



STATE OF THE GAME INDUSTRY 2021

Presented by:

GDC

It's been a tumultuous past year to say the least. Game developers have had to adjust to remote working as well as deal with the general stress that comes with a global pandemic, all while making games for people who are in similar situations all over the world. It's an interesting—if not sadly ironic—situation to be isolated while creating entertainment that helps people get through feelings of loneliness, isolation, and anxiety.

With that backdrop, we asked over 3,000 game developers about their work. We found developers have a particularly keen interest in Sony's console; a significant percentage of developers said they delayed a game due to the pandemic; and the two most advanced game consoles are practically neck-and-neck when it comes to in-development games. On top of that, we've included plenty of your write-in opinions about hot industry topics.

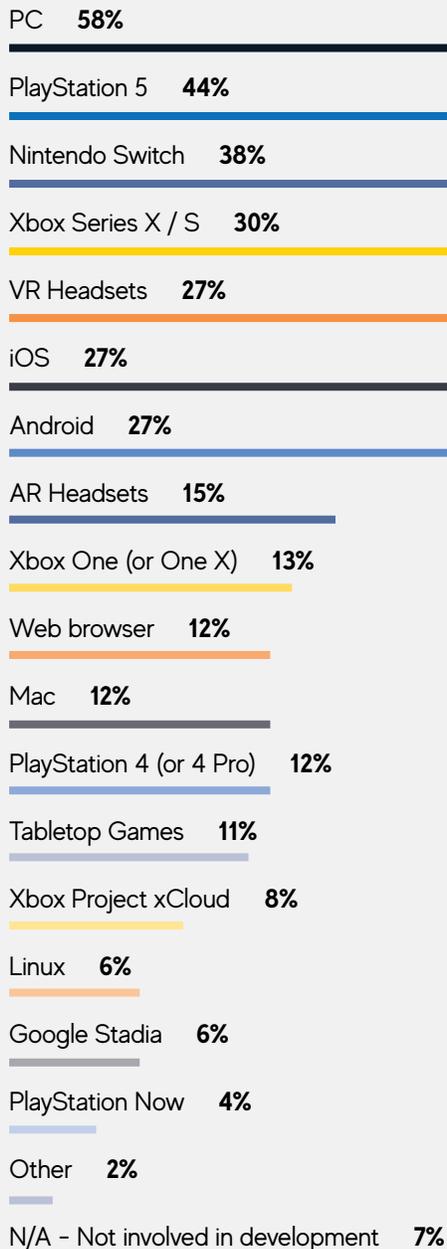
The 2021 State of the Industry Survey is the ninth in an ongoing series of yearly reports that offer insight into the shape of the industry. Thank you all who participated in sharing your insights.

Among consoles, PlayStation 5 leads in developer interest, PC continues to lead overall

Game developers are settling in with developing for next generation consoles and Sony's PlayStation 5 is leading **developer interest** when it comes to game consoles.

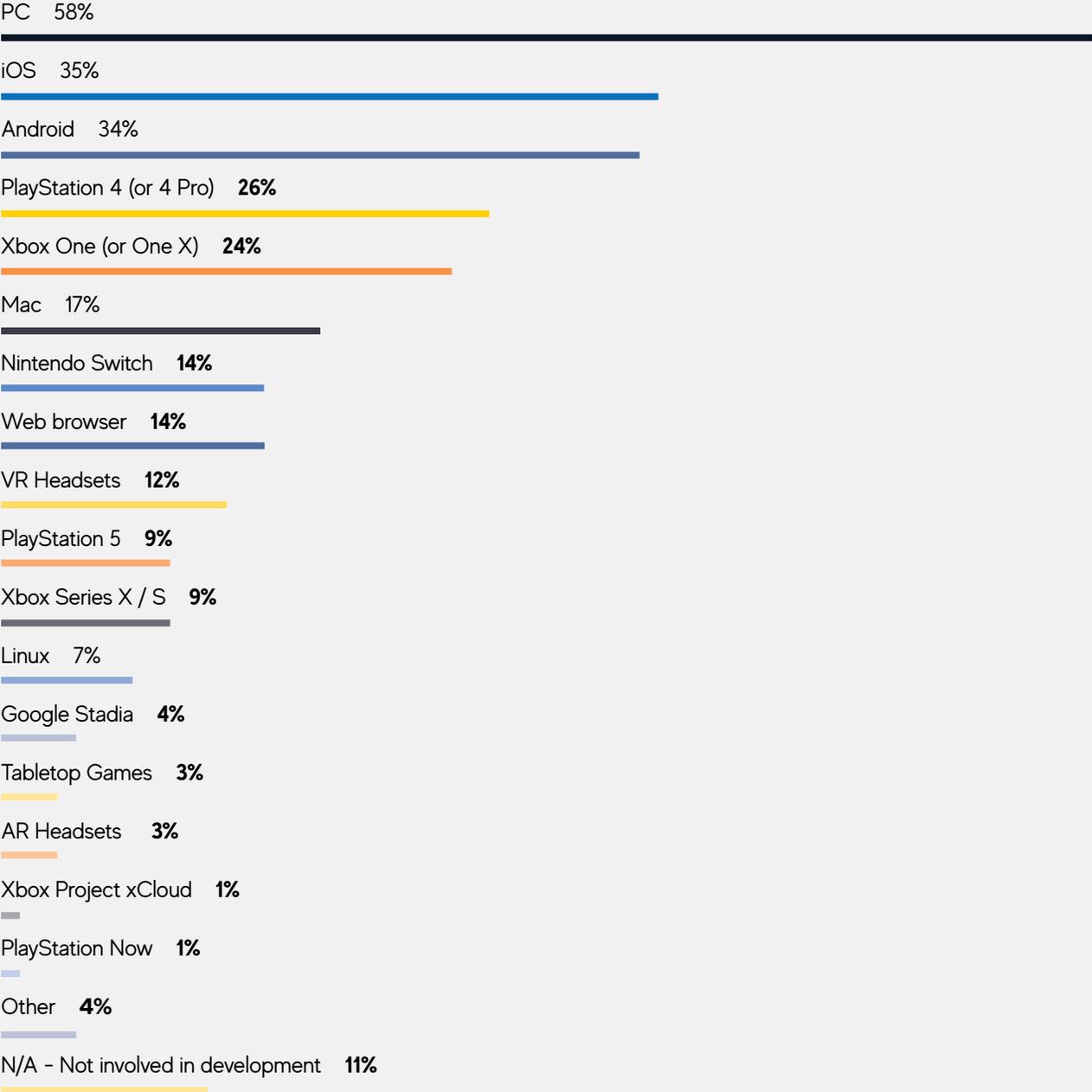
Forty-four percent of those polled said PS5 is the platform they're most interested in right now, followed by Nintendo Switch at 38% and Xbox Series X/S at 30%. Among all platforms, the ubiquitous PC led developer interest for yet another year at 58%.

Which platform(s) most interest you as a developer right now? (Choose all that apply)

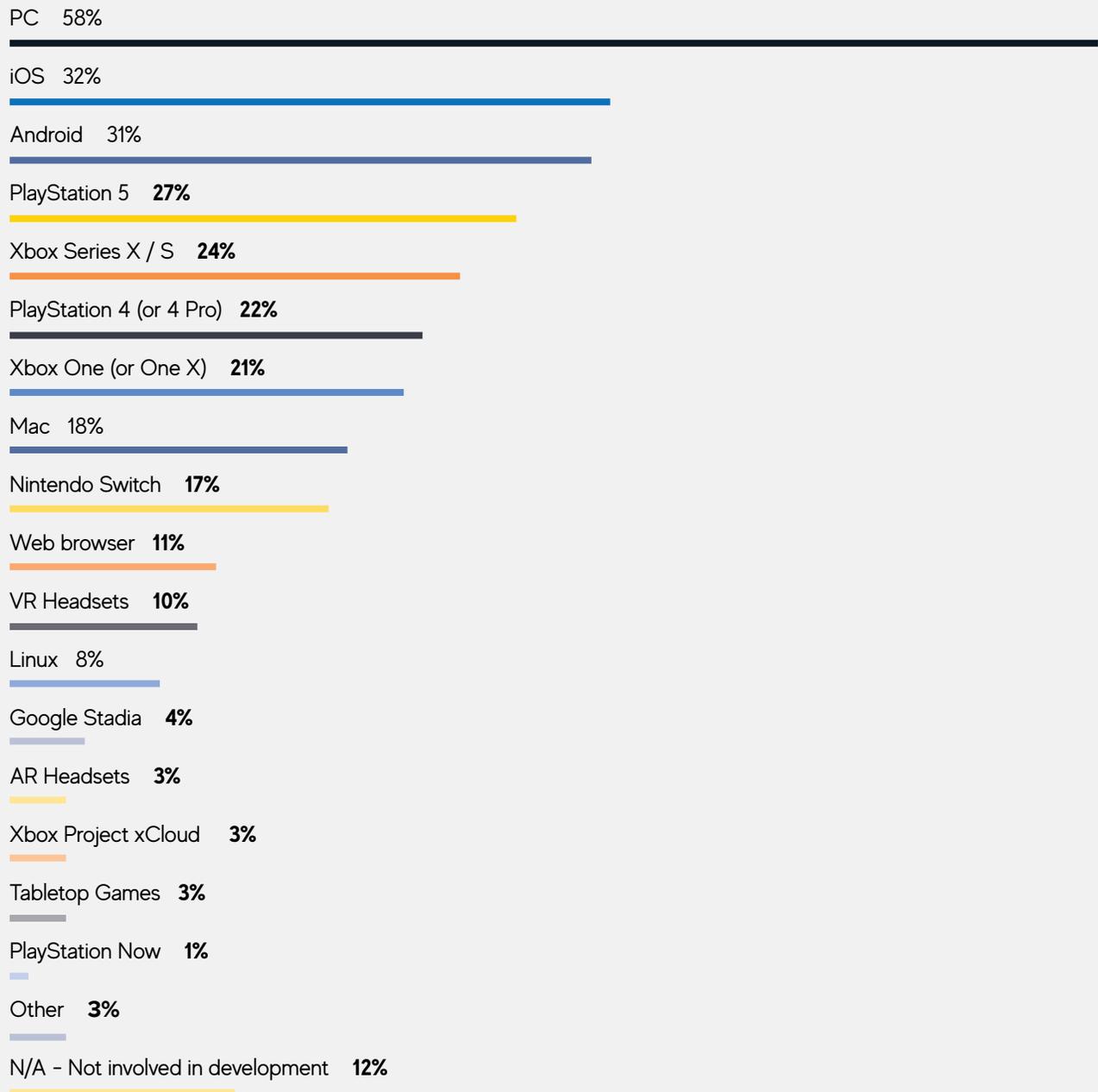


PlayStation 5 also led consoles in terms of which platform game developers are creating their **current project** for at 27%, just edging out Xbox Series X/S which garnered 24% of responses. When asked a similar question about **previous projects**, the split between platforms was very similar.

Which platform(s) was your previous project released on? (Choose all that apply)

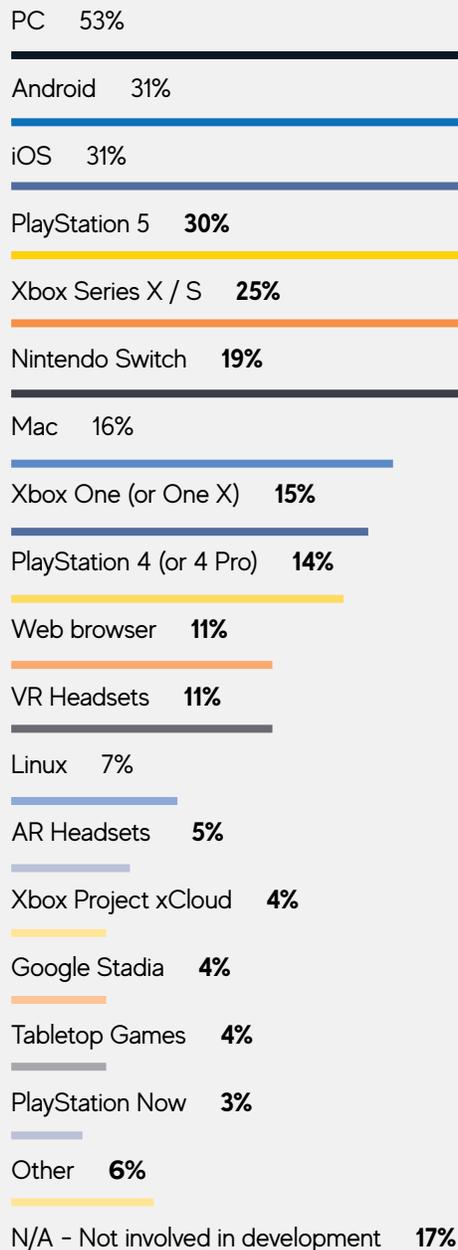


Which platform(s) are you developing your current project for? (Choose all that apply)



When it comes to which platforms game developers **actually plan to develop on next**, 30% answered PS5 and 25% said Xbox Series X/S, with Nintendo Switch trailing at 19%. Mobile platforms remain popular as well with Android and iOS at 31%. PC leads again at 53%.

Which platform(s) will you be developing your next project for? (Choose all that apply)



PC, iOS, and Android typically lead in these surveys for a clear reason: they're the most accessible platforms to develop for. They're ubiquitous, don't require a dev kit like a console, don't require strict certification, and publishing and distributing games is much easier than "walled garden" console ecosystems.

Perhaps what's most intriguing is how, despite PlayStation and Xbox platforms having near-parity when it comes to past, current, and next projects, significantly more developers are showing **interest** in PS5.

Fewer developers are working on VR or AR games

While the hype surrounding virtual and augmented reality has waned since hitting its peak in the mid-2010s, game developers have continued to push immersive technologies forward.

Among our respondents, only 38% said they are or have been involved in VR or AR game development. **That's down from 46% last year.**

As far as VR and AR platforms that are currently of most interest to game developers, **Oculus Quest accounted for 52% of responses**, well ahead of PlayStation VR and Valve Index which each collected 30% of responses.

(Note: this survey was conducted prior to the announcement of Sony's next-generation PlayStation VR)

Which VR/AR platform(s) most interest you as a developer right now? (Choose all that apply)

Oculus Quest **52%**

PlayStation VR **28%**

Valve Index **28%**

HTC VIVE **26%**

Oculus Rift **25%**

iOS phone/tablet using ARKit **20%**

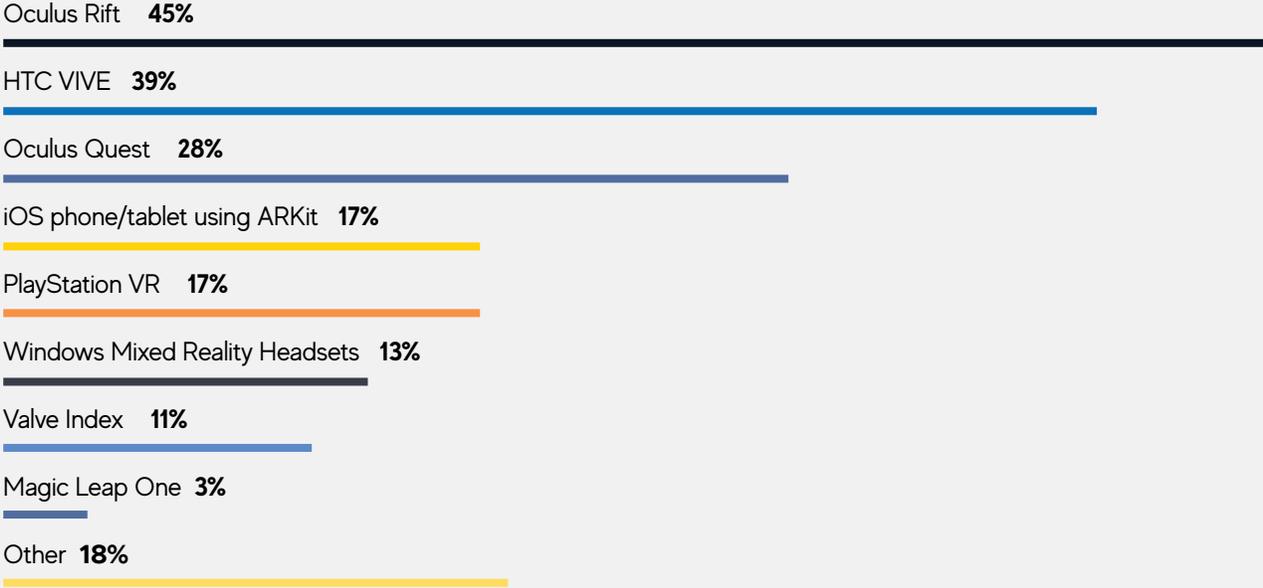
Windows Mixed Reality Headsets **16%**

Magic Leap One **10%**

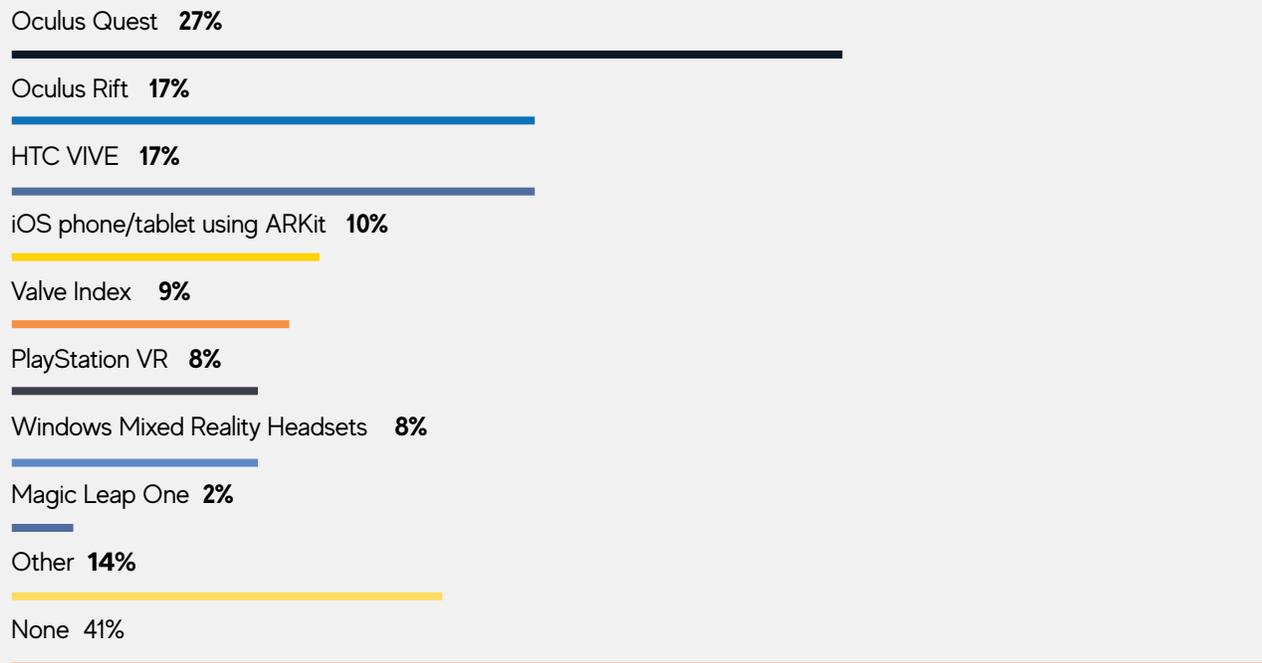
Other **15%**

The following graphs show the VR/AR platforms on which game developers released their last game, which one they are currently developing for, and the platform on which they intend to release their next project. Note how the PC hardware-based Oculus Rift was the most popular for last-released projects, while the all-in-one Oculus Quest leads in current and next project development.

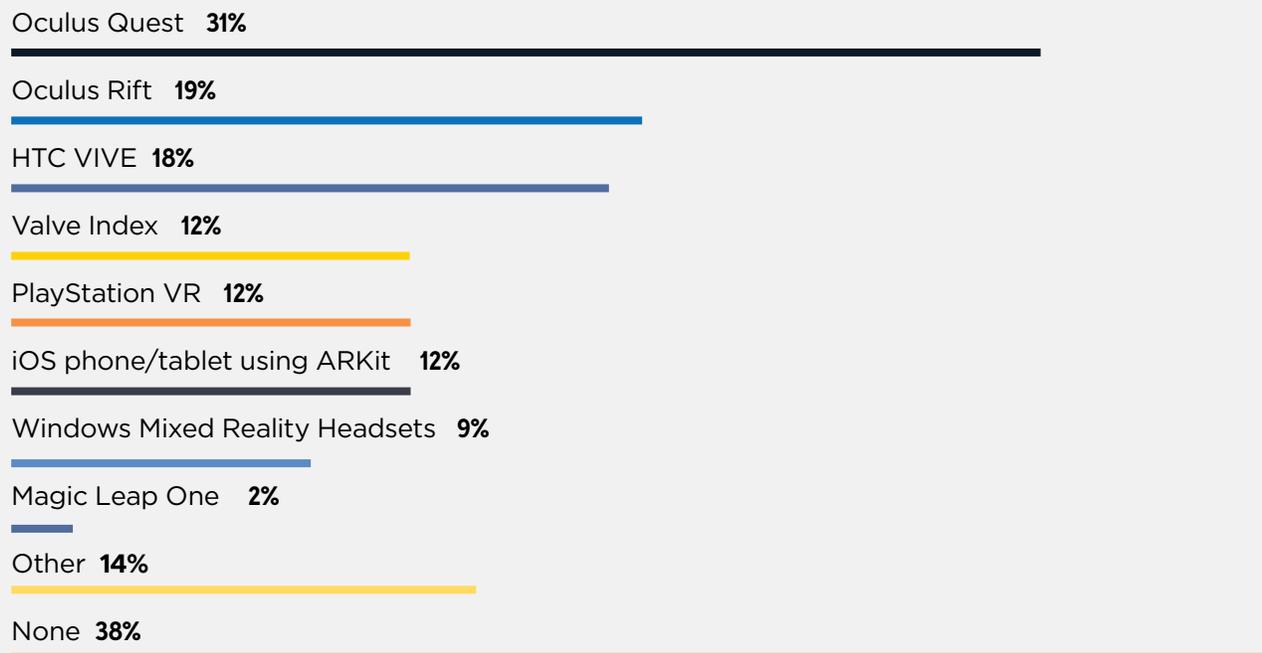
Which VR/AR platform(s) was your last game released on? (Choose all that apply)



Which VR/AR platform(s) are you currently developing for? (Choose all that apply)



Which VR/AR platform(s) do you anticipate your next game will be released on? (Choose all that apply)



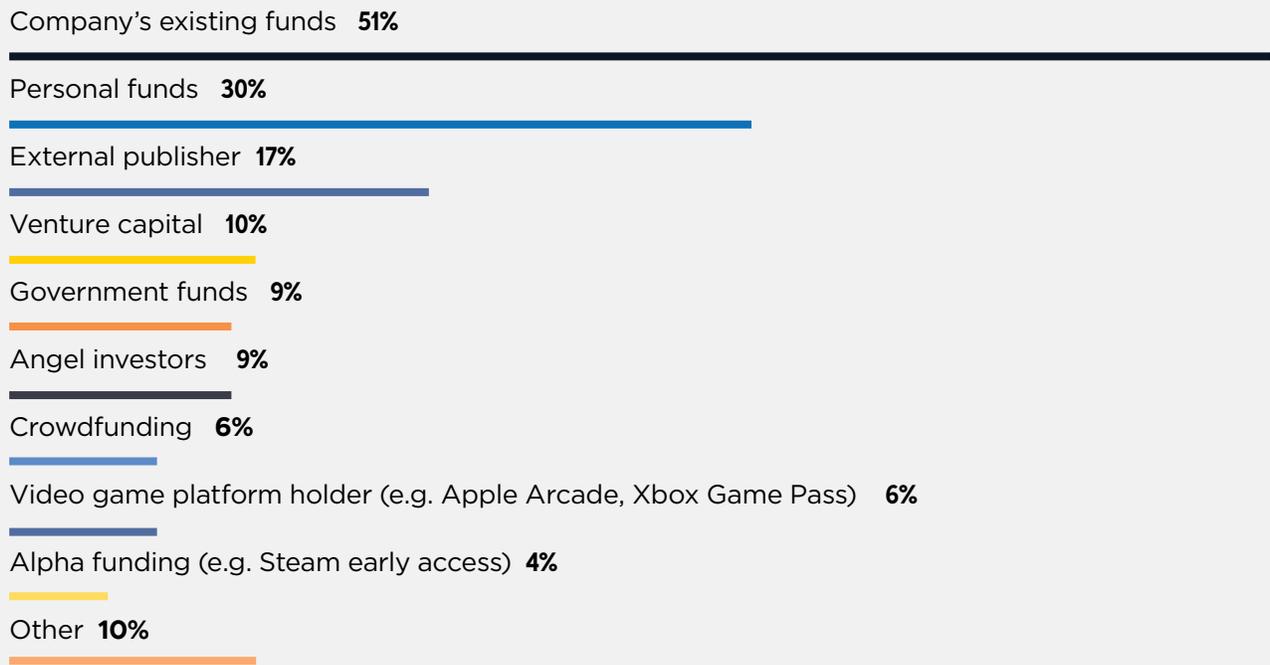
Developers are mostly using companies' existing funds

There was virtually no movement year-on-year when it comes to where game makers get their funding but it's still worth noting **that most respondents (51%) use their company's existing funds** while the second most popular answer was "Personal funds" (30%).

While alpha funding—particularly Steam Early Access—is used for many games and seems like it's everywhere, it garnered the lowest amount of responses at 4%. Funding from deals with platform holders such as Xbox Game Pass and Apple Arcade is also relatively scant at 6%.

Where does your funding come from? (Choose all that apply)

Company's existing funds **51%**



Personal funds **30%**

External publisher **17%**

Venture capital **10%**

Government funds **9%**

Angel investors **9%**

Crowdfunding **6%**

Video game platform holder (e.g. Apple Arcade, Xbox Game Pass) **6%**

Alpha funding (e.g. Steam early access) **4%**

Other **10%**

Discoverability

Time and money investment

Making a game is one thing—getting it out in front of potential customers is another. Discoverability, or the ability for people to find your game in today's crowded marketplace, is one of the most important topics in game marketing today, especially for smaller game studios.

We asked game makers how much of an investment (time or money) they made in various types of discoverability methods, from word of mouth to promotion on a platform's digital storefront.

Respondents mostly said they made **“small investments”** across many types of channels, with online forums and social media (e.g. Twitter, Facebook) being the most popular venues for small investments (25% for each category). Investment in forums and social media edged out real-time communications (Discord, Slack), outreach to traditional press and bloggers, email marketing, and word of mouth which each garnered 24% of respondents who said they made “small investments” in these channels. Least popular here were paid advertising, live events (unsurprising in a year of COVID), and promotion on a digital storefront.

Twenty-five percent of respondents said they made **“moderate investments”** in social media, handily making it the most popular answer among those polled. Pre-recorded YouTube videos and word of mouth were the next most popular answers under “moderate investments” with each coming in at 20%, followed by promotion on a platform's digital storefront (19%) and traditional press and bloggers (18%). Least popular for this level of investment were Facebook streamers, forums, and Twitch streamers.

When it comes to **“large investments”** in discoverability channels, 14% of all respondents invested in social media and word of mouth, making them the most popular answers, followed by paid advertising (13%), digital storefront promotion (12%) and pre-recorded YouTube videos (11%). The most unpopular answers at this level of investment were Facebook streamers, forums, and email marketing.

We also assigned a weighted average for each discoverability method in order to find out where the game industry as a whole is investing most of its time and money. Here, **we see paid advertising leading the way** followed by promotion on a digital storefront, then by word of mouth and social media (tied). Facebook streamers came in last place.

Effectiveness

Using similar measures, we also asked game developers which discovery methods they found to be **most effective for their last completed game**. Twenty percent found that word of mouth was “Very effective” in getting a game in front of customers, making it the most popular answer. That's followed by 18% who said a good promotional spot on a digital storefront is very effective and 15% who selected social media as their answer.

Venues found to be only “Slightly effective” were led by email marketing (selected by 23% of respondents) followed by social media and traditional press and bloggers (22% each) and forums (21%). “Moderately effective” channels were led by social media (24%), word of mouth (20%), and YouTube videos and traditional press and bloggers (18% each).

Taking the weighted average shows that like last year, **those polled felt that a good promotion on a digital storefront was the most effective overall** discoverability method, followed by word of mouth.

Will paid game subscriptions lead to devaluation?

A bottomless library of games provided by services like Xbox Game Pass, EA Play and PlayStation Plus are becoming an expectation among customers. Each service is providing its own take on a “Netflix for video games” to the market, bringing in reliable recurring revenue for game companies rather than relying solely on less predictable hit cycles.

But there is some concern that these services inherently discourage buying games individually and ultimately devalue game prices. **Twenty-one percent of this year’s respondents said “Yes,” they were concerned that subscription services will devalue individual game prices, while 30% said “No,”** and 48% said “Maybe” or “Not Sure.” That’s a meaningful shift from the previous year when 27% said “Yes,” 26% said “No,” and 46% said “Maybe” or “Not Sure.” The year-on-year change indicates that as subscription services become more prevalent, developers are feeling less concerned about the devaluation of individual games.

Are you concerned that paid subscription services (e.g. Xbox Game Pass, Google Stadia Pro, EA Play) will devalue individual game prices?

Yes **21%**

Maybe **26%**

No **30%**

Not sure **22%**

VOX POP

“The waterfall release (theater->premium channels->home video->streaming) has already been shown to work well in the movies/tv business. I think the industry will adapt. Digital distribution on PC has already devalued games a lot as is.”

“There are alternative storefronts: The services need content more than the developers need the services, so it’s in the interests of the services to make sure it’s viable for content creators.”

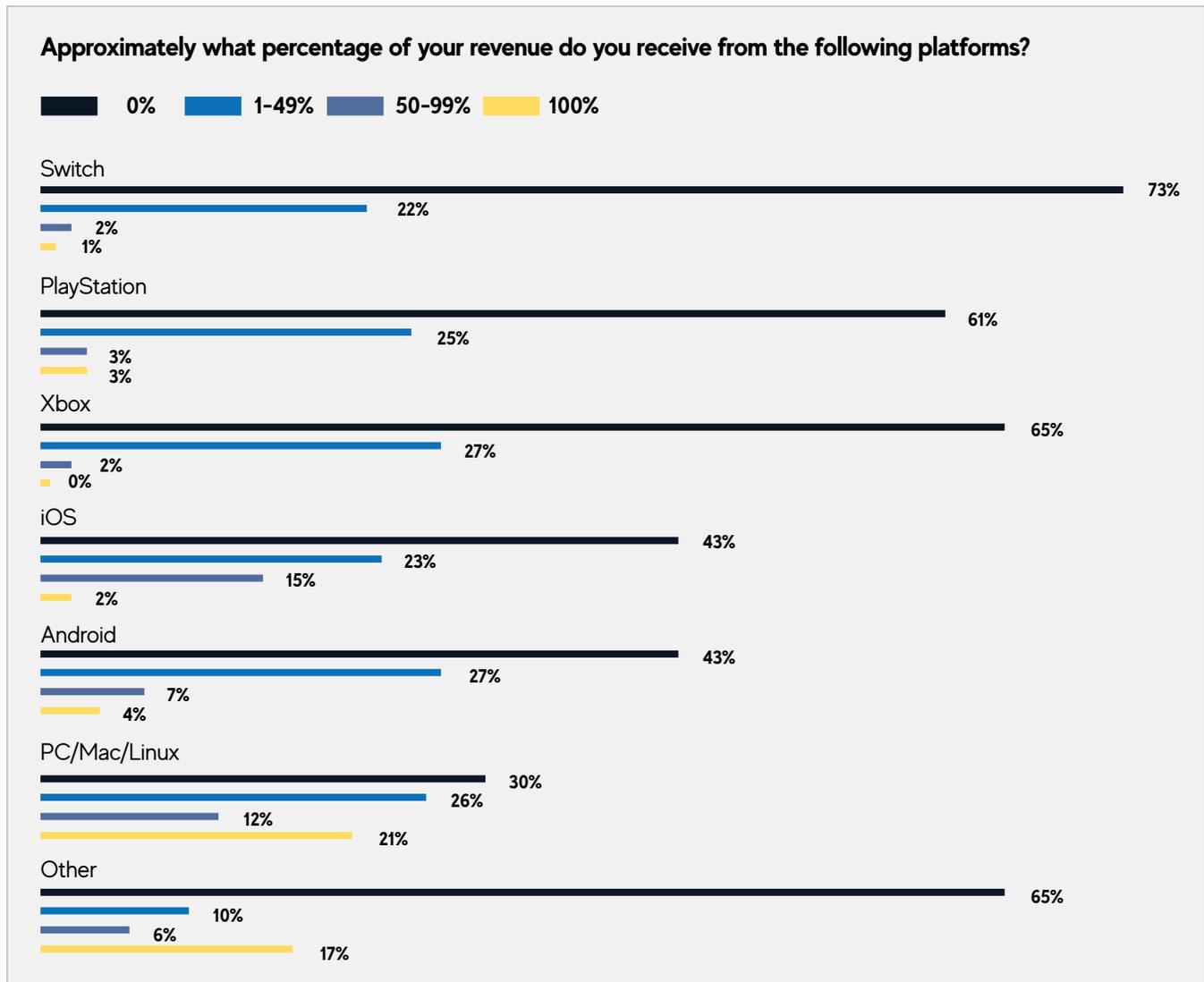
“Equally important, subscription services provide a mass of players that can support the costs of gaming in the cloud, which will become relevant in infrastructure terms as the costs of a service like GCP or AWS are more attractive for developer than building their own infrastructure. As for individual games per se, I think they will gradually gain value in specific niches, becoming more valuable products than the subscription service.”

“Paid subscription services are the natural move for the market, not only as mass players can help more easily to support the cost of productions of a videogame, but also they lower the marketing prices.”

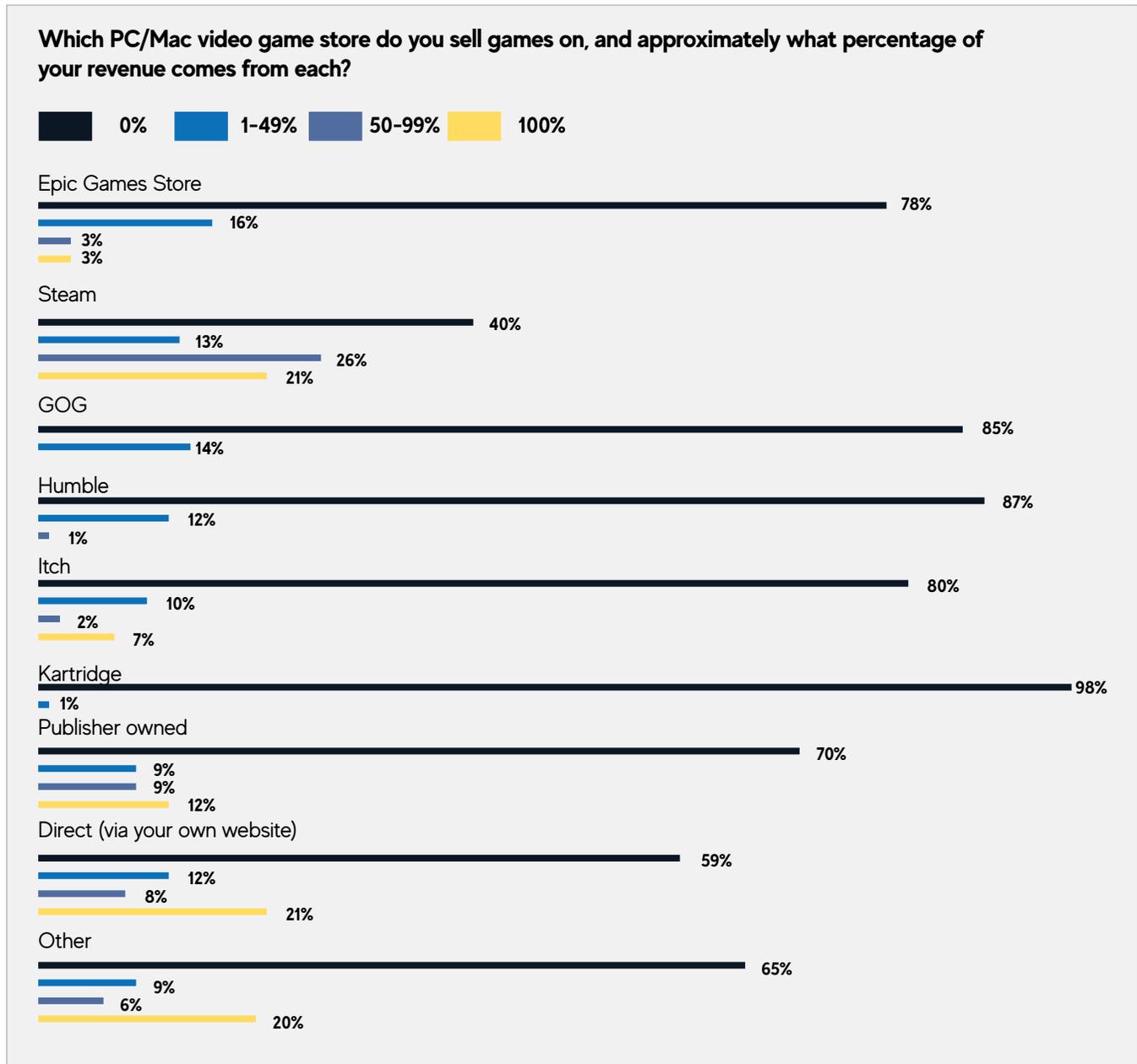
“Art has been continually devalued and defunded for years, and looking at both the music and movie industries (though not 1:1) there’s already side-effects happening we’ll probably see in games eventually leading to ‘how do developers actually get paid well.’”

Where game developers make (or don't make) money

To gain a better understanding of where game developers are making their money, we asked what percentage of revenue major platforms are generating for them. PC/Mac/Linux is where 21% of respondents make 100% of their money—the most popular answer. It's an unsurprising result considering the accessibility of development and distribution via those platforms, and almost exactly in line with last year's survey results.



We also asked which storefronts on PC and Mac game developers make money from. **Twenty-one percent of developers said they made 100% of their revenue from Steam, tying with “Direct (via your own website)” as the most popular answer.** Seven percent said they made all their money from Switch; only 3% said they made all their revenue from the Epic Games Store. More revenue split data is below:



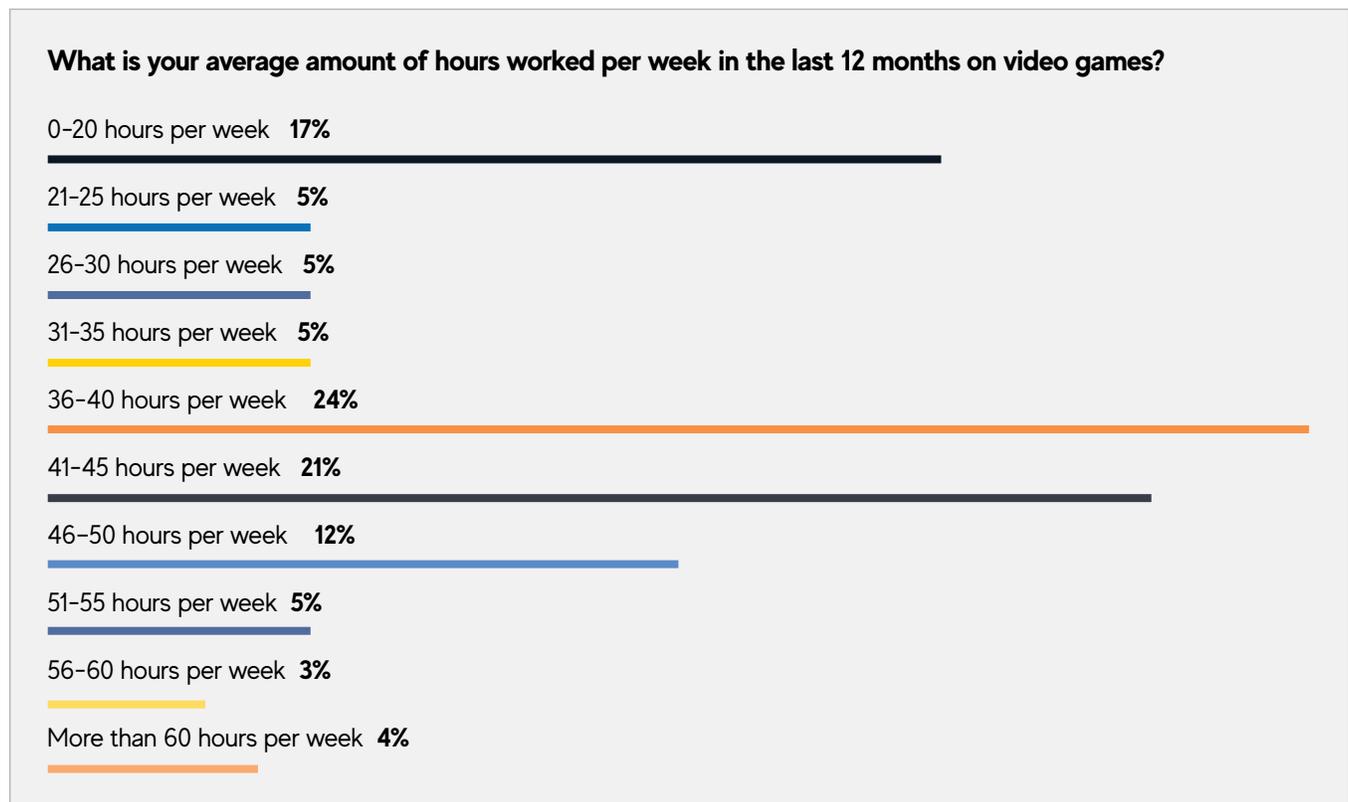
Most game developers work around 40 hours a week, but extreme cases exist

Work-life balance and crunch continue to be a point of concern when it comes to opportunities to reform the game industry. Stories emerge from game companies large and small that highlight excessive work hours that induce stress and burnout that often drive talent out of companies, or out of game development altogether.

That's why it's important to take a regular bird's eye view of just how much game developers are working.

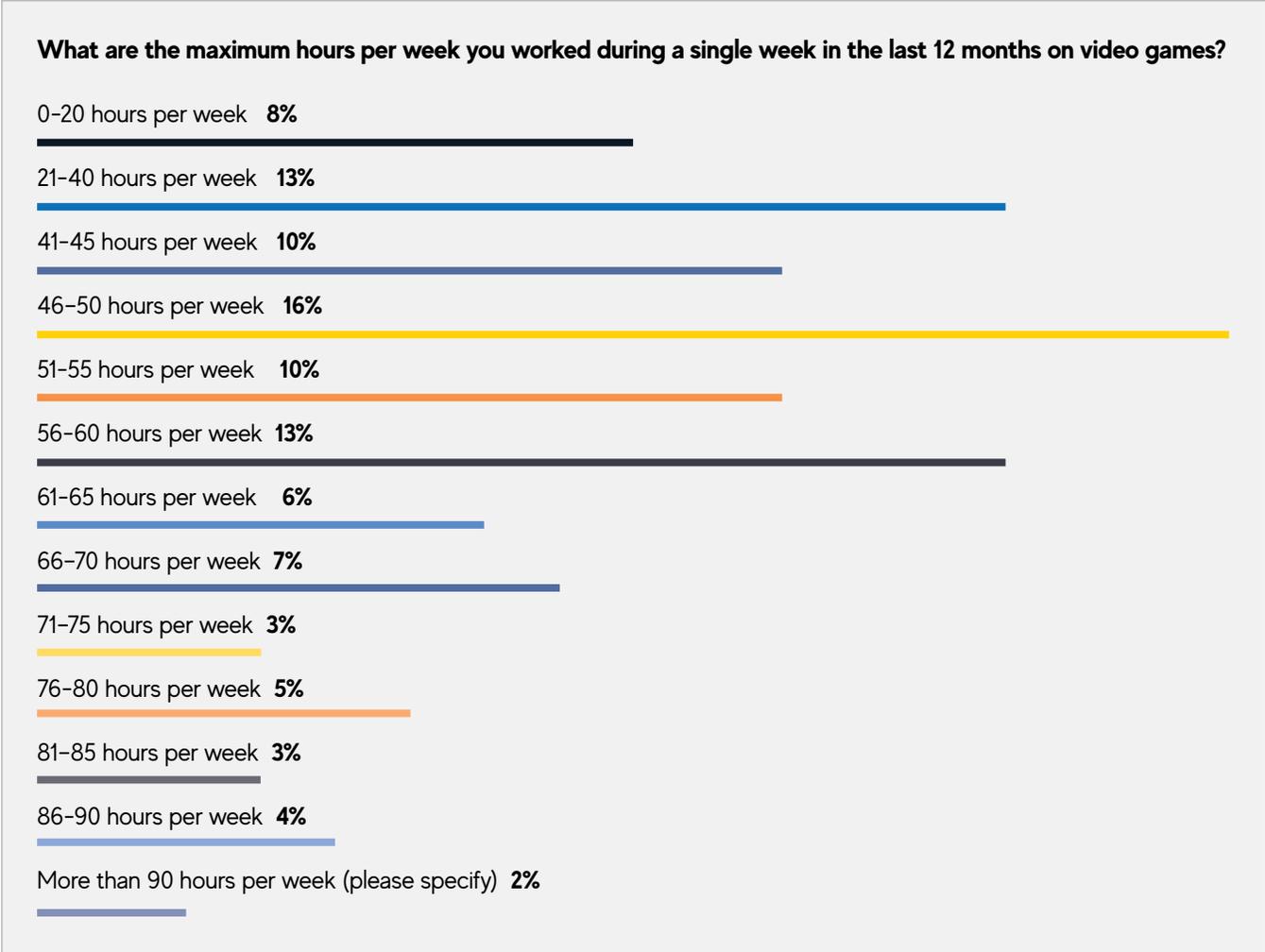
Fifty-six percent of respondents said they worked 40 hours per week or less on average, meaning most of the game industry is working no more than a traditional work week. That's in line with the previous year's results that showed 55% of game industry respondents worked 40 hours or less, which overall seems like good news in terms of work-life balance, especially since the past year was dominated by remote work.

Drilling down further, 24% of people said they average 36-40 hours per week. This 36-40 range was the most popular answer for this question, followed by 21% in the 41-45 hour range. As weekly averages move upwards of 51 hours per week, percentages dwindle. Overall, there was little change year-on-year:



When it comes to **maximum** hours worked in a single week during the previous 12 months, answers were more spread out. The most popular response was 46-50 hours per week, which gathered 16% of respondents, followed by 13% claiming 56-60 hours.

When looking at the data below in larger swaths by combining responses, we see 61 hours-plus work weeks gathered a notable 30% of total responses. Two percent said they maxed out at over 90 hours. These are edge cases and fortunately not in the majority but still can be problematic when it comes to combatting burnout and encouraging work-life balance.



VOX POP

When asked to “please specify” 90+ hour responses:

“Every waking moment.”

“Workaholic.”

“To protect my team to let them have a good work life balance, I tend to do all that needs to be done myself rather than delegate. So there have been weeks where I worked around 119 hours per week to make sure we could release what needed to be released.”

“During the beginning of COVID in March, I worked a couple 100+ hour weeks putting support plans together for our customers.”

“Crunch to meet a deadline.”

“There were times when my last employer was taking on too many projects and I was sleeping in the office regularly and working 15+ hours 7 days a week.”

“Game jams are wild.”

Why did you work overtime?

Also important is to find out why people work overtime. For some, it’s self-pressure or even workaholism. For others, it’s direct or indirect pressure from coworkers or management. And yet for others, they considered the overtime they put in to be totally reasonable.

What were the major factors that caused you to work more than 40 hours per week? (Choose all that apply)

Self-pressure (I was personally working hard and felt I needed/wanted to) **73%**

I don't consider the amount of time I worked to be excessive **33%**

Management pressure (it was made clear that we needed to work those hours) **14%**

Peer pressure (everyone else was working those hours) **11%**

I don't know, I just did **9%**

Other **19%**

This year saw significant changes over last year. While **“Self-pressure” was the leading factor in working more than 40 hours per week for both years, 73% of people selected it as a major factor this year vs. 59% last year.** Also notable is that the second-leading factor, “I don’t consider the amount of time I worked to be excessive,” garnered 33% of responses for this year vs. 40% last year.

Spotting a trend is tricky, as this is possibly just normal fluctuations in game development and cycles vary in rhythm from year to year. Or working from home and pandemic-stress factors may be at play as well.

VOX POP

“As a co-founder I felt it was necessary to ensure the product’s success in a highly competitive environment.”

“Specific hard project deadlines (like certification turn around).”

“A perfect storm of deadlines, lack of staff to adequately meet said deadlines, and a company where crunch is seen as an inevitability instead of a failure on a management level (*note that I no longer work at this company for probably obvious reasons).”

“It was pressure from management, but without any acknowledgement because it would have been illegal for them to know how much I was working. It was just the number of things on my to do list that ‘needed’ to happen and we weren’t going to talk about if it was possible in a legal time frame.”

“Self-imposed: being senior staff means I must lead by example. This used to mean commitment but now it’s discipline and ability to balance life and work so passion does not consume rookies. The studio has a strict no-crunch policy and paid extra-time: so I’m being encouraged to work LESS to rest!”

“I love what I do!”

“Very small team and we were all very committed to the project. Peer pressure might be an accurate way to describe it at times, but we were all somewhat feeding off each other and just pushing as hard as we could.”

“I often lose track of time when I’m enjoying what I’m writing. Hell, exploring sounds and experimenting with creating my own could easily take up the rest of my life if I let it.”

“Personal poor time management.”

“I am currently pandemic virtual schooling my kids and running this studio from my house. It was just a busy week and it all stacked up in the same week. Rock and hard place territory but it happened remarkably less than I expected because of *waves hands around*.”

“COVID and working remotely.”

“Difficulty in managing time during COVID lockdown.”

“Odd hours of teammates due to COVID.”

“COVID, working from home.”

“WE’RE ALL IN QUARANTINE.”

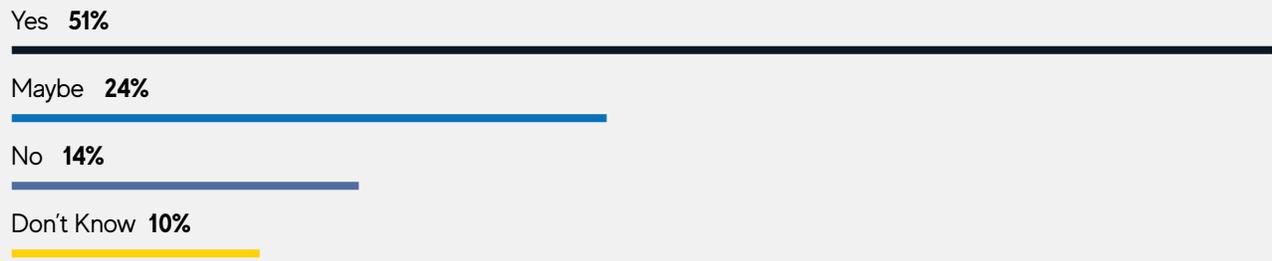
Unionization in the game industry

Work-life balance and the topic of unionization in the game industry tend to go hand-in-hand. As worker issues come to light, game developers are recognizing the advantages of organization in order to achieve fair pay and reasonable working conditions.

This year, when asked if the game industry **should** unionize, 51% answered “Yes,” 14% “No,” and 24% “Maybe.” That’s not much movement from last year when 54% answered “Yes” and 16% answered “No,” with 21% saying “Maybe.”

Do you think that workers in the video game industry should unionize?

Yes 51%



Maybe 24%

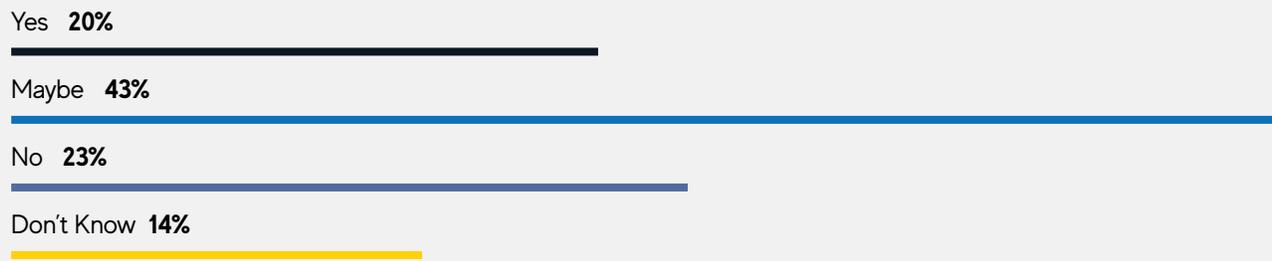
No 14%

Don't Know 10%

When asked if they thought the game industry **will** unionize, the “Maybes” had it with 43%, the same as last year. Twenty percent said “Yes” (down 3%) and 23% said “No” (down 1%).

Do you think that workers in the video game industry will unionize?

Yes 20%



Maybe 43%

No 23%

Don't Know 14%

Pandemic measures led to game delays, game devs say

Adjusting game development workflows for a pandemic is more straightforward for some projects than others. Complications brought on by remote work as we try to keep one another safe have contributed to delayed games, according to people surveyed.

Forty-four percent of those polled said “Yes” when asked if their game has suffered a delay due to the pandemic; 49% answered “No” and the remainder said they were not currently working on a game. This is a notable increase from last year, where only 33% of respondents said their game suffered a delay from the pandemic. This increase is understandable—as the pandemic has waged on, delays have compounded and become increasingly prominent.

VOX POP

“We have lost months due to not being able to travel, work in person, and work together more collaboratively.”

“COVID basically disrupted our communications and work rhythm.”

“Yes but we are already working cross time zone so in many ways its easier, given access to webcams and such. Collaboration has taken a hit though so its not as productive in that sense.”

“While I am the sole developer of my projects, I rely on several musicians and graphic designers to help polish my products. Due to school closures some of my usual contractors were unavailable as they had taken on childcare duties.”

“Delays were blamed on the pandemic, and there were probably some legit reasons why, but also unbalanced priorities and bad management.”

“Getting turnaround times for Nintendo Switch lot check approvals stretched into weeks and months at the start of the pandemic due to lack of staffing, whereas normally it would turn around in a week or less.”

“It’s hard to adapt dev testing and development from home when you need a good internet connection and dev kits that work only via VPN due to 1st Party Partners not accounting for easy ways of facilitating work from home.”

“Yes but only slightly. We were fortunate to be at the beginning of an extensive production cycle and our publisher was able to adjust the schedule to allow us the time needed to get WFH up and running.”

“Had been working with a distributed work force before the pandemic, so change to lifestyle and methods barely impacted...save for people being home MORE to work :-/ (and having to remind them to stop and take a break!).”

“Often interrupted by children.”

“Work-life balance with kids in school at home.”

“Difficulty respecting the work schedules (not only for myself, but also for teammates contacting at any times). Also, the difficulty of not interacting physically is greater, meaning that is easier to get tired from a virtual meeting rather a physical one.”

Game developers can be productive—even from home

As the pandemic forced the game industry to work from home during the pandemic, people have had to adjust to a new reality. This goes beyond office workers having to transition to remote work; developers who already worked from home have had to adapt to the lingering mental and emotional strain of existing during a global pandemic.

For some, that strain affects creativity and productivity. While 32% of respondents said their productivity and/or creativity has been “About the same” since working from home (the most popular answer), 24% said it has “Somewhat decreased.”

Looking at the results another way, **66% of respondents said their productivity and creativity stayed the same or even increased to varying degrees**, which goes against the narrative that working from home is inherently negative when it comes to getting work done. These numbers have remained consistent over last year, when 59% of our survey takers said productivity and 65% said creativity stayed the same or increased. It’s a datapoint that game companies may want to consider when offices begin reopening.

How do you feel working from home has affected your creativity and/or productivity?

Greatly increased 15%

Somewhat increased 20%

About the same 32%

Somewhat decreased 24%

Greatly decreased 8%

N/A - Not working from home 2%

VOX POP

When asked **“What’s been the most difficult part of working from home for you personally?”** common answers had to do with family-related distractions, endless Zoom meetings and difficulty in team communications, self-motivation and loneliness, and maintaining focus. Others said they’re getting along just fine.

Here’s how game developers answered:

“Creating a separation of space. Productivity is reduced compared to going to an office and changing my environment to suit the task at hand.”

“Creative works that needed human interaction were slowed down or postponed.”

“Mixed up sleep hours.”

“I see only positive things, less time commuting, less noise when coding.”

“Connection to my team, work-life balance was much harder, working from home easily slid into ‘living in the (home) office’. I have returned back to working in the office a couple months ago and felt like I got my life back.”

“I’m a producer, so being remote changes the way I interact with the people on my teams.”

“While the loss of a central work environment has hampered maintaining a clear division of work/personal space, we have always operated with flexible on-site/remote arrangements; if anything, the full transition to work-from-home has yielded more benefits than drawbacks: increased time with family, ability to set hours tailored to individual schedules, reduction in cost of rent/utilities (which, in turn, was used to offset employee costs), and infrastructure upgrades (everyone got new desks, chairs, power supplies, and internet upgrades).”

“Our studio has always been fully remote, so there was no change. If anything, this allowed us to stay focused and ship our game as planned. We spent no time on having to trainings or tech support in order to function within a WFH model.”

“Not feeling connected to the team. Having to keep up with a million emails and slack messages, and things can be missed. Reading takes more time over speaking in person, so communication takes longer.”

“Group meetings. Only one person must speak at a time, laughter and side comments could disrupt a conversation (whereas in person that would be fine).”

“None, I enjoy the solitude and privacy of working from home and telecommunications for everything we need to collaborate.”

“Difficulty respecting the work schedules (not only for myself, but also for teammates contacting at any times). Also, the difficulty of not interacting physically is greater, meaning that is easier to get tired from a virtual meeting rather a physical one.”

“They are definitely going to get an awakening when people have to start actually commuting back to work and people have plans outside of the core hours of work.”

“I have ADHD, so it’s tough to stay focused in an environment with lots of interesting things to do. Also dealing with depression from not seeing my family for over a year.”

“Groundhog Day feeling.”

“The company now feels like they can contact me whenever. Or I can be on at any time to handle some issue because what else would I be doing if we can't go out and do things.”

Studio size and growth

It’s been a rough year to say the least—but the game industry was relatively resilient as people were stuck at home with fewer things to do. Games benefited significantly from this captive audience.

For some studios, that translated into stability—and even growth in some cases. Forty-seven percent of respondents said their company expanded in terms of staff over the past pandemic-laden year; 13% say it contracted; 34% say it stayed the same; and just 1% said it closed entirely. Those figures are virtually in line with the previous year, which was much less burdened by the pandemic and remote working.

Did your company expand or contract in terms of staff in the last year?

Expanded **47%**



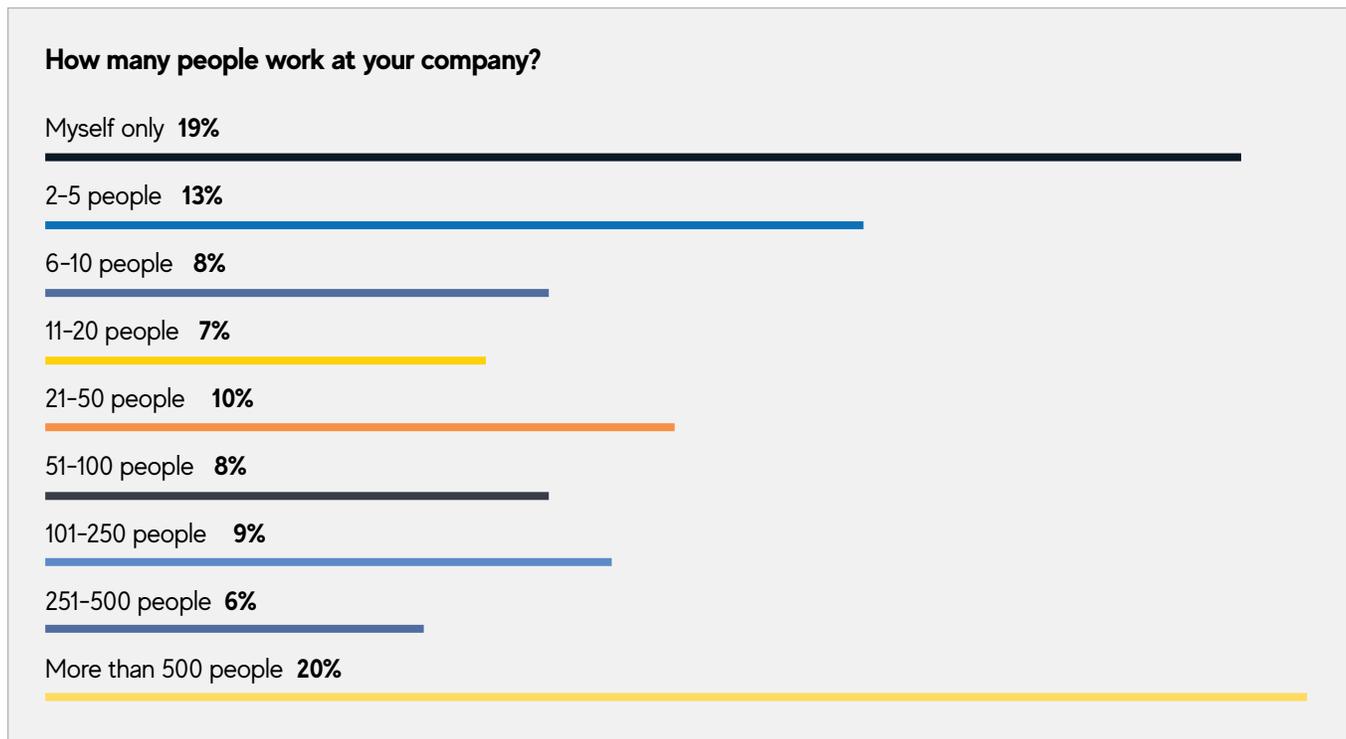
Contracted **13%**

Stayed the same **34%**

Closed entirely **1%**

Other **3%**

As for studio size, 20% said they worked at studios with more than 500 people, followed by 19% who work alone, and 13% whose companies are 2-5 people, generally in line with last year's results.



Making games more accessible

The topic of accessibility in games has gained traction over recent years and we're seeing an expanding movement to create games that are accessible to everyone. Accessibility in games may include spoken text and larger fonts, colorblind modes, controller configuration customization, and more.

When asked, "Have you implemented any accessibility measures (for those with sensory impairment, motor impairment, or other impairments) into your current game?" more respondents replied "No" (42%) than "Yes" (31%), meaning there is plenty of room to increase efforts (27% replied "Don't know or N/A").

When asked what game developers are doing to make their games more accessible, popular answers included adding colorblind modes, dyslexic-friendly typefaces, adaptable fonts, making sound and visuals non-essential, audio prompts, closed captioning, autopilot modes, and making controllers more friendly for people who don't have total use of their hands. And here's more:

VOX POP

“Wheelchair detection for Pokemon Go.”

“[Our game] has a control system called TouchDrive that simplifies a lot the controls used in the action phase, as the car steers automatically, and the player can interact just with one finger during whole action phase and making very few actions, which makes it accessible for very casual players and also players with limited mobility in their hands for whatever reason.”

“Seizure avoidance through setting adjustments. User settings to game content to address common phobias.”

“Using developer guidelines, we’re implementing more difficulty options, subtitles and color-coded options, and much more extensive key rebinding. We are still evaluating broader possibilities like specific full-screen effects for highly-sight-impaired players.”

“We are making efforts to include options for full gamepad support, full button and key remapping, and colorblind support. UI scaling is a post-launch feature we would like to include, and text to speech and audio cue features also planned post-launch.”

“Our game deals with a lot of mature themes and tackles mental health. As such, we provided a feature that warns people when they tackle quests about what content might appear - giving them a heads up. Anyone who doesn’t want to know can similarly turn the feature off.”

Diversity and Inclusion

The Western game industry has traditionally been dominated by cishet white men. Companies today, to varying degrees, are recognizing the importance and advantages of a more diversified workforce.

Sixty percent of those polled said over the past year, their studio focused on diversity and inclusion initiatives ranging from “A moderate amount” to “A great deal” (that’s compared to 56% last year).

Still, 25% said they had not focused on diversity and inclusion initiatives at all, which is down from 28% the prior year.

In the last year, to what extent has your studio focused on staff inclusion and diversity initiatives?

A great deal 21%

A lot 15%

A moderate amount 24%

A little 14%

None at all 26%

In a follow-up question, we asked **“How successful do you think your studio’s attempts at inclusion and diversity have been?”** Forty-two percent said the attempts were “Moderately successful,” 23% said “Very successful,” and 8% said “Extremely successful.” The remaining 27% claimed their efforts were “Slightly” to “Not at all successful.”

Asked specifically if developers’ studios or companies implemented inclusion initiatives in response to the growing Black Lives Matter movement, 31% answered “Yes,” 38% said “No,” and the rest answered, “Don’t Know/Not Applicable.”

VOX POP

When asked **“Where are your diversity and inclusion efforts focused?”** here’s how game developers answered:

“We have focused efforts on increasing ratios of women at and involved with events and projects for years. I also work closely with indigenous communities across Canada, and work to represent a diverse group in any curation.”

“We implemented on how every single person can feel safe and secure at our workplace. The best part is that the employees were themselves understandable and that gives a great validation towards the company growth.”

“Our premise as a company is that diversity is critical for two reasons: 1) it gives us perspective about our users and helps us make a platform that can be more broadly used; 2) there is an under-representation of many groups in technology/gaming, and we are in a position to change that - and we will.”

“There aren’t any, sadly.”

“I do a lot of outreach to minority kids groups, giving presentations on the games industry. As a big publisher, we talk a big game about inclusivity etc. but 1) nothing changes and 2) at the end of the day, if execs think a game with a BIPOC female lead will sell less than a white male lead, the game won’t get made. There’s no risk taking.”

“As a composer and sound designer, when I do need extra help I have very few people I trust to get the job done the way I need. My call list has mostly women and people of color because whenever I can, I would rather give work to someone who might not find it as easily as another white person. I’ve always cheered for minorities for the simple fact that diversity is what makes life worth living.”

“We just naturally have a very diverse team with members from all around the world and various races and genders. We don’t have to do much in terms of specific initiatives because we already happen to be very diverse.”

“Supporting employees who wish to attend protests with paid days off, blind hiring, a member of HR who does not answer to any executive and has been given authority to investigate any allegations.”

“Our intention is to hire a team of diverse backgrounds and experiences to give us insights from many different perspectives -- hopefully adding to representation, but inevitably augmenting the quality of our games and expanding the audience who can have fun with our art.”

“We’re an older studio (average >8yrs, with many employees beyond the 15yr mark and several beyond 25 yrs). The hiring culture has previously focused on ‘cultural fit’ and the sense that the studio is a family; this has resulted in a monoculture. This is gradually and tentatively shifting; managers responsible for hiring have focused energy on getting more diverse candidates. So far, this has resulted in only minor changes.”

“Hiring practices, donations to local charities.”

“Company wide presentations on diversity, focusing on racial discussions and gender identity. And, less formally, our leadership quite openly discusses how to make sure our games appeal to diverse population. Part of keeping our games relevant is making sure we have a development team that is diverse and relevant.”

VOX POP

We also asked, “What are the issues you see around diversifying your studio?” Here’s how game developers answered:

“We seem to have trouble reaching qualified women programmer/engineer applicants. There’s plenty of gender diversity throughout the company as a whole, but female engineers seem hard to come by.”

“Not enough under represented groups (women etc.) are getting through the early stages (high school, university) to get to the job application stage. Often game environments are hostile to these people—especially if you don’t already have a support system in it.”

“My personal hope is that it will be improved over time as we hire diversity in our incoming junior and mid-level developers and do what we can to turn them into leaders for tomorrow.”

“All upper management are white/ male. This feels like a legacy aftershock stemming from (even worse) diversity issues in the industry 10 years ago.”

“So many issues. No inclusivity. No real diversity. Very marginalizing. Anyone who is slightly different is shunned.”

“Many ethnical or gender minorities as well as women in general find the industry so toxic that they don’t even get to the point of applying for jobs.”

“Lack of knowledge about how to identify and approach diverse candidates, discomfort discussing systemic bias.”

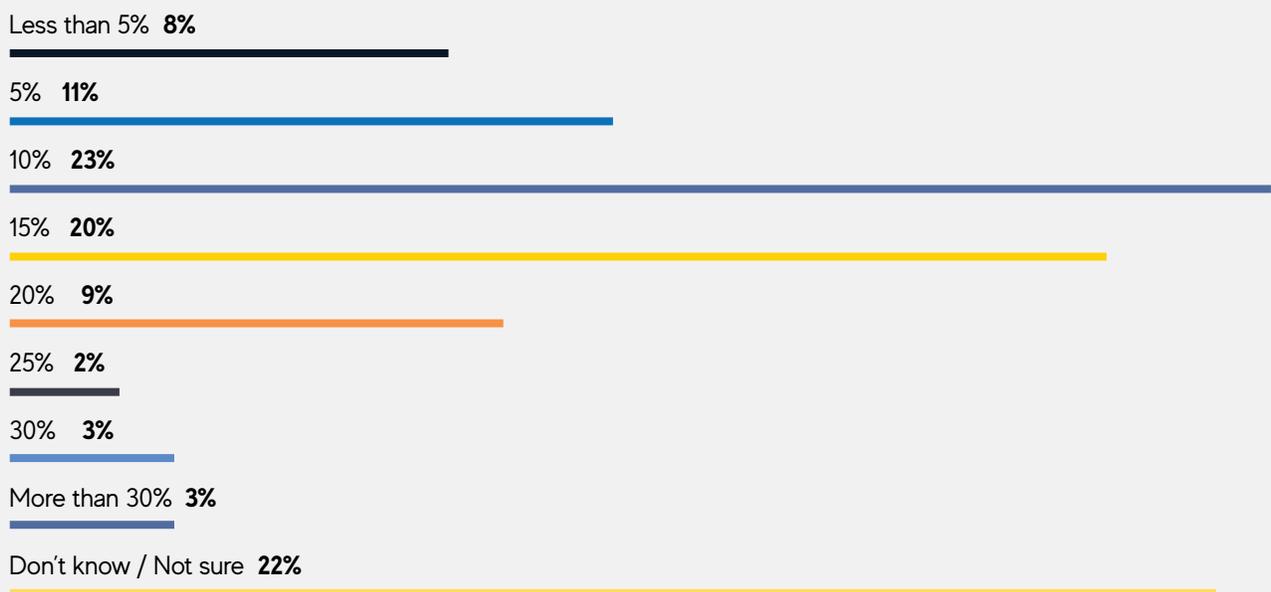
“Old members of the industry having biases not understanding that they have biases.”

Only 3% of those polled think the 30/70 revenue share on digital storefronts is justified

Game developers largely rely on third-party digital storefronts such as Steam, GOG, Google Play, Apple’s App Store, and the Epic Games Store to sell their games. Selling games via these services comes at a cost—the standard share has been 30% for the platform holder, and 70% for the developer.

But that standard has come into question in the past few years, so much so that the standard isn’t so standard anymore: Google Play’s fees will soon lower from 30% to 15% for the first \$1 million earned by a developer, per year; Apple similarly reduced its cut to 15% for developers who sell under \$1 million in a year (though the 30% cut reactivates to affect all revenue if sales go over \$1 million); Epic Games aggressively launched its store with a 12% cut, challenging the industry standard; Steam is still holding tight onto 30%--but gives a discount if your game is making tens of millions of dollars, a rather upside-down model that mostly benefits larger companies and rare breakout hits.

What do you think is a justifiable amount of your game’s revenue for digital storefronts (e.g. Steam, Epic Games Store, App Store) to take?



Only 3% said a 30% cut is justifiable and the most popular answer was 10%, which garnered 23% of responses, followed by 15% with 20% of responses. Viewed another way, **46% of respondents find a 10-15% cut justifiable.**

In our previous survey from 2020, when asked a similar question specifically about Steam’s standard 30% cut, 6% of respondents said 30% was justifiable. With such sentiment surrounding a 30% share, one has to wonder how much longer Valve and Steam can hold onto this premium rate.

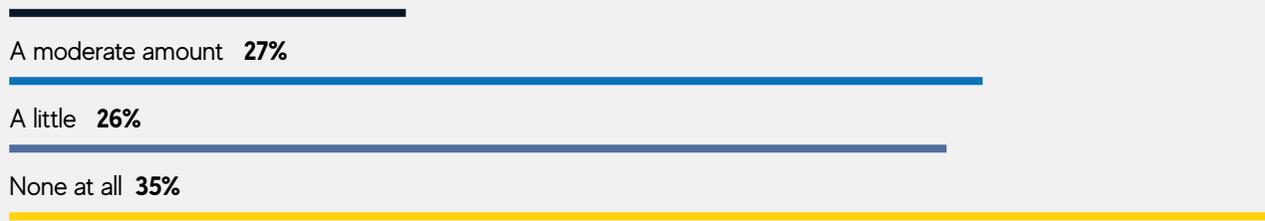
Sustainability: Room for improvement

The game industry does have an impact on the environment, whether it’s the electricity that game and development hardware consumes, the fuel and emissions used to travel the globe for game conferences, or the collection of raw materials that make computing possible, there are many opportunities for game companies to reduce their carbon footprint.

For the most part, game developers polled say their company has taken part in sustainability initiatives, to varying degrees. A full 65% said their company has done “A little” to “A lot” in terms of putting sustainability into practice, leaving 35% saying “None at all.”

To what extent has your studio taken part in sustainability initiatives?

A lot 11%



A moderate amount 27%

A little 26%

None at all 35%

Who are game developers?

Experience: After the 10-year mark, game development experience drops off sharply

When asked how many years they’ve been involved in game development, the most popular answers were 3-5 years and 6-10 years at 22% each. Factoring in other answers, we found that 57% of game developers have 10 years or less of game development experience. So, if you’ve been around for more than a decade, count yourself in the minority.

From 11 years of experience on, things start to drop off—though there is a minor 3% year-on-year uptick in the 11-15 range, which could mean that game developers are sticking around a bit longer.

How many years, if any, have you been involved in game development?

Under a year 4%

1-2 years 9%

3-5 years 22%

6-10 years 22%

11-15 years 16%

16-20 years 9%

21-25 years 7%

26-30 years 3%

More than 30 years 4%

N/A - Not involved in development 4%

Gender: Women continuing to gain ground; men remain large majority

While men continue to dominate the game industry when it comes to gender there was some slight movement here, with women bumping up a percentage point, and men bumping down two percentage points year on year. Additionally, this year we introduced a non-binary gender option and saw 3% of respondents self-identify as such.

This is a gradual trend we're seeing year to year, where women are gaining ground on men; three years ago the ratio was 80:17 in favor of men.

What gender do you identify with?

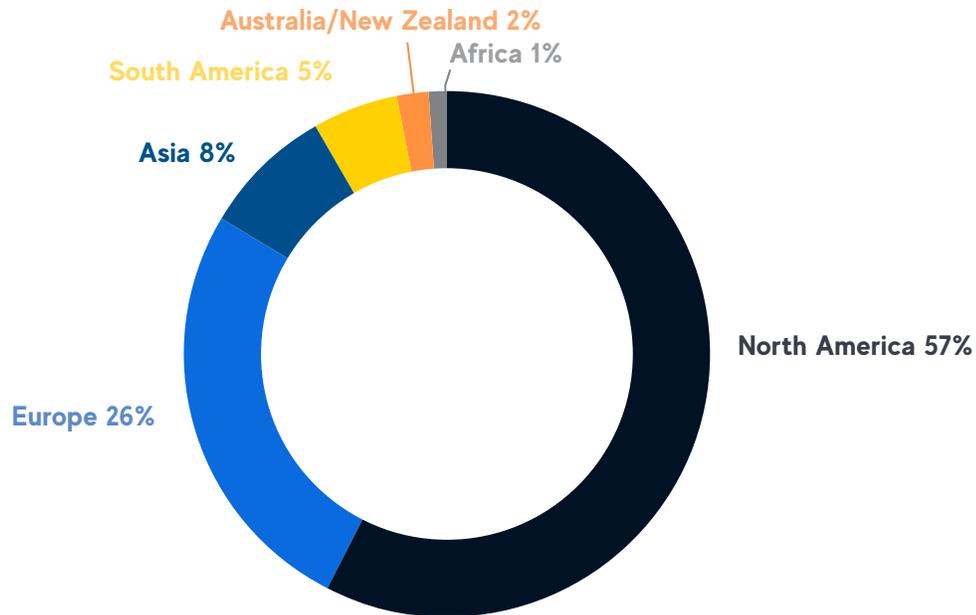
Woman 21%

Man 73%

Non-Binary 3%

Prefer not to answer 3%

Location: Where do they live?



There was not much movement in this area, which is unsurprising as there weren't any events that would lead to a significant surge or decline in any of these regions. Also keep in mind that GDC is based in the U.S., so answers will be Western-centric—but it's still a snapshot worth sharing.

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