STATE OF THE GAME INDUSTRY 2018
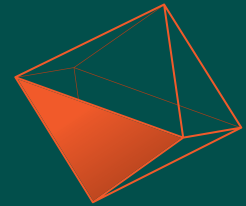
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GDC

GAME DEVELOPERS CONFERENCE

MOSCONE CENTER | **MARCH 19–23, 2018**
SAN FRANCISCO, CA | **EXPO: MAR 21–23, 2018**

The Game Developers Conference has surveyed nearly 4,000 game developers as part of the sixth annual State of the Industry Survey, which provides a snapshot of the game industry and highlights industry trends ahead of GDC 2018 in March.

Significant trends revealed by the survey results include a notable uptick in interest in the Nintendo Switch, game makers' waning opinions of VR, and a move away from mobile to focus on PC and home consoles.

The full report also encompasses insights gleaned from questions on topics like "loot box" monetization schemes, game development funding, the business of eSports, and the best ways of getting the word out about your game.

The 2018 State of the Industry Survey is the sixth in an ongoing series of yearly reports that offer insight into the shape of the industry as a prelude to GDC in San Francisco. Organized by the UBM Game Network, GDC 2018 will take place this year March 19th through the 23rd at the Moscone Convention Center in San Francisco, California.

UBM

PC and mobile are still the most popular platforms to make games for — but PC is rising, while mobile is slipping

Every year we check in with devs to see what platforms they're making games for, and for many years now the most popular answers have been either PC or smartphones/tablets.

That's true of this year's results, as well; when asked what platform their last game was released on, 50 percent of those surveyed said PC, 32 percent said smartphone/tablet, 23 percent said PlayStation 4 or PS4 Pro, and 19 percent said Xbox One or Xbox One X.

Incidentally, we made sure to offer Mac as a separate choice from PC this year, and you might be curious to know that 14 percent of respondents said their last game was released for Mac.

Compared against last year's results, we see an uptick in devs releasing games for the PC, the PlayStation 4 and the Xbox One — but a decrease in those releasing games for mobile devices.

Last year, 45 percent of respondents said their last game was released for PC/Mac, 35 percent said smartphone/tablet, 19 percent said PS4/ PS4 Pro, and 15 percent said Xbox One.

So what is everyone working on right now? When asked what platforms they're currently making games for, the majority of respondents (60 percent!) said PC, 36 percent said smartphone/tablet, 30 percent said PlayStation 4/PlayStation 4 Pro, and 26 percent said Xbox One/Xbox One X.

Which platform(s) was your *last completed* game released on?
(Choose all that apply)

PC **50%**

Smartphones/Tablets **32%**

PlayStation 4 / Pro **23%**

Xbox One / X **19%**

VR Headsets **15%**

Mac **14%**

N/A - Not involved in development **10%**

Web browser **9%**

Linux **8%**

Other **6%**

Nintendo Switch **5%**

Xbox 360 **4%**

PlayStation 3 **3%**

AR Headsets **3%**

Tabletop Games **2%**

PlayStation Vita **2%**

Apple TV **2%**

Nintendo Wii U **1%**

Nintendo 3DS **1%**

Which platform(s) are you *currently developing* games for?
(Choose all that apply)

PC **60%**

Smartphones/Tablets **36%**

PlayStation 4 / Pro **30%**

Xbox One / X **26%**

Mac **20%**

VR Headsets **19%**

Nintendo Switch **12%**

Linux **11%**

Web browser **11%**

N/A - Not involved in development **10%**

AR Headsets **7%**

Tabletop Games **4%**

Other **4%**

Xbox 360 **3%**

Apple TV **2%**

PlayStation 3 **2%**

PlayStation Vita **1%**

Voice Powered Games (Amazon Alexa, Google Home, etc.) **1%**

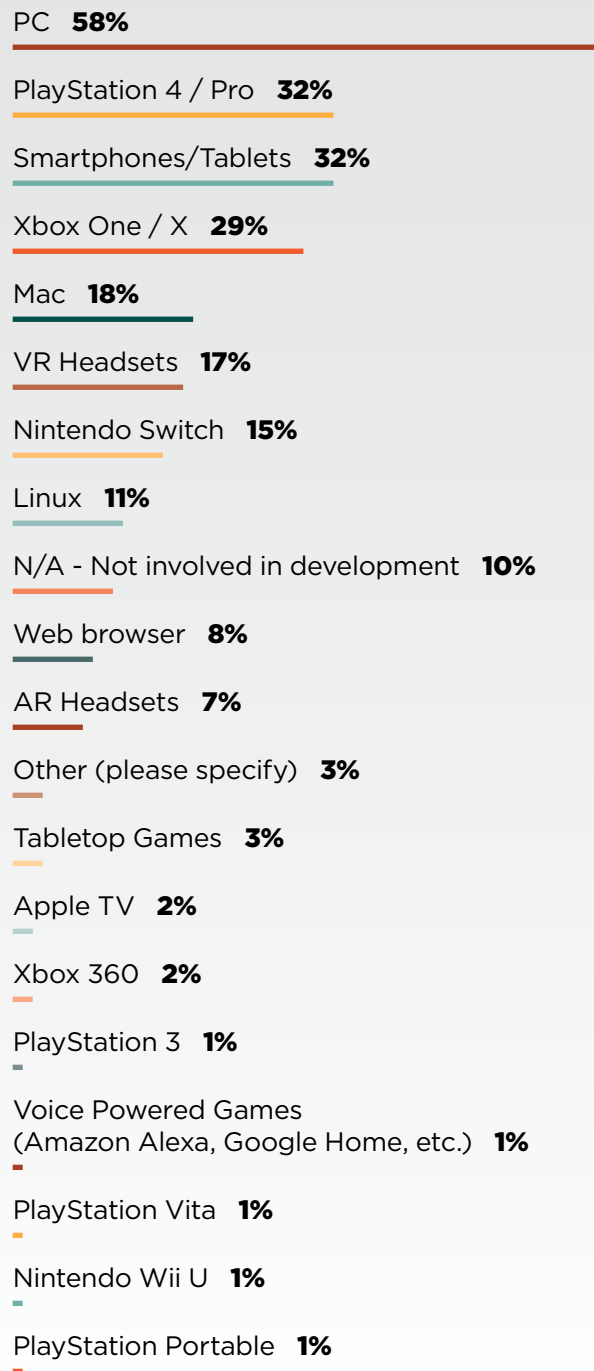Nintendo 3DS **1%**

Nintendo Wii U **1%**

Once again, when compared against last year's results it appears that game devs are increasingly favoring the PC; last year, 53 percent of those surveyed said they were currently working on a game for PC/Mac, while 38 percent said their current project would see release on smartphones/tablets. 27 percent said PS4/4 Pro, and 22 percent said Xbox One.

Looking to the future, it seems that devs are increasingly interested in making games for the latest PlayStation and Xbox consoles. When asked which platforms they expected their next game would be released on, 58 percent of respondents said PC, 32 percent said smartphone, tablet, 32 percent said PS4/PS4 Pro, and 29 percent said Xbox One/One X.

That's a small but significant uptick in interest in the PC and consoles compared to the results of last year's survey, in which 52 percent of respondents said they planned to release their next game on PC/Mac, 34 percent said smartphones/tablets. 29 percent said PS4/4 Pro, and 22 percent said Xbox One/One X.

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

PC **58%**

PlayStation 4 / Pro **32%**

Smartphones/Tablets **32%**

Xbox One / X **29%**

Mac **18%**

VR Headsets **17%**

Nintendo Switch **15%**

Linux **11%**

N/A - Not involved in development **10%**

Web browser **8%**

AR Headsets **7%**

Other (please specify) **3%**

Tabletop Games **3%**

Apple TV **2%**

Xbox 360 **2%**

PlayStation 3 **1%**

Voice Powered Games
(Amazon Alexa, Google Home, etc.) **1%**

PlayStation Vita **1%**

Nintendo Wii U **1%**

PlayStation Portable **1%**

Interest in making games for Nintendo's Switch is rising fast

There's a notable newcomer on that list of platforms: Nintendo's new Switch console. It's not quite a year old, but in last year's survey 3 percent of respondents said they were already working on a Switch game, and 5 percent were planning to work on one in the future.

The future is now, and the results of this year's survey suggest dev interest in the Switch is surging. 5 percent of survey respondents say their last released game is available on the Switch, 12 percent said they were currently making a game for the Switch, and 15 percent expected their next game would be made available on Nintendo's new console.
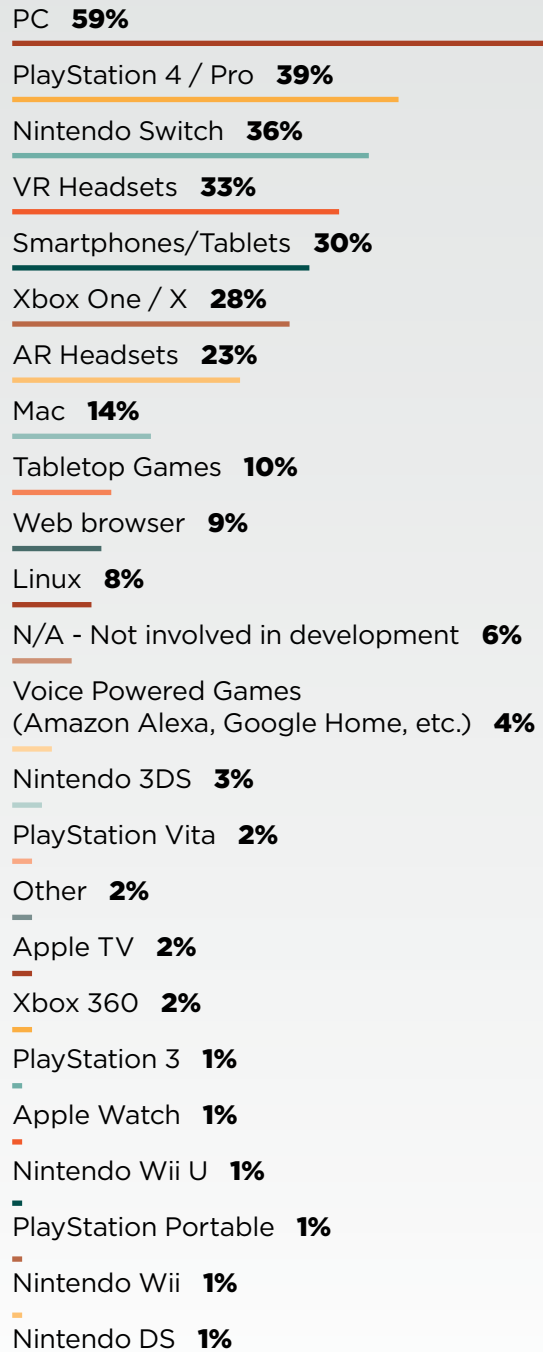
1 in 3 devs thinks the Nintendo Switch is the most interesting console on the market

Sometimes, the console you're most interested in has nothing to do with your current project. With that in mind we asked developers which platforms (if any) interest them most right now, and "PC" proved the most popular answer with 59 percent — followed by PlayStation 4/4 Pro (39 percent) and, close behind it, Nintendo Switch (36 percent).

This is a big deal for Nintendo, given that in our surveys respondents typically favor PC, mobile, PS4, and Xbox One. However, this year Switch surpassed Xbox and mobile in terms of developer interest; as mentioned, 36 percent of respondents said they were most interested in the Switch, while 30 percent said smartphones/tablets and 28 percent said Xbox One/One X.

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

PC **59%**

PlayStation 4 / Pro **39%**

Nintendo Switch **36%**

VR Headsets **33%**

Smartphones/Tablets **30%**

Xbox One / X **28%**

AR Headsets **23%**

Mac **14%**

Tabletop Games **10%**

Web browser **9%**

Linux **8%**

N/A - Not involved in development **6%**

Voice Powered Games
(Amazon Alexa, Google Home, etc.) **4%**

Nintendo 3DS **3%**

PlayStation Vita **2%**

Other **2%**

Apple TV **2%**

Xbox 360 **2%**

PlayStation 3 **1%**

Apple Watch **1%**

Nintendo Wii U **1%**

PlayStation Portable **1%**

Nintendo Wii **1%**

Nintendo DS **1%**

Devs are bullish about how well Nintendo's Switch is resonating with the public

This year we wanted to get a sense of how well the gimmick of Nintendo's new console is being received by our survey respondents, so we asked them whether they thought the Switch's "console to handheld" concept was resonating with the public.

The majority seemed to be bullish on the concept; 46 percent of respondents said "Yes, it's the right product for the right time," while 39 percent said "Maybe; it has some positives, but it just doesn't seem to be world-changing."

Meanwhile, 12 percent of those surveyed responded with "Don't know" and just 2 percent said "No; people are just not that interested in its core premise."

Devs are overwhelmingly confident Nintendo's Switch will outsell the Wii U

Last year, when polled about whether or not they thought the Switch would outsell Nintendo's Wii U (which at that point had an install base of roughly 13 million, worldwide) in its lifetime, 50 percent of our survey respondents said yes, the Switch will outperform the Wii U. 14 percent predicted it wouldn't, and 37 percent admitted they had no idea.

This year we asked the same question again, and as you might expect, dev confidence in the Switch (which has now sold over 10 million units) is riding high. 73 percent of respondents said yes, Switch will definitely outsell the Wii U in its lifetime, 5 percent said no way, and 22 percent said they still weren't sure.

Over a third of devs are making or are interested in making a game for Switch

We asked respondents of this year's survey whether they'd released a Switch game, and very few (6 percent) said yes. However, another 8 percent said they hadn't but were currently working on a Switch game, and 31 percent said they weren't but were considering making a Switch game in the future.

Notably, over half of respondents (54 percent) said they hadn't made a Switch game and had zero interest in doing so.

Most devs' games sell as well or better on Switch as on other consoles

The comparatively small size of the Switch game market has many devs wondering whether it would be a good place to release their game, if only to take advantage of greater visibility among customers.

Since launching your game on Nintendo Switch, how have Switch game sales compared to the average across all the platforms you've launched on? (Choose all that apply)

N/A. (I have only launched on Switch, or other issues.) **33%**

Switch sales have been greater than average. **28%**

Switch sales have been average. **23%**

Switch sales have been less than average. **16%**

We wanted to learn more about this, so we polled survey respondents about how well their games on Switch had sold compared to the same game on other platforms. 28 percent said their game had sold more than average on Switch, 23 percent said their sales on Switch had been average, and 16 percent said their game or games had sold worse on Switch than on other consoles.

Devs embraced VR, but interest now seems to be waning

A number of high-profile virtual reality headsets launched in 2016, and our survey results suggest dev interest in the tech has risen steadily since then — but may currently be on a bit of a downswing.

When asked what platform their last game was released on, 15 percent of survey respondents said "VR headsets" and 3 percent said "AR headsets". 19 percent said their current game will release on VR headsets, and 7 percent said AR headsets.

However, when asked what platform(s) they expected their next game would release on, only 17 percent said VR headsets and 7 percent said AR headsets. It's a very slight dip, but it does suggest that some devs working in VR are not expecting to continue making VR games, while devs working on games for AR headsets remains steady.

Compared to last year's survey, a greater share of this year's respondents have just released a VR game (13 percent last year vs. 15 percent this year), but fewer are working on VR games or plan to in the future — last year 24 percent said they were working on a VR game, and 23 percent said their next game would be in VR.

HTC Vive narrowly remains the most popular VR platform among devs

Last year the HTC Vive overtook the Oculus Rift as the most popular VR platform among devs, and that trend continued through to this year's survey results.

When we polled respondents about which platform their last VR game was released on, 15 percent said Vive, 14 percent said Oculus Rift, and 7 percent said Gear VR. 67 percent said they weren't currently involved in VR development at all. These numbers are roughly in line with the results of last year's survey, though they all went up a bit, suggesting that more devs have had time to build and release VR games.

Similarly, 17 percent of respondents said they were currently working on a game that's coming to the Vive, 16 percent said their current project is releasing on Rift, and 9 percent said PlayStation VR. 69 percent said their current project isn't coming to VR at all.

Looking ahead, the split remains roughly the same; 19 percent of respondents believe their next project will release on the Vive, 17 percent believe it will release on the Rift, and 11 percent think it will come to the PlayStation VR. 66 percent said the question wasn't applicable to them.

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

N/A - Not involved in development for VR/AR headsets   **47%**

HTC Vive (Valve/HTC)   **33%**

Oculus Rift (Oculus)   **26%**

PlayStation VR (Sony)   **20%**

HoloLens (Microsoft)   **18%**

Gear VR (Samsung/Oculus)   **11%**

Magic Leap (Magic Leap)   **10%**

Google Daydream (Google)   **9%**

Google Cardboard (Google)   **5%**

Other   **4%**

When we took the focus off of actual projects and simply asked respondents what VR platform(s) interested them most right now, as a developer, the most popular answer was HTC Vive with 33 percent of respondents. 26 percent of respondents said they were most interested in the Oculus Rift, and 20 percent said PlayStation VR.

Intriguingly, 18 percent said they were most interested in Microsoft's HoloLens headset, and 10 percent were most focused on the upcoming, somewhat mysterious Magic Leap goggles. Meanwhile, just 47 percent said they weren't interested in VR development or the question wasn't applicable to them.

Faith in the long-term sustainability of the VR/AR business is slipping

This is the third year in a row we've asked respondents whether they believe VR/AR is a long-term, sustainable business, and for the first time we're witnessing a rise in the number of "No" answers.

For the past two years, the split has been roughly 75 percent "Yes" to 25 percent "No". However, this year just 71 percent of respondents said "Yes" and 29 percent said "No", they don't see VR/AR as a sustainable business.

We gave respondents room to elaborate on their "Yes" or "No" answer, and some of them shared some interesting opinions on the issue.

"VR adoption and uptake depends on finding that killer game that becomes a must have," wrote one respondent. "Until there is a 'must have' game for VR (at the same level of interest as say, Minecraft or Halo for the original Xbox), there just won't be a large enough player base to support full time VR/AR dev."

"I believe AR will be bigger than VR in terms of reach and utilization," wrote another. "A lot of people already have a smartphone, and there are already many apps that demonstrate clever usages of AR."

"Games like Pokemon Go have shown that it's possible to have mainstream appeal in an AR game," opined another. "I'm skeptical of VR in its current incarnation, as I think it needs more accessible hardware/space requirements and better ways to involve a group of people in the living room before it can take off."

"Honestly, at the moment, it might not seem like it's going far fast, but it's steady," wrote another. "More and more developers are starting to make games with VR or are starting to look more into VR, which in turn lets them create new content or

"I'm skeptical of VR in its current incarnation, as I think it needs more accessible hardware/space requirements and better ways to involve a group of people in the living room before it can take off."

change past content and make it more interesting. This allows for a more broad spectrum for game development. Right now you have some horror games that are taking advantage of this and others are starting to develop FPS games. Next thing you know, you'll have great games coming out that are neither and are artistically vibrant and unique, which will bring more players to start playing more VR games. It may not grow like mobile games, but it will, I feel, take its time to be a medium that interests a decent percentage of players."

Most devs think it will be a long time, if ever, before VR/AR headsets are as common as game consoles

Looking ahead, most devs seem to think it will be a year or two before VR/AR headsets have a meaningful install base and several years (if ever) before these headsets are as common as game consoles.

When we asked our survey respondents when they thought VR/AR headsets would exceed a 10 percent household install base rate in the United States, the most popular answer (31 percent of respondents) was 2021-2022. Next was 2019-2020 with 17 percent of the vote, followed by 2023-2034 with 15 percent.

However, when we asked them when VR/AR headsets might surpass the 2015 U.S. household 40 percent install base rate of game consoles, the most popular answer among respondents (25 percent) was "Never". 22 percent said "After 2030", and 14 percent went with 2025-2026.

Most devs think mobile will be the dominant "immersive reality" tech in 5 years

Is the future virtual, or augmented? We wanted to know how respondents felt about the subject, so we asked them what they thought the dominant "immersive reality" tech would be in 5 years. Nearly half (42 percent) chose mobile AR/VR, 21 percent went with PC/Console VR/AR, and 13 percent figured the two technologies (now broadly distinguishable as "mobile" vs "tethered") would be equally popular.

Android is still beating out iOS in terms of mobile dev interest

Last year, for the first time in the history of the GDC State of the Industry survey, Android surpassed iOS in terms of what platform mobile devs were making games for.

This year Android once again proved a more popular target among mobile devs than Apple's platform; when asked which platform (if any) their companies were currently making games for, 53 percent of respondents said Android and 49 percent said iOS.

Both of those numbers are a smidge lower than last year (when it was 54 percent Android/51 percent iOS), which suggests fewer respondents are working on mobile games.

Less than a quarter of devs are working with a publisher on their next game

To get a sense of how game makers are working to get the word out about their work, we asked survey respondents to tell us which outreach services (if any) they're using for the release of their next game.

Over a third of respondents (38 percent) said they do marketing work themselves, in addition to working on their game. 34 percent said they paid for full- or part-time help from marketing or public relations professionals who worked internally; just 11 percent said they paid for assistance from an external marketing or PR firm.

Which services are you using for the release of your *next* game?
(Choose all that apply)

I do marketing myself in addition to helping to develop the game.   **38%**

Full-time or part-time internal marketing
and/or PR individuals that we pay ourselves.   **33%**

A publisher that has paid us an advance and takes a percentage of sales.   **17%**

Other   **16%**

An external marketing and/or PR agency that we have paid ourselves.   **11%**

A publisher that has not paid
us an advance, and takes a percentage of sales.   **6%**

Meanwhile, less than a quarter of respondents said they were working with a publisher on their next game. Specifically, 17 percent said they were working with a publisher who has paid them an advance and will take a percentage of sales, while 6 percent said they were working with a publisher who would take a cut of sales but had not paid them an advance.

It's interesting to compare these numbers to the results of last year's survey, when we asked respondents whether they were working with publishers on their current project, and whether they planned to work with publishers in the future. At the time, just 23 percent said they were currently working with a publisher, but 34 percent said they planned to on their next project.

European and North American devs still make up the majority of respondents

When asked which continent or major region they reside in, 63 percent of those surveyed said North America and 22 percent said Europe. 8 percent said Asia, 4 percent said South America, and 2 percent hailed from Australia or New Zealand.

That's roughly the same spread as last year's State of the Industry survey, in which 67 percent of respondents said they resided in North America, 22 percent said Europe, 8 percent said Asia, and 3 percent said South America.

Nearly 20 percent of respondents identify as women

17 percent of survey respondents marked "Female" and 80 percent marked "Male" when asked what gender (if any) they identify with. The rest of the respondents either marked "Other" or declined to answer.

It's a small shift from last year, when 78 percent of survey respondents identified as "Male" and 20 percent identified as "Female".

Most have been making games for roughly 5 years

As part of our annual check-in we surveyed respondents on how long they'd been making games, and the largest share of those polled — 32 percent — said 3-6 years.

17 percent said they'd been making games for 7-10 years, and 14 percent said 1-2 years. That's neck and neck with the number of respondents who said they'd been in game development for 11 to 15 years (13 percent), but careers longer than that seemed significantly less common.

8 percent of respondents said they'd been making games for 16 to 20 years, 5 percent said 21 to 25 years, and just 4 percent of respondents said they'd been making games for over 25 years.

These numbers are well in line with survey results from the last two years, which suggests the industry (or at least, the portion of it that goes to GDC and/or reads Gamasutra) hasn't seen too many major influxes or departures of talent in that time.

For comparison's sake, in last year's survey, 37 percent of respondents said they'd been making games for 3-6 years, 17 percent said 7-10 years, and 13 percent said they'd been in the industry for just 1-2 years.

Most devs either work in very small teams or very large companies; 1 in 10 saw their teams shrink this year

We regularly survey game developers to get a sense of what their work situation was like during the year, and we typically find that the largest share of respondents either work in very large (500+ staff) companies or very small (less than 5 people) ventures.

This year was no exception; when asked how many people work at their company, the most popular answer among respondents was "Over 500" (19 percent), followed by "Myself only" (19 percent) and "2 to 5" (15 percent).

Moreover, it seems most respondents' companies either expanded or stayed the same size in 2017. 48 percent said their company had grown (in terms of staff) during the year, 39 percent said their company had stayed the same, 11 percent said they lost staff, and 2 percent said their company had shut down completely.

Most of the game industry is still self-funding — and more often now, that's personal funds

For years now we've seen survey respondents tell us they predominantly self-fund their work, either using their company's existing funds or the money in their own pockets.

Results of this year's survey continue that trend, but the ratio of devs relying on their own personal funds is rising. When asked to mark the places their funding comes from, 49 percent of respondents said their company's existing funds, 34 percent said their own personal funds, and 16 percent said an external publisher.

That's a small but significant shift away from the results of last year's survey, when 55 percent of respondents said they relied on company money, 29 percent said personal funds, and 15 percent used funding from an external publisher.

Interest in crowdfunding remains low

The luster of crowdfunding platforms like Kickstarter and Fig seems to have faded among game devs, as respondents we survey continue to express low interest in using them for their work.

When we polled their opinion on crowdfunding, the largest share of survey respondents (45 percent) said they had no interest in it. 25 percent said they'd never tried crowdfunding but were planning to in the near future, and 15 percent said yes, they'd worked a crowdfunded project. Meanwhile, 5 percent said they'd tried and failed to crowdfund a project.

Intriguingly, the ratio of responses to the same question last year were almost identical.

1 in 10 devs is working on a game that will monetize using "loot boxes"

Given the raucous conversation in 2017 about the implementation of "loot box" mechanics in games, we wanted to check in with devs to get a sense of how they plan to monetize their next game.

When we asked them to select which business model(s) they were planning to use for their next game, nearly half (49 percent) said "pay to download" and 39 percent said "free to download." 23 percent said their next game would feature paid downloadable content (DLC) updates, and 22 percent said it would feature in-game items sold for real money.

Which business model(s) are you planning to use for your *next completed* game? (Choose all that apply)

Pay to download   **49%**

Free to download   **39%**

Paid DLC/Updates   **23%**

Paid in-game items   **22%**

Paid in-game currency   **21%**

Free DLC/Updates   **20%**

Ad supported   **14%**

Paid subscription   **13%**

Other   **12%**

Paid item crates   **11%**

Notably, 11 percent said their next game would include "paid item crates", suggesting that roughly 1 in 10 game makers is figuring out how to implement something like a "loot box" mechanic in their next project.

We also gave our survey respondents room to write in their own thoughts on the controversy around "loot crates" and microtransactions in games, and many shared some intriguing opinions.

"It's only acceptable when it is vanity cosmetic items," wrote one respondent. "When it vastly controls the outcome of the game when playing against other people it's a problem."

"Time is money," wrote another. "So long as A) the content is also accessible by playing the game; and B) this and all parts of the game are balanced for gameplay FIRST and monetization second; then I see no legitimate basis for complaints."

"There are certain markets in which loot crates are always going to be successful — in East Asia (China and Japan) they are a very common mechanic, and the laws are designed to prevent abuse," opined another. "In the West, there is a big cultural difference and they need to be used in a way that does not turn the game into 'Pay to Win.' Skins are an effective way to do that. Heavy use of RNG, like Hearthstone, is another accepted way. Game developers will need to find ways that work for them because the revenue is required. Game devs often do not generate enough revenue from sales to support the team required to make the games the audience demands. Microtransactions have to be a part of your strategy in AAA gaming. So everyone will need to figure out what works for them — I'm sad [Star Wars] Battlefront [II] got it so wrong. This whole controversy will have a lasting impact on the industry and I am most worried it will affect game creators' jobs more than anything."

> *"Microtransactions have to be a part of your strategy in AAA gaming. So everyone will need to figure out what works for them — I'm sad [Star Wars] Battlefront [II] got it so wrong. This whole controversy will have a lasting impact on the industry and I am most worried it will affect game creators' jobs more than anything."*

Social media seen to be the #1 most effective way to get the word out about your games

Like last year, this year we asked survey respondents to share (by ranking them) what promotional methods had been most effective in helping their last completed game get discovered. This year, we asked them to rank the 10 options by allocating 100 points based on value; each option started with equal value (so, 10 points) and then devs could shift those points around to highlight which options had (and hadn't) proven useful to them.

The most popular answer proved to be "Social Media", with an average of 22 points. "Real-Time Communications" (think: Slack, Discord, etc.) proved least popular, with an average of just 5 points allocated. For easy reading, here's the list of ten possible responses sorted in order of most (average) points allotted to least:

Which methods were most effective for discovery of your *last completed* game? (Allocate 100 points across the answer options; there are 10 options, so default would be 10 points to each method then add/subtract accordingly)

Social media (Twitter, Facebook)   **22**

Promotion on a platform's digital storefront   **19**

Word of mouth   **17**

Paid advertising   **12**

YouTube videos   **12**

Traditional press and bloggers   **11**

Live events   **8**

Forums   **7**

Twitch streamers   **7**

Real Time communications (Discord, Slack)   **5**

The breakdown was fairly similar when we asked respondents to rank these options in terms of what they thought would be most effective for their next game. Social media was most popular (again, with an average score of 22) and real-time communication platforms like Slack were seen to be least effective, with an average score of 6 points.

However, respondents did seem to put more stock in Twitch streamers when thinking about their next project. Here's the full ranked list of average points allotted:

Which methods do you anticipate will be most effective for discovery of your *next completed* game? (Allocate 100 points across the answer options; there are 10 options, so default would be 10 points to each method then add/subtract accordingly)

Social media (Twitter, Facebook)   22

Promotion on a platform's digital storefront   19

Word of mouth   16

YouTube videos   13

Paid advertising   13

Traditional press and bloggers   11

Twitch streamers   10

Live events   8

Forums   7

Real Time communications (Discord, Slack)   6

Confidence in eSports as a long-term, sustainable business continues to rise

This year we once again asked our survey respondents whether they thought eSports (games built to be played competitively at a professional level) was a sustainable business, long-term, and 91 percent said yes. That's a very slight increase over the two prior years, when 90 and 88 percent of respondents (respectively) said yes to the same question.

"StarCraft exists, so by definition it is a sustainable business," wrote one respondent. "I am not particularly interested in getting involved in the development of an eSport, however. Being tied down to developing and supporting a single game for the rest of my career sounds pretty hellish, in fact."

"[I believe in eSports] as much as I believe in football or basketball as a sustainable business. These traditional sports games simply had centuries to develop their relevance and audience," added another. "I bet the same is going to happen with eSports — or should I say, it's already happening. Besides, they are the kind of games business in which you can literally sustain the same game over long years and keep players engaged. I myself intend to be making eSports in the near future."

"As long as there is a way for viewers to understand the technical expertise that an eSports player or team shows, we'll love watching it and admiring said players," another respondent wrote. "We'll just keep inventing different sorts of balls to throw around and scoring people for being really good at throwing and/or kicking them."

> *"[I believe in eSports] as much as I believe in football or basketball as a sustainable business. These traditional sports games simply had centuries to develop their relevance and audience. I bet the same is going to happen with eSports — or should I say, it's already happening."*

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