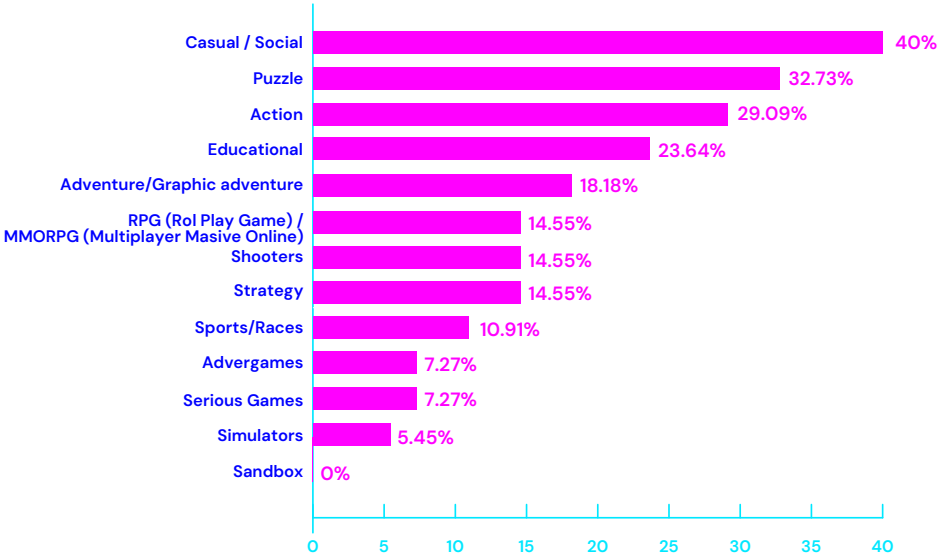
Most take between
0 and 4 years

To release their first video game, businesses take approximately
1.86 years

In-progress and published games by size



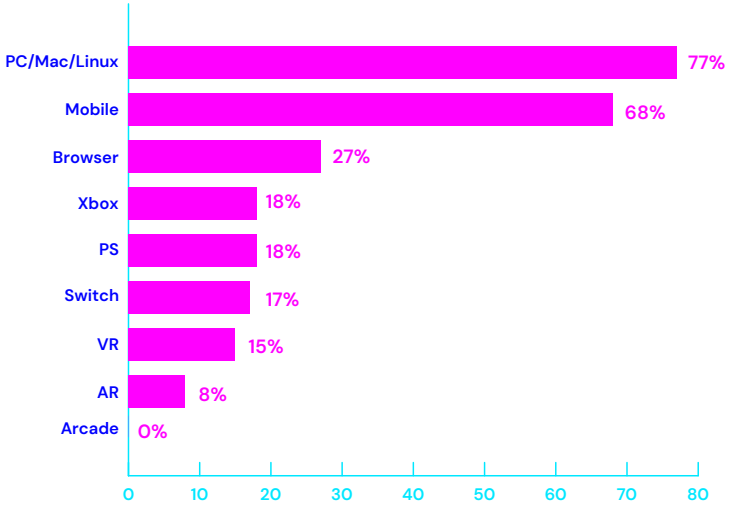
Developed video games' genres *



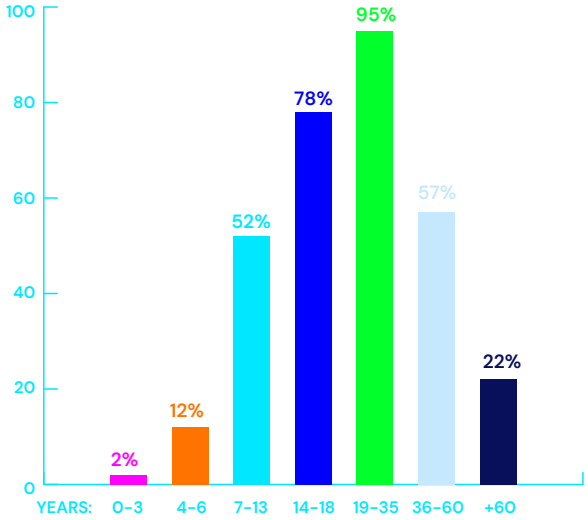
*% calculated based on the enterprises that develop video games

For what are video games developed? *

Platforms for which video games are developed



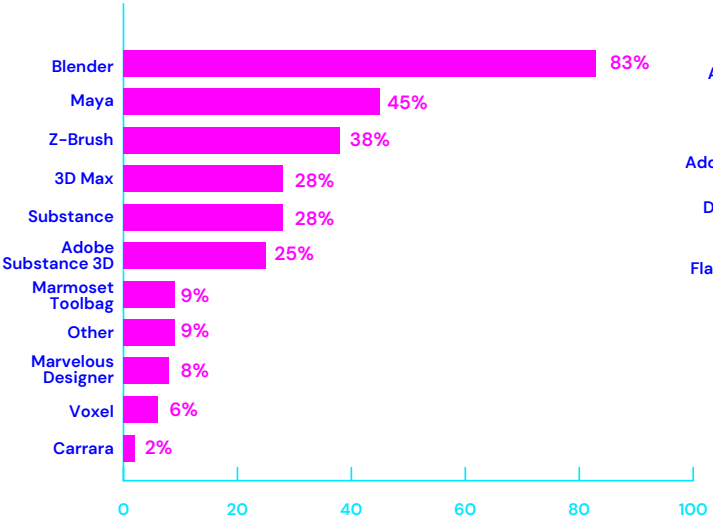
Developed video games' target ages



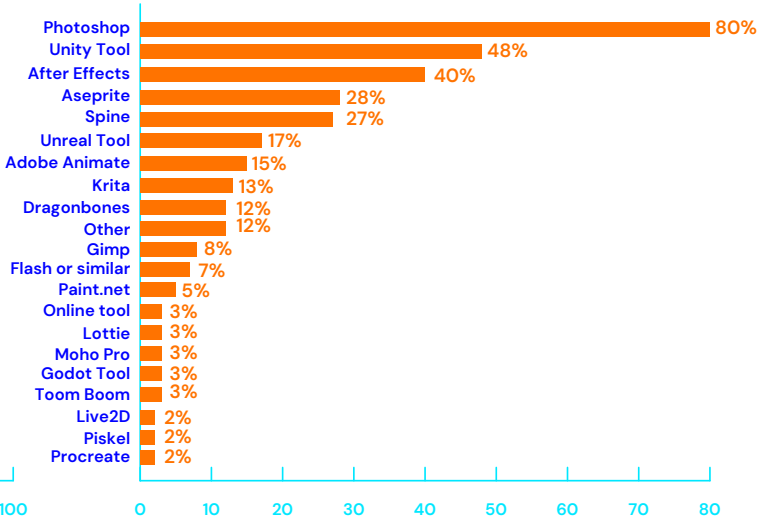
*% calculated based on the enterprises that develop video games

Tools *

What softwares are used to create 3d art and animation?



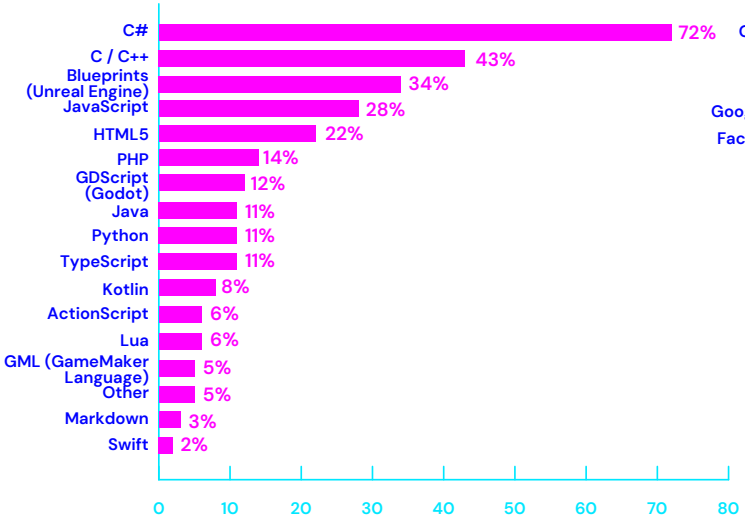
What softwares are used to create 2d art and animation?



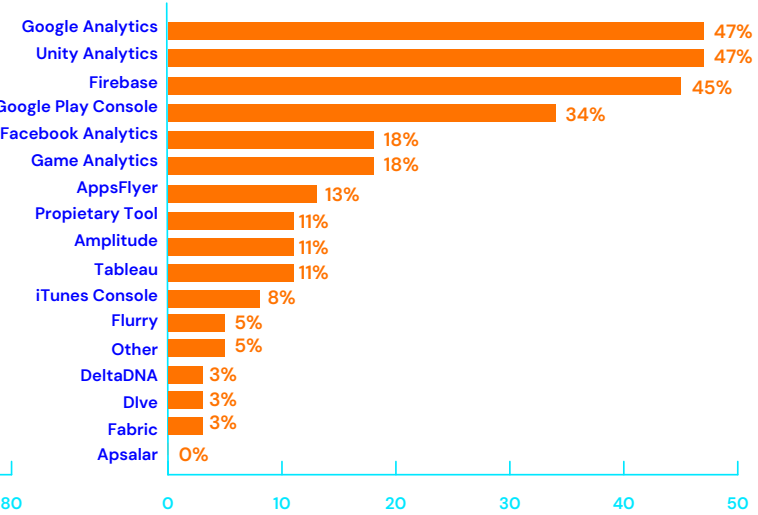
*% calculated based on the enterprises that use the video game development tool

Tools *

What programming language is used?



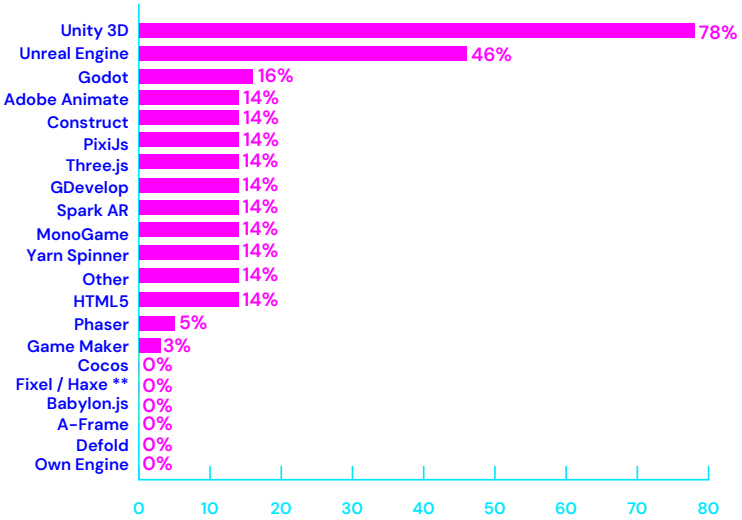
What data analysis engine is used?



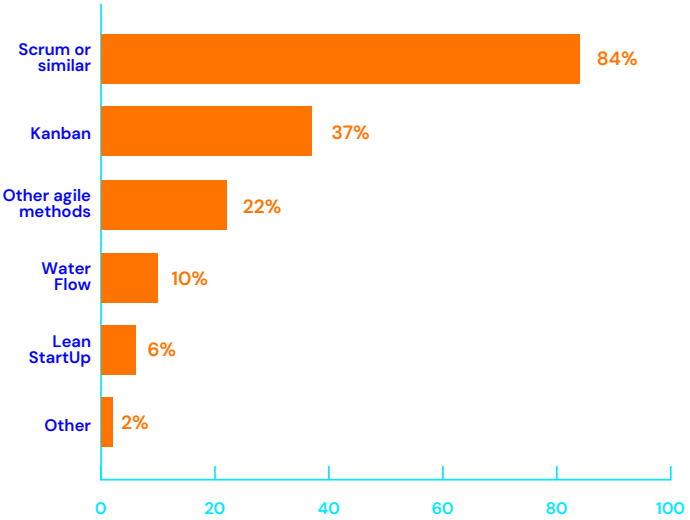
*% calculated based on the enterprises that use the video game development tool

Tools *

What development engines or frameworks are used?



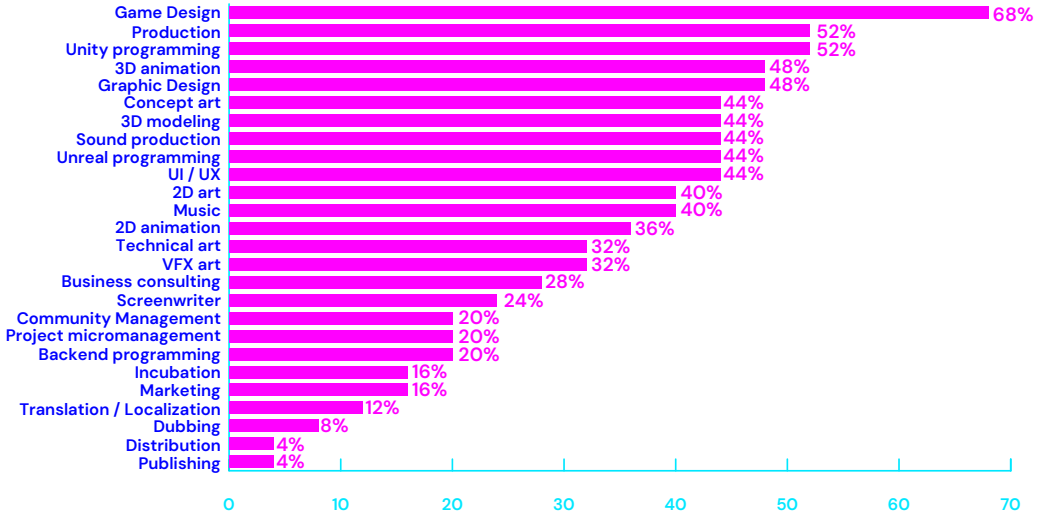
What production methods are used?



*% calculated based on the enterprises that use the video game development tool **or other Flash derivatives

Video game development support services

Areas



*% calculated based on the enterprises that provide services

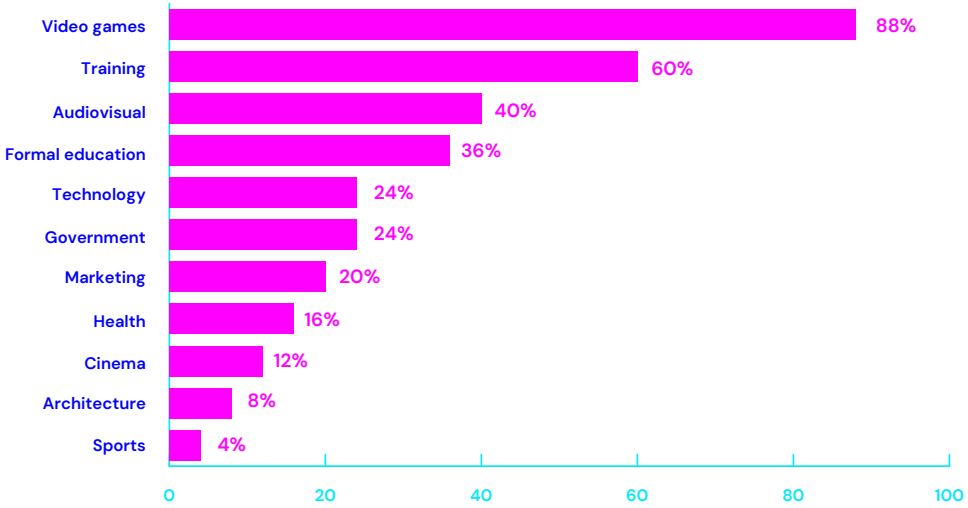
What areas do the enterprises provide services for?

60%
Private sector

0%
Public sector

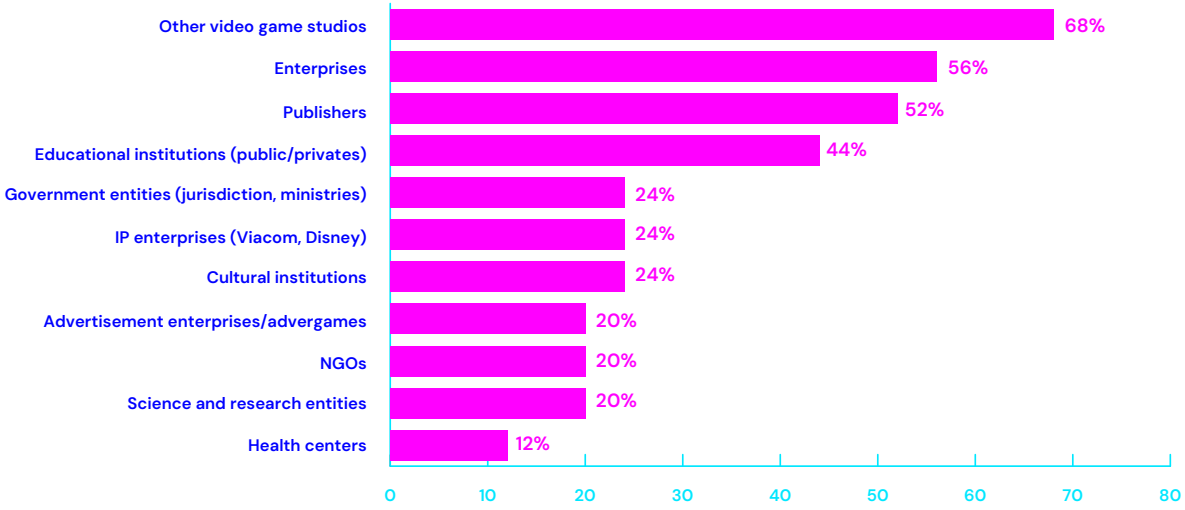
40%
Public and private sectors

Which industries or sectors do the enterprises provide services to?



*% calculated based on the enterprises that provide services

What kind of client do their enterprise/business provide services to?



*% calculated based on the enterprises that provide services

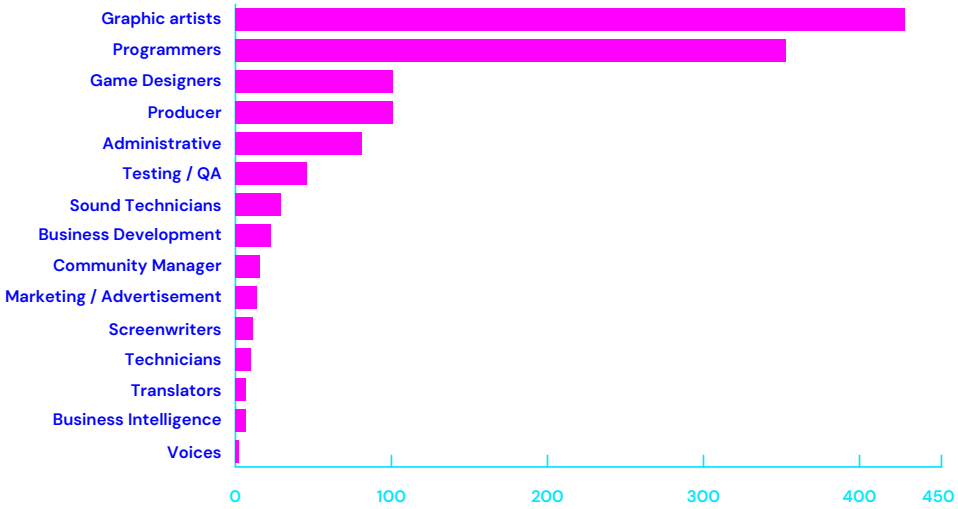
Human Resources

Industry estimated size based on employee projection

USD 91,545,600

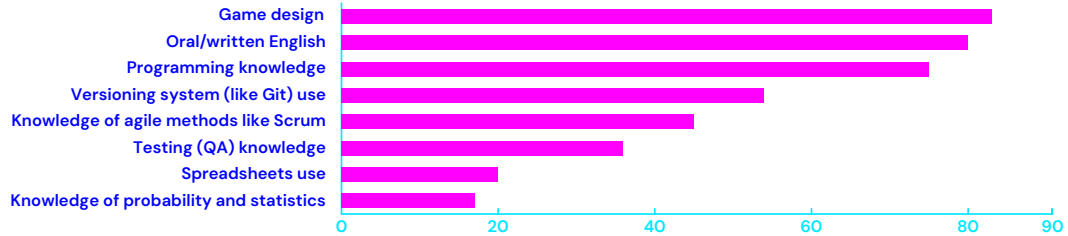
*Calculated based on the total number of active staff

Employees per professional role



Skills

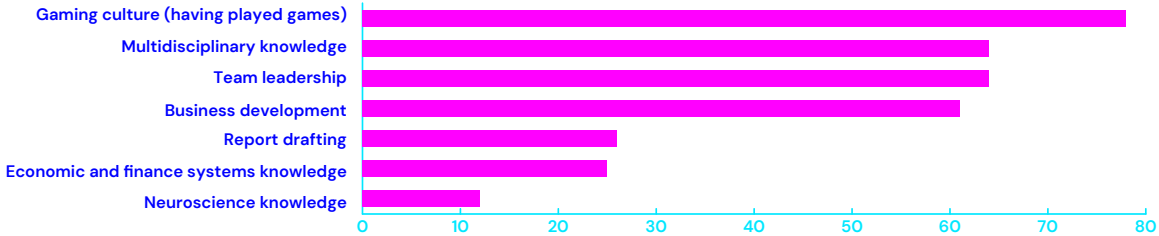
What skills and/or knowledge are considered necessary for the video game industry?



OTHERS:

- Art and aesthetics
- Storytelling
- Current technologies knowledge
- 3D modeling
- Entrepreneurship and business models
- Market knowledge (trends, needs)
- Soft skills
- Organization and communication
- Team work

What other skills are necessary in the video game industry?



Employees with an ongoing or incomplete university education:

24.91%

Employees with a completed university education:

22.6%

Ranking of harder-to-find profiles

1st Marketing

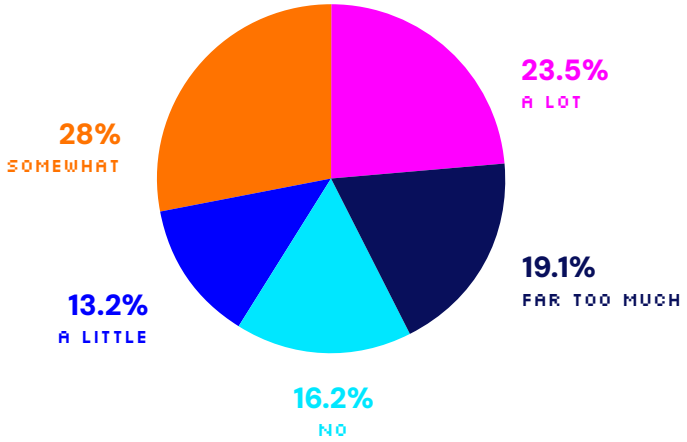
2nd Production

3rd Development

4th Game Design

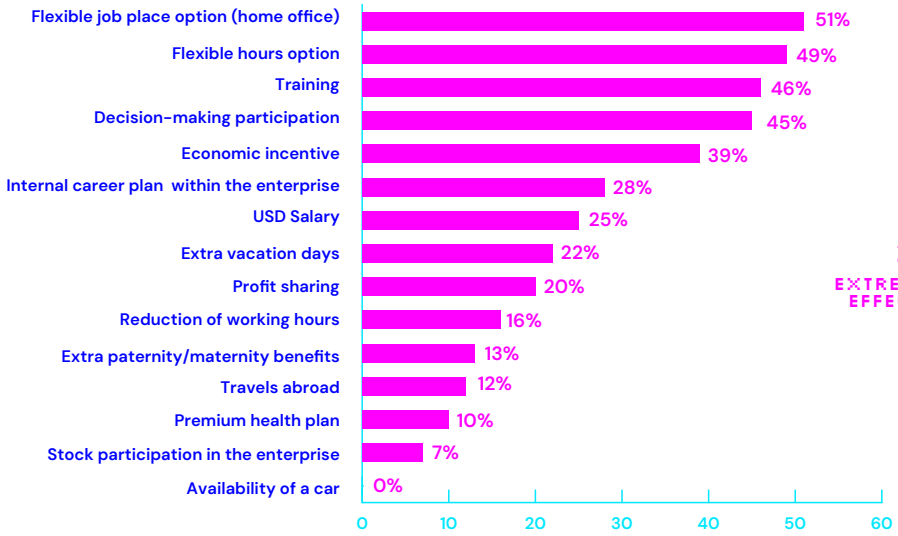
5th Art

Does outsourcing staff abroad make it more difficult to find local employees for your own enterprise/business?

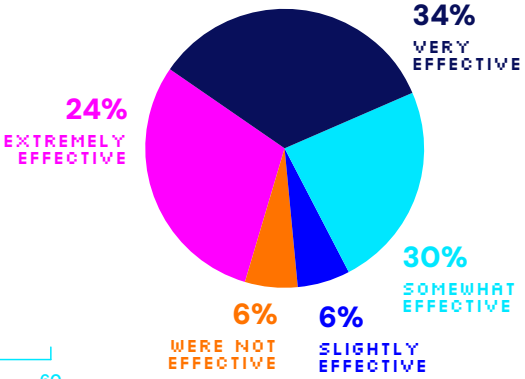


Staff retention actions

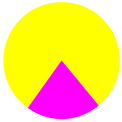
Percentage of studios with employees that have implemented staff retention actions **60.3%**



To what extent do the enterprises consider the staff retention actions implemented were effective?

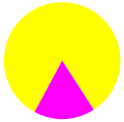


Gender



Percentage of women out of the total professional staff

21%

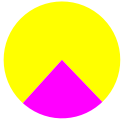


Percentage of women out of the total staff (including co-owners/managers)

17%

Percentage of women in STEM* job positions out of the total female staff

66%



Percentage of women out of the total management positions

24%

Percentage of trans/non-binary/other gender people out of the total staff (including co-owners/managers)

0.61%

*science, technology, engineering, math.

Gender

Percentage of studios/businesses that have implemented actions that reflect on gender and diversity topics in 2022

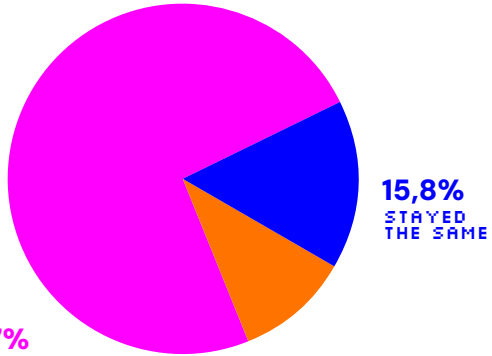
22%

Examples of some of the actions implemented

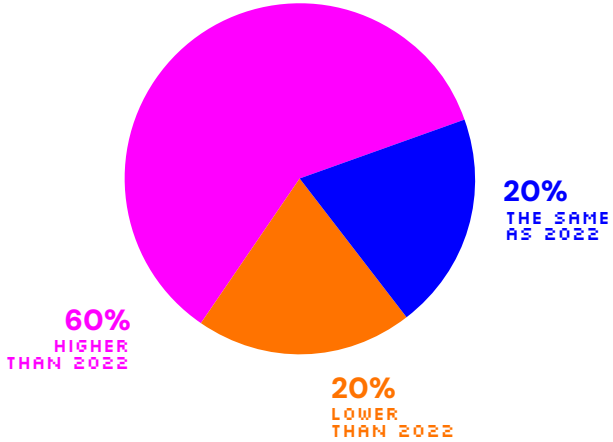
- In-house support and the initiative to make gender and diversity a regular point of analysis
- Participation in events related to gender and diversity topics
- Awareness and educational lectures and meetings about gender and diversity in the industry
- Recruitment of a female screenwriter for her added value regarding video game storytelling
- Implementation of diversity recruitment strategies in the enterprise
- Participation in game jams having gender and gender-identity perspectives
- Development of a gender perspective-themed video game
- Development and implementation of a protocol

Structure and growth

2022 billing in relation to that of 2021



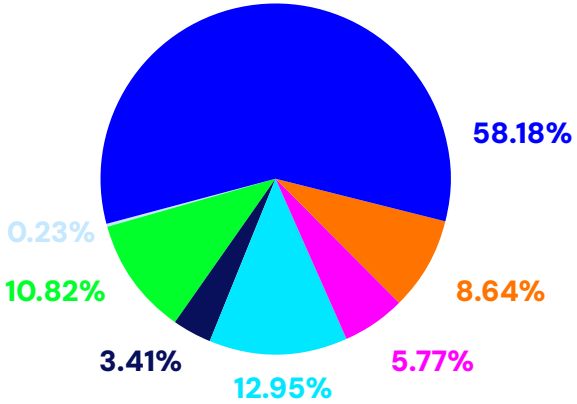
2023 billing projection



Average costs structure

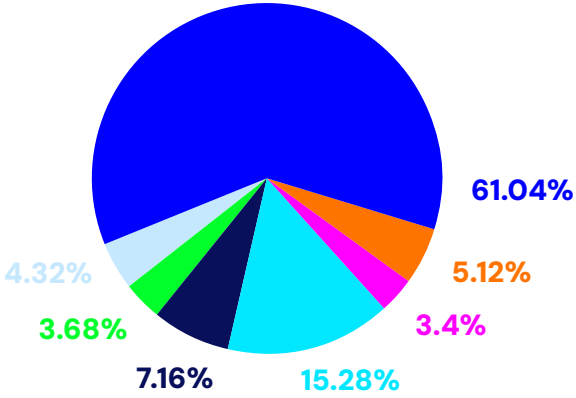
Micro

Average of reinvested returns in micro studios **62%**



Small, medium and large

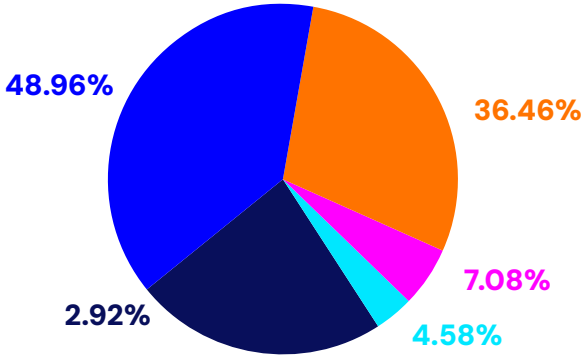
Average of reinvested returns in small, medium and large studios **65%**



Human resources · Goods and supplies · Research and Development (R&D) · Tax burden · Structural costs · Marketing · Others

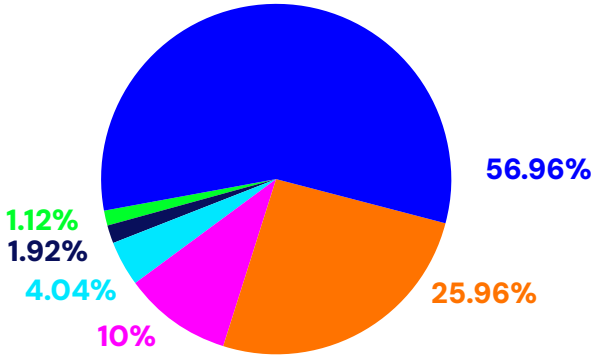
Financing sources percentages

Micro



Sources that were not used (0%):
- Family, friends or acquaintances loans
- Bank loans
- Non-bank financial institutions loans
- Venture capital

Small, medium and large



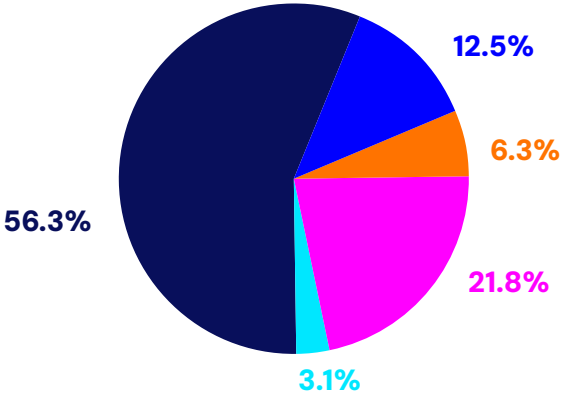
Sources that were not used (0%):
- Family, friends or acquaintances loans
- Bank loans
- Non-bank financial institutions loans

Enterprise/business cashflow · Entrepreneur/owner/co-owner contribution · Public sector grants · Contests/prizes · Publishers · Venture Capital

Preferred main source of financing

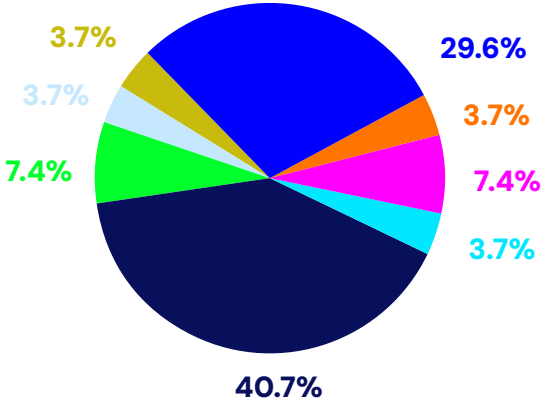
Micro

51,4% of micro studios states having missing investments or projects due to the lack of funding



Small, medium and large

41,5% of small, medium and large studios states having missing investments or projects due to the lack of funding



More self-financing · More credits with subsidized rates and/or with longer schedules · More participation in public grants · Crowdfunding · Publisher financing · New co-owners or stakeholders addition · More participation in credits with lower security requisites · Others

Ranking of the main setbacks in their field

1st Economic instability

2nd Access to funding

3rd Problems with international payments and collections

4th High taxation pressure in relation to salaries

5th Political uncertainty

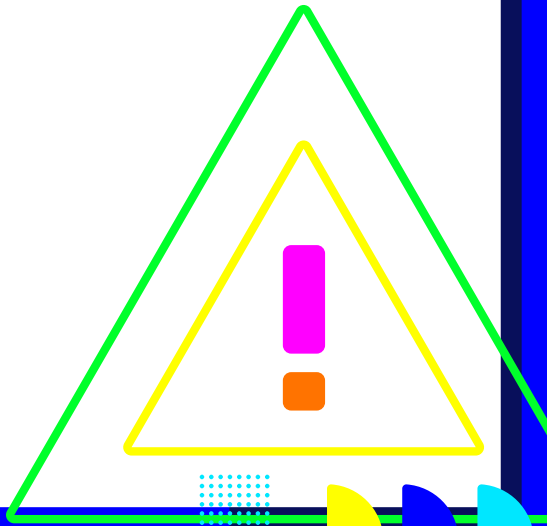
6th Product demand uncertainty

7th High developpent cost

8th Legal security

9th Lack of qualified staff/lack of fair salaries

10th Difficulties in finding cooperation partners for innovation



Thank you!

VIDEOGAMES MADE IN ARGENTINA

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