2023 BRAZILIAN GAMING INDUSTRY

ABRA GAMES

Organized by

Promoted by

MINISTRY OF
DEVELOPMENT,
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AND SERVICES

BRAZILIAN GOVERNMENT

Survey and report by

The aim and significance of the annual mapping of the Brazilian Game Industry

The launch of the 2nd National Survey of the Game Industry extends far beyond simply documenting a moment experienced by Brazilian game developers. This marks the second phase of a much larger commitment assumed by Abragames in 2021 when we started the project. Our primary objective is to anqnually map the studios in the country, identify different aspects of the sector, and capture a "picture" of the ecosystem. This serves as a crucial tool to identify areas requiring evolution, improvements over the previous year, and potential directions to go ahead.

With such important and never-before-reached goals in the Brazilian industry, it is normal to encounter difficulties, learn lessons, and even recalculate the route. This year's survey shows us that this process is essential for improving results, and I am certain that the evolution can already be perceived in the following material, the result of intense work by many people concerned about the future of our studios and professionals.

Nevertheless, we were confident that the forthcoming material would boast a significantly enhanced depth and comprehensiveness. This decision was pivotal to have year-to-year comparisons with greater coherence and to incorporate a broader array of pertinent insights into the study.

The data for the year 2022 is to identify where the structuring of the industry needs to toughen and where an immediate reaction is needed. In the next edition of the study, which should be published in 2025, the reflection of these results will be essential to understand the evolution of the period. In fact, the 2nd National Survey of the Game Industry makes it clear how important it is for this monitoring to be done annually. The gaming market as a whole is extremely dynamic, and this cannot be disregarded with each new report of our industry.

Therefore, at this moment, the greatest legacy of the survey, without a doubt, is the "data update" factor, which gives us a broad and real overview of the market. Another important factor that needs to be mentioned is the evolution of the results and how to identify them; especially when comparing to the first mapping done by Abragames, which had a 2018 survey as the closest reference.

The 2nd National Survey of the Game Industry pointed out important movements in mobile gaming, copyright intellectual property, the most used technologies, among many other relevant points for the sector. It also helped understand the change in intentions of entrepreneurs, developers, producers, actors, and market professionals.

Moreover, we can mention other aspects that affected the sector in some way throughout 2023. Among them: market turbulence in technology related to game production, from revenue generation to efficiency; and changes in international market investment, with many bets on already established franchises.

With the report, it is clear that, at this moment, our industry is mainly made up of micro and small studios. For these and other reasons, the mapping data allows us to understand where we are as an industry, our size, and what we need to grow. Given the mentioned scenario of 2023, short-term — and even emergency — actions will be necessary from different market players over the next few months. The survey also prompts us to consider where we need to take action as an industry and how we should alert the government to participate in this movement.

In other words, it is necessary to identify the problems to act, and the survey is a great ally in this process. After all, in order to maintain sector growth, as predicted in previous surveys, what is needed? How to increase revenues? Exports? The number of studios in the country? The quantity of professionals?

The survey shows us the strengths and weaknesses of the industry, details not perceptible, and trends that will be very important for the coming years. It also provides us with subsidies to address critical issues, which are at the base of a market that is projected to become a solid segment in the near future. From it, we can build ways of acting and develop suggestions for various players, as well as for private and public entities belonging to the game sector's production.

Our plan is to constantly maintain the survey, at a frequency that allows us to show the market's evolution and the importance of investing in data quality. We want the data, when published, to generate a faithful report of the industry. Therefore, what will be seen in the following pages is a portrait of the sector's evolution and studios in the year 2022.

In the role of a market producer, we need to understand companies' mobility regarding their growth and support the ecosystem with precise information that helps strengthen the sector in Brazil. Finally, I take this opportunity to emphasize the significance of the partnership between Abragames and ApexBrasil in the Brazil Games Sector Project, as well as in the construction of this valuable database developed to map the industry.

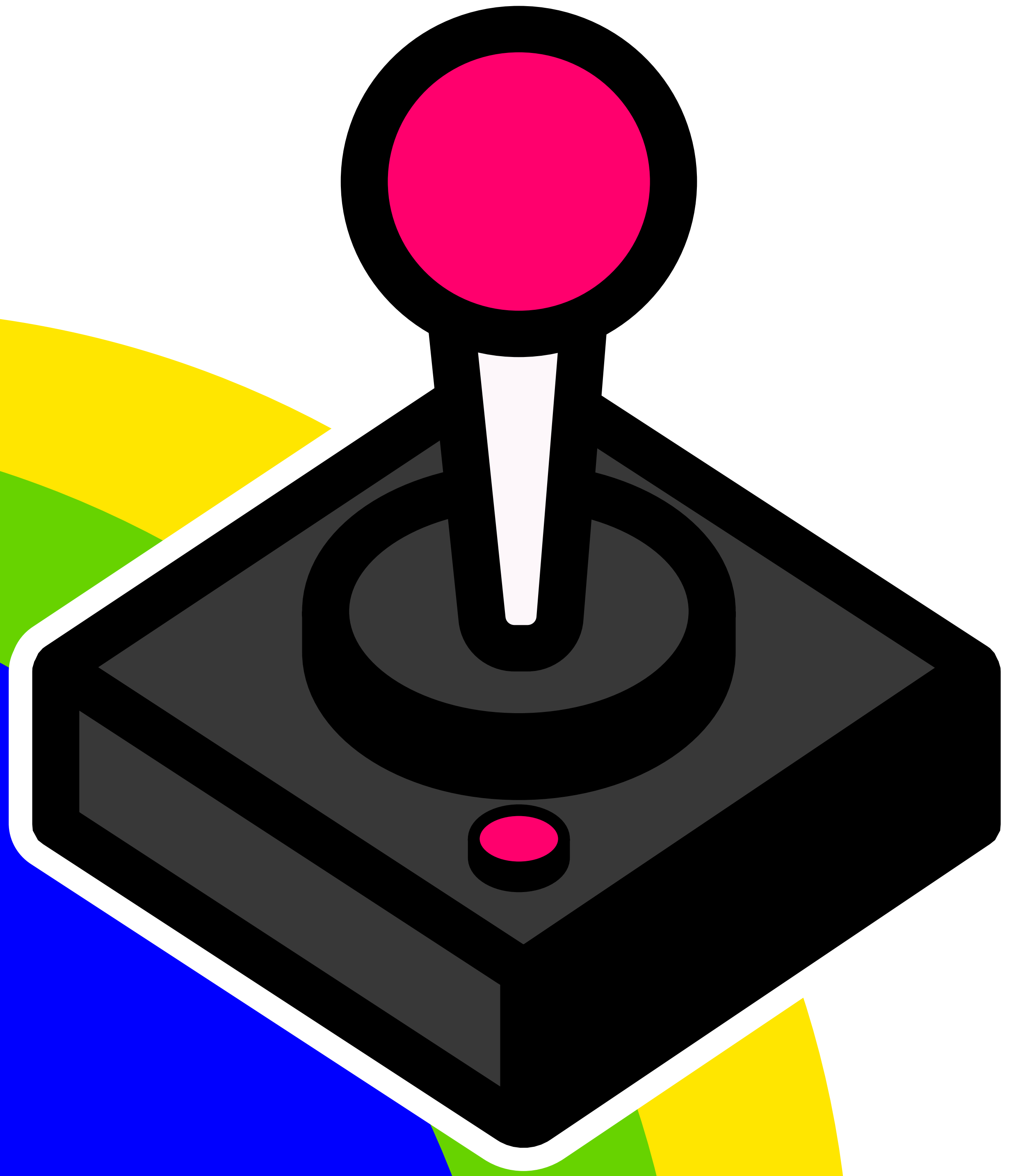
For over ten years, we have been cultivating the international presence of this sector, garnering recognition and visibility for studios. Through our partnership, we have established international platforms to enhance the visibility of Brazilian studios abroad. The success of these initiatives is evident in the impact of Brazil's participation in major international gaming events, among which the 2023 gamescom, which took place in Cologne, Germany, and where Brazil was honored as the featured country.

Enjoy your reading, and remember that Abragames is always open to dialogue!

Rodrigo Terra
Presidente da Abragames.

1.

Introduction



1.1 About the 2023 survey and its report

For the second year running, the Brazil Games project, a partnership between Abragames and the Brazilian Trade and Investment Promotion Agency (ApexBrasil), has produced a study on the digital gaming sector in Brazil. The 2023 Brazilian Gaming Industry Survey, conducted by GA Consulting, moves forward on the work that began in 2022.

Its purpose is to build a comprehensive map of the current state of the digital games' ecosystem in Brazil, considering the year 2022 and how it stands when compared to the previous study. The main focal point was companies and their prospects for sustainable development of the sector. The survey used a mixed methodology, focusing mainly on mapping and questionnaires, using bibliographical references, and drawing on the knowledge already gathered and analyzed from the 2022 survey[1].

The report is organized into six parts. The first part briefly presents an overview of the global gaming market during the reporting period, where the Brazilian development industry fits into the world context, and some aspects of its history.

[1] FORTIM, Ivelise (Org). 2022 Brazilian Gaming Industry Survey. ABRAGAMES: São Paulo, 2022.

The second part (chapters 2 to 9) presents the results found in the survey, highlighting the current state of the industry, studio mapping, game development profiles, how human resources and diversity are shaping up in the industry, the use of technological resources and services, the stage of internationalization among developers, the financial landscape, and their sources of funding.

The third part (chapters 10 and 11) gives an overview of the associations and collectives operating in the country, and the industry-related events held during the survey. In the fourth section (chapters 12 to 14), the report demonstrates the findings regarding the respondents' perceptions of and prospects for the coming years, and the challenges faced by developers.

The fifth part (chapter 15) provides an overview of other participants in the gaming ecosystem in Brazil, such as support companies and freelance developers. Lastly, the sixth section (chapters 16 and 17) presents final considerations and the methodology used in the study.

1.2 Status of the Global Market

Digital games have long since ceased to be entertainment just for children and adolescents and, have become part of popular culture in many countries. Along with the "aging" of gamers have come other applications, including education, company training and qualification, industrial simulations using VR/AR and even in the health sector.

The emergence of an industry with significant economic potential and the impact of introducing digital games as a new technology in other sectors are of great relevance. However, in this section, we will focus on the current scenario of this global industry.

Second only to TV in the ranking of the world's entertainment businesses[2], the digital gaming industry's revenues fell to USD182.9 billion in 2022, a 5.1% drop from 2021 and the first ever retraction since it began to be monitored by Newzoo[3]. The decline wasn't larger because Latin America grew 3.3%,

[2] STATISTA. [S. l.], 2022. Available at: https://www.statista.com/. Accessed on: September 15, 2023.

[3] NEWZOO. Newzoo's video games market size estimates and forecasts for 2022. [S. l.], 2023. Available at: https://newzoo.com/resources/blog/the-latest-games-market-size-estimates-and-forecasts. Accessed on: September 20, 2023.

and the Middle East and Africa grew 5.8% compared to 2021. The reasons for this downturn include rising inflation in some countries resulting in an allocation to other expenses, the lack of components for hardware production, continued impact of the Covid-19 pandemic, and the uncertainties of war and geopolitical instability in Europe.

For 2023, Newzoo projects growth which will not only overcome the drop in 2022, but will generate real growth compared to 2021, reaching USD 193.7 billion, and climbing to USD 206.4 billion in 2025. This projection indicates that digital games will continue to be one of the sectors that will drive the growth of the entertainment industries in the coming years.

1.3 The Brazilian digital gaming ecosystem

The digital games industry, like other technology and entertainment sectors today, is inherently international. The low barriers to international operation allow small companies to place themselves within a global ecosystem, without the need to act in a local one.

To illustrate this point, a Brazilian company can work with international partners to develop a game and distribute it directly on Steam in English, without having a footprint in the local ecosystem.

As presented in the "2022 Brazilian Gaming Industry Survey", the Brazilian ecosystem is part of the global ecosystem. Local companies, each with their own characteristics and ways of operating, will create business networks within global or local value chains, with the players in these chains varying according to the type of
-
panies.

While studios focused on entertainment games (end consumer or development for third parties) can forge relationships with studios of all sizes and support companies (publishers, consulting firms, distributors, etc.), studios that develop training games, advergames and educational games will have companies, schools, training area experts, among others, in their value chain.

This variety of players and arrangements
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sitions in the market, and they can vary

business evolution, including operations in other related sectors, such as animation and gamification projects.

1.4 Where Brazil fits into the Global context

In recent years, the Brazilian gaming industry has presented two vital characteristics that show robust development. On the one hand, the demand for games in Brazil maintained 3% growth in 2022, contrasting with the global decline of 5.3% observed in the same year, according to Newzoo data. Although the Game Brasil Survey showed that the number of Brazilians who say they play a game has fallen from 74.5% (2022) to 70.1% in 2023, around 82.1% of Brazilians say that playing digital games is one of their main forms of entertainment[4].

[4] Game Brasil Survey. PGB 10 Years 2023 Edition. Available at: https://www.pesquisagamebrasil.com.br/. Accessed on: October 2, 2023.

As the largest Latin American market, Brazil is considered to be the 5th largest in terms of online population, with an estimated 103 million players[5]. The mobile market accounted for 49% of revenues in 2022, with the PC making up 26% and consoles 25%. Another relevant data point observed in the PGB (2023) was the inversion in the ratio between male and female players. The survey found that men represent 53.8% of gamers, while women account for 46.2%, a fact that hasn't happened since the 2016 survey.

The age distribution among players is increasingly balanced, with the 19 to 44 age group ranging from 10.1% to 16.2%, the latter being the 25 to 29 age group, followed by people aged 30 to 34 (16.1%). The over-50 age group grew by 2%, reaching 8.5%.

With regard to ethnicity, the majority of Brazilian gamers responding to the PGB (2023) identify themselves as white (42.2%), followed by mixed race (41.4%) and black (12.7%). The biggest variation was in the mixed race group, which grew by 4.1%. Then, in smaller numbers, 2.0% declared themselves as yellow, 0.8% as indigenous and 0.4% as other colors or races. And as far as social class is concerned, there has been no change in the profile of the Brazilian gamer, with 65.7% belonging to classes B2, C1 and C2, followed by class B1, at 11.7%; class A, at 12.3%; and classes D and E, at 10.4%.

The preference of gamers in relation to platforms shows that smartphones grew by 3.4%, now accounting for 51.7% of gamers. Home consoles now rank second, with 20.5% of the public's preference, overtaking PCs (desktops and laptops), which dropped to third place at 19.4%, with other platforms accounting for 8.4%, according to PGB (2023).

On the other hand, the number of studios and the launch of Brazilian companies abroad has grown, as has the interest of international studios and publishers investing in Brazil.

[5] NEWZOO. Key Insights into Brazilian gamers – Newzoo Gamer Insights Report. Available at: https://newzoo.com/. Accessed on: June 7, 2023.

As shown in this report, over 1000 studios were mapped in the country, with more than 2600 games released between 2020 and 2022, 1009 of which were released just last year. One way to measure the growing success of Brazilian gaming companies overseas is the reception for their products in the various markets where they operate, both in terms of their own

the domestic developers operating in international markets obtained over 70% of their revenue internationally. This number rises to 65% when considering studios whose overseas revenue exceeds 50%. This growing number of games launched abroad reinforces the position of Brazilian studios in terms of their performance in the consumer market.

Brazil's potential as a promising region for External Development services, as indicated in the 2021 and 2022 XDS Summit reports[6], shows that Brazilian studios focused on external development are meeting international demands with quality. Indeed, Brazil is highlighted in the report for its artistic as well as engineering and co-development capabilities, in addition to its favorable time zone for communication with both Europe and the United States.

In addition, there has been direct investment in local projects and companies, such as the acquisition by Fortis Games and investments by Room 8 Group, along with EPIC Games' investment in the company Aquiris, from Rio Grande do Sul.

Finally, it's worth noting that the estimated revenue of local studios amounts to only 10% of the consumption of Brazilian gamers, which shows that despite the growth and strengthening of Brazilian developers, there is still a lot of room for evolution.

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[6] XDS – External Development Summit. 2022 Insights on external development for the video game industry. Available at: https://xdsummit.com/wp-content/uploads/2022/03/XDS_2022_Insights_Report.pdf. Accessed on: August 29, 2023.

1.5 Our moment in history

The 2022 Brazilian Gaming Industry Survey[7] presented a brief history of the Brazilian gaming industry divided into five stages: 1) 1983 to 1992 – The Beginning: the domestic trail blazers; 2) 1993 to 2001 – Professionalization: the CD-ROM era; 3) 2002 to 2010 – Coordination: The industry gets organized; 4) 2011 to 2017 – Rise: Opening the doors to the global industry; and 5) 2018 to the present – Pandemic and consolidation: the sky is the limit.

This section seeks to complement what was previously presented with relevant information on what happened in the Brazilian gaming industry in the years 2022 and 2023. As part of the historical moment, it was decided not to determine whether the year 2023 continues the fifth stage presented by the 2022 survey, nor to state that it begins a new historical moment.

The 2022/2023 biennium was marked by international acquisitions and investments in Brazilian companies. In March 2022, the Londrina, Parana based studio Oktagon, which developed the smartphone games Armies & Ants and Dungeon Battles, was bought by Fortis, a newly created North American company and publisher, and joined the already acquired Doppio Games and Metagame. In November 2022, Pernambuco studio PUGA, which specializes in art production, was bought by developer Room 8 Group. Epic Games acquired the Aquiris studio, making an initial investment in 2022 and completing the purchase in April 2023, creating Epic Games Brasil.

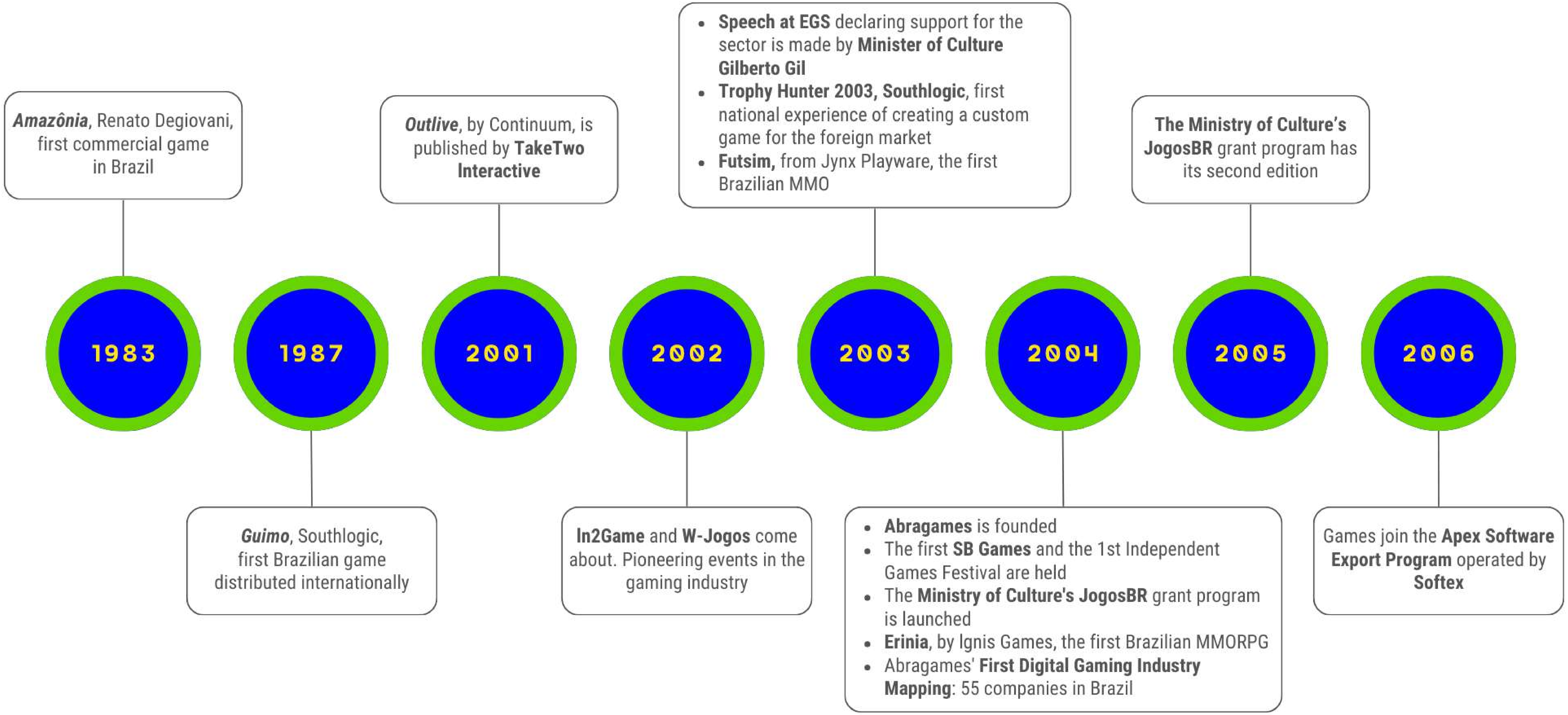
Also in 2022, the studio Rogue Snail had its game Relic Hunters: Rebels distributed exclusively by Netflix.

Brazil was the country honored at the world's biggest gaming event, Gamescom 2023, held in Cologne, Germany. As a Country Partner, the Brazilian delegation stood out at the event, reflecting the growth of Brazilian developers.

[7] FORTIM, Ivelise (Org). 2022 Brazilian Gaming Industry Survey. ABRAGAMES: São Paulo, 2022.

In terms of public policies, the main highlight was the approval of the Paulo Gustavo Law (LPG), Complementary Law No. 195/22, which allowed up to BRL 1.95 billion to be earmarked to support audiovisual productions. In the details of Decree No. 11.523/23, the production of games was included among audiovisual productions. In September and October, several cultural secretariats published calls for proposals to support the creation of electronic games, the results of which had to be published by the end of 2023.

Figure 01: History of the Brazilian gaming industry



2008

- **The Ministry of Culture's BR Games** grant program is launched
- **Abragames**' second **Digital Gaming Industry Mapping**: 42 companies in Brazil

2009

- ***Southlogic*** is acquired by Ubisoft, the first national studio bought by a major publisher
- First edition of **BGS - Brasil Game Show**

2011

1st Workshop for the **Creation of Projects** for the Development of a Digital Games Industry in Brazil

2012

First edition of the **BIG Festival**

2013

Launch of the games **Export Program** at **Apex Festival** with Abragames, Brazilian Game Developers (currently Brazil Games)

2014

FEP Games and the **1st Census of the Brazilian Digital Gaming Industry**

2016

Horizon Chase, by Aquiris is the first national game awarded in the main category of the **BIG Festival**

2017

The companies **Kokku** and **Diorama** participated in the development of the game **Horizon Zero Dawn** by **Guerrilla Games**.

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

2018

- **Second Census** of the digital gaming industry
- Long Hat House's **Dandara** named one of TIME magazine's 10 best games of 2018
- **Celeste**, a game developed by **Matt Makes Games** (currently **Extremely OK Games**) in partnership with the Brazilian studio MiniBoss, is awarded as best independent game at The Game Awards

2019

- **Wildlife** is valued at **USD 1.3 billion** and becomes the **1st Brazilian unicorn**
- **The Line**, by **ARVORE,** receives the first **Venice Film Festival Lion** for a Brazilian production

2020

- **Paranormal Order: Enigma of Fear**, by **Rafael Lange (Cellbit),** developed by **Dumativa**, becomes the creative project with the highest fundraising in the history of Brazilian crowdfunding.
- **Wildlife** is worth **USD 3 billion** after new investment
- **Afterverse** reaches 50 million users in just one year
- **The Line**, by **ARVORE,** receives the **Primetime Emmy** for outstanding innovation by the Academy of Television Arts & Sciences

2021

Dominoes Café developed by **Gazeus Games** is the first national game published on the service **Netflix Games**

2022

- **Oktagon** is acquired by **Fortis Games**
- **PUGA** is acquired by **Room 8 Group**
- **Relic Hunters: Rebels**, developed by **Roque Snail**, is the **first game** to be released **exclusively** on the **Netflix Games** service
- **YUKI**, by **ARVORE**, is a finalist in the **D.I.C.E. Awards**

2023

- The **first edition** of **Gamescom Latam announced** for **2024** in Brazil.
- **Aquiris** is acquired by **Epic Games**, becoming **Epic Games Brasil**
- **Brazil** is a country **honored** at **Gamescom 2023**
- **Public grants** from the **Paulo Gustavo Law** are launched

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

2.

State of the industry

2.1 The challenges of mapping Brazilian digital games companies

Mapping any sector of the economy takes time and a perspective that mixes methodological rigor and market aspects. Mapping the digital gaming industry in Brazil adds some extra challenges that should be pointed out for a better understanding of this report and its use for decision-making.

One problem that has been observed and addressed in the literature for some time now is the lack of a specific CNAE (National Economic Activity Classification) for game development companies. This is neither a new problem, nor is it exclusive to the Brazilian industry, as the 2022 Finnish Industry Report[8] indicates the same challenge. As seen in the 2022 Survey, one of the CNAEs used by Brazilian companies is 3240-0/01 – Manufacture of electronic games, which, because it is not exclusive to development studios, is confused with other activities, such as the construction and rental of arcades, for example.

Other options chosen by Brazilian studios, already showcased in the previous survey, are CNAEs 6201-5/01 – Development of computer programs to order;

[8] The Game Industry of Finland - Report 2022. Available at: https://www.playfinland.fi/. Accessed on: June 20, 2023.

6202-3/00 – Development and licensing of customizable computer programs; 6204-0/00 – Information technology consultancy; 6209-1/00 – Technical support, maintenance and other information technology services, or other audiovisual production CNAEs. All of these are shared

share any characteristics with digital game developers.

Another barrier in surveying the number of companies active in the market is related to one of its specific characteristics, which is that it is highly dynamic, with low barriers to new entrants. Many companies can be informal and remain so until their product is very close to launch, while other young companies remain inactive for some time due to a lack of resources, but can return to activity at a later date. Other studios, although closed, have active games on the market with revenues, and there are cases of individual developers with Corporate Taxpayer Registry (CNPJ) numbers, among others.

While the lack of a CNAE does not allow us to define a more precise universe of companies, the other barriers and situa-

companies are actually active.

1042
Active studios

2.2 Number of developer studios in Brazil

above and maintaining the logic previously established, it was decided to adopt the same definition of "Digital Game Developer", i.e. "a company or business, made up of one person or more, that performs one or more of the following: a) develops digital games for smartphones and tablets, computer, web, virtual reality (VR), augmented reality (AR), social networks or console, for profit and non-profit, as a main or secondary activity; b) develops entire games or provides game development services for clients or partners." It is also worth considering the fact that these companies could engage in other activities.

When analyzing the respondents to the previous survey, it became clear that some of the mapped studios were formalized individual developers. With this in mind, it was decided to keep them on the list of studios (active or inactive), since in order to develop their products these studios hire services or create partnerships with other developers, or they may even have changed their company structure during this period.

However, since filling in the questionnaire is optional for the respondent, they could fill in the data as a freelancer, based on their choice.

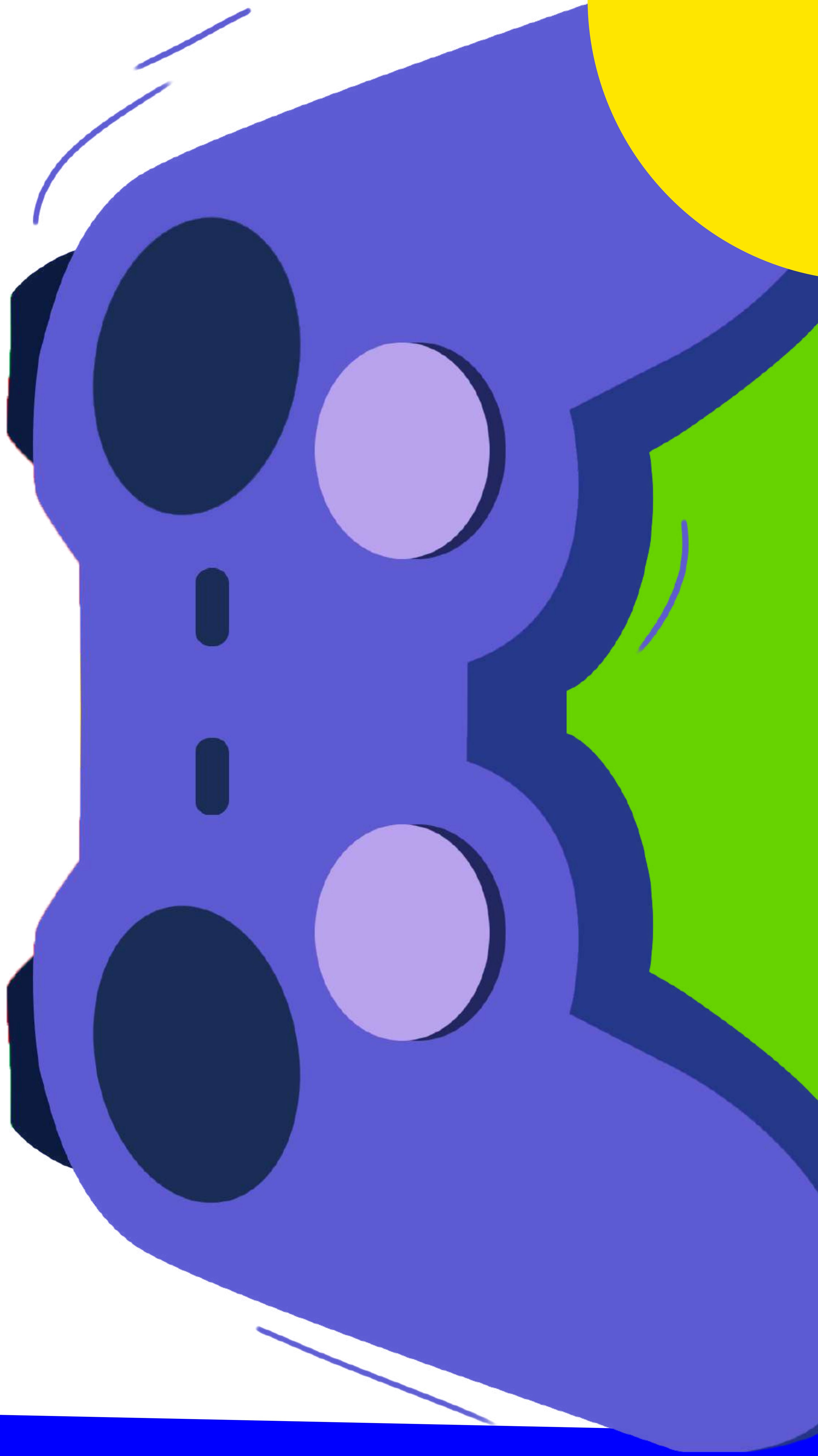
In order to avoid generating a statistical break in the sample between the years, the criteria for considering a mapped company as active in the survey were maintained for 2022 with one change.

To be active, developers had to meet at least one of the following criteria: a) participate in a specific regional digital games association/collective; b) have answered the survey questionnaire; c) have a company website and/or social networks with activity in the years 2021/2022; d) have a game released in the year 2021/2022; e) have a company with an active game and revenue, as measured by the AppMagic platform; f) have an active CNPJ and a main CNAE consistent with the game development activity; g) have confirmed receipt of the survey by telephone; h) have one or more games updated in 2021/2022/2023; or i) have a Google account indicating the company's operating hours. Additionally, j) have a product participating in the "MADE IN

BRAZIL SALE 2023” on the STEAM platform. Using these criteria, 1042 active studios developing digital games in Brazil were mapped.

In the 2023 survey, 309 companies responded as developer studios, an increase of around 39% compared to 2022 (223 companies). The respondent studios represent 29.7% of all active developers. In addition, 34 studios on this list answered the questionnaire as self-employed because they have individual companies, most of them MEI (these companies are analyzed in chapter 15).

This brought us to 343 responses from companies considered active, reaching 33% of the active developers mapped by the stipulated criteria. Given that this sample can be considered representative, as in 2022, it is estimated that the respondent studios represent the industry, with the exception of the two largest companies focused on the mobile market and two large studios that have been acquired by international companies. The fact that not all the companies answered all the questions led to the number of answers varying depending on the question. This led us to indicate the number of responses in the respective charts.



2.3 We continue to grow

In order to keep the data historical and to be able to compare the evolution of the industry, we used data from the 2022 Brazilian Gaming Industry Production Capacity Survey[9], which used data collected that year, comparing it with the First Census[10] and the Second Census[11] of the Brazilian Digital Gaming Industry, as can be seen in Table 1. It should therefore be kept in mind what was already pointed out in 2022, that the first two mappings used census research methods.

Table 1: Evolution of the number of developers (2014, 2028, 2022 and 2023)

GAME DEVELOPERS	2014	2018	2022	2023
Formalized developers	133	276	203	263
Non-formalized developers	-	99	40	46
Respondent developers	133	375	243	309
Estimated % of respondents over total	89 %	94 %	24 %	29,7 %
Estimation of total developers	150	400	1.009	1.042
Growth	-	167 %	152 %	3,2 %

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

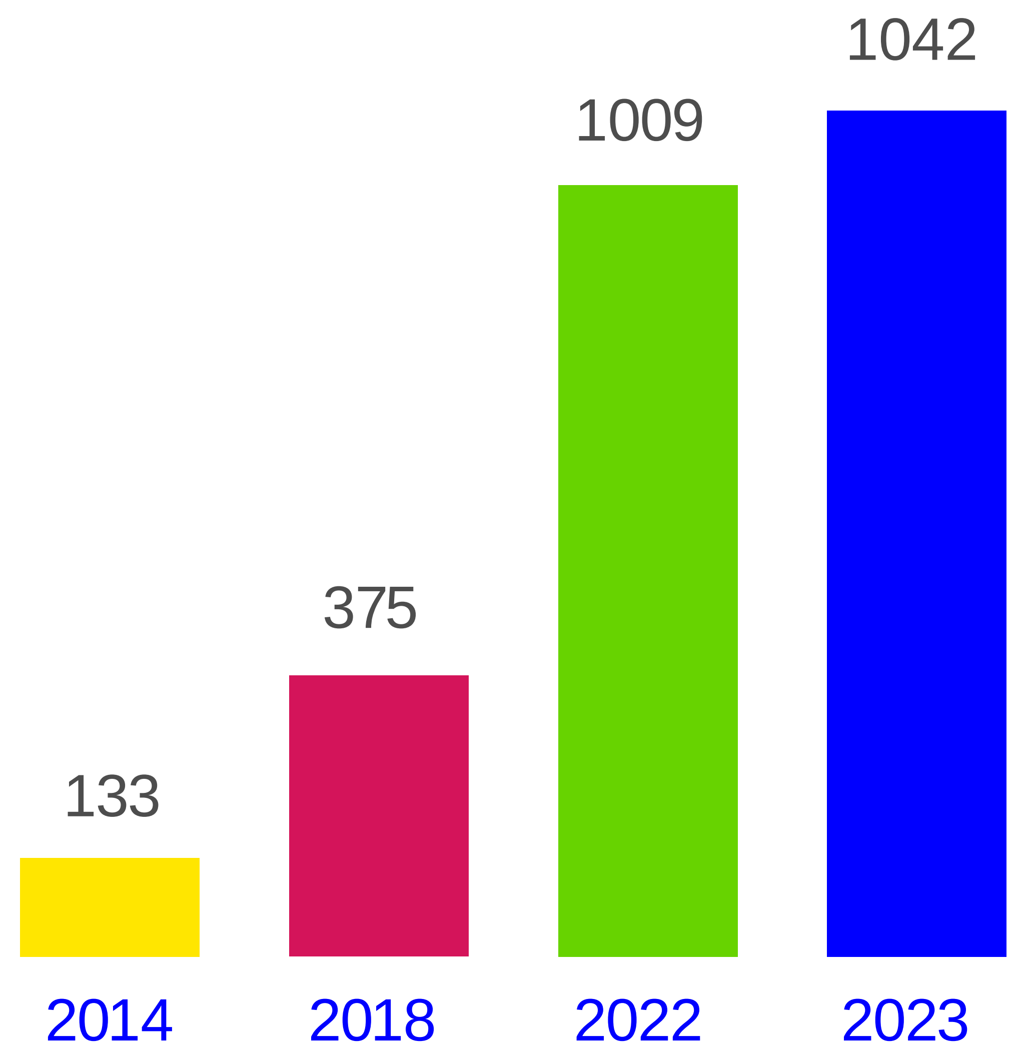
[9] FORTIM, Ivelise (Org). 2022 Brazilian Gaming Industry Survey. ABRAGAMES: São Paulo, 2022.

[10] FLEURY, Afonso; SAKUDA, Luiz Ojima; CORDEIRO, José H. D. I Censo da Indústria Brasileira de Jogos Digitais, com Vocabulário Técnico sobre a IBJD. Available at: https://censojogosdigitais.com.br/wp-content/uploads/2020/03/I-CENSO-II-CENSO.pdf. Accessed on: April 4, 2023.

[11] SAKUDA, Luiz Ojima.; FORTIM, Ivelise (Orgs.). II Censo da Indústria Brasileira de Jogos Digitais. Ministry of Culture: Brasília, 2018. Available at: https://censojogosdigitais.com.br/wp-content/uploads/2020/03/AF-IICenso-completo.pdf. Accessed on: May 3, 2022.

The estimated growth in the number of developers between 2022 and 2023 is 3.2%, while growth over the last 5 years (2018-2023) has reached 177%, always taking into account the aforementioned criteria.

Figure 02: Evolution of the number of developers



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

2.4 Activities performed

In addition to developing games, some of the studios surveyed also perform other activities in parallel. This is because some of these studios have recently started developing games, or to supplement their income. In this case, they are not services for which they are contracted to perform for other gaming companies, which will be discussed in the next topic, but activities that the company carries out in addition to producing games.

Of the respondent studios, 211 performed other activities, while 98 dedicated themselves exclusively to game development. Among the main changes is the drop in gamification activities, which in the 2022 Survey was conducted by 32% of companies.

Art Services (28%) became the most performed activity, overtaking Gamification (24%), which remained in second place, tied with Animation, which rose from eighth place (21% in the previous survey) to second place, with 75 companies (24%) performing the activity.

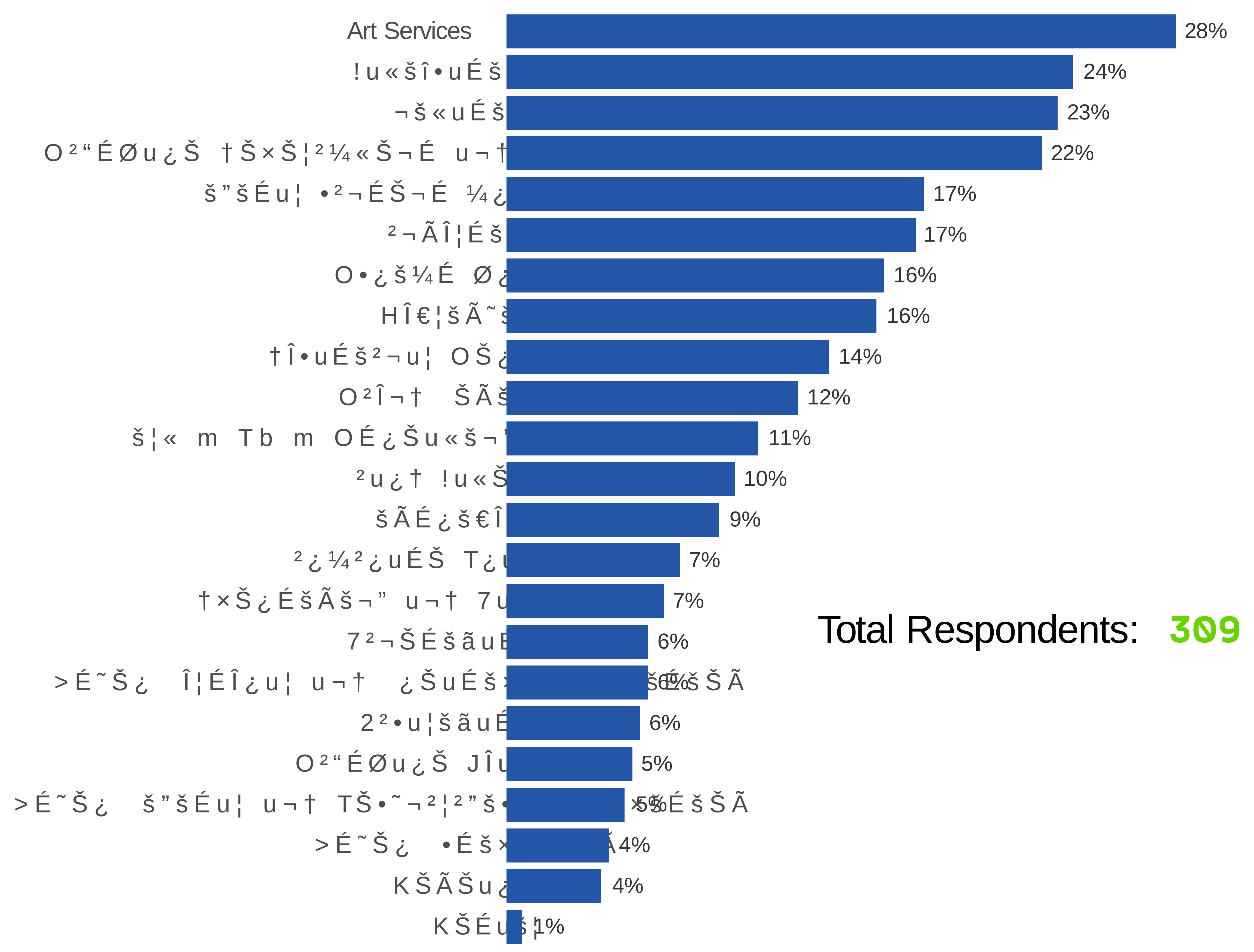
Software development dropped from 25% to 23%, now ranking as the fourth most performed activity by developers. Figure 3 shows the main activities conducted in 2022.

2.5 Services provided to other gaming companies

The percentage of companies that provided services to third parties fell from 56% in 2020/2021 to 50.8% in 2022. The percentage variation, however, is low,

samples, and not necessarily a trend. However, it will be important to track this trend going forward in order to better understand its impact in the future. Figure 4 shows the changes from 2021 to 2022.

Figure 03: Activities carried out by developers



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

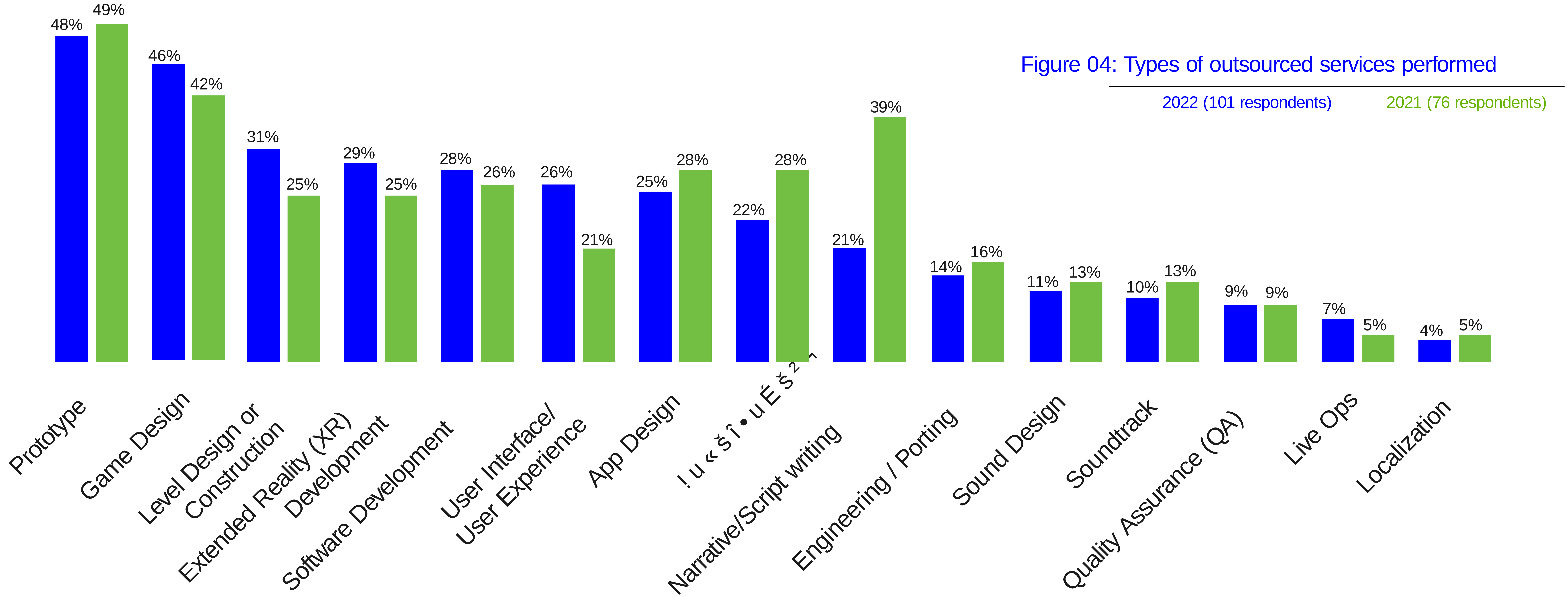


Figure 04: Types of outsourced services performed

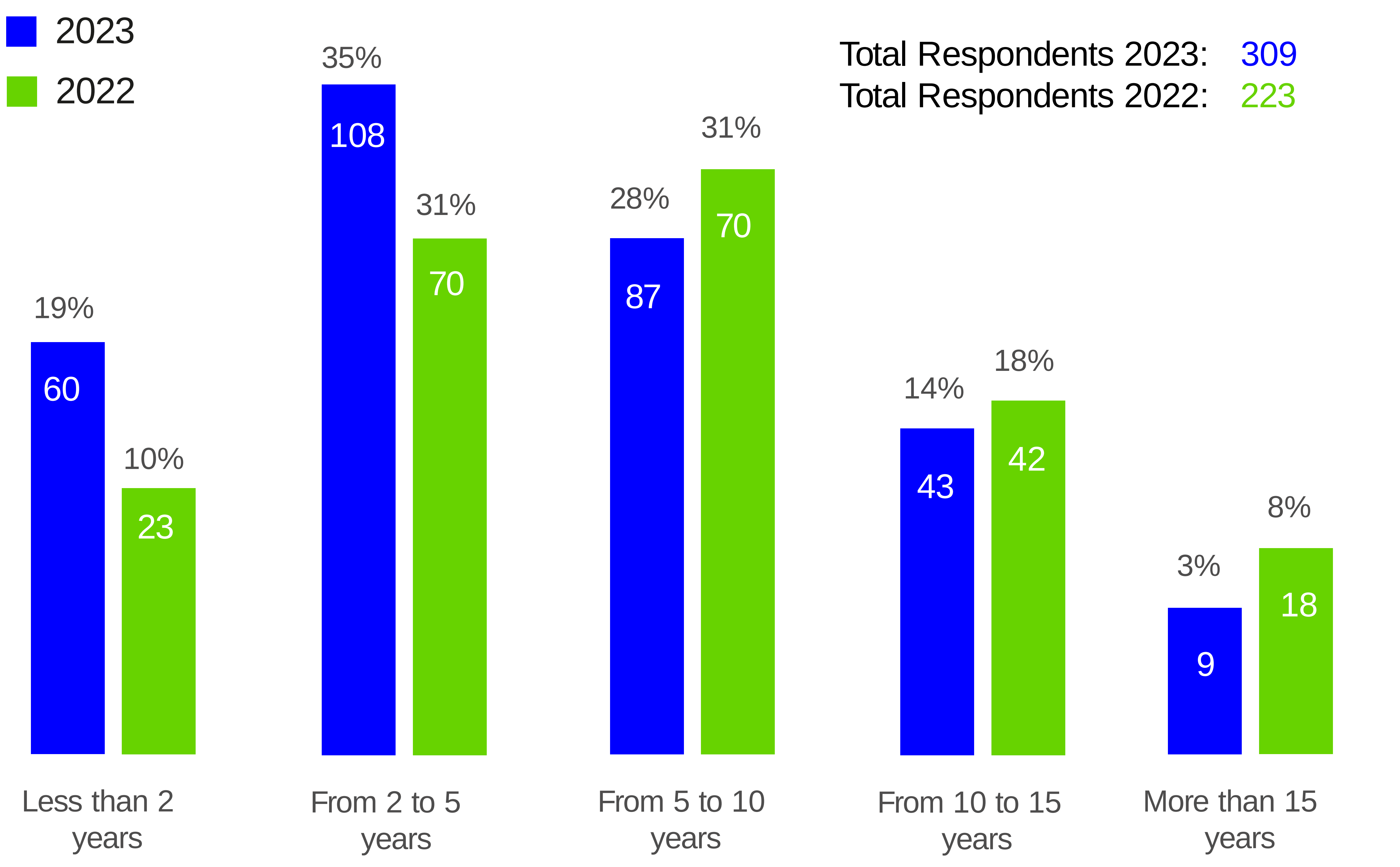
Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

In 2022, the prototype development service continued to be the service most provided to third parties at 48%, one percentage point less than the previous year, followed again by Game Design, at 46%, compared to 42% in 2021. In 2021, application design and gamification followed with 28% each, but application design fell to seventh place in 2022 with 25%, while gamification came in eighth at 22%. The types of outsourcing that took third and fourth place were Construction/Level Design (31%) and Extended Reality (XR) Development (29%). On the other hand, localization (5% in both years), Live Ops (5% in 2021 and 7% in 2022) and QA (9% in both years) are the least outsourced services, which may be the result of the growth of support companies specializing in these segments.

2.6 Operating Time

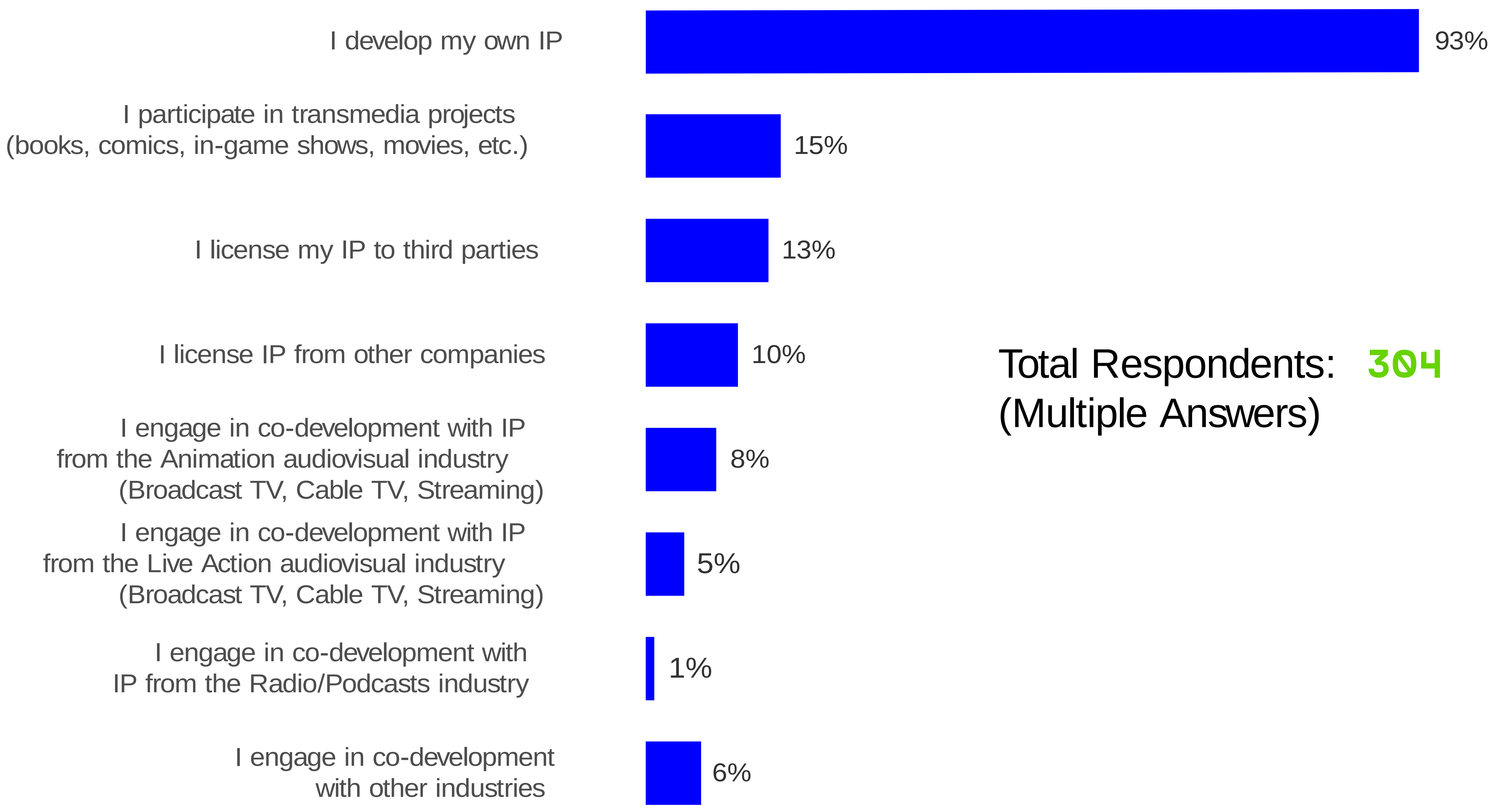
Compared to the 2022 survey, the absolute number of respondent companies over 15 years old fell due to the non-participation of some older companies in the market that were acquired or invested in 2022. The data collected during the BIG Festival 2023 in June showed a greater number of young companies, which in percentage terms almost doubled from 10% to 19%, and more than doubled in absolute numbers. (Figure 5)

Figure 05: How long the studios have been around



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 06: Aspects related to Intellectual Property



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

These results do not invalidate the conclusion that companies are becoming increasingly long-lived, presented in the 2022 report. Clearly, compared to the 2018 census, companies are staying around longer; –

lected in 2022 and 2023 generates these percent-

2.7 Intellectual Property

Similar to 2021, the vast majority of Brazilian studios (93%) developed their own intellectual property (IP) in 2022 (Figure 6). However, participation in transmedia projects (15%) and licensing their own IPs to third parties (13%) surpassed licensing IPs from other companies (10%), which held the second place at 18% in the previous year. Developers exclusively using their own IP rose from 59% to 64%.

3.

Studios on the Map

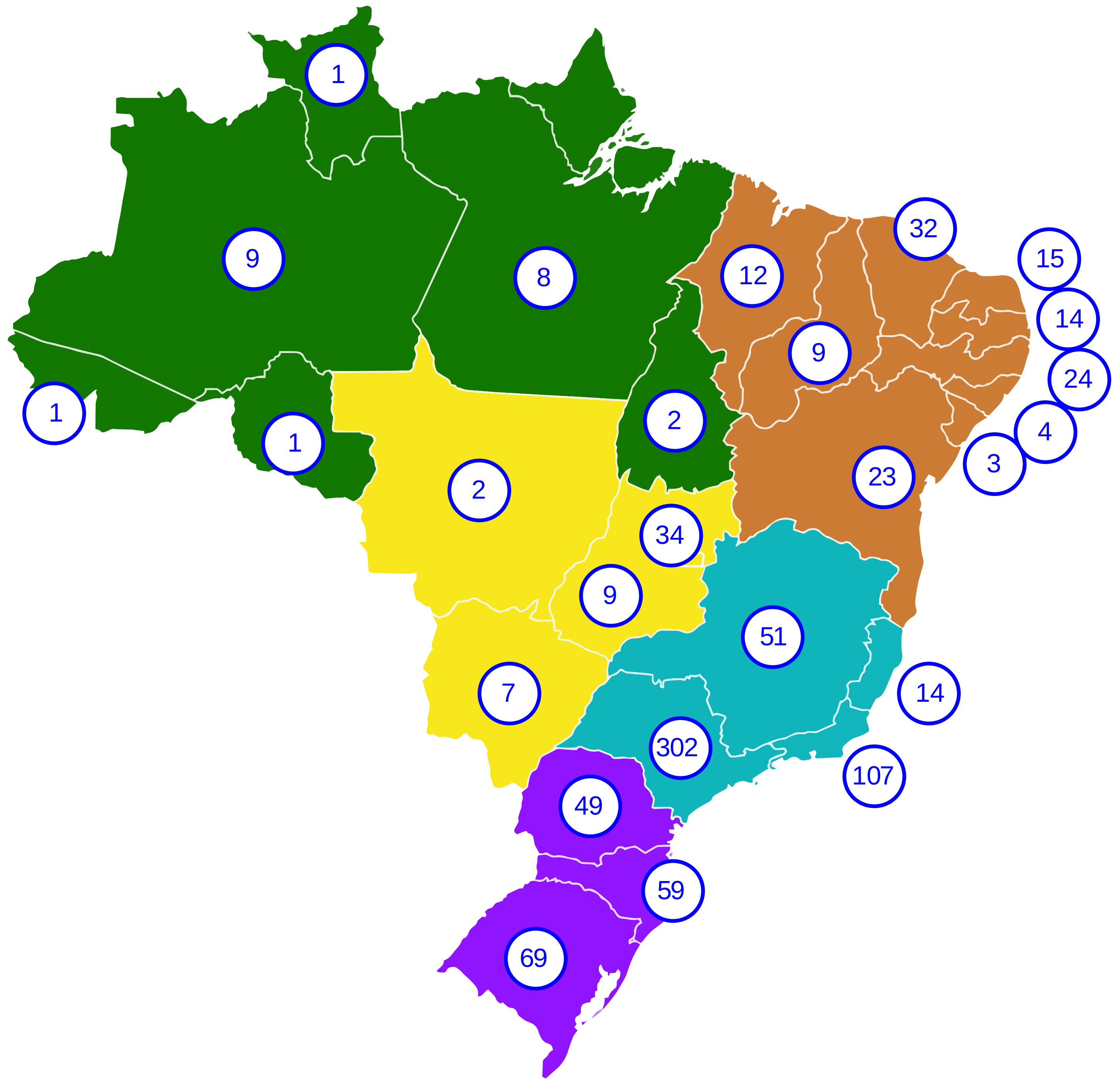
3.1 Map with distribution of companies by state

Although there are studios in practically every state in Brazil, the concentration remains in the southern and southeastern parts of the country. This historical concentration is due to the emergence of the first game design and digital game development courses in these regions, as well as the entire creative ecosystem present in their key cities.

Figure 7 shows the distribution of 861 developers across the country. Their locations were obtained from data collected on their websites and social networks, using the data from the 2022 and 2023 surveys and/or in other ways. It is worth noting that it was not possible to estimate the location of 181 companies when the final version of the report was completed.

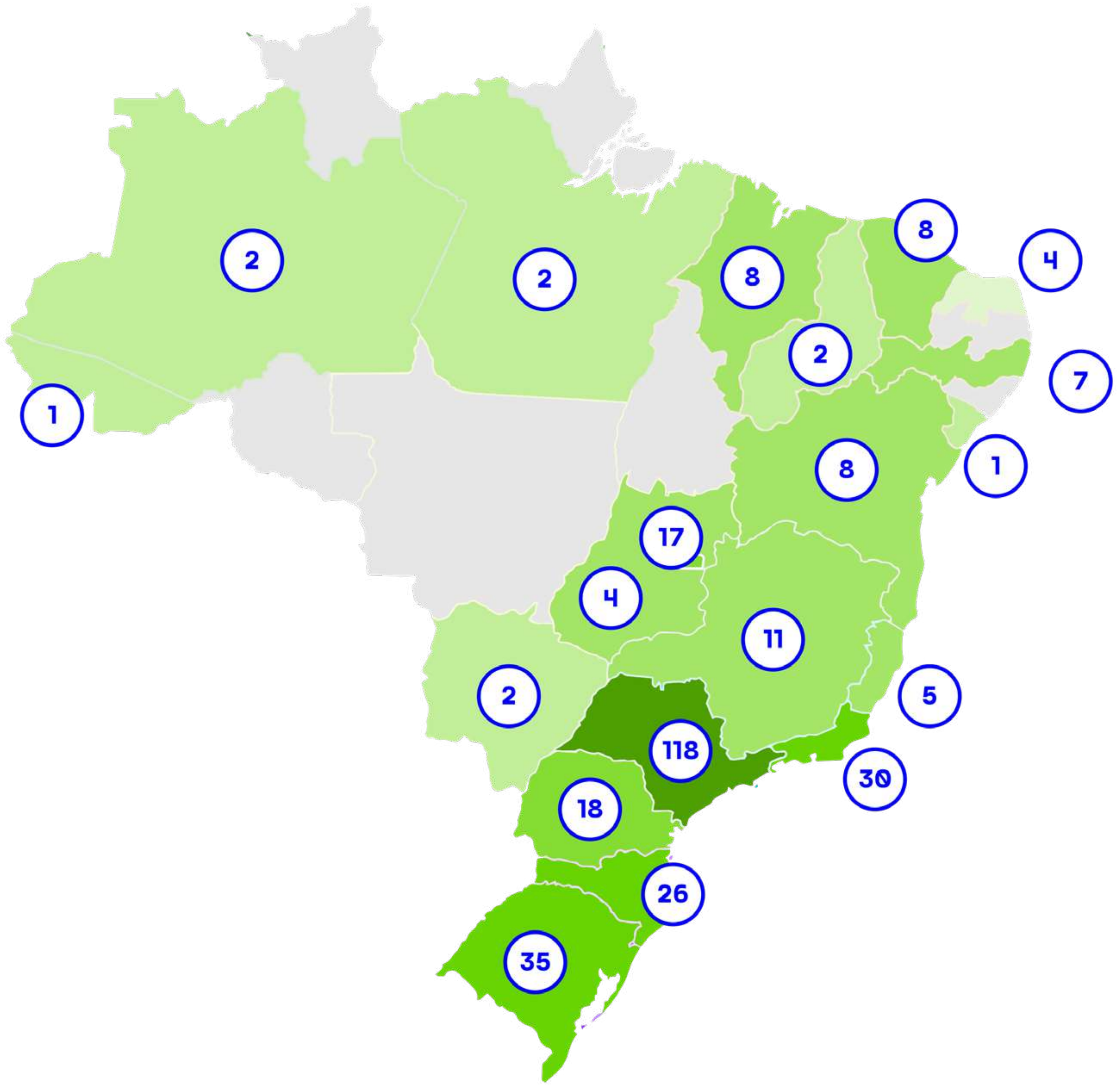
The mapping shows that the states with the highest concentration of developers are: São Paulo (302 companies); Rio de Janeiro (107); Rio Grande do Sul (69); Santa Catarina (52); Minas Gerais (59); and Paraná (49). The figures show a concentration of developers in the southeastern

Figure 07: Distribution of developers mapped throughout the country



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 08: Distribution of respondent developers



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

and southern areas of the country. Amapá is the only state without any developers, while Acre, Rondônia and Roraima only had one company each.

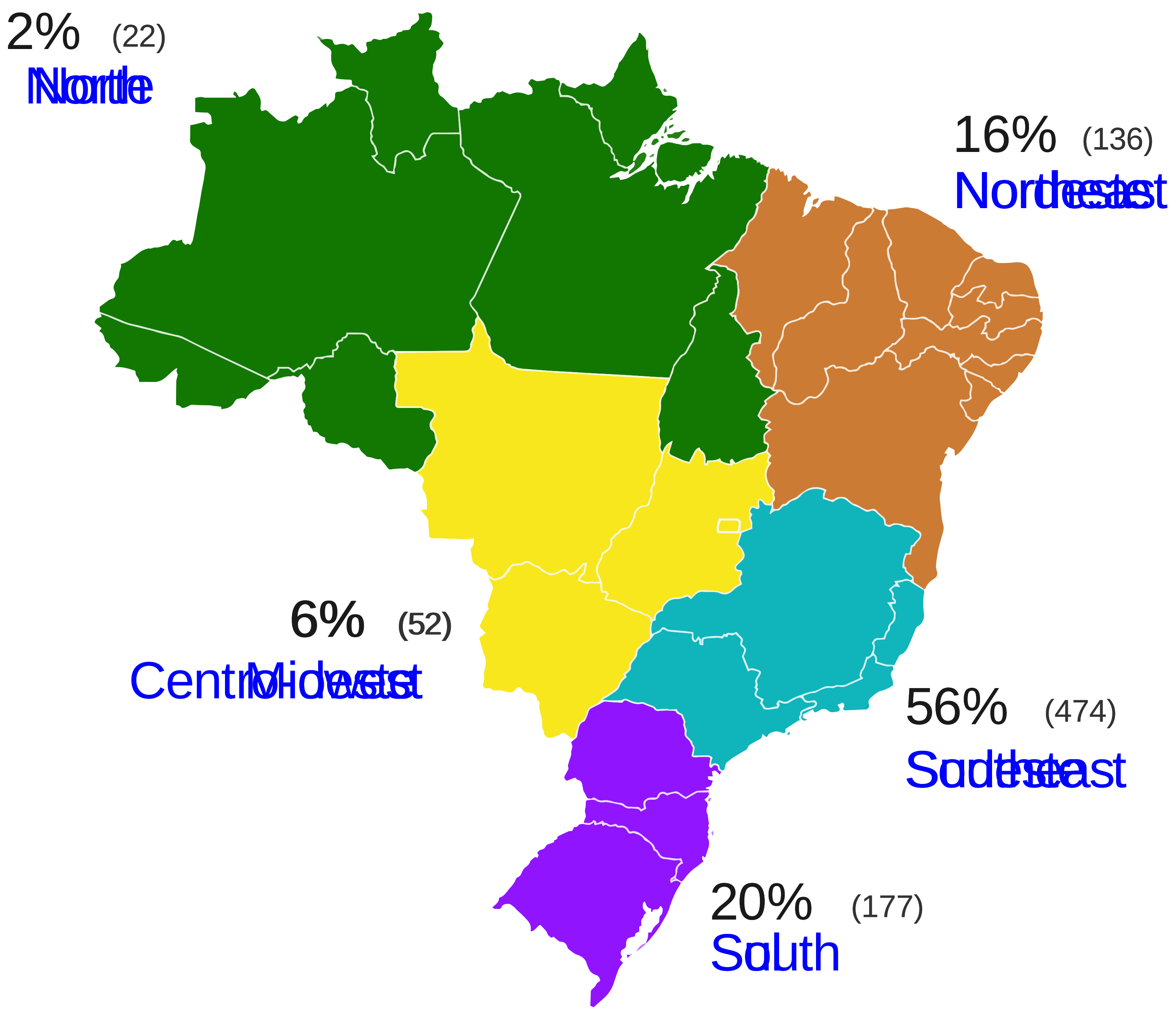
The distribution of studios responding to the survey by state is shown in Figure 8. The result is similar to that suggested by the initial mapping, with the following distribution: São Paulo (118 companies); Rio Grande do Sul (35); Rio de Janeiro (30); Santa Catarina (25); Paraná (18); and Brasília (17). Rio Grande do Sul and Brasília stood out, with at least 50% of the mapped developers having responded to the survey.

3.2 Distribution map of developers by region

As pointed out in the 2022 survey, the distribution of companies by region reflects some critical points in the development of the gaming industry in any country, such as: the creation and longevity of educational courses for game development (design or programming), computer science and the arts, and consequently the market for professionals trained in these areas; the maturity of the technological infrastructure; the existence of other players in the ecosystem that support the growth of the sector and, finally, the more proactive relationship of the public sector with the industry.

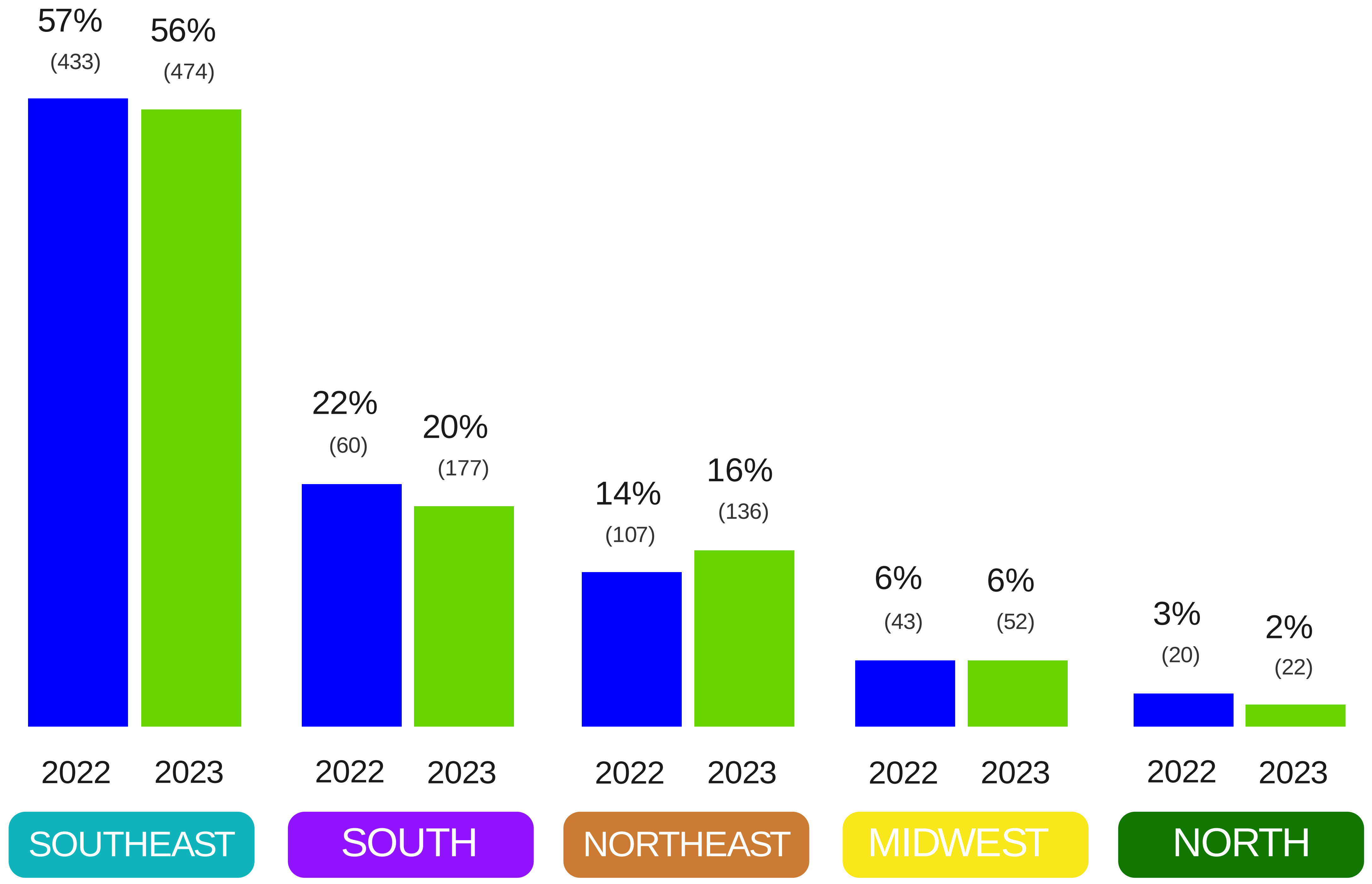
The digital games industry can be considered one of the industries in the Creative Economy. For this reason, their companies are expected to grow closer to cities or regions that support more technology- and creativity-intensive companies. Based on this reasoning, the next section seeks to analyze the ranking of cities with the most mapped companies in 2023.

Figure 09: Mapping by Region



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 10: Comparison of distribution of developers by region in 2022 and 2023



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Of the 861 developers analyzed in 2023, 56% are concentrated in the Southeast, 20% in the South, 16% in the Northeast, 6% in the Midwest and 2% in the North. It is worth noting that the Southeast and South appear with 1% less than in 2022 and the Northeast with 2% more. The Southeast continues to concentrate more than half of Brazil's developers, but the growth of the Northeast does not necessarily indicate more companies operating in the region, but rather that in 2023, the majority of the 99 additional companies whose location can be established were found to be located in the Northeast.

3.3 The main cities where developers are located

Table 2 illustrates the fact that digital game developers set up and develop in cities where the technological and creative structure is more developed. São Paulo has the largest number of mapped studios (167), followed by Rio de Janeiro (71), Curitiba and Porto Alegre (34), Belo Horizonte (32) and Brasília (31), and Curitiba (14).

Table 2: Top 10 mapped cities with the largest number of digital game developers.

CITIES	STUDIOS
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	[illegible]
	[illegible]
	[illegible]
	[illegible]
	[illegible]
	[illegible]
	[illegible]
	[illegible]
	[illegible]

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Table 3: Mapped cities with 5 or more respondent digital game developers.

CITIES	STUDIOS
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Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

When we consider the cities with more than five developers responding to the 2023 survey, we see that the list is in line with the cities, almost all of them capitals, from the initial mapping (Table 3). São José do Campos is the only non-capital city with at least 5 studios based in the city.

4.

Games overview

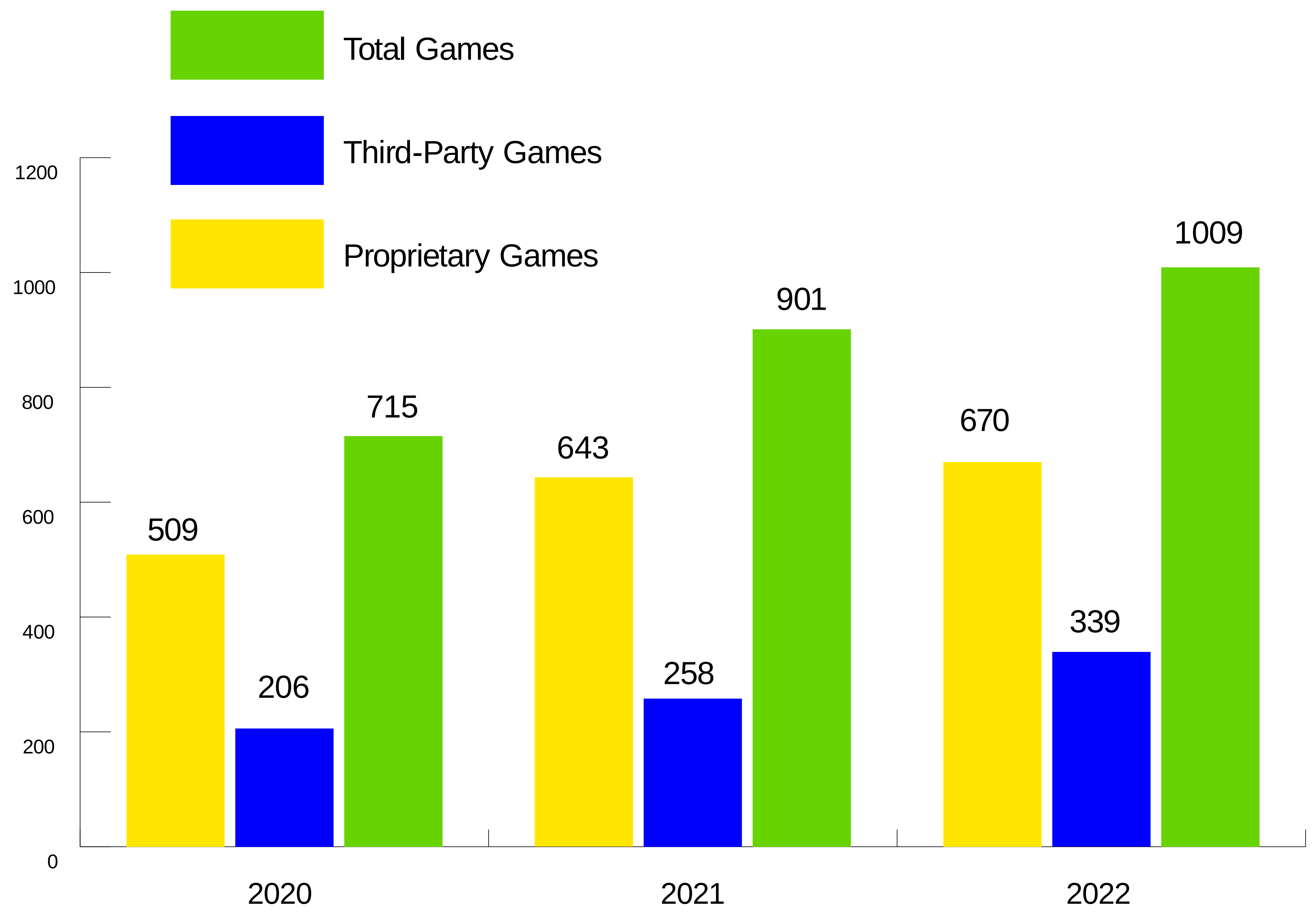
An overview of the games produced in 2022, according to the respondents' data, will be presented in this chapter. The data, when compared with those for 2020 and 2021 from the previous year's survey, should be analyzed con-

4.1 Number of games

Of the 309 respondent companies, 49% produced a proprietary game in 2022. The number of proprietary games developed reached 670 in 2022 compared to 643 in 2021, up 4.1%. The total number of proprietary games produced in the last three years has reached 1,822.

Adding games for third parties, the production of games in 2022 reached 1,009 games, an increase of 12% over 2021 (901 games), thus totaling a production of 2,625 games over the 3 years. Figure 11 shows the growth of games released between 2020 and 2022.

Figure 11: Evolution of the number of games developed from 2020-2022



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

4.2 Types of games developed

Table 04: Games produced by category in 2020, 2021 and 2022.

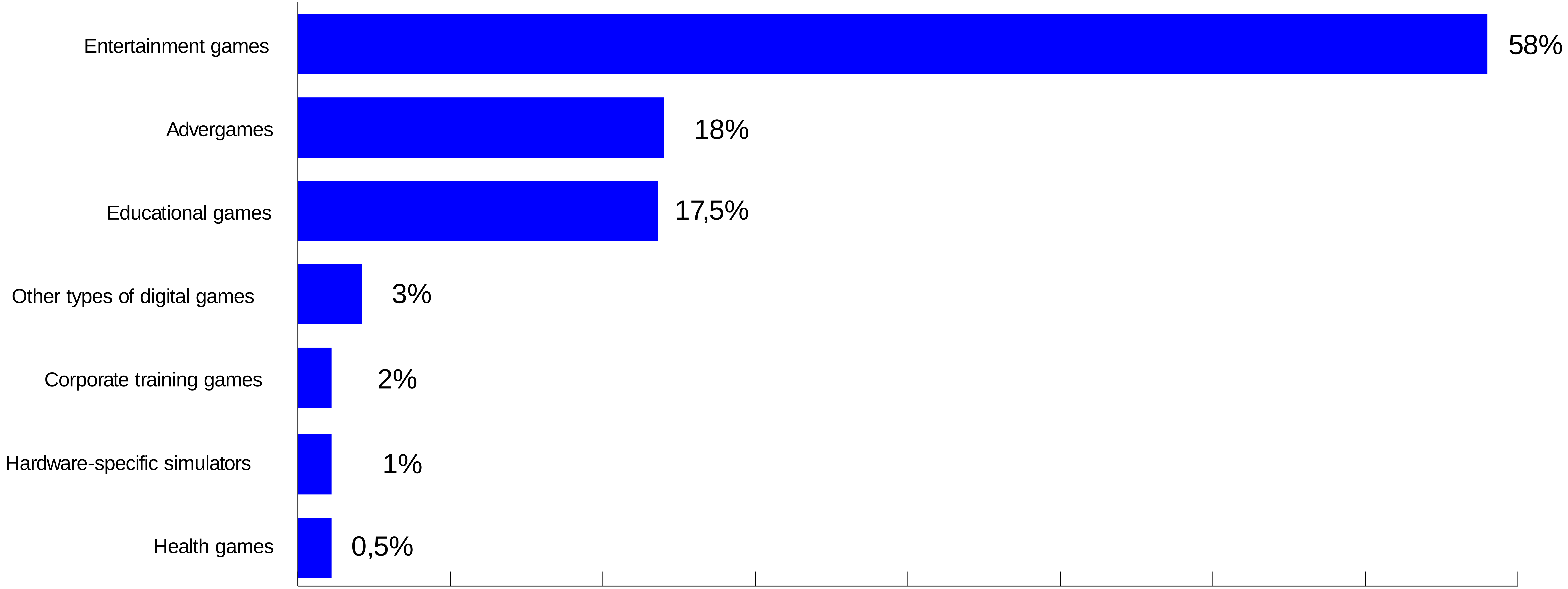
Entertainment games	36%	44%	58%
Advergames	9%	6%	18%
Educational games	35%	26%	17,5%
Other types of digital games	3%	5%	3%
Corporate training games	15%	16%	2%
Hardware-specific simulators	2%	2%	1%
Health games	1%	0%	0,5%
TOTAL GAMES PER YEAR	509	643	670

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

To allow comparison between the years, the categorization by type used in the 2022 survey was maintained. It's worth noting that games in one category are not the same as games in another, either in terms of the investment made in their development or the time taken to complete them. The same applies to games in the same category.

Table 4 shows the production percentage in each of the categories. The increase within a given category may indicate activity growth in the category, since studios don't tend to change their production profile.

Figure 12 – Types of proprietary games produced in 2022



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

In 2022, around 670 games were developed, with the entertainment games category (58%) producing 390 games (Figure 12). Advergames and educational games came next. As indicated in Table 4, there has been a big change compared to 2021. This change is partly explained by the composition of the sample, since the number of companies that responded that they produce games for this category increased by 35%.

Another impacting factor was the variation in the average number of games produced by the advergames, educational games and corporate training games categories. The average number of games produced per company in the advergames category climbed from 3.2 to around 10.9 games between the years surveyed, while educational games fell from 8 games on average to 4.7 and corporate training games dropped from 10.3 to 1.6 games on average.

4.3 Games developed by platform

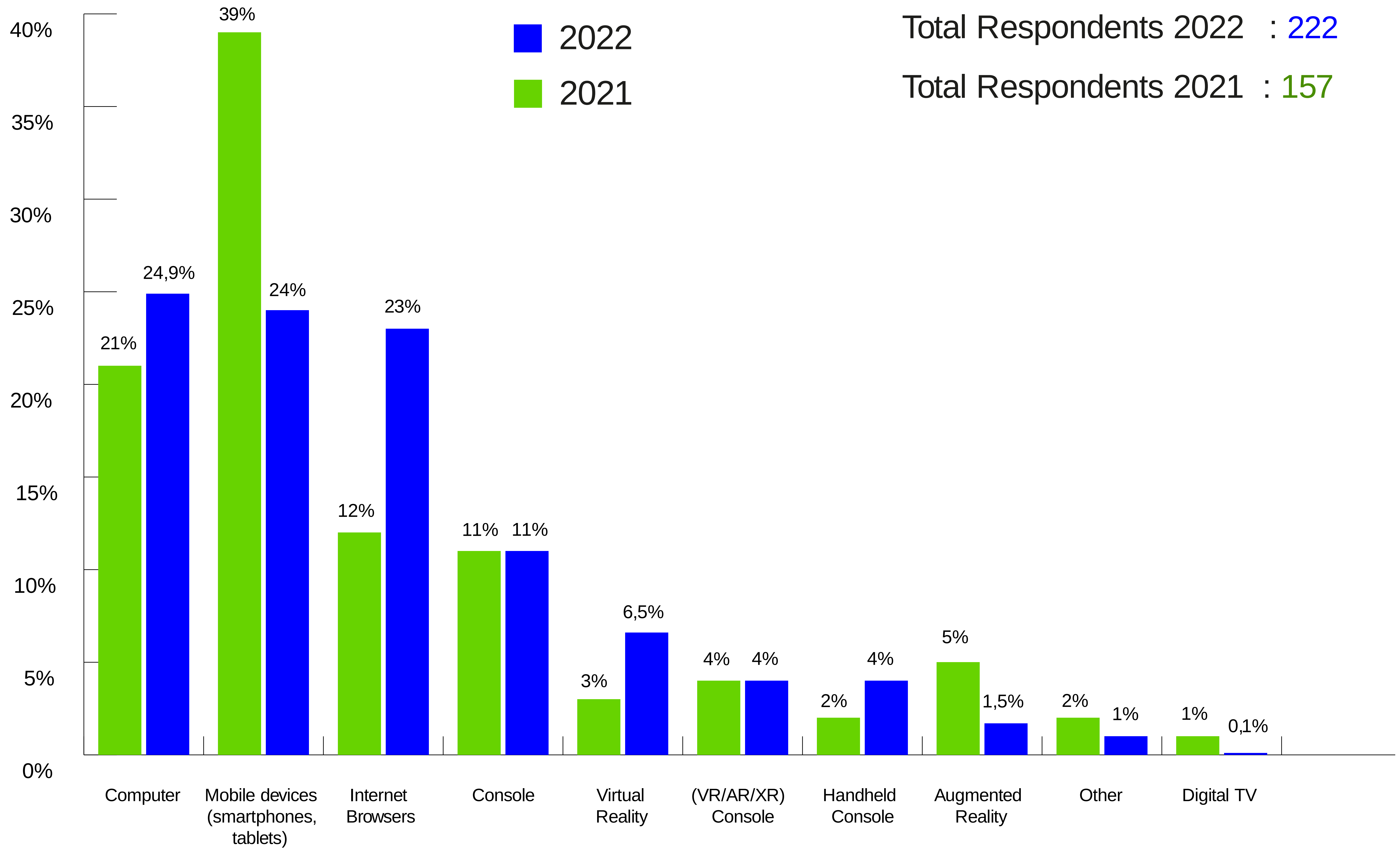
When we compare the distribution of games developed

samples in this study compared to the previous year ex-

there was stability between the platforms in 2020 and 2021. However, in 2022, web browser games jumped from 12% to 23%. This result was impacted by three educational and corporate games companies that make their projects available in web format. If the company with the highest production of the three were to be removed from the sample, just for comparison, web browser games would account for 13.4% of the total, close to what was found in 2021.

Figure 13 shows the full results and, most significantly, the computer platform overtook smartphones and tablets, at 24.9% for the former and 24% for the latter. The web browser platform comes third, as indicated above, with 23% and consoles maintained their share at 11%, as in previous years. The digital TV platform, despite being an innovation with the possibility of future growth, fell from 1% to 0.1%, with only 2 projects developed, and social networks again had no response.

Figure 13: Number of games developed by platform in 2021 and 2022

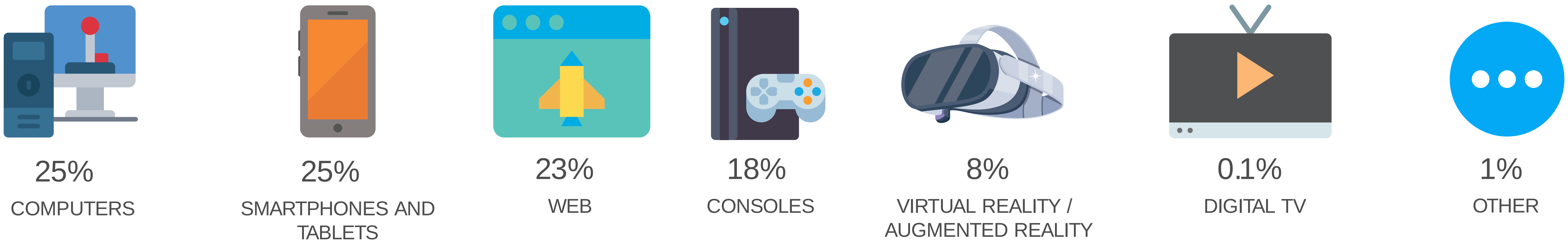


Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Another relevant factor is the continued growth in the production of games for consoles, which was already pointed out in the 2022 survey. Production reached 5% in 2018, 17% in 2021 and 19% in 2022, with an even greater emphasis on portable consoles, which doubled compared to the previous year. Figure 14 shows the distribution of development by platform.

Figure 14 – Summary of development by platform

Total Respondents: 222



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

One figure that demonstrates the multiplatform development trend is the average number of platforms for which the studios produce. In 2022, on average, each of the 222 respondent studios developed for 2.2 platforms. Although it is not possible to guarantee that the same game was made available on more than one plat-

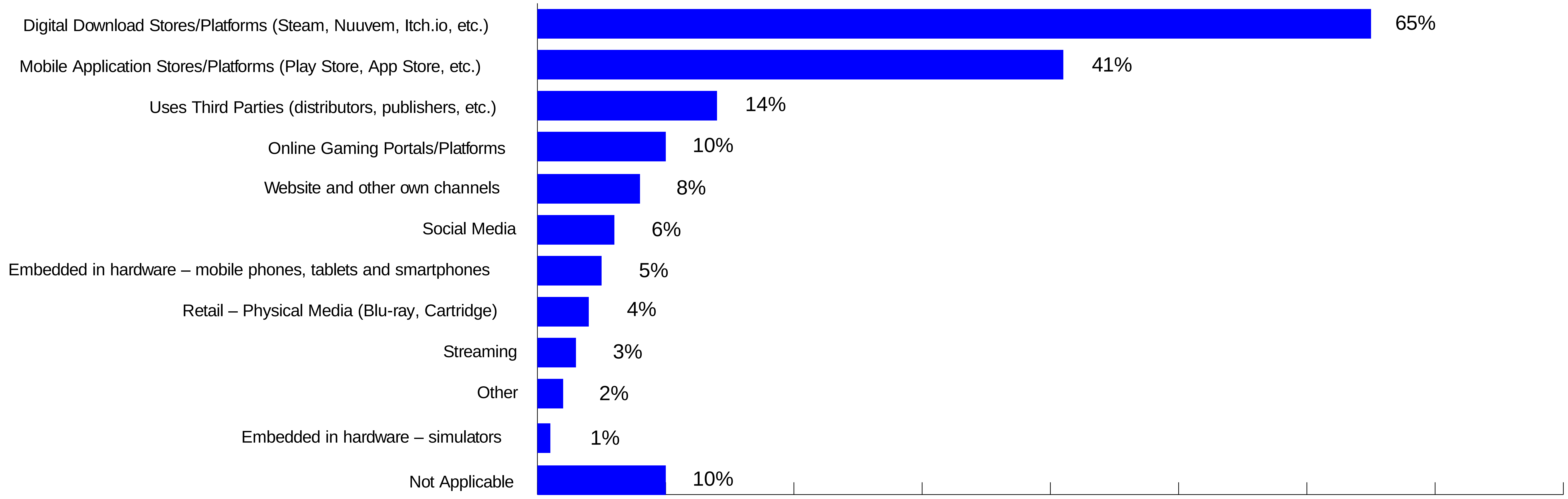
4.4 Distribution

The way games are distributed is directly linked to their development platform. Companies with multiplatform games tend

companies here were able to choose more than one distribution option for their games. As seen in Figure 15, the main platforms for entertainment games are digital download platforms/stores (Steam, Nuuvem, itch.io, among others), accounting for 65% of responses, and mobile application platforms/stores (Play Store, App Store, among others), at around 41%. In line with the production of games for computers and mobile devices presented earlier, the least common include Retail – physical media (4%), Streaming (3%), Other (2%), and Embedded in Hardware, representing 1% of the responses. The results found are in line with the 2022 Survey, when analyzing the order of use of entertainment game distribution platforms.

Figure 15 – Distribution platforms for entertainment games

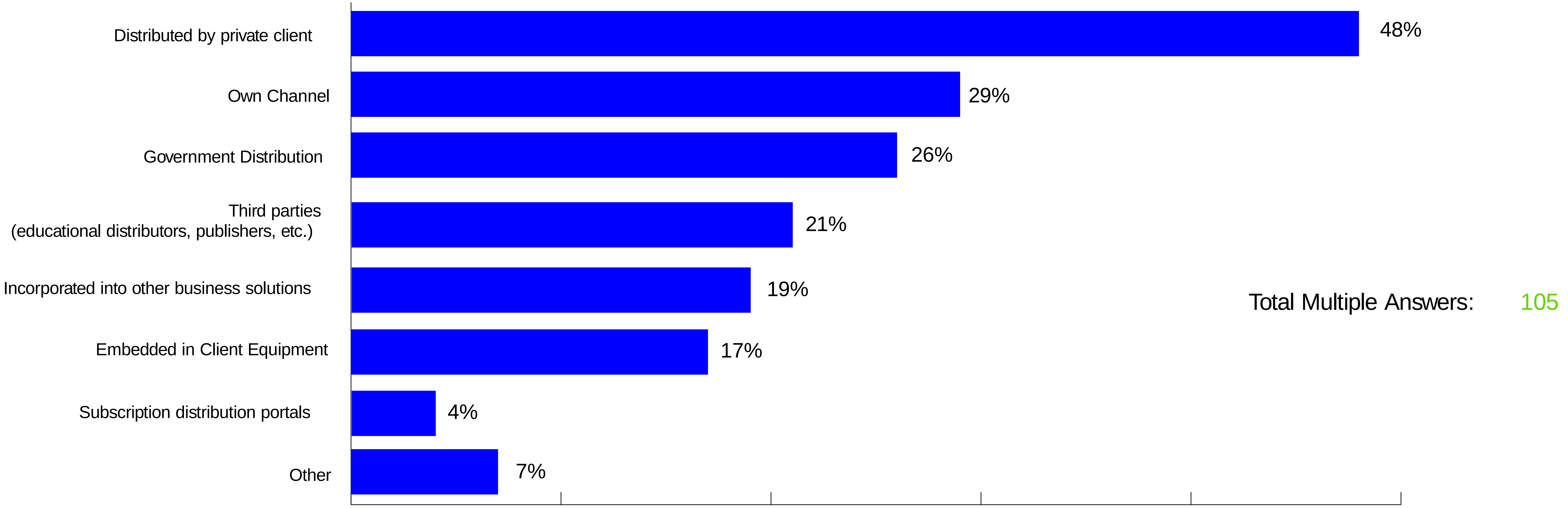
Total Multiple Answers: 280



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Regarding the distribution of impact games/serious games (Figure 16), the main methods cited were: distribution by private clients, representing 48% of the responses; by own channel (29%) and by government distribution, with around 26% of the responses. The least common means of distribution is through subscription distribution portals, at 4%. The distribution of impact games, serious games, through their own channels overtook government distribution in the current survey, whereas in the previous survey government distribution stood second by a small margin.

Figure 16 – Distribution platforms for impact/serious games



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

4.5 Outsourcing games and services

In 2022, the respondent companies indicated that they carried out 1,064 service outsourcing projects. The increase compared to 2021 was around 62%. It should be noted that there was a 30.2% increase in the number of companies providing services, i.e. the number of respondent companies grew from 76 to 99. At the same time, there was an increase in the average number of outsourced services per company, which rose from 8.6 to 10.8. The distribution of these projects is shown in Figure 4 of item 2.5 in this report.

As shown in Figure 17, 157 of the respondent companies (51%) reported providing services to third parties in 2022. Developers that said they did not provide services to third parties amounted to 150 (49%). When compared to 2021, the percentage of companies that said they provide services to third parties fell from 56% to 51%.

Figure 17 – Provision of services to third parties in 2022

Total Respondents: 307

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

However, in relation to games developed for third parties in 2022, as shown in Table 5, we find that entertainment games reach 40%, when adding up the games produced for international and national clients. Entertainment games for international customers (28%) overtook educational games (23%) in 2022, reversing the order presented in 2021. Corporate training games rose to 18%, versus 10% in 2021, taking the third position reported, overtaking full advergames, which fell from 23% to 15%.

Complete health games and complete simulators using specific hardware remain the least outsourced services, at 2% each.

Table 5 – Types of outsourcing by game category

TYPES OF OUTSOURCING BY GAME CATEGORY	2020	2021	2022
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Respondents (2020-2021): 72 (multiple responses)
Respondents (2022): 71 (multiple responses)

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Table 6 – Types of outsourcing by art service

TYPES OF OUTSOURCING BY ART SERVICE	2020	2021	2022
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•			•
• • • - € -	•		••

Total Respondents: 63

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

In 2022, developers conducted around 1,067 outsourced art projects. The main outsourced services were 2D Art and 3D Art at 21%, with 3D Art growing 7% compared to 2021, surpassing Art – Illustration which fell 8% to become only the fifth outsourced art service. Conceptual Arts and Animation follow with 13% each, both of which grew by 3%. Technical arts, despite having grown by one percent compared to 2021, reaching 6%, remain the type of service least outsourced. (Table 6)

4.6 Awards

The number of respondent companies with national or international awards fell from 34% to 28%, mainly as a result of the growth in the number of companies with less than 2 years in the sample. As highlighted in the 2021 survey, "the awarding of prizes allows developers to accumulate symbolic capital, attracting interest from both investors and the end public."[12]

Among the national awards mentioned as relevant by the developers, in order of citation rather than importance, we have SBGames, Sebrae Nacional, BIG Festival, Gamepolitán, Animaí, Cubo de Ouro, Inovaapps, Pixel Show, Guarnicê Film Festival, IGN Brasil, Rio2C, Drops de Jogos, Prêmio Quirino, Brasil Game Show, Games for Change America Latina, and Brazil Game Awards. Others are also mentioned, such as the Curitiba City Council, the ADVBRS/APEXBRASIL Export Award and Inovativa Brasil.

[12] FORTIM, Ivelise (Org). 2022 Brazilian Gaming Industry Survey. Page 52. ABRAGAMES: São Paulo, 2022.

The international awards cited were those received at VIDEOJUEGOS MX, Epic MegaGrants, Games Gathering Conference, Bienal de Veneza, Google Play, Primetime Emmy for Outstanding Innovation, D.I.C.E, Japan Media Arts Festival, IGF - Independent Games Festival, Dubai Game Expo, Casual Connect Serbia, Indigo Design Award, NYX Game Awards, Behance Portfolio Review, Raindance Festival, GDC play, Game Connection America Global Top Round, Overcome Film Festival, Qualcomm Vuforia Vision Awards, Casual Connect, PAX East and West, Square Enix Latin American Contest, Kidscreen Awards, EGW and comKids Prix Jeunesse Iberoamericano, among others.

There were also awards for game development marathons, such as Buildbox Game Jam, Game Jam Plus, MAD GAME JAM, Good Game Brazil Game Jam, Indie Game Jam and Facebook Game Jam.

5.

Human Resources and Diversity

Human capital is the main factor in the so-called Creative Economy. This chapter aims to present how human resources currently present themselves in the Brazilian digital games industry, as well as the situation of diversity.

5.1 Estimation and evolution of the numbers of people at developers

Using data from the 2022 Survey, we can see how the estimated number of people working at Brazilian developers has evolved.

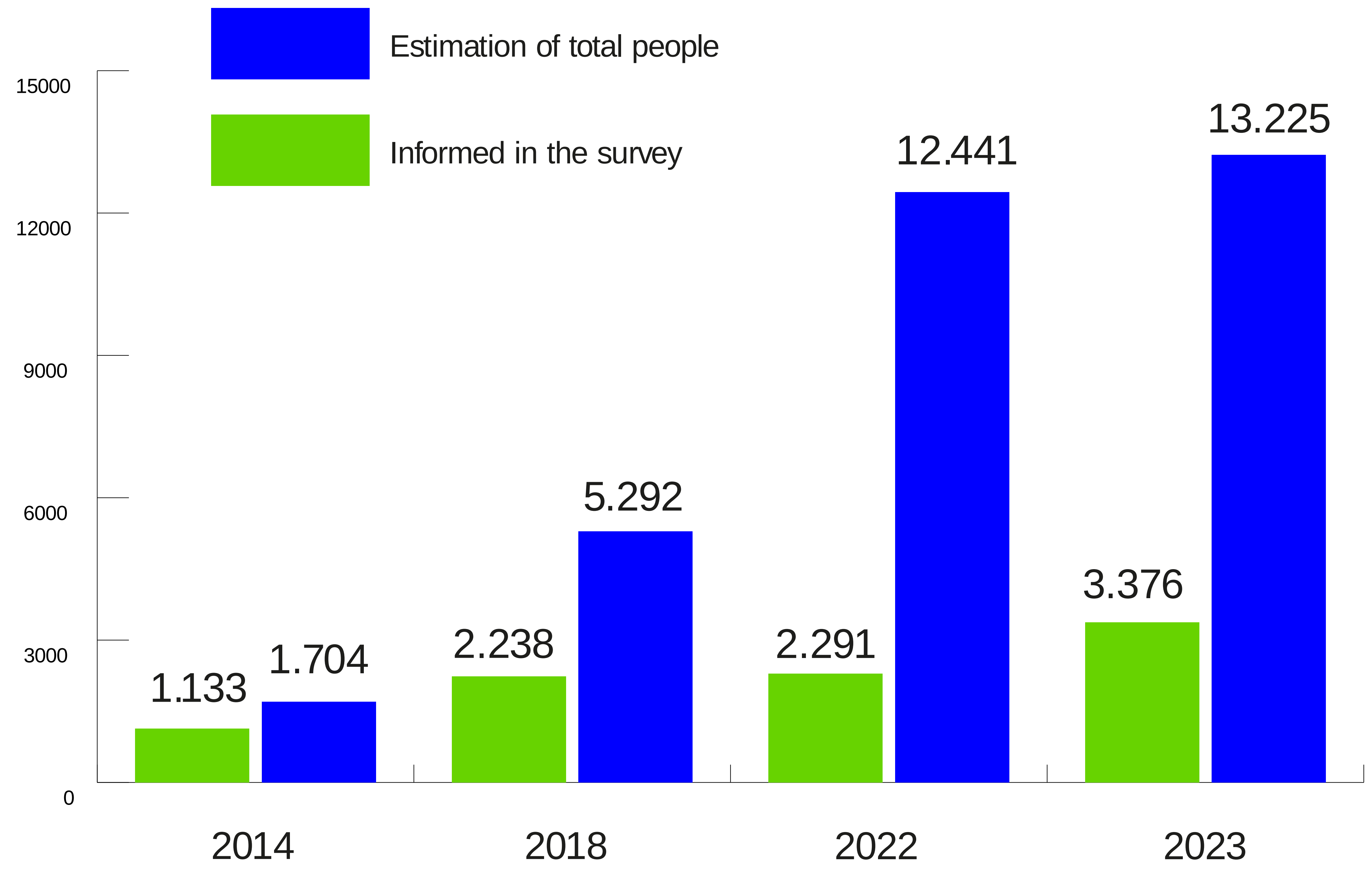
THE ESTIMATED NUMBER IS **13,225 PEOPLE** AT DEVELOPERS OF BRAZILIAN GAMES

Table 7 – Number of people and developers

PEOPLE	2014	2018	2022	2023
		[illegible]	[illegible]	
		[illegible]	[illegible]	[illegible]
		[illegible]	[illegible]	[illegible]
		[illegible]	[illegible]	
		[illegible]		[illegible]
	[illegible]		[illegible]	[illegible]
		[illegible]		[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
- €,ƒ„		[illegible]		[illegible]

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 18 – Evolution of the number of people at developers (2014, 2018, 2022 and 2023)



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

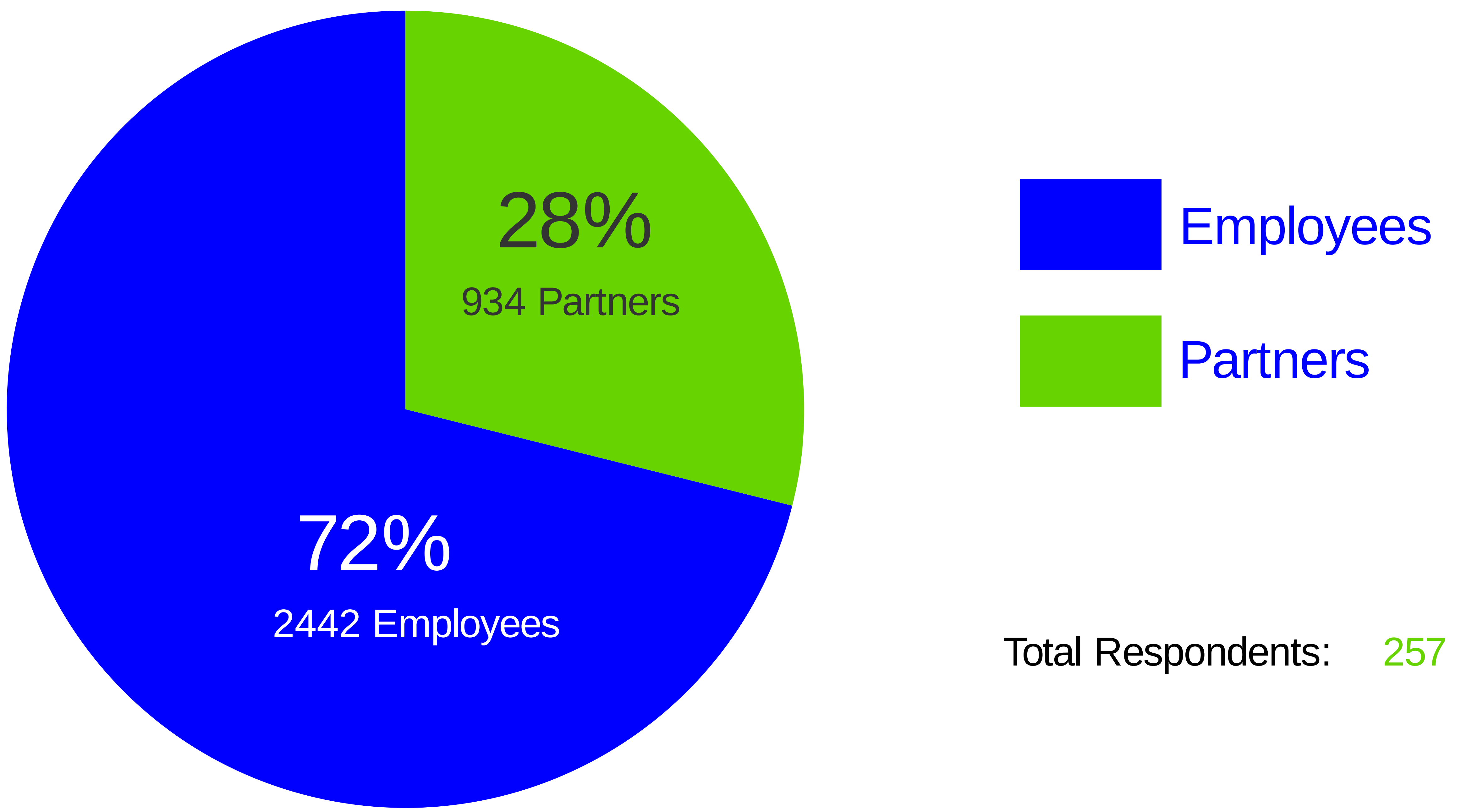
It is estimated that the number of people working for game developers in 2023 reached 13,225 (Table 7 and Figure 18). This is an estimated growth of 6% over the previous year. The average number of people in formal companies grew very little, from 14.0 to 14.2 people. Non-formal companies, on the other hand, saw an increase in the average, which more than doubled, although it didn't return to the 2018 figures.

largest companies during 2022, it is estimated that 784 people started working at Brazilian game developers.

5.2 Ratio of partners to employees

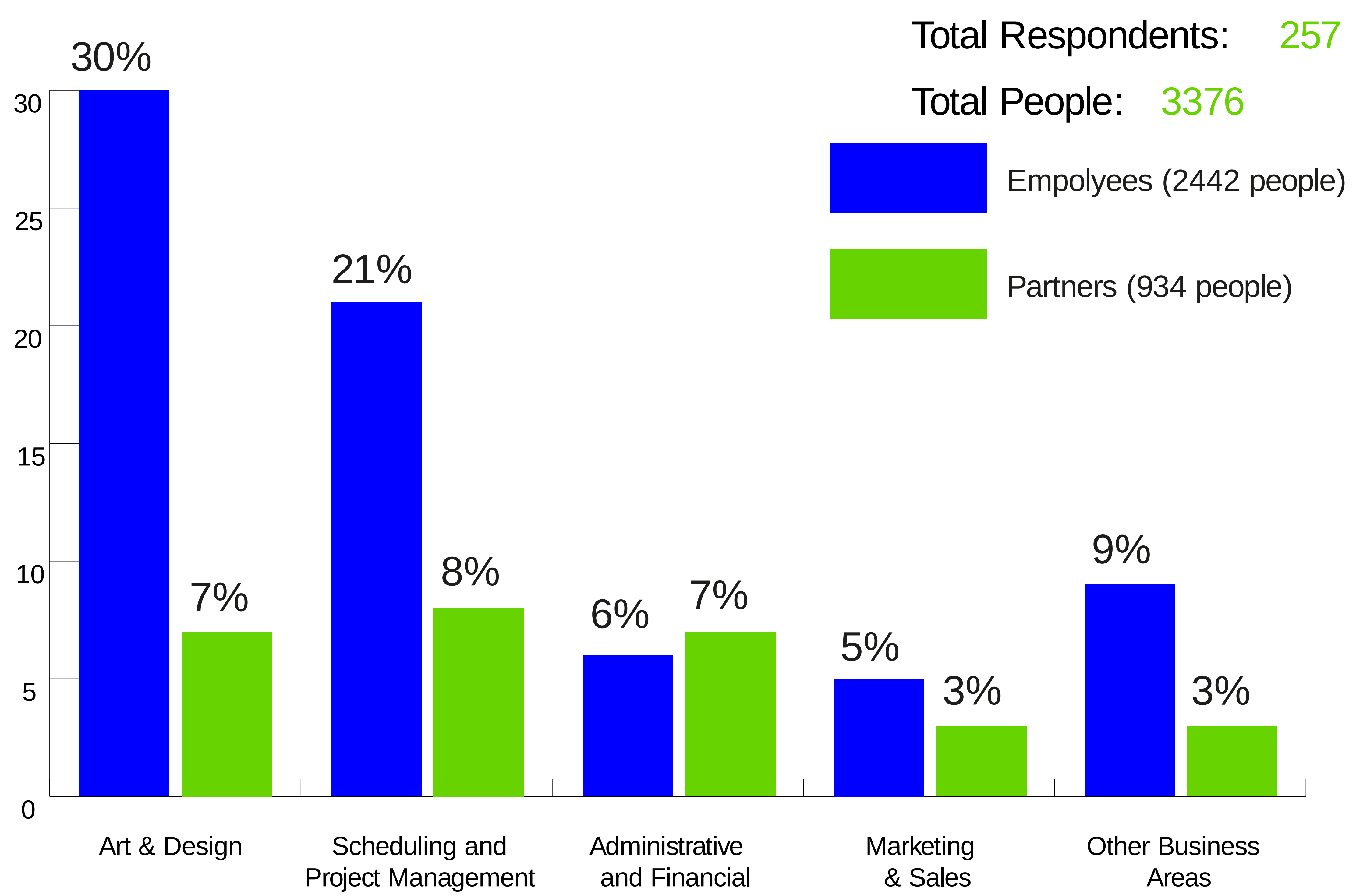
The ratio of partners in developers fell by 1% from 29% in 2021 to 28% in 2022 (Figure 19). The number of employees thus automatically rose to 72%. As already indicated in the 2022 survey, if we consider that partners accounted for 36.2% in Census II of 2018, this ratio indicates a tendency for the average size of companies to grow.

Figure 19 – Ratio of partners to employees



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 20 – Professional/area ratio – Partner-employee division



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 20 illustrates the ratio of professionals by area. It can be seen that the Art and Design area concentrates the largest number of people in the respondent developers, 37%, followed by Programming and project management at 29%. Only in the Administrative and Financial area is the number of partners (7%) slightly higher than that of other employees (6%).

The average number of partners in formalized and non-formalized developers is practically the same. However, it was possible to observe that the number of partners in non-formalized companies is higher than the number of employees. Although this is common in early-stage organizations, the gap has narrowed, as in 2021 the results showed 2.1 partners to 1.3 employees, while in 2022 the data shows 3.6 partners to 3.3 employees. (Table 8)

Table 8 – Average number of partners and employees per formalized and non-formalized developer

AVERAGE NUMBER OF PARTNERS AND EMPLOYEES			
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	• ••	•	• •
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	••	•••	•
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Respondents: 254 (multiple responses)

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

5.3 Work regime

Table 9 – Work regime at developers

WORK REGIME AT DEVELOPERS

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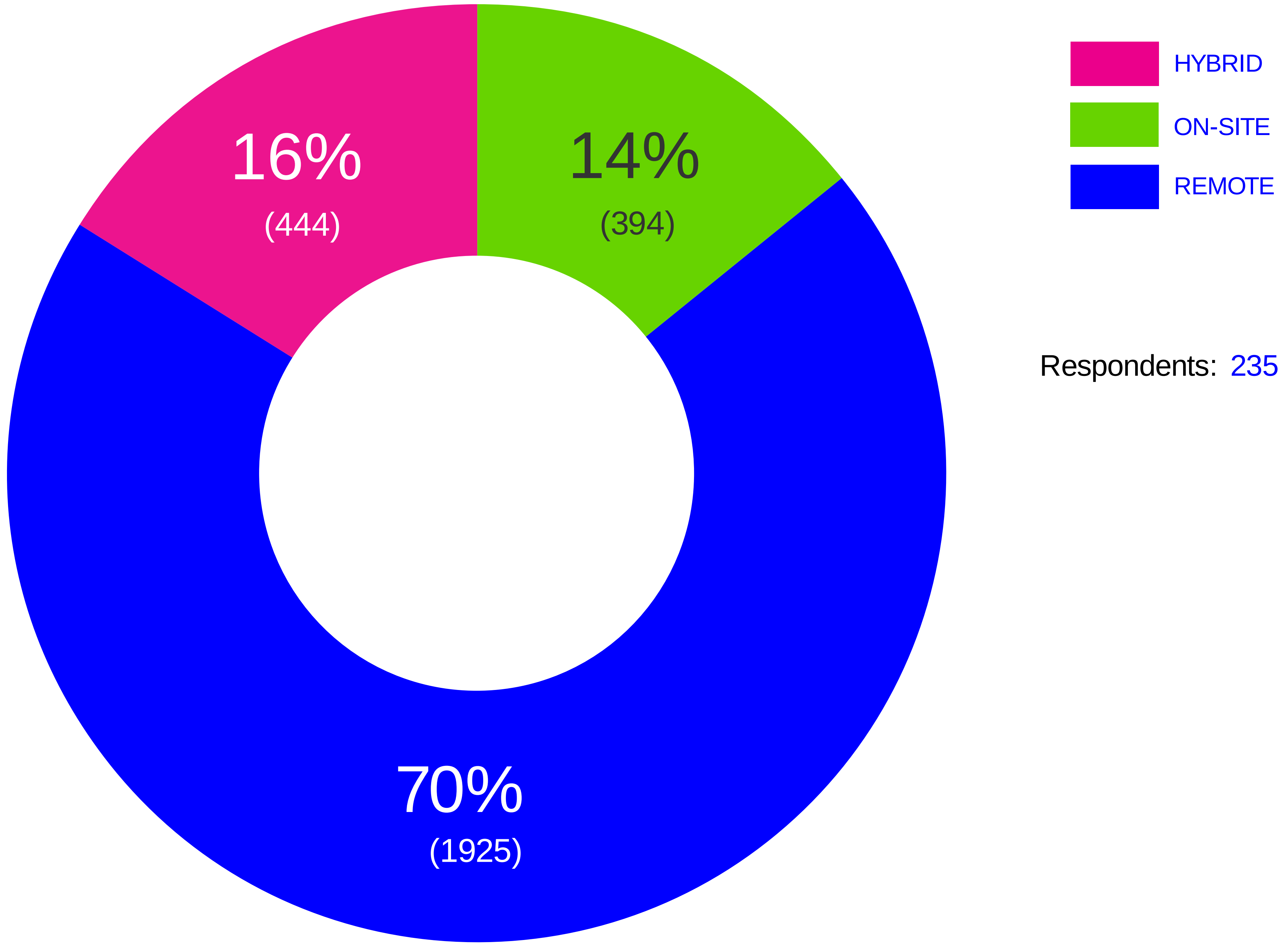
Respondents: 235

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

The predominant work regime at developers is outsourcing at 47%, followed by CLT at 26%, partners at 17%, non-formalized at 6%, interns at 3% and scholarship holders and young apprentices at less than 1% each. Companies reported that remote work continues to be the most used this year, a trend that came in strong during the Covid-19 pandemic, which started in 2020. Of the total number of people, 70% are working remotely, 14% on-site and 16% in a hybrid manner (Figure 21). It is noteworthy that the main work regime is remote work, especially among outsourced workers, where 85% of employees work remotely. CLT employees and interns have the lowest percentage of remote work, reaching 50% and 49% respectively. It was also observed that hybrid work is higher than on-site work for CLT employees and outsourced workers, but for other types of employees, on-site work ranks second. (Table 9 e Figure 22) š”Î¿Š <; u T²Éu¦ Š«¼¦²ÞŠŠÃ ¼Š¿ ²ì•Š ¦²•uÉš²¬`



Respondents: 235

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

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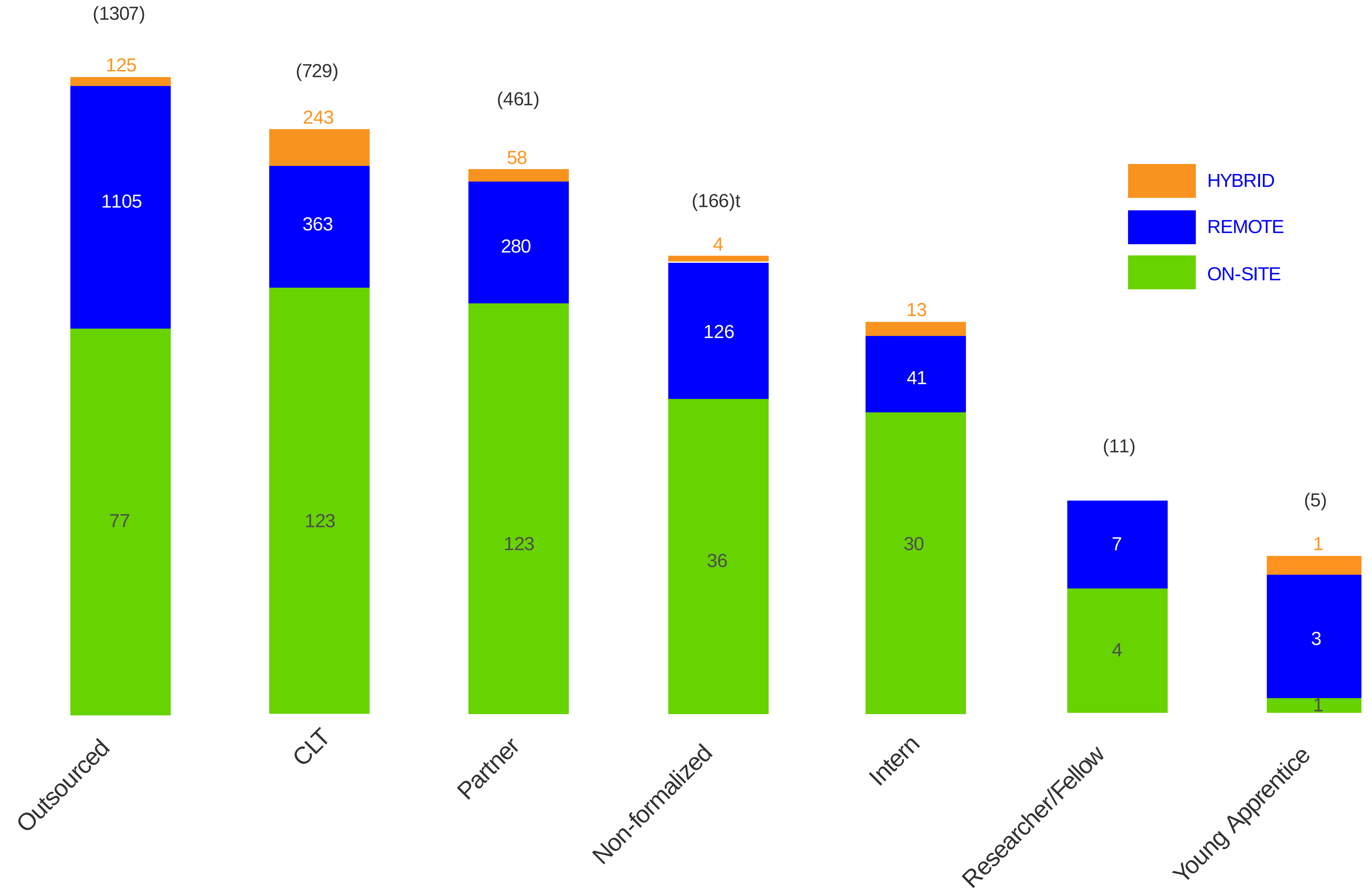


Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

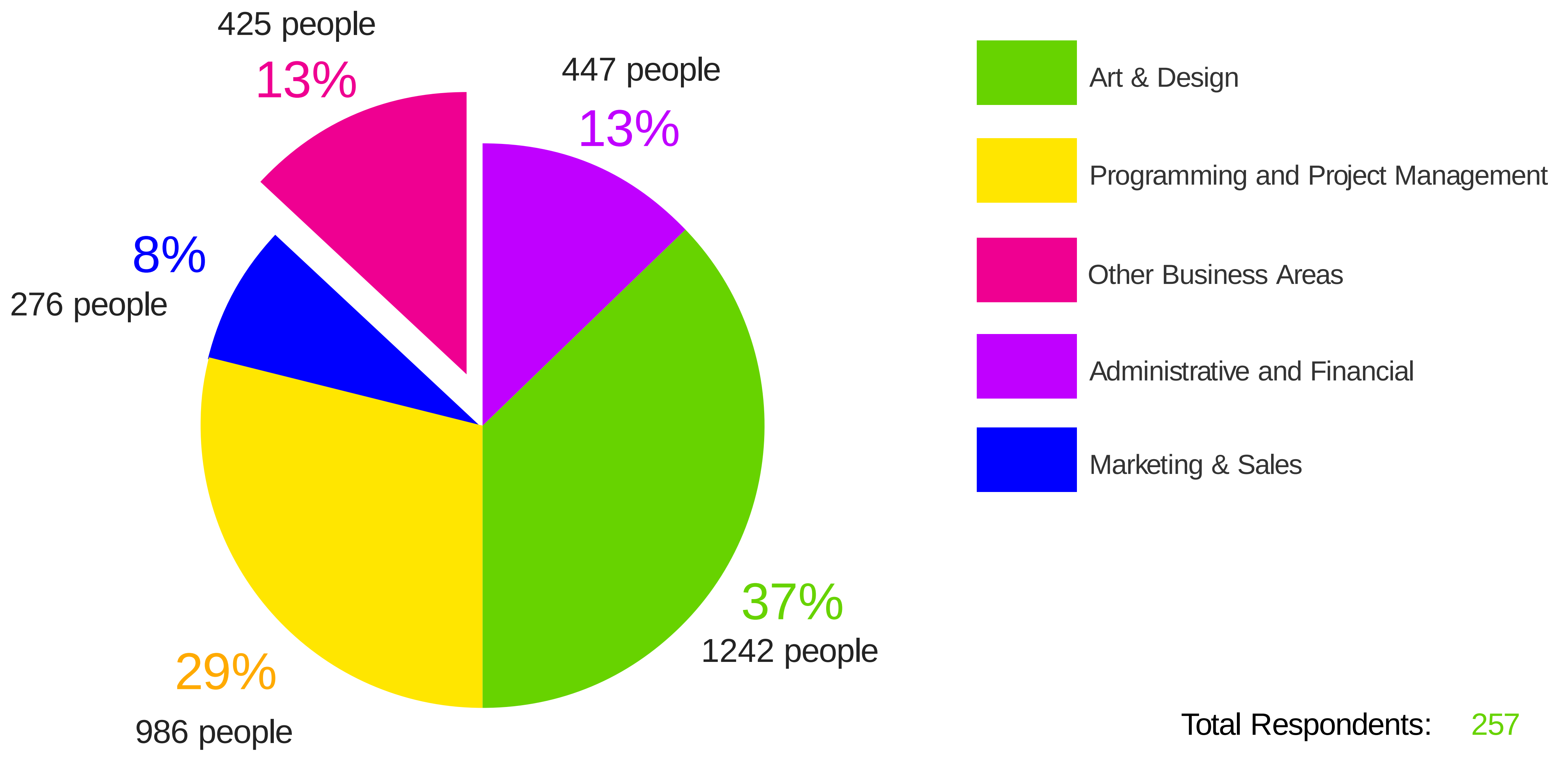
13

were developed using a logarithmic scale, and for this reason, they are not proportional to the values shown.

5.4 Distribution by area of the company

Regarding professional distribution within developers, 37% of respondents focus on the area of art and design, the same percentage found in the previous survey, while in the area of programming and project management, which remains the second largest area, there was a drop from 31% to 29% of the people allocated within developers. The administrative and financial area maintained the same 13%, tied with other business areas, which grew by two percentage points, and the marketing and sales area, which maintained the same 8% (Figure 23).

Figure 23 – Professional/area ratio



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

and project management area to the more business-oriented area, i.e. the administrative and financial area. This migration may indicate a greater maturity of companies, which now have more people in management areas that are important for the long-term success of the organization. However, the figures still show the great importance of the technical area in the industry.

5.5 Diversity of the workforce

Diversity is a very relevant factor in the creative industries. Having a diverse workforce brings benefits to companies, which can

As in 2022, 57% of companies stated that there are black, indigenous, disabled, neurodiverse, foreign, refugee, trans people and people over 50 years old. The absolute number of developers with a diverse workforce grew from 111 to 160. (Figure 22)

Figure 24 - Presence of black, indigenous, disabled, neurodiverse, foreign, refugee, transgender, and/or individuals over the age of 50.

Total Respondents: 282

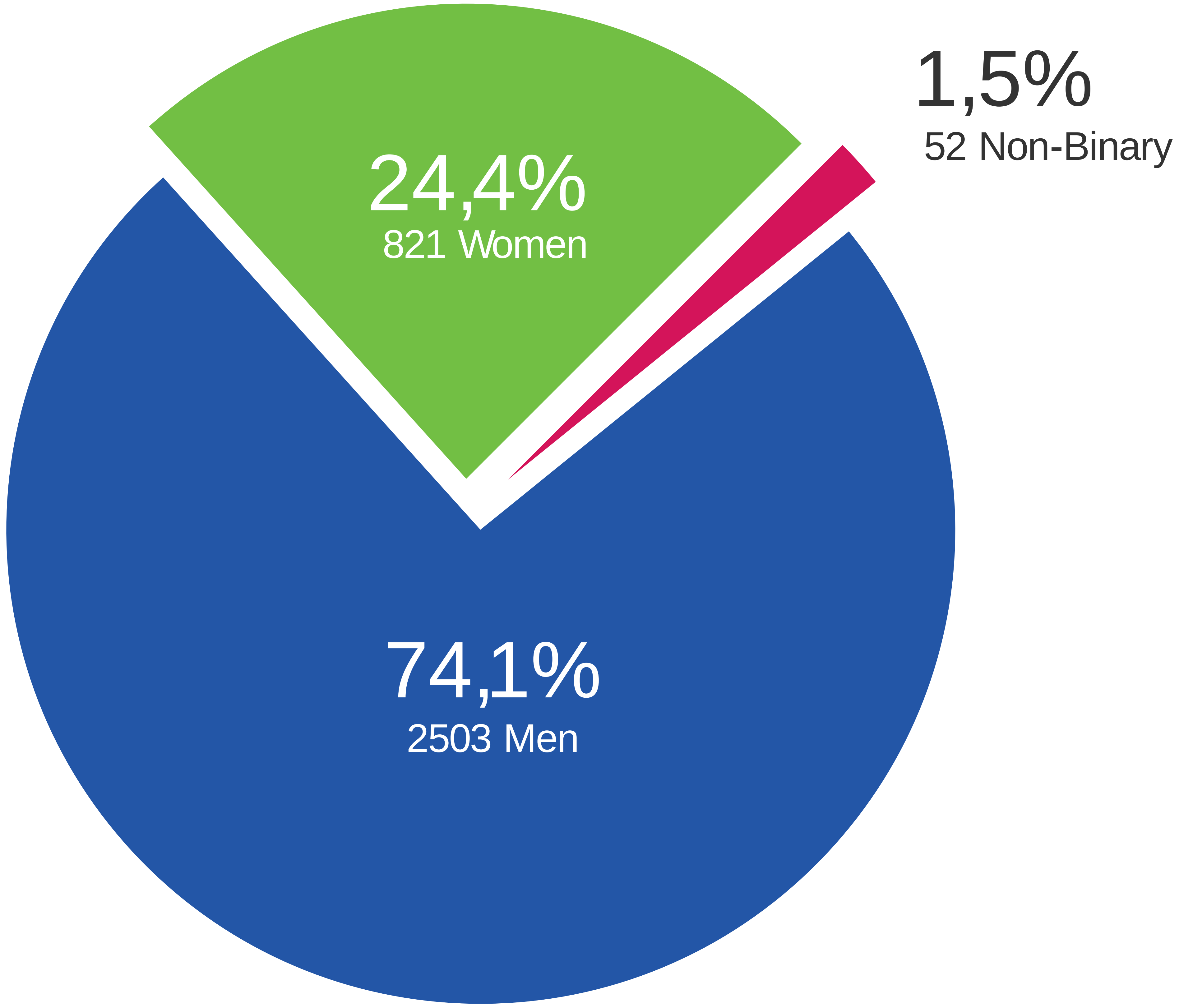
Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

5.5.1 Gender

The data collected shows that men are the most present within developers as partners and employees, accounting for around 74.2% of respondents, up from 68.7% the previous year. The percentage of women fell from 29.8% in 2022 to 24.3% in this survey. Despite this, as indicated in the 2022 survey, the number of women in the industry has been gradually climbing, with 15% in 2014 and 20% in 2018. The number of non-binary people remained at 1.5%. (Figure 25)

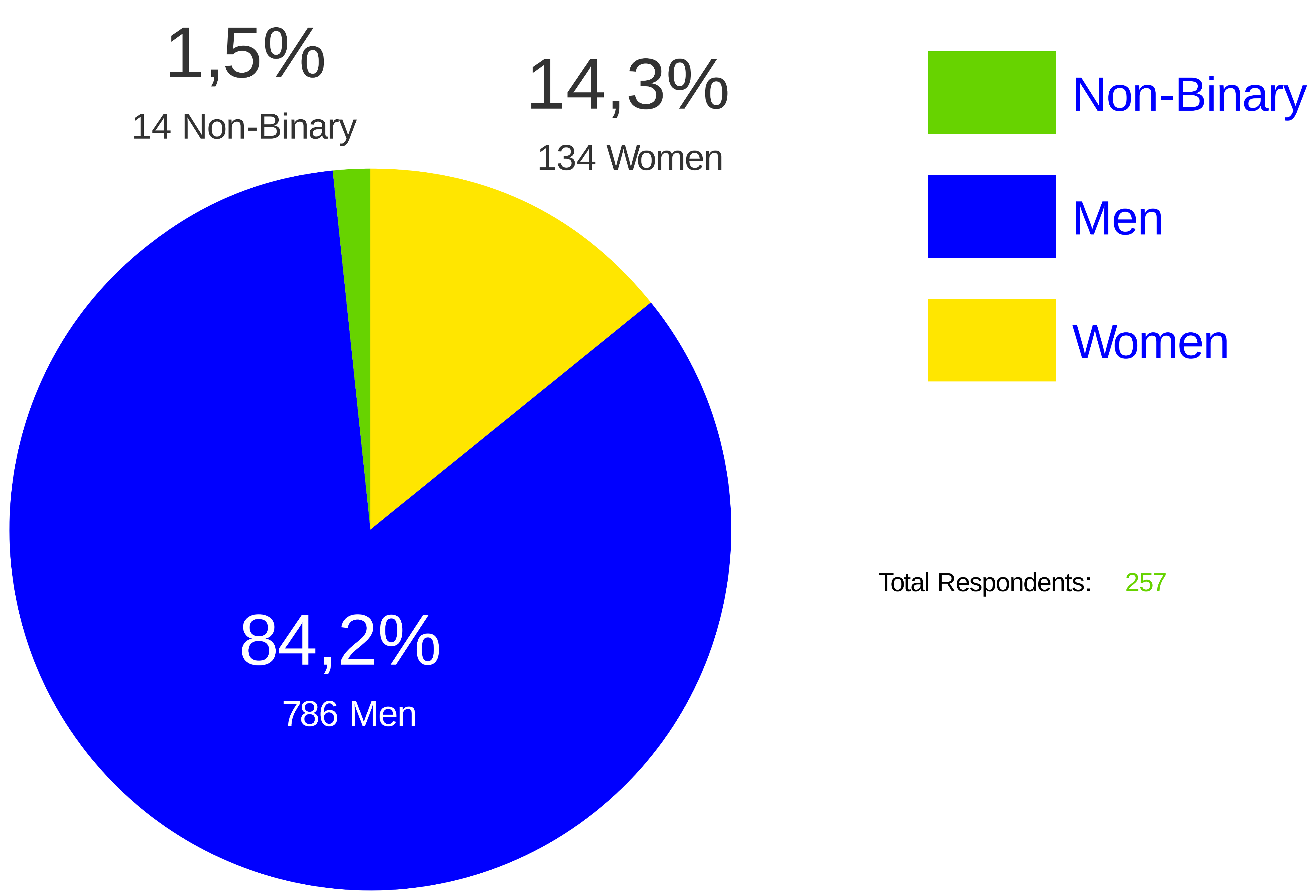
One of the explanations for the reduction in the number of

Figure 25 – Distribution of partners and employees by gender



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Figure 26 – Distribution of partners and employees by gender



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)4

When analyzing the ratio of employees, men continue to represent the majority of the workforce at 70.3% (Figure 26), compared to 65% in 2022. The number of women grew in absolute terms from 552 to 687, but in percentage terms the number fell from 33% to 28.1%. While the number of non-binary people rose from 33 to 38, the percentage fell from 2% to 1.6%.

The number of female partners fell from 17.6% (2022)[14] to 14.2% in the current survey (Figure 26). The absolute number of partners rose from 110 to 132. The number of non-binary people rose from 0.4% to 2% and the number of male partners climbed from 81.8% to 84%. Just as the absolute number of women grew over the years, so did the number of men and non-binary people.

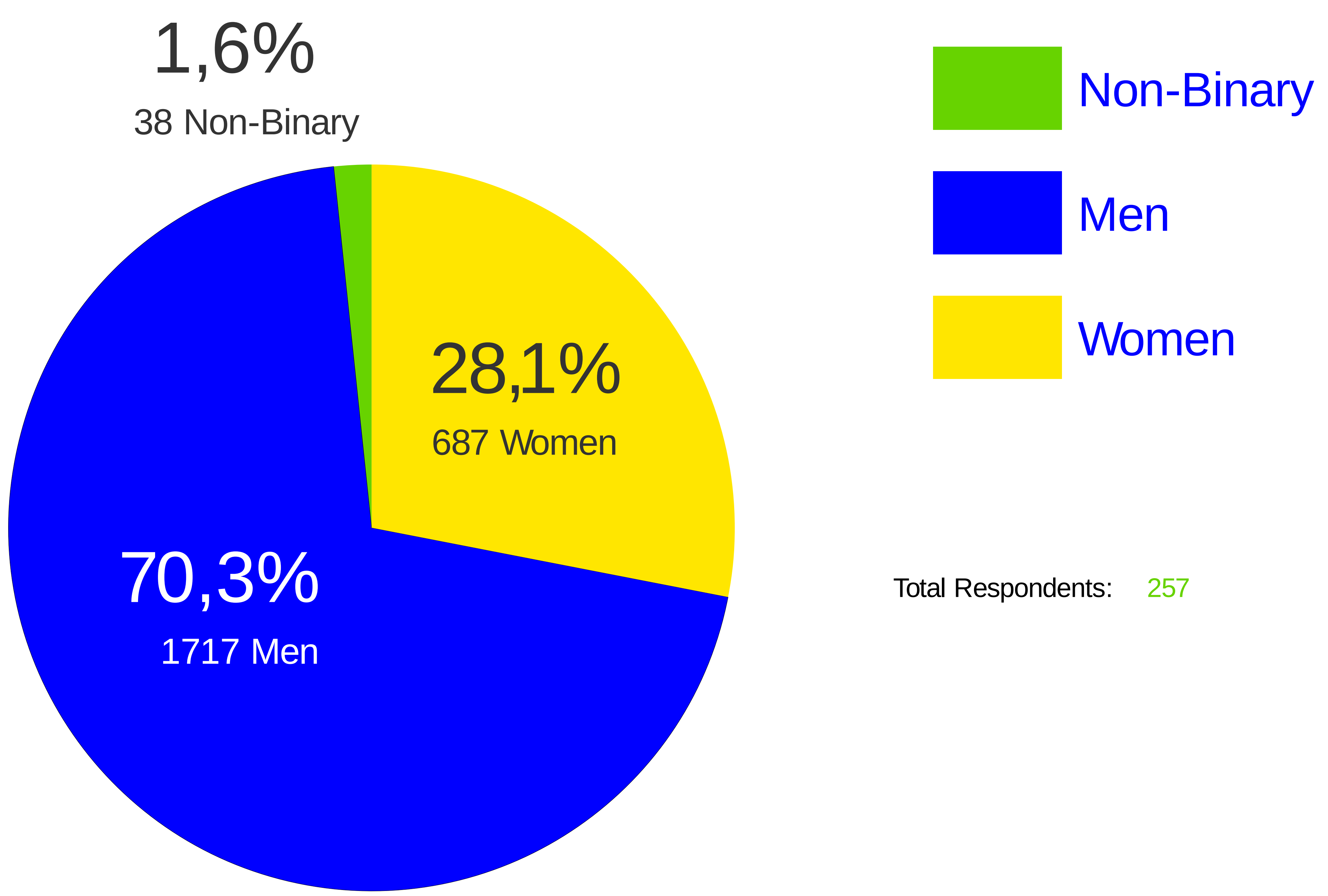
[14] A total of 81.8% were men, 17.6% women and 0.6% non-binary people. The proportion of employees was also corrected to 64.3% men, 33.7% women and 2% non-binary people.

Focusing only on employees, the proportion of men grew from 64.3% in 2022 to 70.4% in 2023, while the proportion of women dropped from 33.7% to 28.1% and non-binary people fell from 2% to 1.6%. However, it's worth noting that all genders grew in absolute numbers. Women went from 621 in 2022 to 685 in 2023, men from 1183 to 1716 and non-binary people from 34 to 38. (Figure 27)

The drop in the number of women is influenced by a change in the sample of respondent companies, since some companies responding in 2022, whose female

in 2022, did not respond to the questionnaire in 2023.

Figure 27 – Proportion of employees by gender



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

Table 10 shows that in none of the areas surveyed did women or non-binary people outnumber men among the partners. The largest proportion of men is in the area of Programming and Project Management at 30% (237 people), a lower proportion than in 2022 (35%), although the absolute number has risen. Meanwhile, marketing and sales continues to be the area with the lowest male participation.

As in 2022, the Art and Design area has the highest number of female partners,

2023 in the predominant area of non-binary partners, which became Programming and Project Management at 50% (7 people), surpassing Art and Design, which was the area with the most non-binary people in the previous survey.

The area with the lowest female participation was no longer Other Business Areas, as seen in 2022, but Programming and Project Management in 2023, with 12% of female partners (16 employees). The current survey did not report the presence of non-binary people only in the Marketing and Sales area, driven by the number of members of this gender rising from 3 in 2022 to 14 in 2023.

Table 10 – Distribution of partners by area and gender at developers

DEVELOPER PARTNERS BY GENDER

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Total Respondents: 257 (multiple responses)

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

The results found in terms of employee gender by area indicate that, with the exception of the Administrative and Financial area, where women are in the majority with 114 employees, men outnumber women and non-binary people. Unlike in 2022, where the majority of men were concentrated in the Programming and Project Management area (430 and 616 employees respectively), in 2023 it was the Art and Design area that concentrated the largest number of male employees (426 in 2022 and 675 in 2023). The Administrative and Financial area had the lowest number of men (100 in 2023 and 76 in 2022), swapping places with the Marketing and Sales area, which had the lowest number of men in 2022 (202 in 2023 and 69 in 2022). (Table 11)

As in 2022, the majority of female employees are concentrated in the areas of Art and Design (44%), with a drop of 3%, now followed by Administration and Finance at 17% (14% in 2022) and Programming and Project Management, which maintained the same 15%. Marketing and Sales is still the area with the lowest incidence of women, although it has risen from 11% to 12% of employees.

Little has changed in relation to the presence of non-binary employees in Brazilian developers, since it can be seen, as in 2022, that they are present in all areas, but still in small numbers. The highest concentration continues to be in the area of Art and Design, which has risen from 18 to 25 non-binary people; however, in the other fields, the number still doesn't reach one decimal place. Compared to 2022, the lower concentration is reversed, with the Marketing and Sales area having only 1 representative, and Administration and Finance with 2 members.

Table 11 – Distribution of employees by area and gender at developers

DEVELOPER EMPLOYEES BY GENDER

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	-•-•	•-€€•	…•	•-€€•	•…	•-€€•

Total Respondents: 257 (multiple responses)

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

5.5.2 Diversity

The presence of black people at development companies is still far below their participation in society. In the current survey, the companies reported having 43 male partners, 12 female partners, 115 male employees, 70 female employees and 7 non-binary employees. Compared to the previous report, with the exception of black male partners who decreased by 3 and non-binary partners who had no reported presence, the number of black positions increased. Even so, the gap between men and women and non-binary black people is still wide among developers. (Table 12)

The second group with the largest presence reported by the developers is neurodiverse with 101 people, up 172% compared to the 2022 report. Of these, 27 are male partners, 11 are female partners, 4 are non-binary partners, 30 are male employees, 25 are female employees and 4 are non-binary employees. The result showed a greater balance when comparing neurodiverse employees, men and women.

With regard to data on trans people, 47 people were reported in this survey, compared to 34 in 2022, of which 4 are female partners, 5 partners are non-binary people, 1 male partner, 9 are male employees, 21 are female employees, 7 employees are non-binary people. As can be seen, unlike other minority groups, the trans population within developers is characterized by a predominance of women and non-binary people.

The number of people over 50 reached 40 in 2023, distributed as follows: 22 are male partners, 2 female partners, 11 male employees, 5 female employees and non-binary partners and non-binary employees appear in the sample. This number has almost doubled from 22 in 2022. Next came the group of foreigners who reached 27 in 2023, compared to 7 in 2022, i.e. more than tripling in the period. Of these, 4 are male partners, 15 are male employees and 8 are female employees. These two groups reinforce the predominance of men in most of the groups studied.

The presence of people with disabilities is also quite scarce. The study reported 25 people with disabilities (PwDs), which, despite being more than double that of 2022 (10), is still a long way from their participation in society. Regarding the PwDs, 6 are male partners, 2 are non-binary partners, 10 are male employees and 7 are female employees, with no female partners or non-binary employees reported.

The indigenous population remains a minority with 16 people reported in 2023 compared to 10 in the 2022 survey. Of these 16, 3 are male partners, 8 are male employees, 3 are female employees and 2 are non-binary employees, and there is no data on female and non-binary indigenous partners. Finally, no refugees were found working for local developers. Of the categories presented so far, these have been the least included among developers.

Table 12 – Distribution of diversity among partners and employees

DIVERSITY		
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Total Respondents: 144

Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

When asked whether or not they had inclusion policies, 162 or 62% of the companies said they did not have specific policies, up 8% compared to the 2022 survey, while 20% reported that policies are in the development phase, a drop of 8% compared to the previous year. In other words, around 82% of companies do not have inclusion policies, the same number as reported last year. However, the situation seems to have worsened, as fewer companies are working on a policy and more are simply not thinking about adopting them (Figure 28).

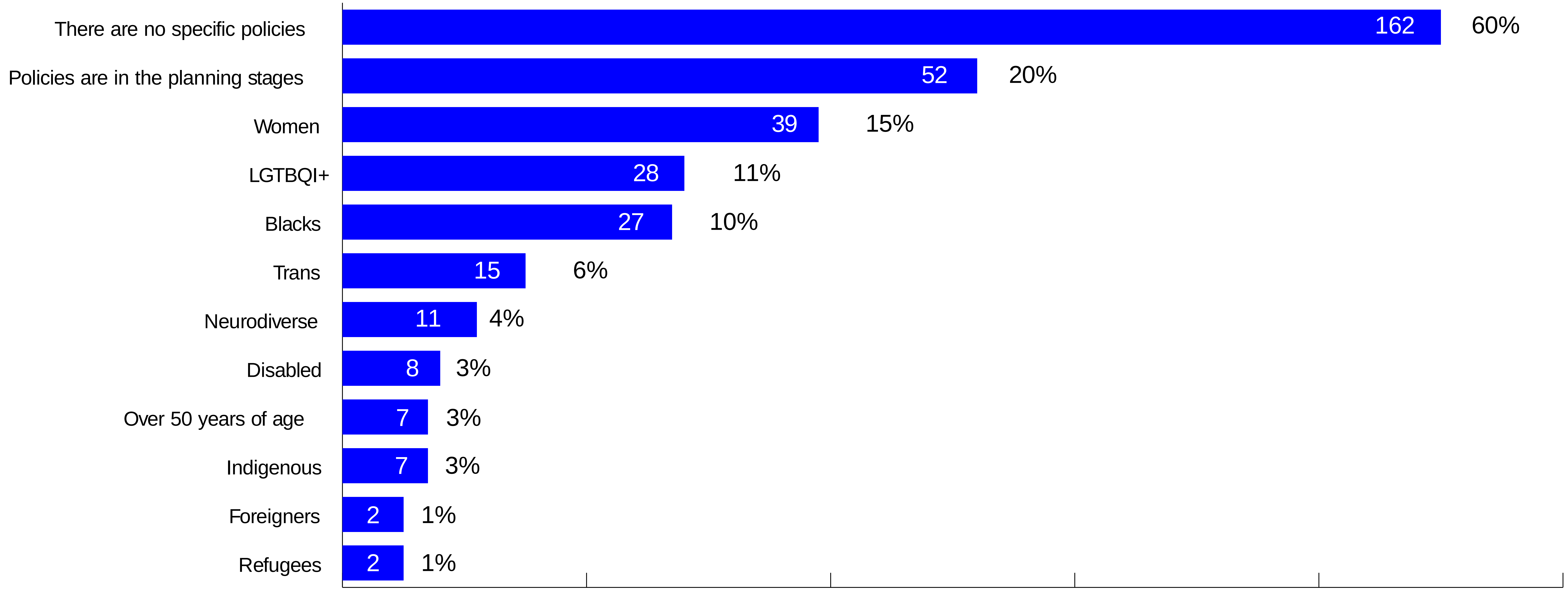
Women are the group with the highest number of inclusion policies, representing 15% of developers, 1% less than in 2022. The other inclusion policies are represented as follows: 11% for LGBTQIA+ people; 10% for black people; 6% for trans people; 4% for neuro-diverse people; 3% for disabled people, indigenous people and people over 50, and 1% for refugees and foreigners.

The number of people from these groups at development studio shows that in some groups we are still far from reflecting their –

cording to the IBGE make up more than 50% of the population. Despite the low number of trans people at developers, 47 including partners and employees, they represent 1.4% of the sample, a figure close to the 1.9% presented in surveys conducted in the country. The initiative of companies to put inclusion policies into action will always be welcomed and supported in today's market.

Figure 28 – Inclusion policies

Respondents: 260 (Multiples Responses)



Source: Pesquisa Capacidade de Produção da Indústria Brasileira de Games (2023)

As pointed out in the 2022 survey, there are actions for the inclusion of these people in the industry beyond the internal policies of the companies. These actions include game jams (Women Game Jam, We Game Jam, Sampa Diversa, Game Jam das Minas) and the Abragames Diversity Council, which awards Diversity Seals (race, gender, LGBTQIA+ and PwD) to Abragames member companies with diverse employees.