



## **Unprecedented research by Abragames reveals that Brazil currently has more than a thousand game development studios**

*The survey was carried out in partnership with the Brazilian Export and Investment Promotion Agency (ApexBrasil) and released this Wednesday during the BIG Festival; among other data, the study presents the mapping of studios by region, information on participation in international events, technologies used, diversity, production capacity, sources of income and expectations*

**São Paulo, July 7, 2022** – In the last four years, Brazil went from 375 game development studios to 1,009, an increase of 169% that reflects the excellent moment of the sector in the country. The data are part of the **1<sup>st</sup> National Survey of the Games Industry**, carried out by [Abragames](#) (Brazilian Association of Videogame Developers) in partnership with the [Brazilian Export and Investment Promotion Agency \(ApexBrasil\)](#), and were released this Wednesday morning. , in a panel promoted by Abragames at the [BIG Festival](#), the largest festival of games, creation, networking, and business in Latin America, which takes place this week at São Paulo Expo, in São Paulo.

“The study brings an unprecedented mapping of the Brazilian game development industry and presents data that place the country as an important hub for the sector in Latin America, as well as a barn of talent for the global electronic game market”, says Rodrigo Terra, president of Abragames. “The significant increase in the number of studios, from 2018 to 2022, has a lot to do with the maturation of our industry and today we have almost 20% of these companies in activity for a period between 10 and 15 years”, he added.

### **Mapping of Brazilian studios per region**

Another outcome from the 1<sup>st</sup> National Survey of the Games Industry that draws attention is the geographic distribution of studios in Brazil. Despite the increasingly digitized production environment and the presence of studios in all regions of the country, the Southeast still concentrates more than half of developers (57%), followed by South (21%), Northeast (14%), Central West (6%) and North (3%).

“We have an increasingly larger and richer scenario in Brazil, and the survey helps us understand who these studios are, where they are, what they are doing and what they need to develop. Therefore, it is another tool for Abragames to support them in the best possible way in order to generate development as companies, businesses and successful cases”, explains Eliana Russi, director of Abragames.



## **Quality and diversity**

Regarding diversity within Brazilian studios, the survey shows that there are about 12,441 people working with game development in the country, 29.8% of which are women. In the 2018 and 2014 surveys, this same share represented only 20% and 15%, respectively. In addition, more than half of Brazilian companies (57%) claim to have a diverse workforce with transsexuals, the elderly, foreigners, refugees, people with disabilities, black, brown or indigenous people.

To qualify the industry, Brazil currently has more than four thousand undergraduate courses in Digital Games or Game Design registered before the Ministry of Education. Only 0.27% of the courses are offered by the public sector. In geographic terms, more than 40% of these courses are in the Southeastern region, and the estimate is that a total of 3,965 students graduate each year.

## **International talent**

With more and more qualified professionals and significant achievements in the international market, it was already expected that many Brazilian studios would reveal business with companies from abroad, but the result was above expectations, with 57% of developers having sold their services and games to companies from other countries. countries only in 2021.

The main consumer markets for Brazilian productions are the United States and Latin America, which carried out business with 55% and 53% of Brazilian studios, respectively. Following are Western Europe (49%), Canada (49%), Portuguese-speaking countries (41%), Japan (37%) and China (24%).

In addition to sales, the survey revealed that 12% of Brazilian studios have representation or press relations in other countries, 9% have a formalized company, 2% have a local office and 2% have at least one development unit abroad.

## **Participation in major industry events**

The Brazilian presence also extends to participation in international events, whether accompanying content sessions, exhibiting products or participating in business roundtables and trade missions. "Since 2013, Brazil Games, an export sector project carried out by Atragames in partnership with ApexBrasil, has taken Brazilian delegations to the main events of the global industry. In addition to providing an important experience with developers from different cultures and expanding commercial contacts, the initiative has been a great facilitator of projects and, consequently, a driver of new business", says Carolina Caravana, vice-president of Atragames.



According to the study, 39% of the Brazilian studios that are active and responded to the survey have already participated in international business events as visitors or listeners, 33% have attended international business roundtables, 17% have attended international events as exhibitors or speakers and 13% took part in trade missions in other countries.

### **Technology industry**

The alignment of Brazilians with the international industry can also be analyzed from a technical point of view. Currently, among national studios, 83% of the sample uses the Unity graphics engine in their projects. Coming second with 23% is the use of Epic Games' Unreal Engine, followed by Blender Engine (13%), Construct (11%) and Game Market (7%).

### **Production capacity**

The survey also shows that the vast majority of studios (93%) participating in the survey develop their own IP (intellectual property), while 18% license projects from other companies, 17% are involved with transmedia projects and 13% license their IP. "Practically all national producers develop games or provide services associated with them, such as location, sound, monetization and gamification. It is also interesting to note that, in 2021, 58% of studios developed at least one proprietary game", explains Terra.

Among the services offered by Brazilian studios to third parties, topped the list in 2021 game prototype (49%), game design (42%), application design (28%), gamification (28%), software development (26%). % and building or designing levels (25%).

### **Source of income per game type**

Finally, the research raised the studios' income sources per game type. Although it is common for a developer to operate in more than one area, for the purposes of the survey, only the indication of the highest income was taken into account. Among the respondents, the following stood out: entertainment games (76%), educational games (12%), advergaming (6%), corporate training (4%) and simulators using specific hardware (1%).

Mobile devices (38%) are the main technological platform used, followed by PCs (20%), consoles (17%), web (13%), virtual/augmented reality (9%) and social networks (0.4%).

### **Expectations and growth potential**

The president of Atragames believes that, despite the challenges imposed by the pandemic and the economic crisis of recent years, the Brazilian game



development industry is still in full turmoil and constant evolution. “In addition to the numbers and facts presented in this survey, our expectations are even more optimistic due to factors such as the official presence in Brazil of several multinationals in the industry and their plans to encourage local developers, excellent results from our studios in the area of external development (XD) and even the growth of remote work, which made many Brazilian professionals start working directly for companies in other countries”, concludes Terra.

In the private sector, Abragames expects an intensification of activities, investments and international publications, in addition to a gain in scale in business opportunities in emerging areas and an even greater increase in the relevance of Brazilian events in the international scenario. In the public sector, a quantitative and qualitative increase in actions that support companies according to their location, size and focus is expected. “We also hope that the academy will strengthen ties with both sectors, carrying out joint actions so that teaching, research and extension activities are more synergistic and have an increasingly greater impact on our industry”, concludes Terra.

#### **About Abragames**

The Brazilian Game Companies Association, ABRAGAMES was founded in 2004 and represents Brazilian studios developing games in various platforms such as PC, consoles, mobile phones and Internet.

Besides catalyzing the game production in the country by training and promoting expertise, Abragames aims at making Brazilian creativity and technology available to the main players of the international game industry.

#### **About Brazil Games**

The Brazil Games Export Program is the export program created by the Brazilian Game Companies Association, ABRAGAMES, in partnership with ApexBrasil, the Brazilian Trade and Investment Promotion Agency.

Our goal is to promote the Brazilian Game industry internationally, developing new business opportunities for our companies.

#### **About ApexBrasil**

The Brazilian Trade and Investment Promotion Agency (ApexBrasil) works to promote Brazilian products and services abroad, and to attract foreign investment to strategic sectors of the Brazilian economy. The Agency supports more than 15,000 companies from 80 different industries, which in turn export to 230 markets.

ApexBrasil also plays a key role in attracting foreign direct investment to Brazil, working to detect business opportunities, promoting strategic events and providing support to foreign investors interested in allocating resources in Brazil.

[Click here to learn more about ApexBrasil.](#)

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