



# Developer Satisfaction Survey 2019

## Industry Trends and Future Outlook Report

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## Introduction

The mission of the International Game Developers Association (IGDA) is to support and empower game developers around the world in their pursuit of fulfilling and sustainable careers. Part of the core set of tools that the IGDA uses to achieve this mission and to empower game developers is knowledge and information. The Developer Satisfaction Survey (DSS) conducted in partnership with Western University is a valuable source of information about the well-being and opinions of developers and of the game industry as a whole.

This report contains the results and findings of the sixth DSS, conducted in the first quarter of 2019. It dives deeper into the industry insights from the responses and compares them to the data over the prior three surveys. This report is focused on comparing the data across surveys to identify industry trends and future directions.

We see that, while many parts of the industry remain consistent, there are positive trends, including better public perceptions of the industry, significantly less mandatory crunch, and expected growth of studios.

Diversity and inclusion also continues to grow in its recognized importance. More game developers acknowledge the importance of localization and diversity of game content, and have concerns about diversity, sexism, and racism in both the industry and among gamers.

However, we see that it is the diverse members of our industry who bear these concerns most, and who report challenges related to them. This is our call to action to push forward initiatives and changes to create a better industry for all game developers around the world. Together, we can create a welcoming and supportive environment in which game developers will be able to thrive in both their careers and their lives.

All are welcome and encouraged to share this report and these findings with others to encourage change and long-term solutions that will improve our industry and its accessibility for all developers.

If you would like to assist with translating this report into other languages or helping us reach a wider audience for our next survey in the first quarter of 2021, please reach out to us at [staff@igda.org](mailto:staff@igda.org).

Renee Gittins, Executive Director, IGDA

## Executive Summary: Comparing 2019 to 2015

This Executive Summary compares summarizes key industry trends data from the 2019 DSS and compares this to the 2015 DSS – when the last Industry Trends Report was produced. The Full Report which follows provides additional detail about the 2019 data and compares it with previously unreported data from the 2016 and 2017 DSS.

In interpreting the data presented in this report, it is important to note that changes in response rates could reflect an industry trend, but also may be merely due to differences in the sample composition of each survey. Also note that throughout the report, totals may not add up to 100% due to rounding or because a question allowed multiple response options.

### Few Differences in the Sample Composition

Fewer people took the survey in 2019 than 2015. Otherwise, the general composition of the survey respondents is roughly the same (Table A). This is important in determining the comparability of the data over time.

### Little Change in Perceptions of Quality of Life

- In 2019, 71% of respondents felt their quality of life was “somewhat positive” or “very positive” compared to 68% in 2015.
- In 2019, 17% of respondents felt their quality of life was “somewhat negative” or “negative” compared to 15% in 2015.

### Job Satisfaction Slightly Less Positive

- In 2019 65% of respondents rated job satisfaction as “somewhat positive” or “very positive” compared to 67% in 2015.
- In 2019 23% of respondents rated job satisfactions as “somewhat negative” or “very negative” viewpoint compared to 18% in 2015.

### More Negative Perceptions of the ‘State of the Industry’

- Current State of the Industry
  - Respondents with positive perceptions decreased from 42% in 2015 to 36% in 2019.
  - Respondents with negative perceptions increased from 34% in 2015 to 38% in 2019.
- Future State of the Industry
  - Respondents with positive perceptions decreased from 52% in 2015 to 44% in 2019.
  - Respondents with negative perceptions increased from 21% in 2015 to 27% in 2019.

**Table A: Sample Composition**

	DSS 2019	DSS 2015
Sample size	1116	2928
Language of survey	92% English	93% English
Respondent primary roles		
Developers	61%	54%
Managers	30%	39%
Administrative roles	4%	7%
Students*	13%	20%
Respondent demographics		
Gender	71% men	75% men
Ethnicity	81% white	76% white
Age	Largest categories: 35-39 and 40-49 (each at 22%)	Largest category: 25-29 (26%)
Country of work (top 3)		
United States	52%	60%
Canada	12%	12%
United Kingdom	6%	4%

Source: IGDA DSS 2019

\*Students studying to make games or about games/game industry counted separately; those working on games for pay or goal of pay are included in main figures

### Uncertainty about Job Opportunities Remains

- In 2019 42% of respondents reported negative perceptions of job opportunities compared to 37% in 2015.
- Notably, 23% reported neutral perceptions.

### Changing Public Perception of the Game Industry

- Compared to 52% in 2015, a smaller percentage of 2019 respondents (40%) felt that the game industry is perceived negatively by society. In the 2015 Industry Trends Report, these negative perceptions were attributed to Gamergate incidents and associated public discourse throughout 2014-2015.
- Compared to only 24% in 2015, 33% of respondents in 2019 felt that the game industry is perceived positively by society.

## Company & Industry Growth

- More than half of the respondents reported company growth in each of the 2015 and 2019 surveys
- But a consistent proportion of respondents reported increased downsizing in each survey year (14% in 2015 to 16% in 2019).
- Projections for the next three years were positive. In each of 2015 and 2019, about 90% reported that they expected either “no change,” “moderate growth” or “considerable growth” in their companies.
- More respondents felt that diversity in game content was important to industry growth (Table B).

**Table B: Factors Important to Industry Growth**

2015		2019	
Advancement of game design	71%	More diversity in game content	61%
Advancement of storytelling	54%	Advancement of game design	58%
More diversity in game content	53%	Advancement of storytelling	50%
Source: IGDA DSS 2015 and 2019			

## Development Platforms: Use, Projected Use, and Importance for Future Growth

- In both survey years, respondents were invited to select the development platforms that their company currently develops for, which platforms they will support in the next 12 months, and the overall importance of each platform for industry growth. In general, PC, iOS, consoles, and Android platforms were dominant across all domains for 2015 and 2019.

## Innovation in Game Mechanics & Technology

- The data from 2015 and 2019 reflect constant innovation in the gaming industry. In each year, more than 82% of respondents reported innovation in game mechanics, and about 90% reported innovation in the development of game technology and tools.

## Importance of Localized/Regional Versions of Games

- In 2019, 87% of respondents stated that localization was somewhat or very important, compared to 69% in 2015. This suggests an increased focus on games that are linguistically and culturally sensitive to specific audiences.

## Top Distribution Platforms

- Top distribution platforms may reflect continual change in digital distribution vendors and monetization models (Table C).

**Table C: Top Distributions Platforms**

2015		2019	
Apple iOS	54%	Steam	58%
Google Play	50%	Google Play	53%
Steam	47%	PlayStation Network	39%
Personal or studio website	42%	Xbox Live Arcade	34%
Retail chains	32%	Publisher website	34%

Source: IGDA DSS 2015 and 2019

### Top Game Genres

- Publishers and developers continue to focus on the same game genres (Table D).

**Table D: Top Game Genres**

2015		2019	
Action games	51%	Action games	53%
Casual games	38%	Role playing games	34%
Role playing games	35%	Casual games	33%
Strategy games	33%	Strategy games	30%

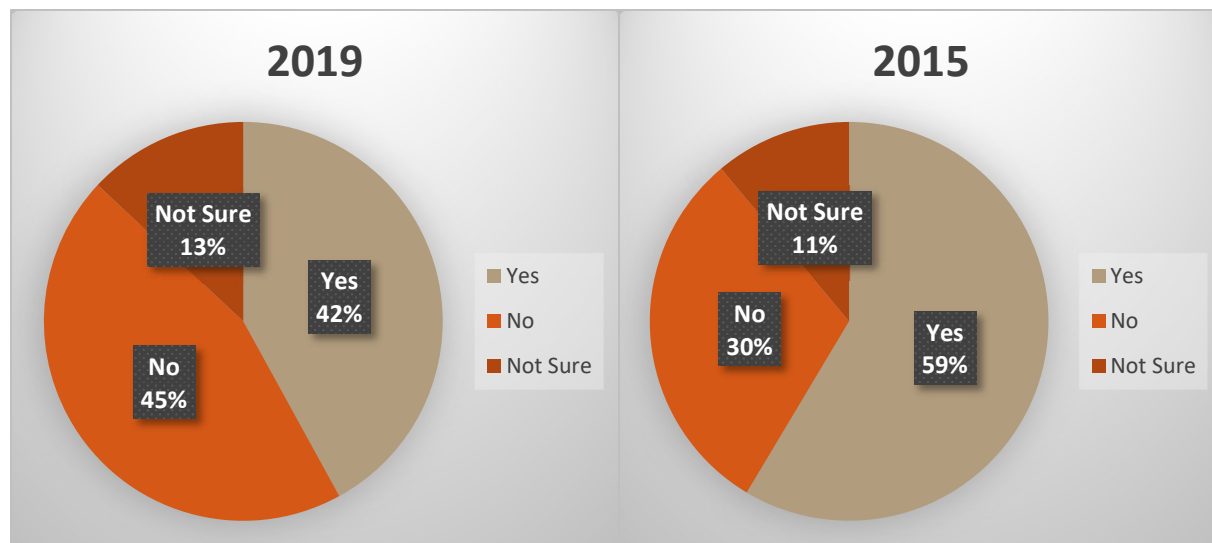
Source: IGDA DSS 2015 and 2019

### Working Time May Be Showing Improvement

- In 2019 more respondents than 2015 said that crunch or long hours was not expected as a normal part of their job (Figure A).
- Over two-fifths still felt the pressure to crunch.



**Figure A: Is Crunch Expected as a Normal Part of the Job?**

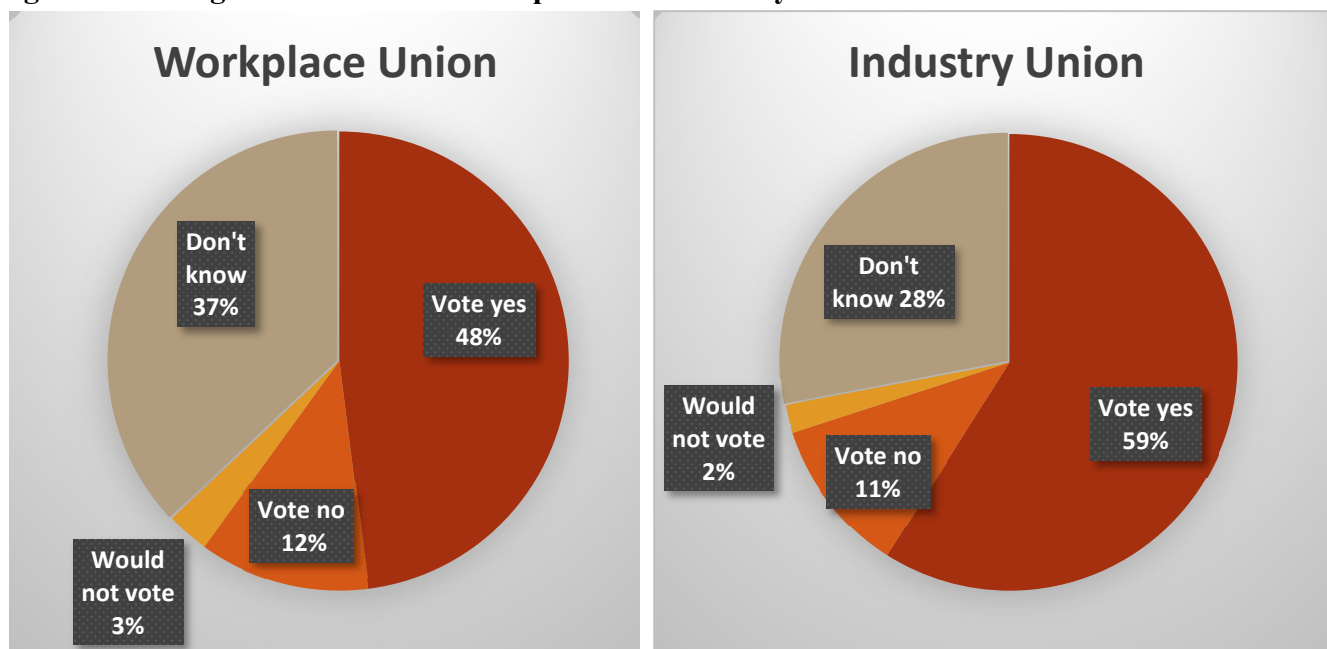


Source: IGDA DSS 2015 and 2019

### Unionization

- For the first time in the IGDA surveys, the 2019 DSS asked respondents if they were union members; 6% said yes.
- Almost half of respondents in 2019 (48%) said that they would vote in favor of a union at their company/studio, and 59% stated they would vote in favor for a sectoral or industry union.

**Figure B: Voting Intentions for a Workplace and Industry Union**



## Full Report: DSS 2019 Industry Trends and Future Outlook

### Report Overview and Background

The IGDA's Developer Satisfaction Survey (DSS) for 2019 was open for responses from March to May 2019. A preliminary [Summary Report](#) on this raw data was released on November 20, 2019. The survey produced a final valid sample of 1,116 responses.

This is a detailed report on a sub-set of the survey about industry trends and the future outlook of the industry. It presents data on topics like the relative importance of game platforms, perceptions of industry growth, and the image of the game industry to society. It can be read in comparison to the [2014 and 2015 IGDA Industry Trends Reports](#).

Throughout the report, we will focus on the 2019 survey data, with some mention of previous survey years (2016, 2017). Explicit comparison for some variables to the 2015 Industry Trends Report is made in the Executive Summary.

In addition, we will occasionally present the data for portions of the survey sample to highlight the responses of particular groups of developers. These sub-samples are defined in Table 1.

The inclusion criteria for completing this survey were quite broad. As a result, the responses reflected in the following pages represent the experiences and perceptions of those in core development roles as well as roles that are auxiliary to the making of games or part of the larger game industry community (Table 2). That said, the majority of respondents are directly involved in game development (89%). Most (66%) reported that their primary work was to make games in a core creation or development role (including QA). A further 7% reported that a portion of their primary work is to make games, 5% said they made games for commercialization in their off-time, 4% were academics who make games as a core part of their job and 7% supported the development of games in administrative or ancillary roles. Of this dominant game development group, 30% held managerial, project manager or team lead roles and 61% held core development roles (e.g., tech, art, audio, design, QA).

**Table 1: Sub-sample Descriptions**

Sample	Inclusion Criteria
Whole	<ul style="list-style-type: none"> <li>all survey respondents</li> <li>this includes those in the broad game community such as: students, academics, game journalists, people who work on game-related events, game hobbyists, investors, the currently unemployed and those seeking a first job in the industry</li> </ul>
Manager	<ul style="list-style-type: none"> <li>all survey respondents who identified as holding a management role: founder, owner, senior manager, middle manager, producer/project manager, team lead</li> <li>this includes only people working to make games for pay, in whole or in part, and in core development or support roles</li> </ul>
Developer	<ul style="list-style-type: none"> <li>all survey respondents who identified as holding a non-managerial role in core development areas: programming, art, audio, design, writing, localization, UX</li> <li>this sample does not include QA and testing</li> <li>this includes only people working to make games for pay, in whole or in part, and in core development or support roles</li> </ul>
Employee	<ul style="list-style-type: none"> <li>all survey respondents who identified as being permanent or temporary employees of a game company</li> <li>this includes only people working to make games for pay, in whole or in part, and in core development or support roles</li> </ul>
Freelance	<ul style="list-style-type: none"> <li>all survey respondents who identified as being independent contractors or freelancers (i.e., paid through contracts with 1 or more clients/companies)</li> <li>this includes only people working to make games for pay, in whole or in part, and in core development or support roles</li> </ul>
Self-employed	<ul style="list-style-type: none"> <li>all survey respondents who identified as being self-employed (i.e., owns a company/studio/business and is paid by self)</li> <li>this includes only people working to make games for pay, in whole or in part, and in core development or support roles</li> </ul>

Source: IGDA DSS 2019

**Table 2: How you would best describe your connection to the game industry?**

Connection to the Game Industry	% of respondents
My primary work is to make games in a core creation or development role (this includes QA)	66.4%
A portion of my primary work is games-related or to make games	7.3%
Work is to support the development of games in administrative, support, or ancillary roles not involve game creation	6.8%
Work is not to make games, but I work on games for pay or with the intent of commercialization in my off-time	4.5%
Academic or educator who studies/teaches about games/the game industry and also makes games as a core part of my job	3.6%
I am currently unemployed in the game industry	3.5%
I am looking for my first job in the game industry	2.8%
I am an academic or educator who studies/teaches about games/the game industry	2.0%
I am a fine artist working in the games medium and display my games as art pieces	1.7%
I am involved in the production of game related events, but I do not make games	0.8%
I make games as a hobbyist with no intention to make money from games	0.2%
I am a game journalist or critic	0.2%
I am an external investor to the industry	0.1%
<b>Total</b>	100%
Student studying to make games or about games/game industry*	12.6%
Source: IGDA DSS 2019	
*Students counted separately; those working on games for pay or goal of pay are included in main figures	

Across the whole sample, 13% of respondents were full- or part-time students and 3% were unemployed at the time of the survey. Among those who were employed, 89% reported being full-time employees with the remainder being part-time. These individuals could be employees of a company, work freelance or on contract, or be self-employed (Table 3).

**Table 3: How you would label the status of your employment?**

Employment Status	2019	2015
Permanent employee (part-time or full-time)	71%	65%
Temporary employee (part-time or full-time)	3%	4%
Independent contractor or freelancer	11%	12%
Self-employed	15%	19%
Source: IGDA DSS 2015 and 2019		

With respect to **gender**, 71% of respondents identified as men, 25% as women, 3% as nonbinary, and 2% selected “prefer to self-describe.” In an additional question, 4% identified as transgender.

Regarding **ethnicity**, respondents were able to select up to 3 options. Most respondents identified as White or Caucasian (81%). The next highest group was Hispanic or Latinx (7%). When asked whether they identified as a member of a racial or ethnic minority in their workplace, 17% indicated yes.

The **age** range of respondents was quite large (20-76 years), and the respondents were older compared to previous IGDA surveys. This could reflect a feature of the particular sample of respondents or signal a trend of aging in the industry. Most respondents in 2019 were between the ages of 35 to 49, making up 44% of the sample.

First introduced in the 2015 survey, respondents had the option to choose their preferred survey response **language** from seven options. In 2019, English was the dominant response language, but a small number of responses were gathered from most languages offered: English (91.7%), French (4.7%), Traditional Chinese (1.2%), Spanish (1.1%), German (0.7%), Japanese (0.5%), Simplified Chinese (0.3%), and Italian (0%).

## Quality of Life and Job Satisfaction

The 2019 DSS contained a general question about both quality of life and job satisfaction. Compared to previous years perceptions of quality of life were on the higher side in 2019 (Table 4).

However, the respondents in 2019 were more polarized with respect to perceptions of job satisfaction – there were fewer positive and more negative responses than previous years.

**Table 4: Views on Quality of Life and Job Satisfaction**

Quality of Life	2019	2017	2016	2015
Somewhat or Very Positive	71%	66%	71%	68%
Somewhat or Very Negative	17%	16%	16%	15%
Job Satisfaction				
Somewhat or Very Positive	65%	65%	71%	67%
Somewhat or Very Negative	23%	20%	18%	18%

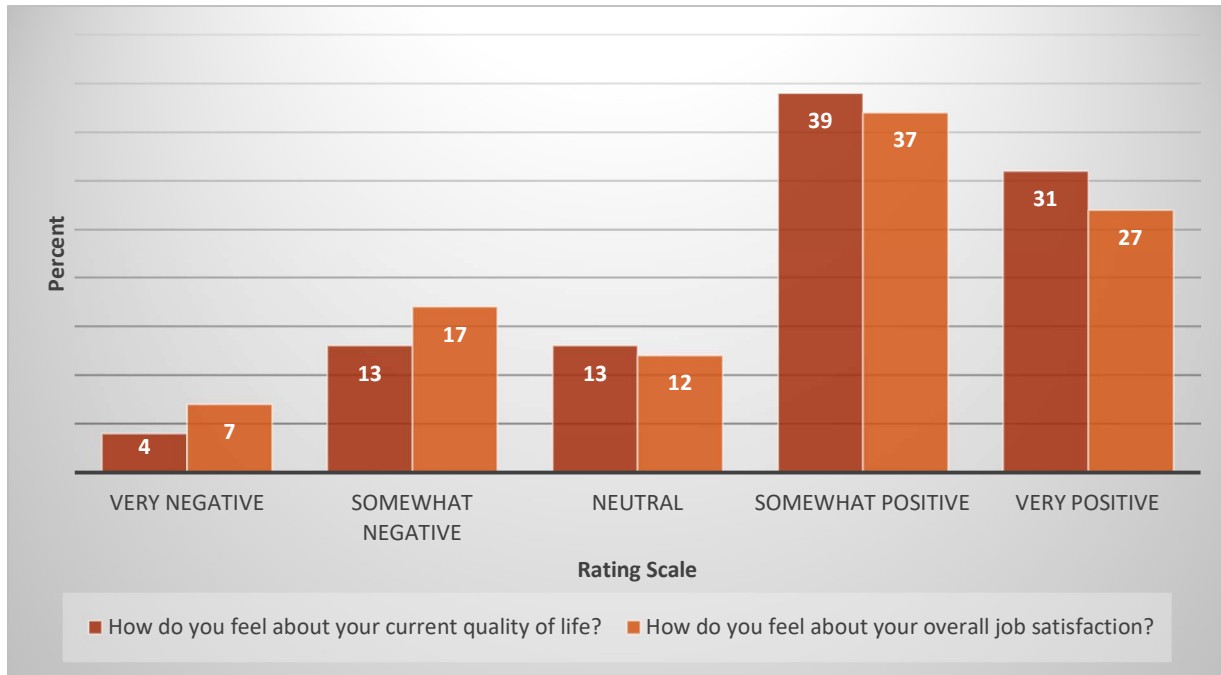
Source: IGDA DSS 2019, 2017, 2016, & 2015

Looking specifically at 2019, respondents seem to be a relatively happy bunch (Table 4; Figure 1). That said, 17% expressed “somewhat negative” or “very negative” quality of life. Almost one-quarter (23%) considered their job satisfaction to be “somewhat negative” or “very negative.”

These variables are moderately positively correlated such that those who indicate negative feelings about their quality of life are in turn more likely to also report negative feelings about their overall job satisfaction.

A weak positive correlation was found between quality of life and being a senior manager and weak negative correlations between quality of life and being a visual artist, being an independent contractor or freelance, and being unemployed.

In addition, weak positive correlations were found between job satisfaction and age, being a senior manager, and being self-employed.

**Figure 1: General Views on Quality of Life and Overall Job Satisfaction**


Source: IGDA DSS 2019

## Current State of the Games Industry

Over the years, respondents were asked to rate their views on the current state of the games industry (Table 5). Between 2015 and 2016, positive perceptions increased. However, between 2015 and 2019, positive perceptions decreased, and negative perceptions increased.

**Table 5: Views on Current State of the Industry**

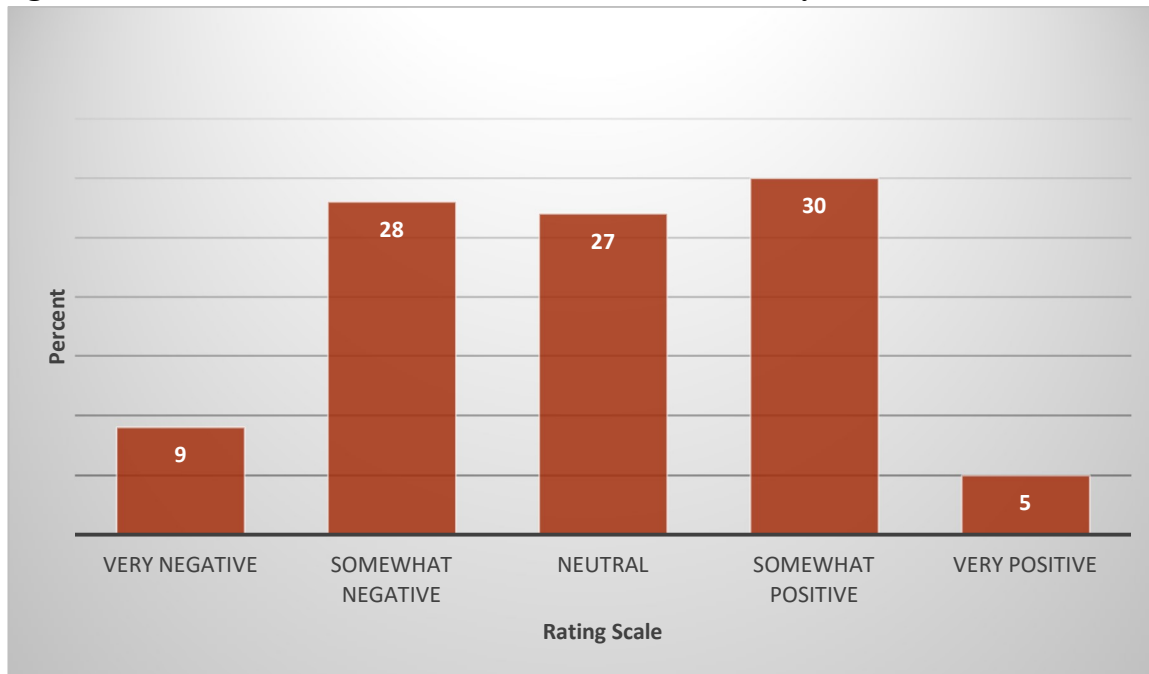
Current State	2019	2017	2016	2015
Somewhat or Very Positive	36%	45%	50%	42%
Somewhat or Very Negative	38%	30%	24%	33.5%

Source: IGDA DSS 2019, 2017, 2016, &amp; 2015

Looking specifically at 2019, the data show mixed and middling opinions (Figure 2) about the state of the industry. Slightly more respondents indicated a negative view (37%) compared to those with a positive view (35%), but many (27%) also reported a neutral perspective. In addition, few respondents selected the most extreme response options.

Views on the current state of the industry were found to be weakly positively correlated with job satisfaction and quality of life. This suggests that respondents who indicate more positive perceptions of the industry are also likely to report greater job satisfaction and quality of life. Current state of the games industry was also weakly positively correlated with being senior management. In addition, current state was weakly negatively correlated with being nonbinary or being transgender.

**Figure 2: Views on the Current State of the Games Industry**



Source: IGDA DSS 2019

## Job Opportunities in the Games Industry

Across the survey years, respondents report negative perceptions of their job opportunities (Table 6). The proportion of negative perceptions about job opportunities was greater than the proportion of positive perceptions for every year except 2016.

**Table 6: Views on Job Opportunities in the Game Industry**

	2019	2017	2016	2015
Somewhat or Very Positive	34%	35%	39%	34%
Somewhat or Very Negative	42%	37%	32%	37%

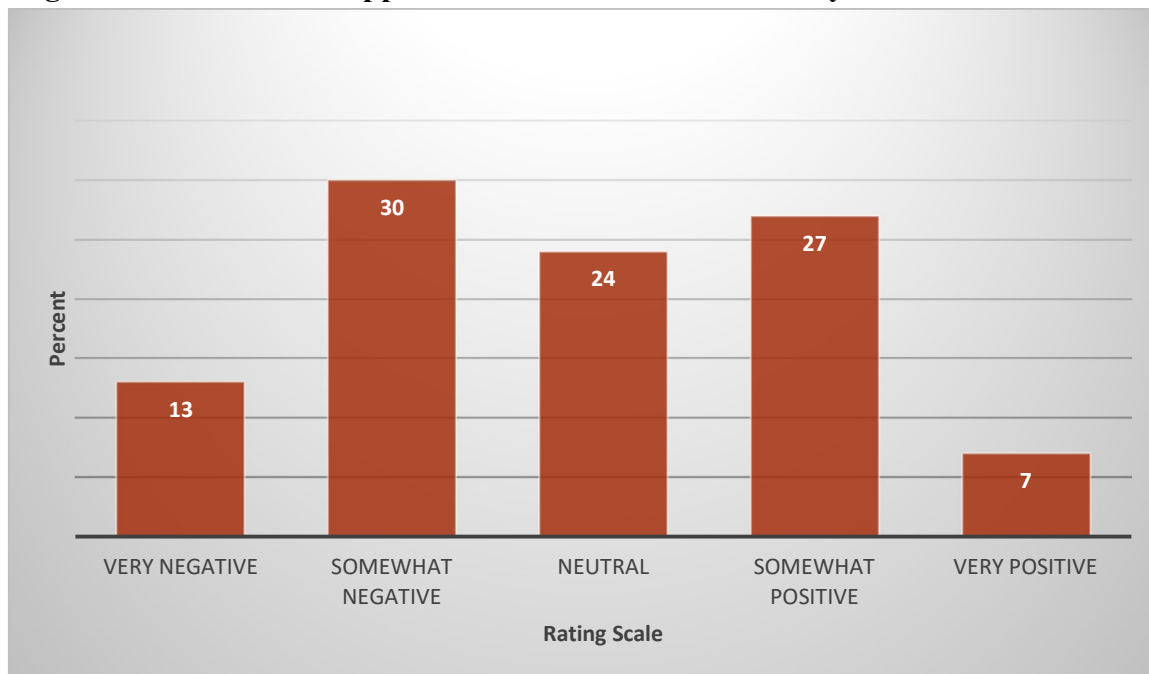
Source: IGDA DSS 2019, 2017, 2016, & 2015



In 2019, respondents appear to have a more negative perception of their job opportunities compared to their quality of life and job satisfaction. Looking at perceptions of job opportunities specifically (Figure 3), the proportion of negative perceptions (42%) was greater than the proportion of positive perceptions (34%). However, a sizeable minority had neutral feelings about their job opportunities (24%) and few selected the extreme response options.

Respondents who reported a favorable outlook on job opportunities also tended to report positive job satisfaction and positive quality of life. Current outlook on the game industry was also strongly positively correlated with views on job opportunities. This suggests that respondents with a rosy perception about the state of the industry are more likely to believe that there are opportunities for growth through employment. Favourable job outlook was also related to working in a larger team and being a permanent employee. In contrast, job outlook was negatively related to being an independent contractor or freelancer, being nonbinary, and being transgender.

**Figure 3: Views on Job Opportunities in the Games Industry**



Source: IGDA DSS 2019

## Geographies of the Industry

Respondents were asked to provide the country in which they work and to list the location of the head office of the company for which they work. Table 7 includes the top responses. The Country of work data reflect the Western-centric sampling bias of the survey and should not be taken as a representative

picture of the global nature of the game industry. The results are informative, however, for the interpretation of the rest of the survey data.

**Table 7: Country of Work and Location of Head Office**

	Country where I work	Location of head office
United States	52%	51%
Canada	12%	5%
United Kingdom	6%	4%
France	5%	10%
Finland	4%	3%
Australia	3%	3%
New Zealand	3%	3%
Sweden	2%	2%
Germany	2%	1%
Japan	1%	4%
Korea	0%	2%
Source: IGDA DSS 2019		

## The Outlook for the Industry – Looking 1 Year Ahead

When asked to rate their views on the outlook for the industry in the year ahead, positive perceptions increased between 2015 and 2016 (Table 8). However, between 2016 and 2019, positive perceptions decreased, and negative perceptions increased.

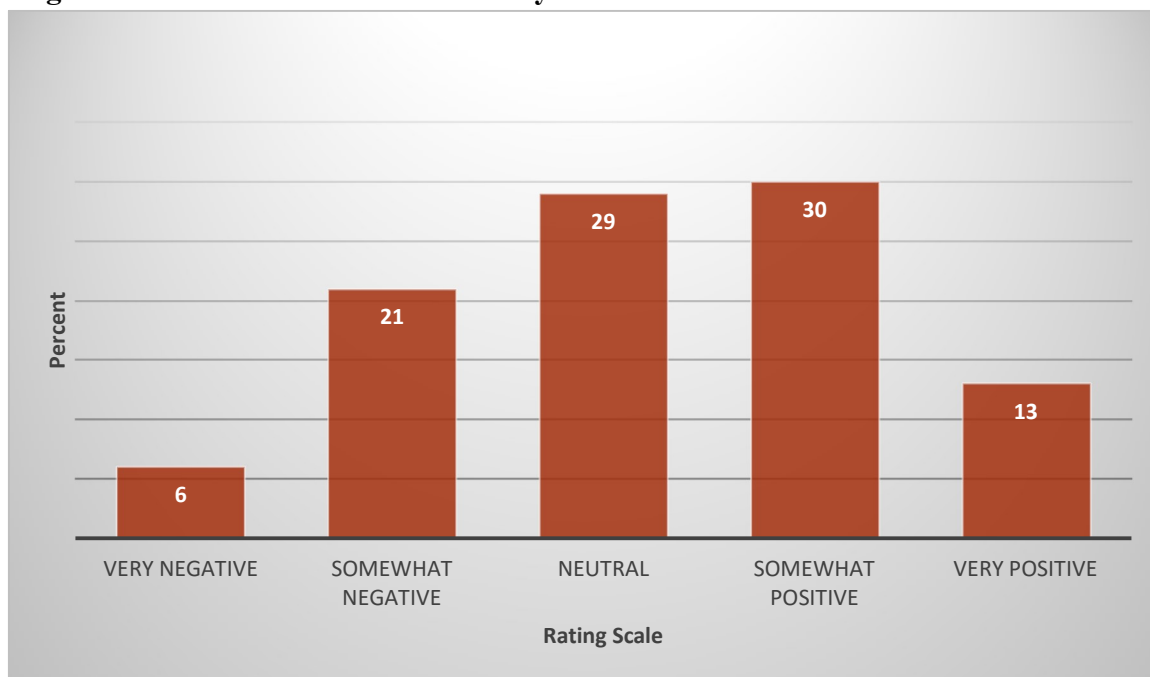
**Table 8: Views on Future Outlook**

Future Outlook	2019	2017	2016	2015
Somewhat or Very Positive	44%	54%	58%	52%
Somewhat or Very Negative	27%	20%	16%	21%
Source: IGDA DSS 2019, 2017, 2016, & 2015				

Examining 2019 specifically, 43% of respondents reported a positive outlook (Figure 4). Only 27% held a negative outlook, while the remaining 29% reported a neutral outlook. Again, middling responses were most common.

Respondents who reported a positive future outlook also tended to report favourable job opportunities and current state of the industry, with strong positive correlations. Moreover, job opportunities were weakly positively related to job satisfaction and quality of life. Future outlook was also weakly positively related to team size and weakly negatively related to being an independent contractor or a freelancer.

**Figure 4: The Outlook for the Industry in 1 Year**

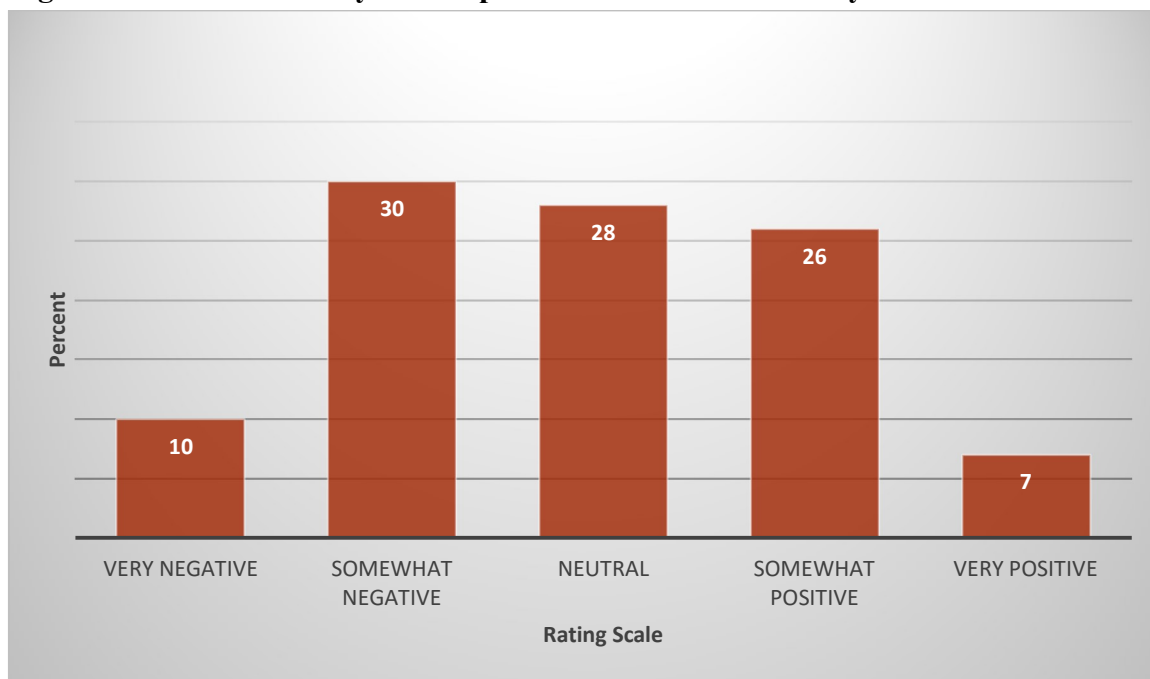


Source: IGDA DSS 2019

## Views on the Public's Perception of the Game Industry

Respondents were asked about their views on the public's perception of the game industry (Figure 5). A greater proportion of respondents reported a negative perception (40%) compared to a positive perception (33%) in 2019. However, this is an improvement since 2015, where 52% reported a negative perception (Table 9). In the 2015 Industry Trends Report, this was attributed to Gamergate incidents and public discussions throughout 2014-2015. However, it is important to note that actual views of the general public may be different than the perceptions of survey respondents.

**Figure 5: Views on Society's Perception of the Games Industry**



Source: IGDA DSS 2019

**Table 9: Views on Society's Perception of the Game Industry**

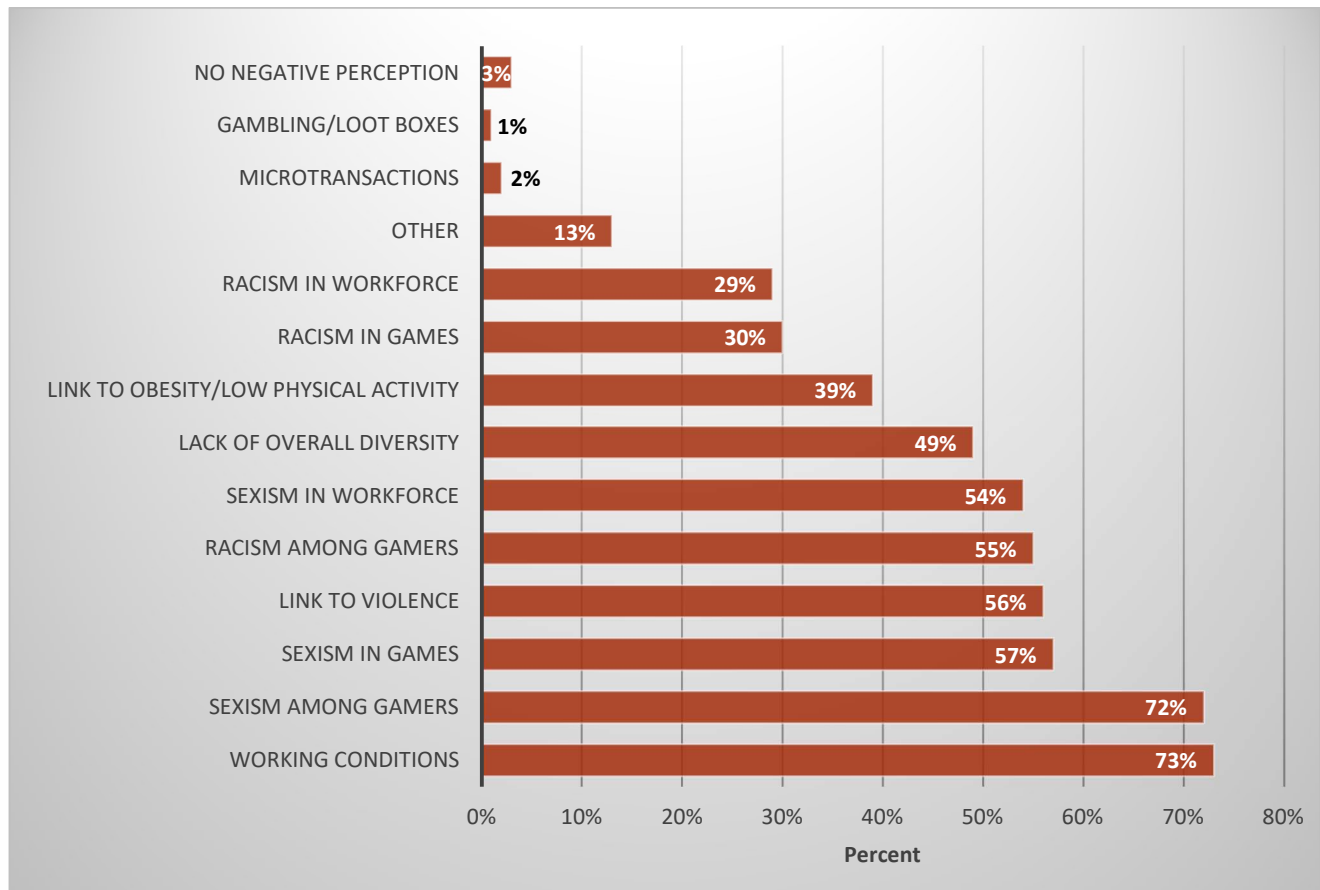
	2019	2017	2016	2015
Somewhat or Very Positive	33%	37%	37%	24%
Somewhat or Very Negative	40%	38%	38%	52%

Source: IGDA DSS 2019, 2017, 2016 & 2015

Survey respondents were asked a subsequent question to better target the factors that they think might be associated with a negative perception of the industry (Figure 6). The top reasons included 'working conditions' (73%) and 'sexism among gamers' (72%). What is also interesting and perhaps disheartening

to note is that only 3% of respondents indicated that they believe there is no negative perception of the game industry. This is a challenging message coming from industry insiders and community members.

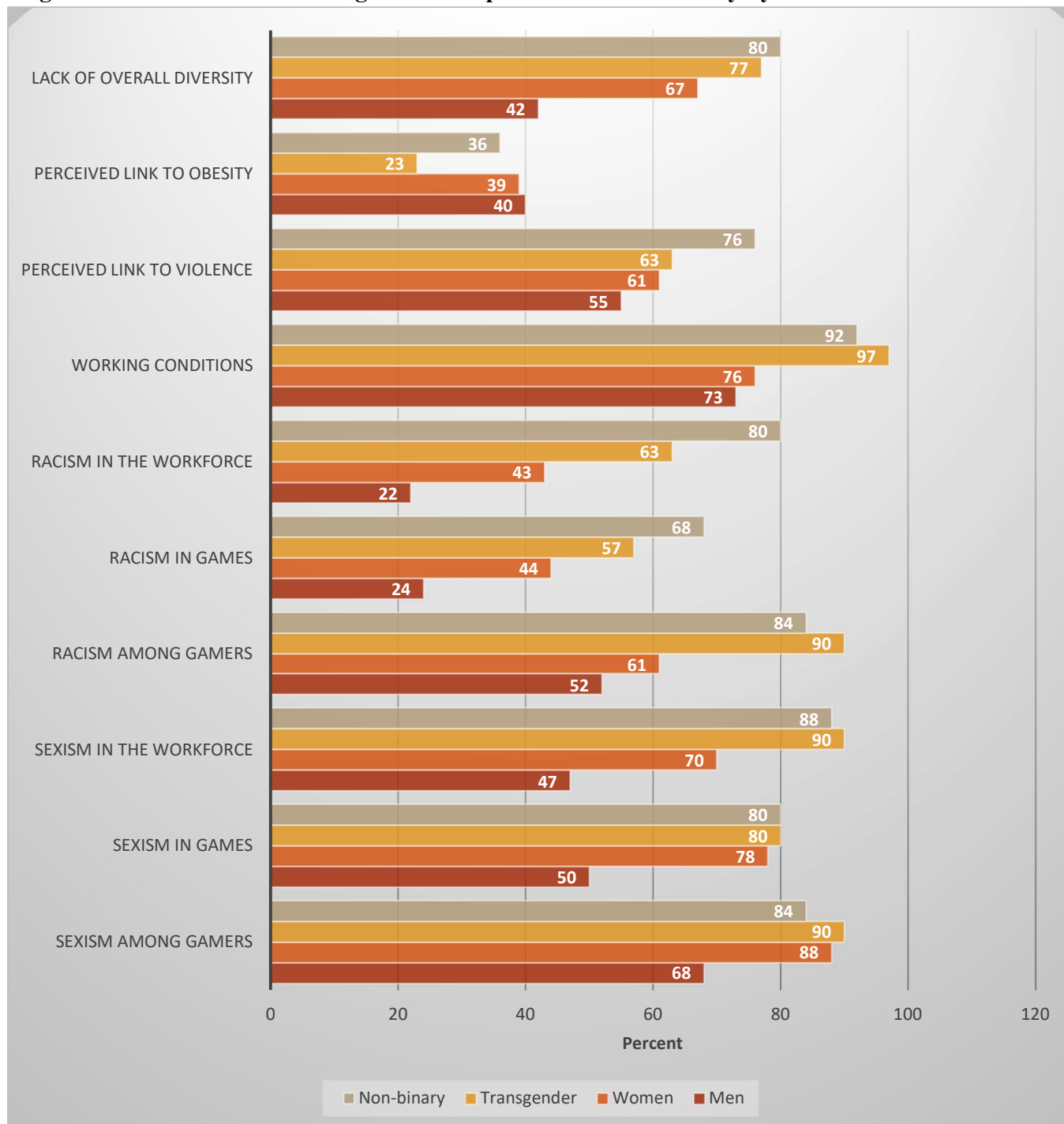
**Figure 6: Factors Influencing a Negative Perception of the Games Industry**



Source: IGDA DSS 2019

Analysing this set of questions by gender revealed variation in the frequency pattern (Figure 7). Respondents who self-identified as a woman, a transgender person, or person of non-binary gender each represent minority genders in the industry and were compared to the responses from men. Most notably, men were the least likely group to report that any of these factors were contributing to a negative perception of the industry other than a perceived link to obesity. Within their group, men selected working conditions most frequently. Among transgender, non-binary, and male respondents, working conditions were the most highly rated factor contributing to negative perceptions (to a lesser degree for the male respondents). Women respondents reported sexism among gamers as the top factor followed by sexism in games and working conditions. Respondents who identified as transgender and of non-binary gender were more likely to select each of these categories than men or women except perceived link to obesity and had high overall ratings. Note that the sample size for these groups is quite small and may not be representative.

**Figure 7: Factors Related to Negative Perception of Game Industry by Gender\* §**



Source: IGDA DSS 2019

\*Lowest rated options were dropped for this figure (microtransactions, gambling, no negative perception, other)

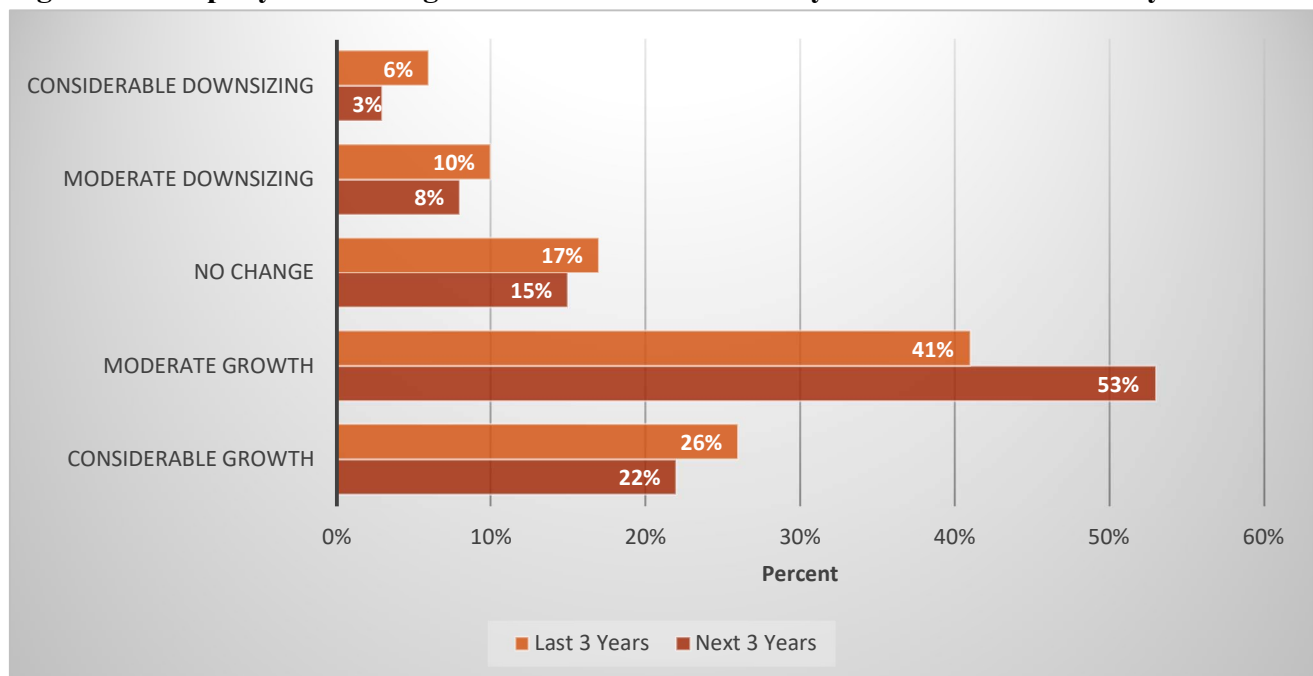
§The data for Transgender and Non-binary are based on low sample size

## Company Growth Rate

Respondents were asked to characterize the growth rate of their company over the **last three years**; current students were asked about their school or program (Figure 8). More than half of the respondents indicated growth in each of the 2015, 2016, 2017, and 2019 surveys. However, a consistent proportion of respondents indicated downsizing across the years (between 14% to 19%).

When asked to think about the **next three years**, respondents were optimistic in each of the 2015, 2016, 2017, and 2019 surveys. In 2019 specifically (Figure 8), only 11% projected downsizing while 15% anticipated no change. While 67% reported moderate to considerable growth over the *last* three years, 75% projected moderate to considerable growth over the *next* three years. Considering both “no change,” “moderate growth” and “considerable growth” together, a vast majority of respondents (90%) had a positive outlook with respect to growth over the next three years.

**Figure 8: Company’s/school’s growth rate in the last three years and the next three years**



Source: IGDA DSS 2019

## Important Platforms for Future Growth

Respondents were asked what platforms they believed were “very important” for the future growth of the industry over the next five years. They were also asked to indicate their current and projected support for these platforms. Comparing data across the 2015, 2016, 2017, and 2019 survey years, PC, iOS, consoles, and Android platforms were generally ranked highly for all domains. Note that the data are not directly comparable because the list of platforms offered to survey respondents changed in 2019 to include Virtual Reality, which also ranked somewhat highly.

Examining the 2019 data specifically, an overwhelming majority of respondents (76%) ranked PC as “very important” for the future growth of the industry (Table 10). The second and third most chosen platforms were consoles (74%) and Android (53%), respectively. This list contrasts in many instances to the list of the platforms that companies currently develop for or support (Table 10). Most respondents ranked consoles as very important (74%), yet only about half of respondents said their companies currently support this platform (54%). Despite some changes that have increased access to console development for smaller studios, this may indicate continued monopoly of consoles in a closed and restricted system. There were also notable differences between importance of and support for dedicated handhelds, pervasive games, social network games, analog games, and virtual reality. Moreover, responses for Mac and iOS indicate that these platforms are currently supported but not ranked as highly for importance. This could suggest decreased hype for these platforms.



**Table 10: Importance of Platforms for Future Growth and Current Support of Platforms**

Platform	Very Important to Future Growth	Currently Supported	Difference
PC	76%	77%	+1%
Console	74%	54%	-20%
Android	53%	61%	+8%
iOS	50%	60%	+10%
Augmented Reality	45%	--	--
Virtual Reality	37%	27%	-10%
Analog games	31%	6%	-25%
Dedicated handhelds	23%	6%	-17%
Mac	20%	32%	+12%
Pervasive games/ARGs/ Big games	19%	2%	-17%
Social network games	19%	7%	-12%
Mobile – other	18%	11%	-7%
Web-based application	17%	23%	+6%
Interactive TV	13%	4%	-9%
Wearables	11%	3%	-8%
Linux	10%	16%	+6%
Custom platform or installation	9%	5%	-4%
Windows mobile	7%	8%	+1%
Proprietary platforms	5%	3%	-2%
Microconsoles	4%	2%	-2%

Source: IGDA DSS 2019

In addition to the rankings presented in Table 10, respondents were asked which platforms their company would develop for or support in the next 12 months. Table 11 contrasts these future platform plans with currently supported platforms. There were no major differences in current and projected platforms.

**Table 11: Platforms Currently Supported and Projected in the Next 12 Months**

Platforms	Currently Supports	Will Support in Next 12 Months	Difference
PC	77%	75%	-2%
Android	61%	57%	-4%
iOS	60%	57%	-3%
Console	54%	56%	+2%
Mac	32%	32%	0%
Virtual Reality	27%	26%	-1%
Web-based application	23%	20%	-3%
Linux	16%	16%	0%
Mobile – other	11%	10%	-1%
Windows mobile	8%	6%	-2%
Social network games	7%	6%	-1%
Dedicated handhelds	6%	5%	-1%
Analog games	6%	7%	+1%
Custom platform/Installation	5%	5%	0%
Interactive TV	4%	3%	-1%
Wearables	3%	3%	0%
Proprietary platforms	3%	2%	-1%
Pervasive games/ARGs/ Big games	2%	2%	0%
Microconsoles	2%	1%	-1%

Source: IGDA DSS 2019

When separately analysing this data for independent contractors/freelancers and the self-employed we saw a similar response pattern to the whole sample in that the top three platforms are PC, iOS and Android. However, there were some differences in their relative weighting and the degree of anticipated change.

Self-employed respondents reported similar commitment to all three top platforms when compared to the whole survey sample; 83% were currently developing for PC, 52% for iOS and 55% for Android. However, in the next 12 months this group reported minor declines in these traditional platforms in favour of newer platforms. Projected development for PC dropped to 75% (8% decline), iOS dropped to 50%

(2% decline) and Android dropped to 52% (3% decline). In contrast, there was an increase in projected support for consoles (from 44% to 53%; a projected 9% increase), as well as minor increases in projected support for Mac (1% increase), interactive TV (4%), and social network games (2%).

For contractors/freelancers, responses were similar. The highest supported platforms were PC (82%), iOS (57%) and Android (61%). When examining projected support over the next 12 months, each of these platforms showed a projected decline (8% decline for iOS, 9% for Android, and 7% for PC); analog games showed a minor 3% projected increase in support (16% current support vs. 19% projected support).

## Important Distribution Platforms

Respondents were asked about which distribution platforms were used by their company/clients. The rankings have changed over the survey years (see Table C in the Executive Summary). In 2019, the top responses included Steam (58%), Google Play (53%), PlayStation Network, (39%) Xbox Live Arcade (34%), and publisher website (34%) (Table 12).

We also analysed this data separately for the self-employed and for independent contractors/freelancers. As with the development platforms above, the ranking of distribution platforms remained fairly constant with some interesting differences. The top three distribution platforms for self-employed respondents were the same as the whole sample, with Steam coming out ahead (54%). But the self-employed were much less likely to report using many platforms, including Google Play (38%) and Apple iOS (41%). Instead they reported using their studio or personal website (33%) and Fan Conventions (7%). Compared to the whole sample, the contractor/freelance group was also much less likely to report using most platforms, though they used Steam (66%) and itch.io (21%) in higher numbers.

**Table 12: Important Distribution Platforms across All Respondents**

Distribution Platform	% of Respondents
Steam	58%
Apple iOS	55%
Google Play	53%
PlayStation Network	39%
Xbox Live Arcade	34%
Publisher Site	34%
Retail Chains	31%
Amazon	27%
Xbox Live Arcade	24%
Studio or Personal Website	23%
Retail Independent	18%
Nintendo Game Store	16%
GOG.com	8%
Itch.io	7%
Windows Mobile	6%
Kongregate	5%
Green Man Gaming	4%
Fan Conventions	4%
Microconsole or Smart TV	1%
Source: IGDA DSS 2019	

## Factors Important to Industry Growth

Respondents were asked to indicate the importance of various interventions to the growth of the industry. Between 2015 and 2019, the top three factors remained the same, but their relative ordering changed (see Table B in the Executive Summary). In 2019 (Table 13), the top response was more diversity in game content (61%), followed by advancement of game design (58%) and advancement of storytelling (50%).

Table 13 also organizes the responses by employee role for 2019. Managers and developers both rated content diversity and game design highly. Managers also rated better discovery of games highly, whereas

developers rated storytelling highly. This contrasts the 2015 data, where managers rated financial factors such as monetization and funding more highly.

**Table 13: How Important are the Following to the Future Growth of the Industry?**

Future Growth of Industry	Very Important		
	Whole Sample	Managers	Developers
Better Diversity in Game Content	61%	59%	63%
Advancement of Game Design	58%	54%	59%
Advancement of Storytelling	50%	42%	51%
Better Discovery of Games	45%	51%	44%
More Funding in Game Development	43%	46%	39%
Better Monetization of Games	21%	21%	21%
Source: IGDA DSS 2019			

The responses change slightly when examined separately for salaried employees, self-employed respondents and contractors/freelancers (Table 14). Compared to employees, self-employed respondents placed more importance on game discovery, monetization of games, and funding in game development. This makes sense as these are bread and butter issues for someone who runs their own company in a crowded market. Moreover, freelancers placed a stronger emphasis on advancement in storytelling and funding in game development compared to the other two groups. Finally, employees were most highly focused on content diversity.

**Table 14: Features Important to Future Industry Growth by Employment Type**

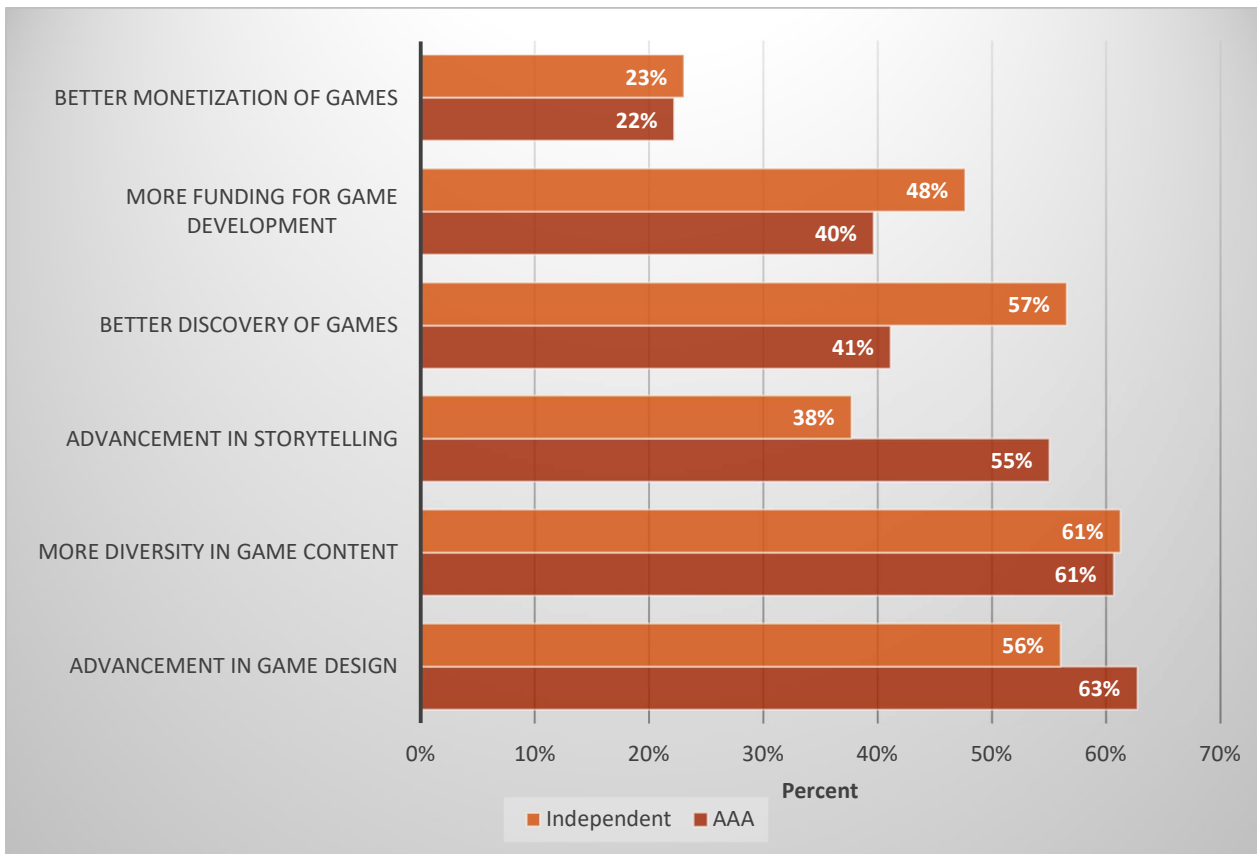
Future Growth of Industry	Very Important		
	Self-Employed	Freelance	Employee
Advancement of Game Design	49%	46%	59%
Advancement of Storytelling	41%	52%	49%
Better Diversity in Game Content	52%	56%	64%
Better Discovery of Games	55%	54%	44%
More Funding in Game Development	46%	53%	41%
Better Monetization of Games	25%	24%	21%

Source: IGDA DSS 2019

These questions were also analyzed with respect to company type (Figure 9), in particular for the difference in views between those who worked at independent studios and those who worked in studios more traditionally associated with AAA games (first-party developers, publisher-owned developers and third-party developers). The responses are somewhat similar to the self-employed and employee distinctions above.

Overall, both indie and AAA respondents reported more diversity in game content as highly important. Better discovery of games and more funding for game development were more important for indie respondents compared to AAA respondents, whereas advancement in game design and advancement in storytelling were more important for AAA respondents. These responses largely reflect the business realities for these types of companies. Small or start-up independents experience challenges in gaining visibility for their product in a crowded digital distribution marketplace, but they also compete on the diversity and novelty of their games. AAA studios following a franchise model rely more heavily on advancement in game design to maintain player interest over multiple releases.

**Figure 9: Interventions Important to the Future Growth of the Industry by Broad Studio Type**



Source: IGDA DSS 2019

## Game Genres

Respondents were asked which genre best fit their company. As Table 15 indicates, the most common response in 2019 was action games (53%), followed by role-playing games (34%) casual games (33%), and strategy games (30%). These were also the top genres in 2015, although the order differed slightly (see Table D in the Executive Summary).

Analysing the 2019 responses by employment type (Table 16), action games remained the most developed genre among employees (50%), the self-employed (48%), and freelancers/contractors (54%). The second most selected genre differed across employment type: role-playing games for employees (32%), adventure games for freelancers (41%), and casual games for the self-employed (41%). The greater development of casual games among the self-employed may reflect the smaller size and budget of the studios where they work, reduced access to consoles as a development platform, and also the increased focus on online distribution mechanisms.

**Table 15: Game Genres Being Developed by All Respondents**

Genre	% of respondents
Action Game	53%
Role Playing Game	34%
Casual Game	33%
Strategy Game	30%
Action Adventure Game	29%
Simulation Game	26%
Adventure Game	23%
Serious/Educational Game	18%
Sports Game	14%
Art Game	10%
Party/Music/Dance Game	7%
Exercise Game	4%
Source: IGDA DSS 2019	

**Table 16: Game Genres Being Developed by Employment Type**

	% Respondents by Employment Type		
	Employee	Self-Employed	Freelance/Contract
Action Game	50	48	54
Role Playing Game	32	34	40
Casual Game	30	41	36
Action Adventure Game	27	34	24
Strategy Game	27	32	35
Simulation/Educational Game	25	27	31
Adventure Game	17	37	41
Serious Game	15	23	28
Sports Game	14	10	10
Art Game	7	17	22
Party/Music/Dance Game	7	7	7
Exercise Game	3	4	5
Source: IGDA DSS 2019			



## Innovation in Game Mechanics & Technology

The data from 2015, 2016, 2017, and 2019 reflect constant innovation in the game industry. In each year, more than 80% of respondents report innovation in game mechanics, and about 90% report innovation in the development of game technology and tools (Table 17).

Looking at the 2019 data (Figure 10), an overwhelming majority felt that there was ‘some’ or ‘significant’ innovation with regard to the evolution of game mechanics. A small number of respondents felt that there was no innovation (9%) and others reported that they did not like where the innovation was heading (7%).

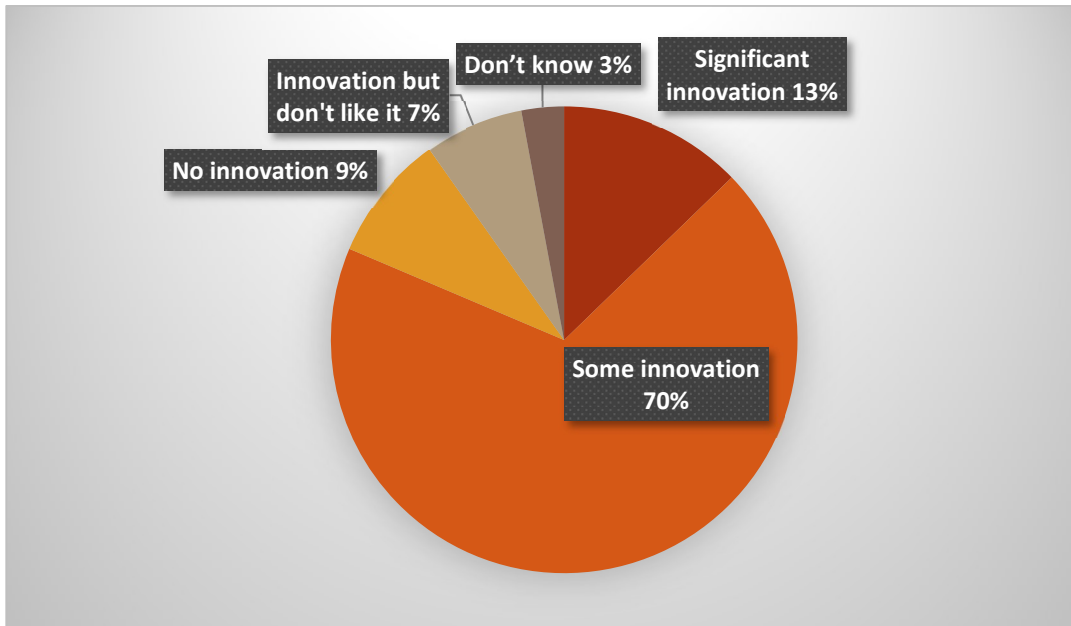
Similarly, the data presented in Figure 11 show overwhelmingly positive feelings regarding the advancement of game development technology/tools. Only 3% felt negatively about the innovation occurring in game development technology/tools and 5% felt that there was no innovation happening.

**Table 17: Views on Innovation in Game Mechanics and Technology**

	‘Some’ or ‘Significant’ Innovation	‘No Innovation’ or ‘Don’t Like It’	‘Don’t Know’ Or ‘Other’
<b>Game Mechanics</b>			
2015	82%	16%	2%
2016	83%	14%	3%
2017	80%	18%	2%
2019	82%	15%	3%
<b>Game Technology/Tools</b>			
2015	92%	6%	2%
2016	92%	5%	3%
2017	90%	6%	3%
2019	89%	8%	3%

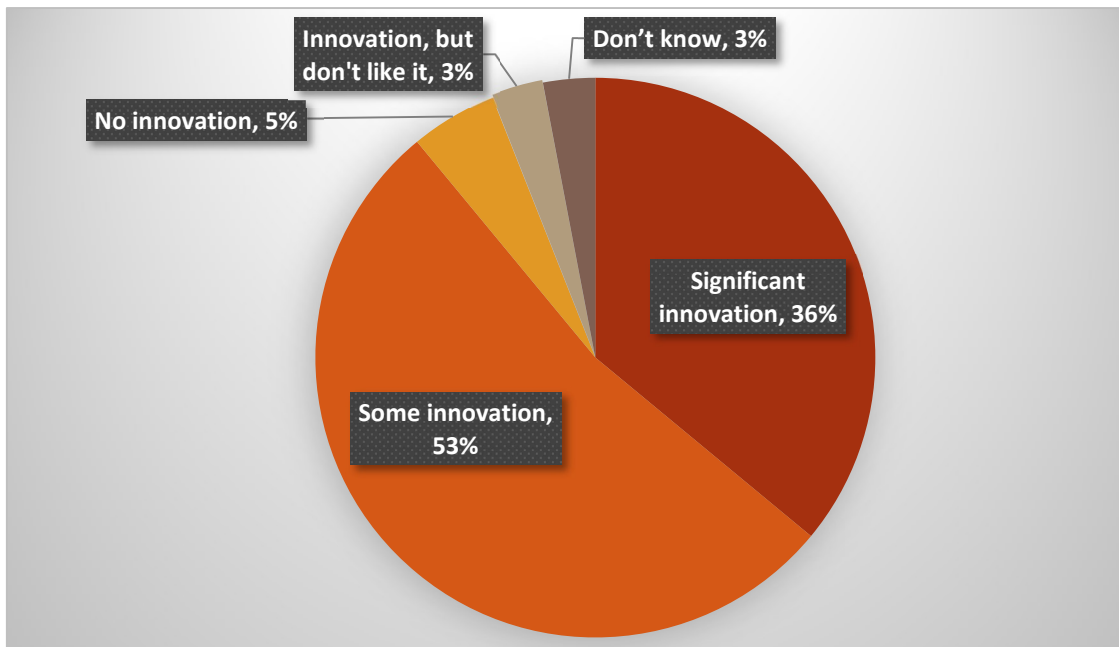
Source: IGDA DSS 2019, 2017, 2016 & 2015

**Figure 10: Overall Innovation of Game Mechanics**



Source: IGDA DSS 2019

**Figure 11: Overall Innovation of Game Development Technology/Tools**

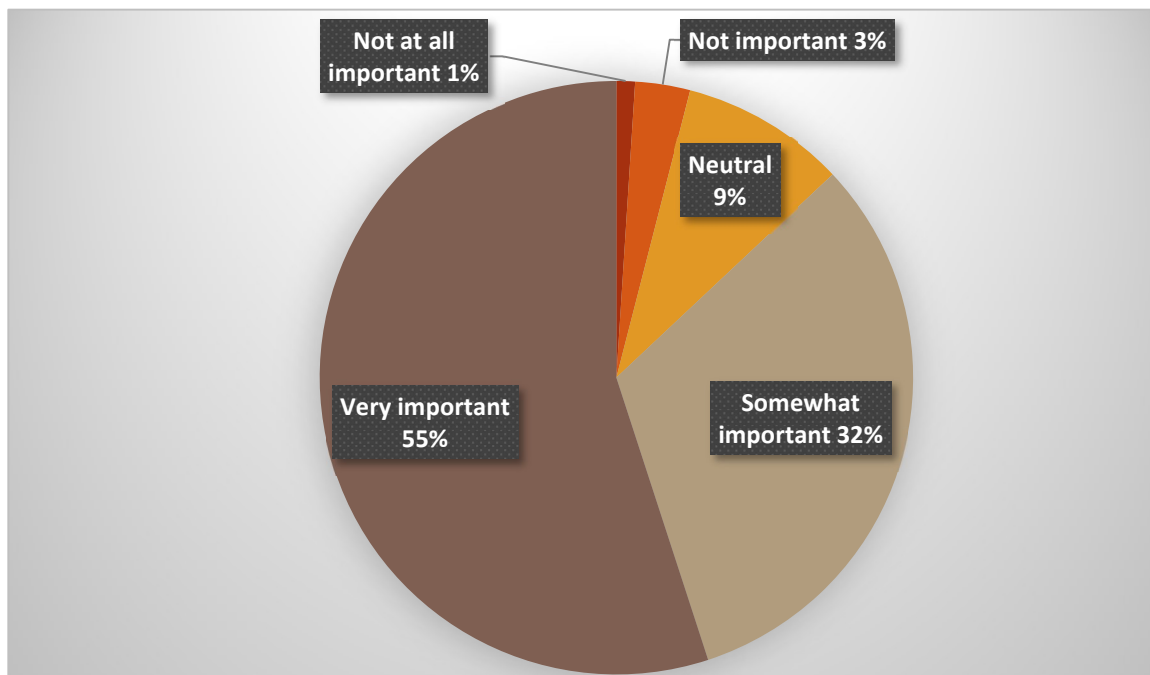


Source: IGDA DSS 2019

## Importance of Localized/Regional Versions of Games

Over the survey years, respondents agreed on the importance of having localized versions of games that are linguistically and culturally sensitive to specific audiences. Notably, this sentiment was strongest in the 2019 data (Figure 12) but has risen each survey year. In 2019, 87% of respondents stated that localization was somewhat or very important, compared to 69% in 2015, 80% in 2016, and 85% in 2017.

**Figure 12: How Important are Localized/Regional Versions of Games?**



Source: IGDA DSS 2019

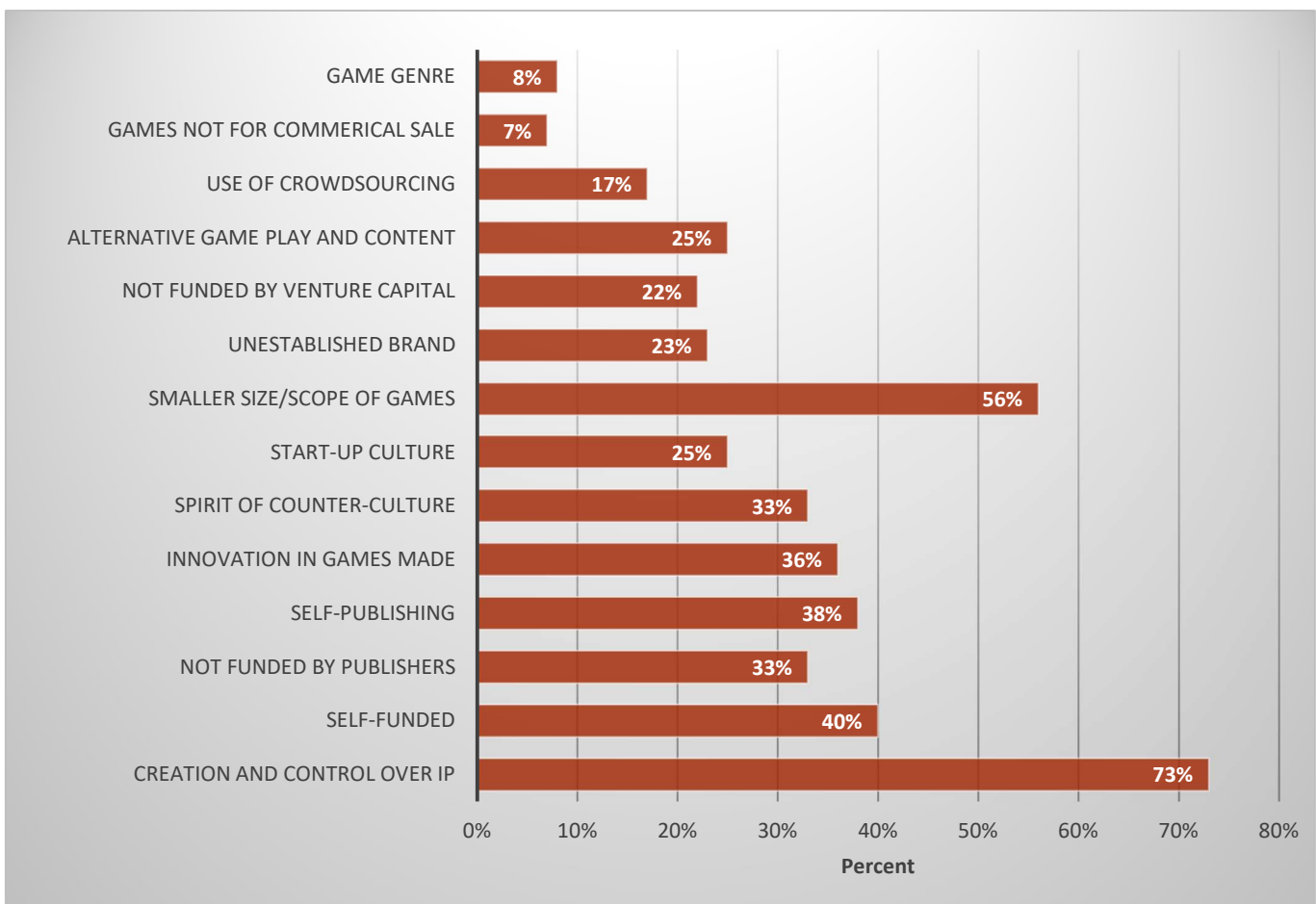
## Preferred Employers

Respondents were given the option to list the developer or publisher they would most like to work for. There were 151 distinct responses with Nintendo at the top with 10% of the vote. Other popular responses were their own studio (7%), Ubisoft (6%), Blizzard (5%), Naughty Dog, Sony, Valve and Paradox Interactive (each with 3%). The ranking of responses differed from previous survey years. Notably, Valve has remained in the top five responses, though it has fallen in the rankings since this question was first asked in 2015. For a complete list of preferred employers, see our report at: <http://gameqol.org/discussions/>.

## Indies Defined

With the rise of independent studios and their expansion in the market have come spirited debates about what an indie developer really means. Respondents were invited to select all the factors they felt defined indie development. In previous survey years, the highest-ranking factor was creation and control over IP (76%, in 2015, 76% in 2016, and 75% in 2017). In 2019, the creation and control over IP again tops the list at 73% and is followed by smaller size/scope of games at 56% (Figure 13).

**Figure 13: Major Factors Defining and Independent or Indie Developer**

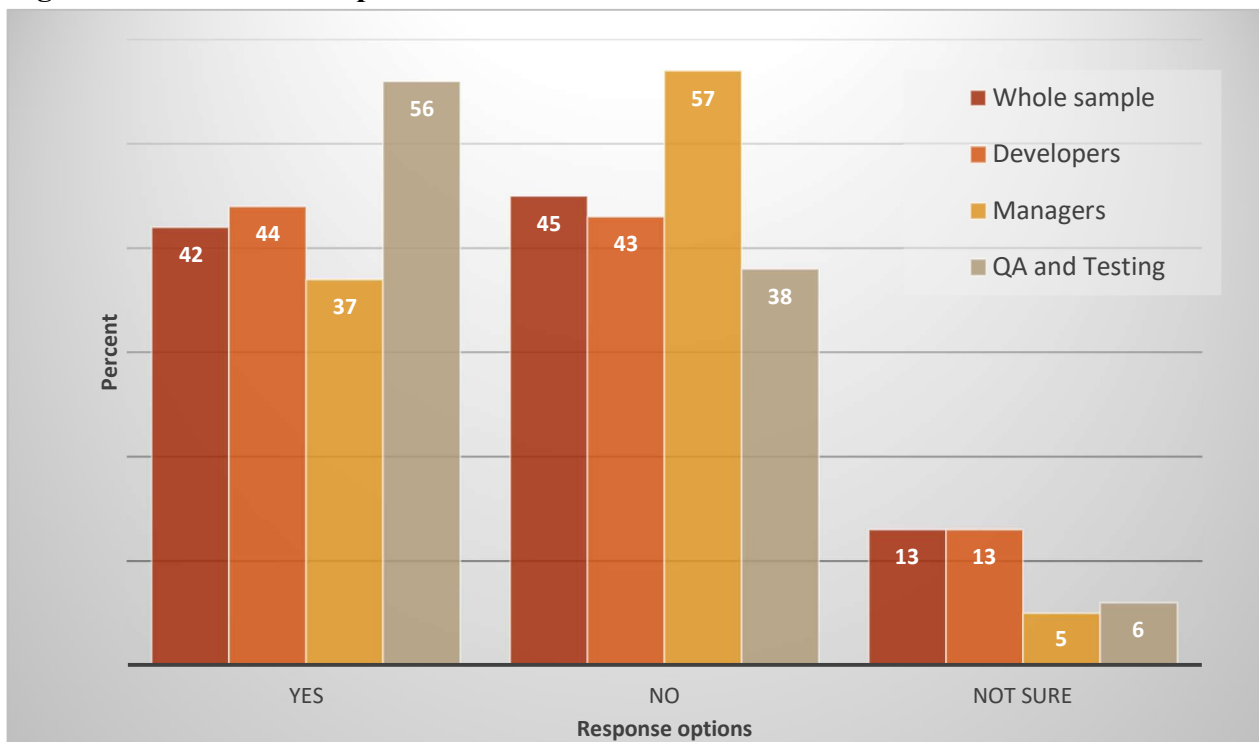


Source: IGDA DSS 2019

## Crunch Still Pervasive

We also asked whether crunch time or long hours were expected in the workplace as a normal part of the job. Notably, fewer respondents in 2019 responded ‘yes’ compared to previous survey years (see Figure A in Executive Summary). Nonetheless, crunch is still expected for almost half of respondents across sub-populations of developers, managers, and those who work in QA and testing (Figure 14). QA workers seemed to experience the most extreme hours as 56% said that crunch is a necessary part of game development compared to 37% of managers and 44% of developers. Managers were the least likely to assert an expectation for crunch or long hours and were also the most certain of their response (only 5% responded ‘not sure’).

**Figure 14: “Is Crunch Expected as a Normal Part of the Job?”**



Source: IGDA DSS 2019

Note: QA and Testing sample size is quite small

The response patterns also differed slightly across employees, contractors/freelancers, and the self-employed (Table 18). Strong crunch expectations were suggested among freelancers, though a sizeable minority (22%) was unsure. The self-employed reported crunch expectations more similar to managers; however, a sizeable minority (18%) was also unsure. Employees reported crunch expectations similar to the overall sample which makes sense since they are the dominant group in the sample.

**Table 18: “Is Crunch Time an Expected Part of Game Development?”**

	% Respondents by Employment Type		
	Employee	Self-Employed	Freelance/Contract
Yes	42	30	56
No	49	52	22
Not Sure	10	18	22

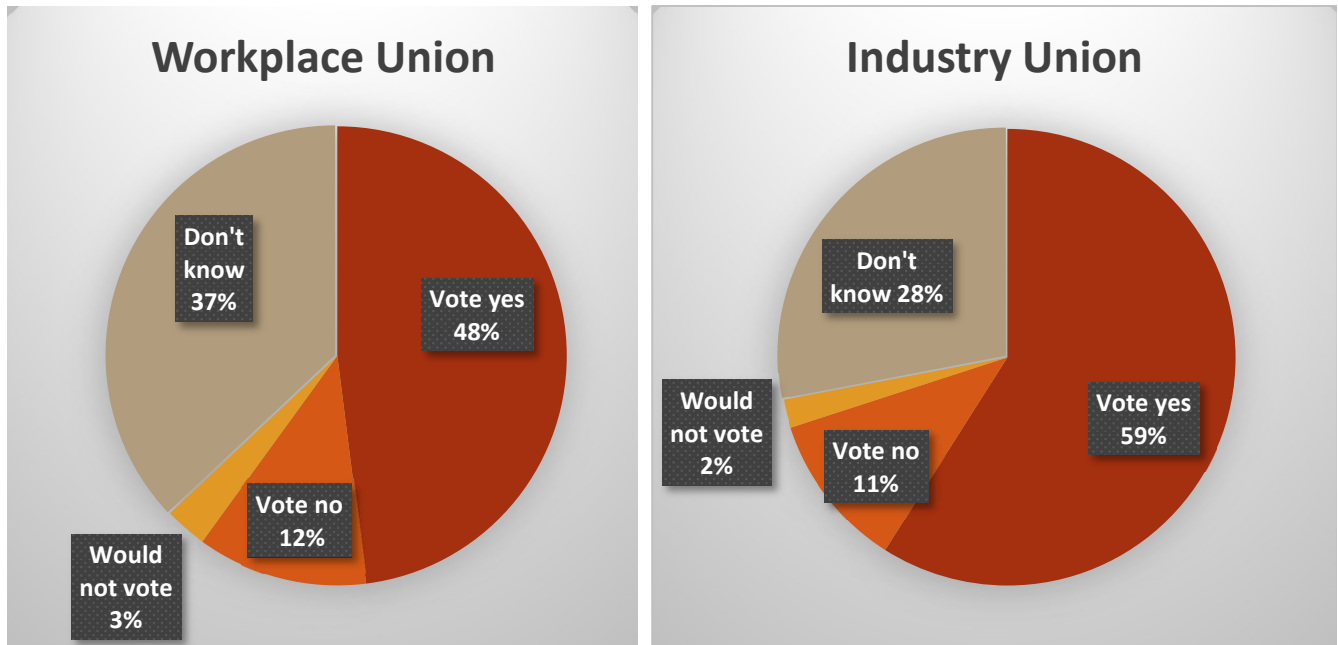
Source: IGDA DSS 2019

In 2019, we also asked respondents how their company portrays crunch time and why crunch time happens at their company. These questions have not been asked since the 2014 survey. About 61% of respondents reported that they rarely crunch and do everything they can to avoid it, and 25% reported that they crunch, but view it as a failure in scheduling. Another 11% reported that crunch is considered a regular part of game development, and 4% reported that crunch is considered an important creative part of making games. As for why crunch occurs, the top reasons included poor/unrealistic scheduling (62%), unclear expectations (30%), not enough people on the time (30%), that people do it voluntarily (30%), and inexperienced management (23%).

## Unionization

Unionization is new to the game industry, though there is a growing number of game developers around the world who count themselves as union members. The 2019 DSS was the first year to ask and 6% of the sample reported being members of a union. When asked how they would respond to a unionization vote at their company/studio, almost half of respondents (48%) said they would vote for the union (Figure 15). This number increased to 59% when asked about sectoral or national unions that represent workers and negotiate issues across entire industries rather than workplace by workplace (Figure 15).

**Figure 15: Voting Intentions for a Company/Studio and Sectoral/Industry Union**



Source: IGDA DSS 2019

## Conclusion

The IGDA administered the 2019 Developer Satisfaction Survey (DSS) from March to May of 2019. The survey was directed to the broadest definition of “developers” and targeted people working directly in game development as well as workers and students in the broader industry. That said, the vast majority of respondents to the DSS 2019 were people working as employees in game development studios. 1,116 people responded to the survey, primarily in English and from the United States. The DSS 2019 gathered data about demographics, diversity, quality of life, employment experiences, structures and practices, industry trends and future outlook. The data presented in this report focus on these latter themes and provide a snapshot of the satisfaction and confidence that developers feel toward their industry. The data in this report is comparable to the [2014 and 2015 Industry Trends Reports](#).

The overall conclusions from the 2019 data are not widely different from past years. Overall, members of the broad game community seem satisfied in terms of industry growth, advancement and innovation in game mechanics, and individual perceptions of job satisfaction and quality of life. That said, respondents reported negative perceptions of the state of the industry, some uncertainty about job opportunities, and the need for more diversity in game content and advancement of game design. The game community also continues to wrestle with the issue of crunch, both in its real form and in the mythology of crunch that remains a part of the industry.

Moreover, the 2019 data revealed that views about society’s perceptions of the industry have improved since 2015. Nonetheless, a greater proportion of respondents reported a negative perception (40%) compared to a positive perception (33%) in 2019. Based on the respondents’ views, the top three reasons for a negative public perception had to do with working conditions, sexism among gamers, and sexism in games. It is important to note that respondents who identify as women, transgender people, or those of non-binary gender were significantly more likely to report industry challenges related to sexism and racism. Overcoming some of these challenges is critical to increasing demographic diversity in the game industry.

Given its position at the intersection of technology, art and entertainment, the game industry has always been a place of innovation, change and flux. This is borne out in this data when considering the plethora of game platforms and distribution platforms available to developers. With these changes come significant challenges, both positive and negative, to the structure of the industry and the traditional publisher-developer relationships. Throughout this report, respondents reported mixed or middling perceptions on the overall health and outlook of the industry. The concerns and experiences of respondents with negative perceptions are important in building and maintaining a strong industry for the future. In particular, the DSS 2019 was able to isolate people working under different employment regimes (e.g., dependent employees, self-employed, freelancers/contractors in indie or AAA environments) and highlight their unique experiences, views and challenges. Acknowledging the



different industry forms and developer experiences are crucial to any interventions to improve the industry as a whole.

If you wish to help with translating this report into other languages or to spread the word about future surveys, contact the IGDA: [staff@igda.org](mailto:staff@igda.org).

**The IGDA 2021 Developer Satisfaction Survey will launch in January!**

As always, the more respondents who answer the survey, the more accurate the data becomes as a reflection of the population's experiences

Join the survey mailing list: <http://gameqol.org/>