

# STATE OF THE GAME INDUSTRY 2020

Presented by:

# GDC

March 16–20, 2020  
San Francisco

**The Game Developers Conference has once again surveyed nearly 4,000 game developers as part of the eighth annual State of the Industry Survey, which provides a snapshot of the game industry and highlights big industry shifts ahead of GDC 2020 in March.**

Some of the most notable trends highlighted in this survey include a shift in dev focus to next-gen consoles like the PlayStation 5, rising interest in VR and the Oculus Quest headset specifically, and growing confidence that the game industry can and should unionize.

The full report also includes a smorgasbord of insights into everything from cross-platform multiplayer adoption to platform preference, as well as how devs are feeling about the Epic Games Store, Google Stadia, Apple Arcade, and much more.

The 2020 State of the Industry Survey is the eighth 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 Informa Tech, GDC 2020 will take place this year March 16th through the 20th at the Moscone Convention Center in San Francisco, California!



## PC remains the most popular platform among game makers, and over 10 percent are currently making games for next-gen consoles

Every year we check in with game industry professionals to see which platforms they've targeted for their past, present, and future game projects, and for the past few years we've seen PC and mobile win out as the most popular platforms.

We saw that trend continue this year, as when we asked respondents what platform their last game was released on, the majority (54 percent) said PC, 40 percent said mobile, 24 percent said PlayStation 4/Pro, and 21 percent said Xbox One/One X.

### On which platform(s) was your previous project released? (Choose all that apply)

Xbox One / X **21%**

PlayStation 4 / Pro **24%**

Nintendo Switch **12%**

Mobile **40%**

Web browser **13%**

PC **54%**

Mac **15%**

Linux **7%**

VR Headsets **15%**

AR Headsets **4%**

Tabletop Games **3%**

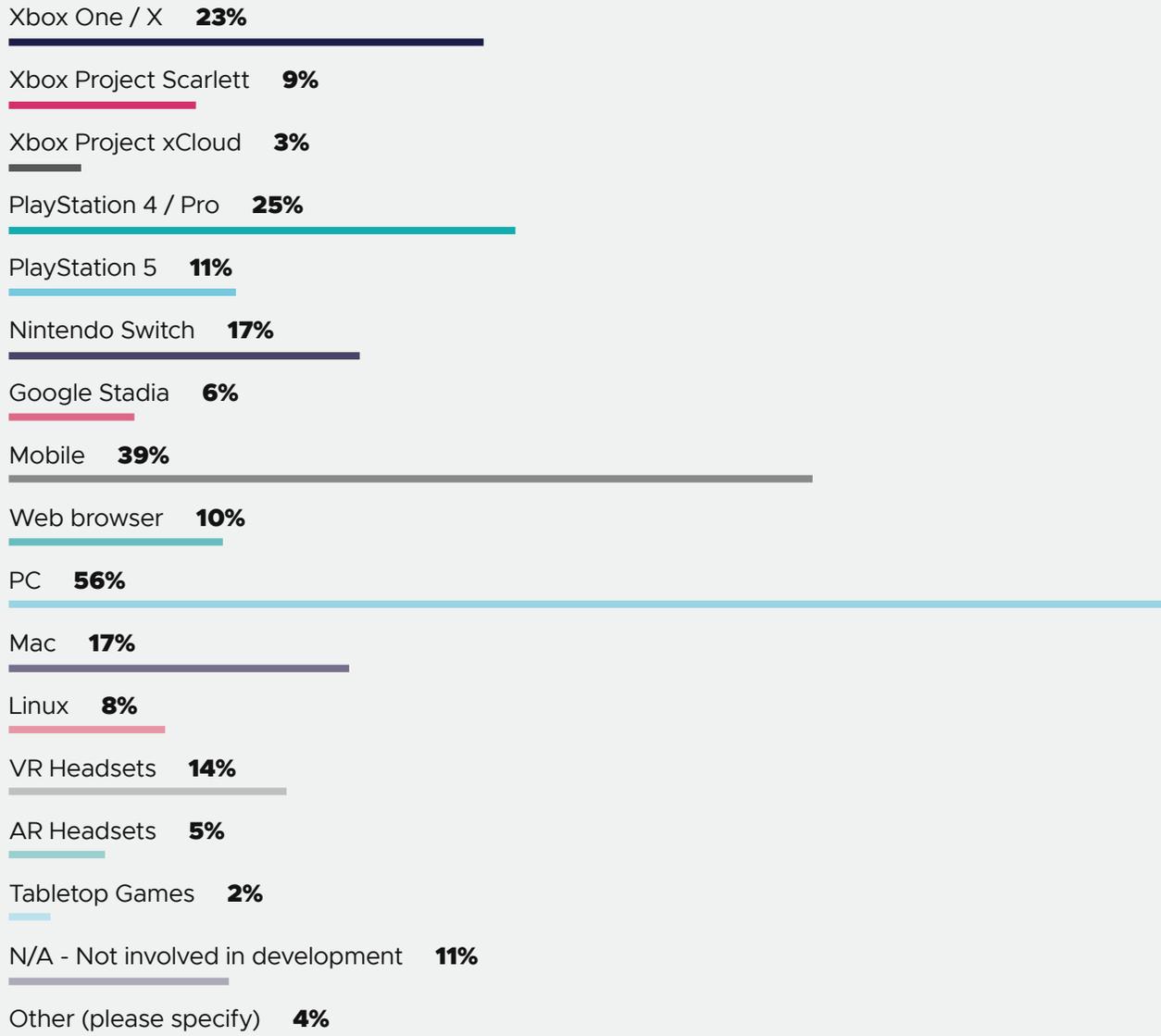
N/A - Not involved in development **12%**

Other (please specify) **5%**

The data gets more interesting when we asked respondents about what platforms they're targeting for their current project, because we had the opportunity to ask about the next generation of consoles from Sony and Microsoft.

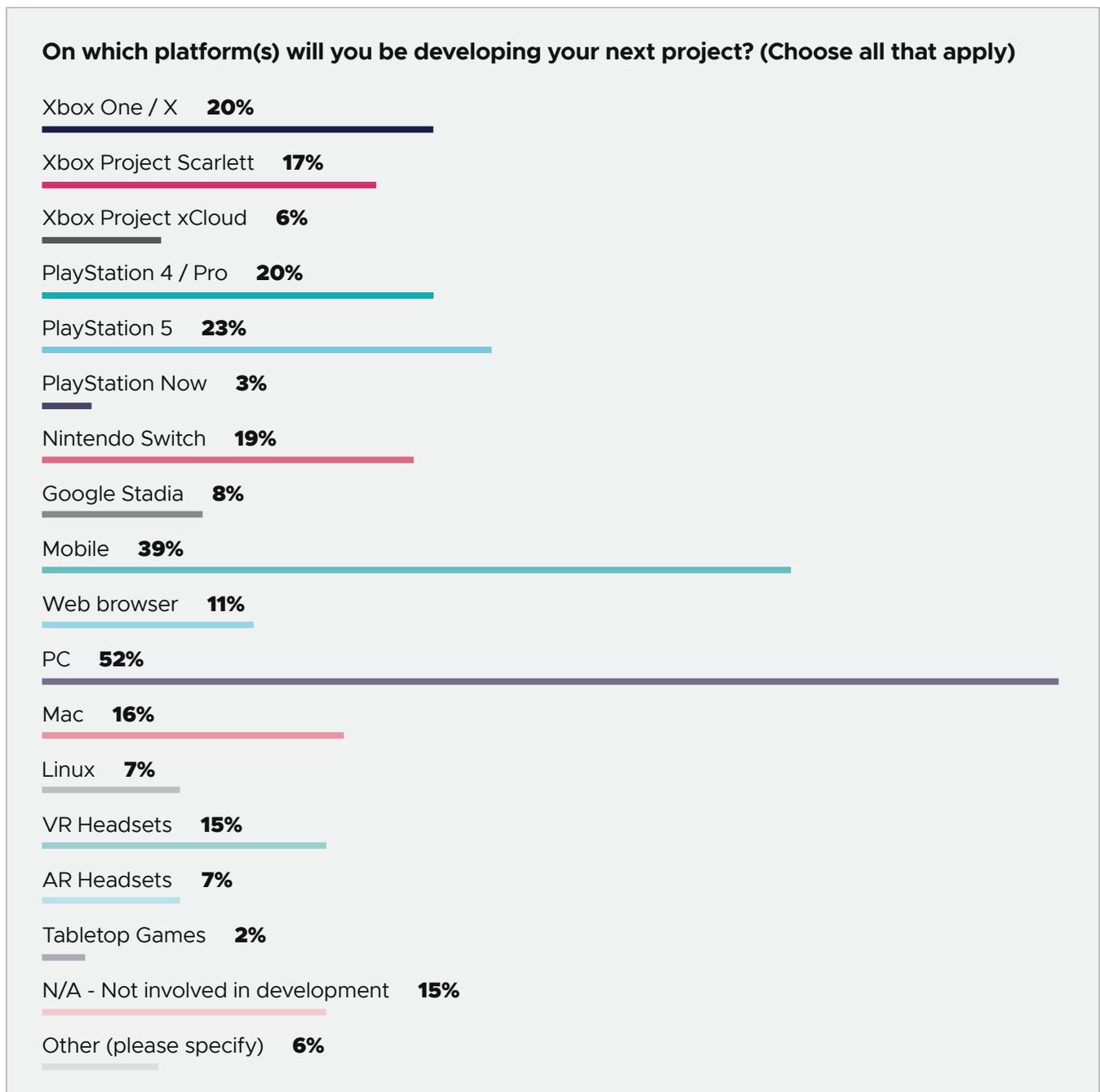
While the majority of respondents said their current projects are being developed for the PC (56 percent) and/or mobile (39 percent), 11 percent of survey respondents said their current project is being developed for the PlayStation 5, and 9 percent said they're currently targeting the next generation Xbox Series X (still known as "Project Scarlett" at the time our survey was conducted).

### On which platform(s) are you developing your current project? (Choose all that apply)



We also checked to see how many were currently working on games for Google Stadia and Microsoft's Project xCloud, two high-profile game streaming services which made waves in 2019. 6 percent of respondents said they're currently targeting Google Stadia and just 3 percent said they're aiming to put their current project on xCloud, suggesting that dev interest in making games for these services remains nascent.

As you might expect, dev interest in targeting next-gen consoles increased a bit when we asked respondents what platform(s) they expect to launch their next project on. 23 percent said they expect their next game will launch on PlayStation 5, while 17 percent expected it would come to the next-gen Xbox.



The most popular platform for future projects was the PC (52 percent), followed by mobile (39 percent) and again, the PlayStation 5 (23 percent). Only 19 percent of respondents said they expect to release their next game on the Nintendo Switch, while PlayStation 4/Pro and Xbox One/One X tied with 20 percent of respondents targeting each for their next game.

We also saw a slight uptick in dev interest in game streaming services for future projects, as 8 percent expect to launch their next game on Google Stadia and 6 percent are targeting xCloud.

## Just 5 percent of devs are targeting next-gen exclusively, but a third expect their games to launch on both current and next-gen consoles

With new consoles from Sony and Microsoft on the horizon, we checked in with our survey respondents to see whether they're developing their next game exclusively for these next-gen platforms. Just 5 percent said yes; 34 percent said they're targeting both current and next-gen platforms, and 22 percent said they're exclusively targeting current platforms. However, the largest share (39 percent) admitted they don't know whether their next project will be exclusive to next-gen platforms.

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### Are you developing your next game for next-generation platforms or existing platforms?

Exclusively for next-generation platforms **5%**

Exclusively for existing platforms **22%**

Both existing and next-generation platforms **34%**

N/A - Don't know at this time **39%**

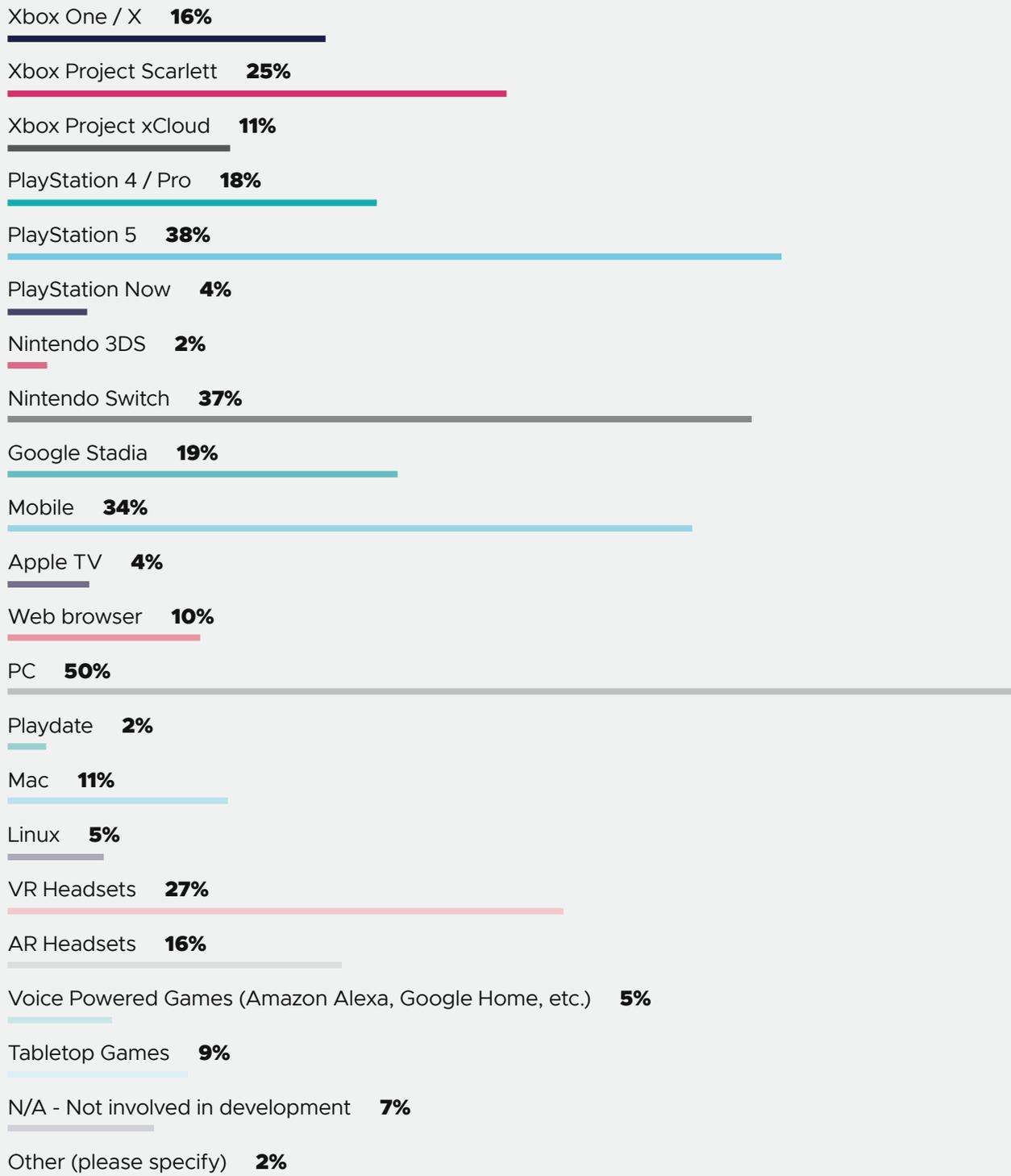
## PC remains the most interesting platform for game makers, followed by the PlayStation 5 and the Nintendo Switch

Just because you're targeting a specific platform for your games doesn't mean you aren't intrigued by others, so we always like to ask our survey-takers what platform(s) most interest them as game makers.

Here, again, the PC historically leads the pack, but last year we saw the Switch following close behind with nearly 45 percent of respondents (in 2018) interested in making games for Nintendo's latest console.



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



However, this year it seems next-gen consoles are on devs' minds; while 50 percent said they're most interested in making games for PC, 38 percent said they're interested in the PlayStation 5 and 25 percent said they're interested in the next-gen Xbox. 37 percent said they're interested in the Switch, suggesting that while the platform remains high up in devs' estimation, the lure of new tech has taken some of the shine off Nintendo's latest hardware.

We also received some interesting data regarding dev interest in some of the more esoteric platforms: 5 percent of respondents said they're most interested in making games for voice-activated assistants like Amazon's Alexa or Google Home, 9 percent said they're interested in making tabletop games, and 2 percent said they're interested in producing games for Playdate, the upcoming handheld console from Panic.

## Android remains mobile devs' most popular platform, though the number of devs making mobile games is slipping

In last year's survey we saw Android win out as the most popular platform for devs making mobile games, with 54 percent saying they were planning to release their game on Android and 50 percent saying iOS.

### Which mobile platform(s) is your company currently making games for? (Choose all that apply)

Android **50%**

iOS **48%**

None **43%**

Other (please specify) **3%**

We asked the same question this year and saw a similar ranking, though the percentage of devs making mobile games appears to have dropped year-over-year. This year, 50 percent of respondents said their company is currently making games for Android, while 48 percent said they were making games for iOS. 43 percent said they weren't making any mobile games, up from 39 percent last year.



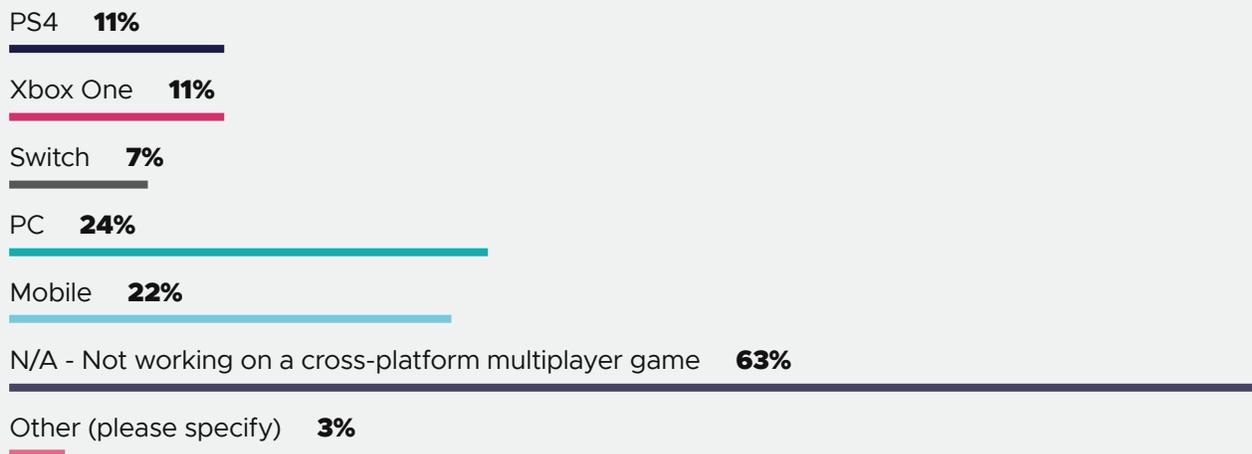
## Consoles lag behind PC and mobile when it comes to cross-platform multiplayer support

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2019 was the year that cross-platform multiplayer became a big talking point in the game industry, as Sony joined Microsoft and other major platform-holders in affording devs the option to build games with cross-platform multiplayer features.

We wanted to get a general sense of how many devs are taking advantage of these features, and where they're most common, so we asked our survey respondents to tell us which platforms (if any) their game's cross-platform multiplayer features support.

### If applicable, across which platforms do your game's cross-platform multiplayer features work? (Choose all that apply)



The two most popular platforms were PC (24 percent) and mobile (22 percent), with PlayStation 4 and Xbox One lagging behind (11 percent each) and Nintendo Switch bringing up the rear (7 percent). However, the majority of respondents (63 percent) said they currently aren't working on a game with cross-platform multiplayer, which isn't surprising given how few games (in the grand scheme) are built with multiplayer support at all.

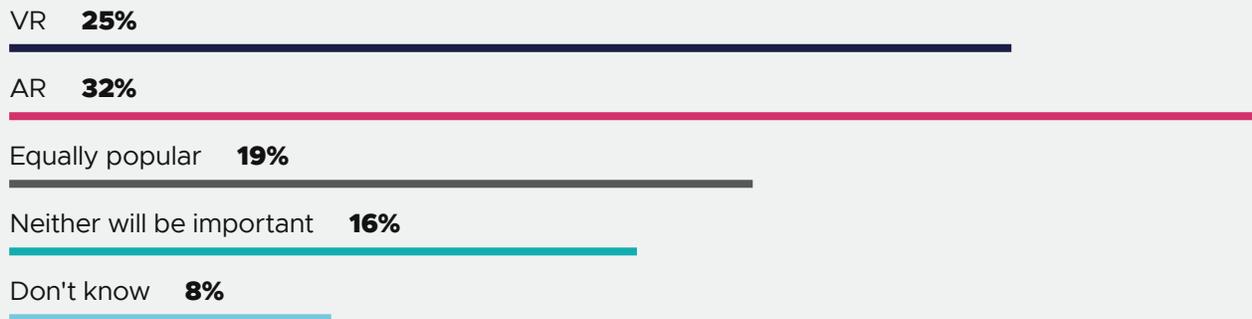
## AR remains the popular answer for what will be the most dominant 'immersive reality' tech in 5 years, but faith in VR is rising

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For a few years now we've been polling game industry professionals about which 'immersive reality' technology they think will be dominant in 5 years, and augmented reality has long been the most popular answer.



### Which do you believe will be the dominant 'immersive reality' technology in 5 years?



That held true this year, but we were surprised to see a significant year-over-year uptick in the percentage of respondents who believe VR will be dominant; one in three respondents (32 percent) said they think AR will dominate, while one quarter (25 percent) said VR. 19 percent expect AR and VR to be equally popular, 16 percent think neither tech will be important in 5 years, and 6 percent admitted they just don't know.

Last year we saw a very similar pattern of responses, except back then (in 2018) only 19 percent threw in with VR as the eventual top dog. It's a small increase, one which may be influenced by the recent mainstream success of the wireless Oculus Quest VR headset.

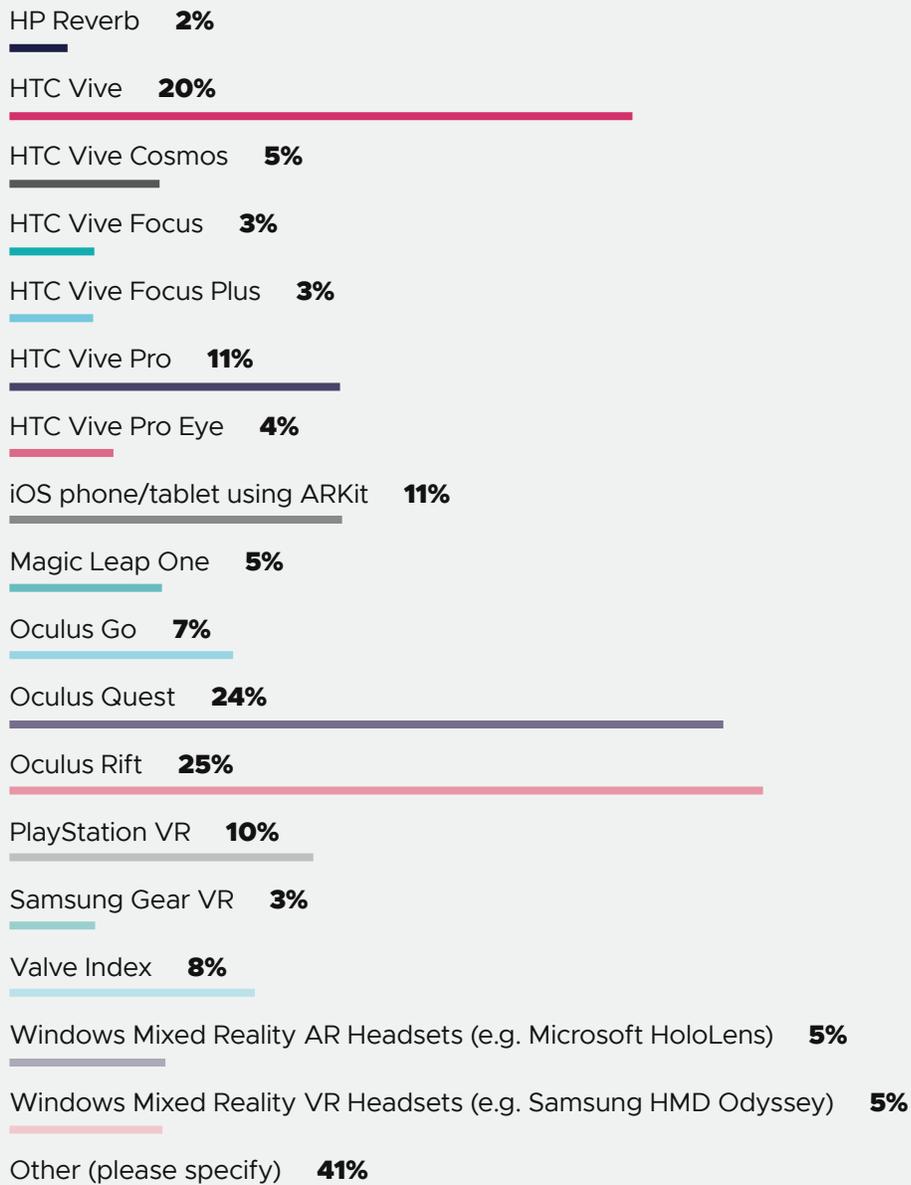
## Nearly half of game makers are or have been involved in AR/VR development, and current VR devs are shifting focus from the HTC Vive to Oculus and its new Quest headset

When we checked in with our 2019 survey respondents about whether they were currently (or had ever been) involved in AR/VR game development, the majority (54 percent) said no. That's roughly in line with surveys from years past (52 percent said no in 2018, for example), suggesting AR/VR still has plenty of room to grow in game devs' estimation.

We also surveyed the 48 percent who said they have worked in AR/VR game dev about which AR/VR platforms they're currently making games for, and the most popular answer proved to be the Oculus Rift (25 percent). Close behind was the Oculus Quest wireless headset (24 percent), followed by the HTC Vive (20 percent) and iOS (via ARKit) and the HTC Vive Pro headset, netting 11 percent each. It's worth noting that 41 percent of respondents selected "Other" as an option – the majority of these clarified that they were not currently developing for any VR/AR platform.



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



This is a significant shift, since in prior years we've seen the HTC Vive win out as AR/VR devs' most targeted platform. In 2019 it appears more devs turned their attention to Oculus' flagship Rift headset, even as the company's new wireless Quest headset has quickly attracted a lot of interest from VR devs.



This is further reinforced by the responses we saw when we asked the same devs which AR/VR platform(s) their last game was released on; the most popular response was again the Oculus Rift (41 percent), followed very closely by the HTC Vive (38 percent) and, a bit further behind, the PlayStation VR (15 percent).

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

HP Reverb **2%**

HTC Vive **38%**

HTC Vive Cosmos **4%**

HTC Vive Focus **3%**

HTC Vive Focus Plus **2%**

HTC Vive Pro **13%**

HTC Vive Pro Eye **3%**

iOS phone/tablet using ARKit **14%**

Magic Leap One **5%**

Oculus Go **8%**

Oculus Quest **14%**

Oculus Rift **41%**

PlayStation VR **15%**

Samsung Gear VR **10%**

Valve Index **6%**

Windows Mixed Reality AR Headsets (e.g. Microsoft HoloLens) **5%**

Windows Mixed Reality VR Headsets (e.g. Samsung HMD Odyssey) **8%**

Other (please specify) **18%**



Looking ahead, AR/VR devs seem chiefly interested in the Oculus Quest; when we polled our survey-takers about which AR/VR platform(s) they expected their next game to release on, the most popular answer (with 24 percent) proved to be the Quest, followed by the Rift (20 percent) and the HTC Vive (17 percent). 21 percent of respondents said "Other", and most of them clarified they weren't targeting AR/VR for their next project. However, 32 percent of respondents said they were yet undecided, leaving plenty of room for things to shift as the AR/VR market evolves.

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

HP Reverb **2%**

HTC Vive **17%**

HTC Vive Cosmos **6%**

HTC Vive Focus **3%**

HTC Vive Focus Plus **3%**

HTC Vive Pro **11%**

HTC Vive Pro Eye **4%**

iOS phone/tablet using ARKit **9%**

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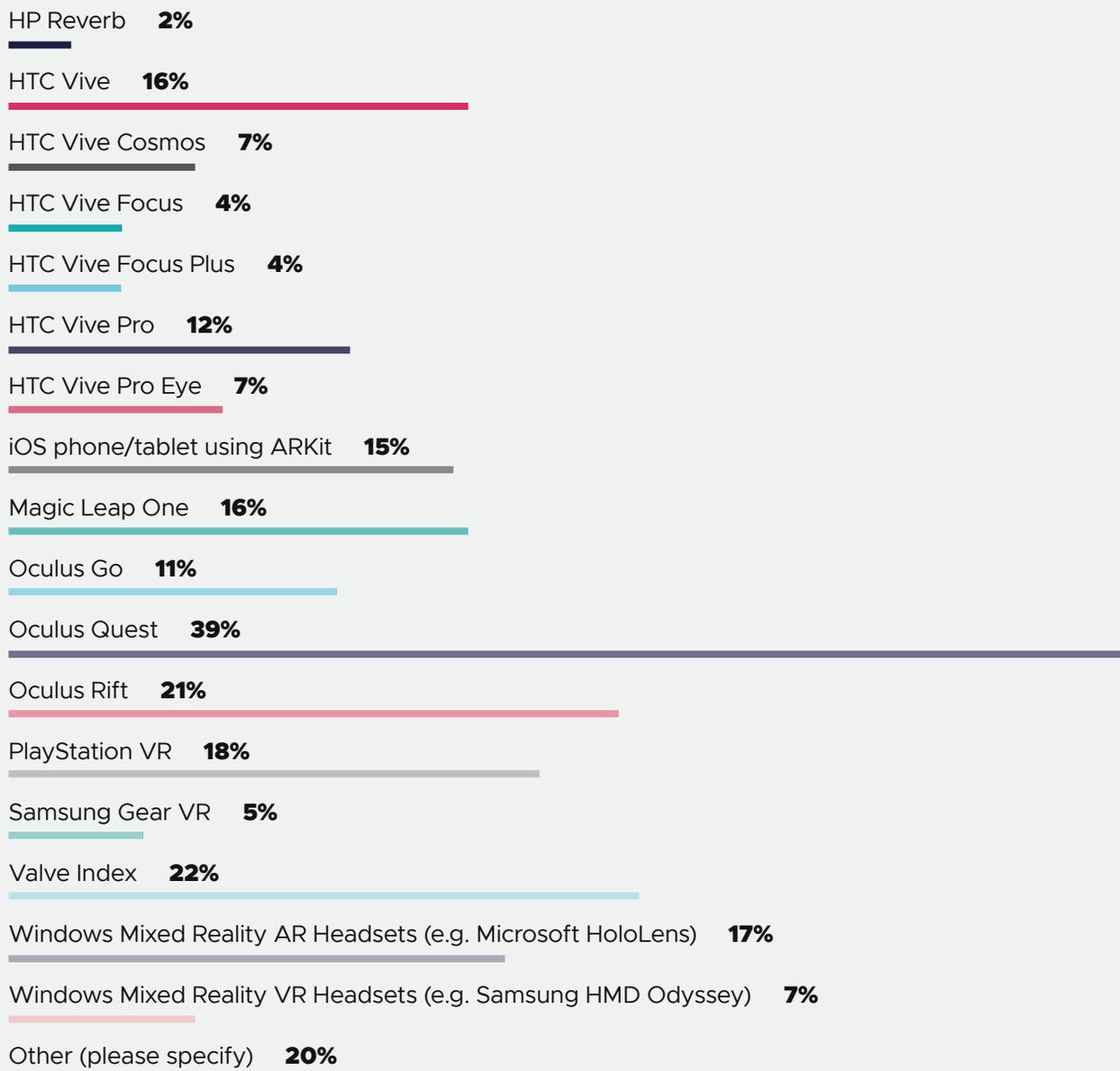
Undecided **32%**

Other (please specify) **21%**



Of course, the platforms you make games for aren't always the ones you're most excited about, so we always like to check in and see which headsets our pool of game industry professionals are most interested in.

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



The Oculus Quest took top prize with 39 percent of respondents saying they were interested in it, followed by the Valve Index (22 percent) and the Oculus Rift (21 percent). 18 percent of respondents said they were interested in PlayStation VR, 17 percent said Windows Mixed Reality AR headsets (think: HoloLens), and both the HTC Vive and Magic Leap One netted interest from 16 percent of respondents apiece.

## More than 25 percent of devs are working with a publisher

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To get a better sense of what publishing and marketing services devs are using these days, we polled our survey-takers about what services they're using for the release of their next game.

About a third (36 percent) said they had full- or part-time internal marketing and/or PR staff who they paid themselves, and roughly the same percentage (36 percent) said they do marketing themselves in addition to developing the game. Only 11 percent of devs said they're using an external PR or marketing agency they pay themselves.

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

A publisher that has paid us an advance and takes a percentage of revenue	<b>19%</b>
A publisher that has not paid us an advance, but takes a percentage of revenue	<b>7%</b>
An external marketing and/or PR agency that we have paid ourselves	<b>11%</b>
Full-time or part-time internal marketing and/or PR individuals that we pay ourselves	<b>36%</b>
I do marketing myself in addition to helping to develop the game	<b>36%</b>
Other (please specify)	<b>14%</b>

Intriguingly, 19 percent of respondents said they have a publisher who has paid an advance and will take a cut of sales, while 7 percent said they're working with a publisher who hasn't paid them anything but will still take a cut of the sales. Together that's roughly a quarter (26 percent) of our respondents, suggesting that publishers are still influencing the game industry in a meaningful way.

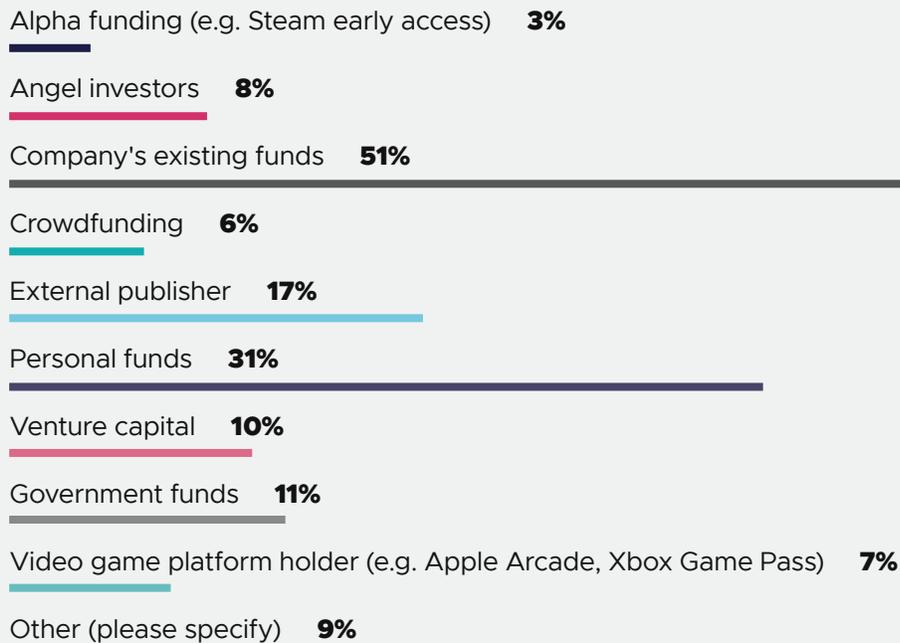
## Most devs still rely on company money or their own to fund their projects, while interest in crowdfunding remains low

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We checked in with our respondents this year about all the different sources their funding comes from, and over half (51 percent) said they use their company's existing funds. 31 percent said personal funds, suggesting that the majority of games are still being paid for without outside help.



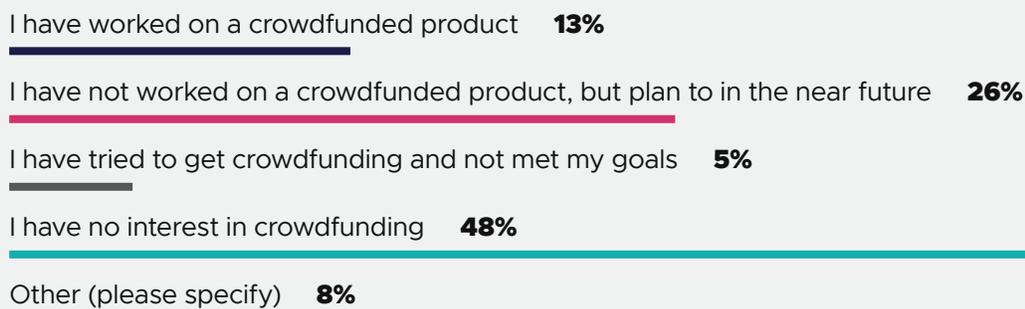
### Where does your funding come from? (Choose all that apply)



17 percent said they received funding from a publisher, 11 percent said they got government funding, and 10 percent said they'd received some investment from venture capital. This is all roughly in line with the responses we got in 2018, right down to the least common source (at just 3 percent) proving to once again be alpha funding via platforms like Steam Early Access.

Just 6 percent said they received funds via crowdfunding platforms like Kickstarter, and when we followed up with a question about their experience with crowdfunding, nearly half of respondents (48 percent) said they had no interest in crowdfunding at all.

### What is your experience with crowdfunding?



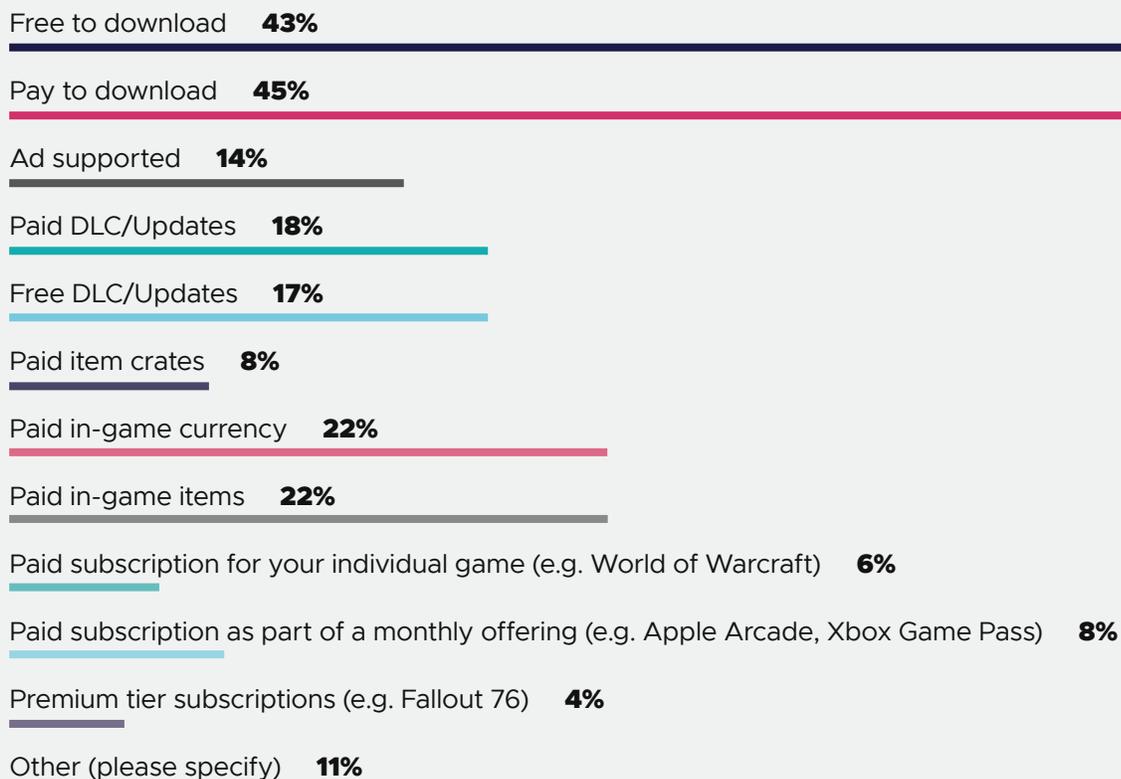
Roughly 1 in 4 (26 percent) said they hadn't worked on a crowdfunded project but plan to, while 13 percent said they had worked on a crowdfunded game and just 5 percent said they'd tried and failed to crowdfund a project.

These results are nearly identical to last year's survey, suggesting crowdfunding platforms continue to attract a small but steady number of game makers seeking funding for their projects.

## Loot box mechanics remain an unpopular method of game monetization

As the game industry's economies grow and change, we like to check in with our survey respondents to see which business model(s) they're choosing to use in their current project. As in last year's survey, the most popular response was "pay to download" (45 percent of respondents), followed by "free to download" (43 percent) and options to purchase in-game currency or items (22 percent each).

### Which business model(s) are you using for the current game you're developing? (Choose all that apply)



We noticed a small but significant shift downward in the number of respondents who said they're offering paid downloadable content (down to 18 percent of respondents from 24 percent in 2018), which may correspond to a broader industry trend away from paid, discrete chunks of game content in favor of seasonal updates and cosmetic item sales.

In addition, just 8 percent of respondents said they're currently working on something that will offer paid item crates (think: loot boxes), down slightly from the 9 percent who said so in 2018. This reinforces our understanding of this controversial monetization system as an enduring but still relatively uncommon business model in games.

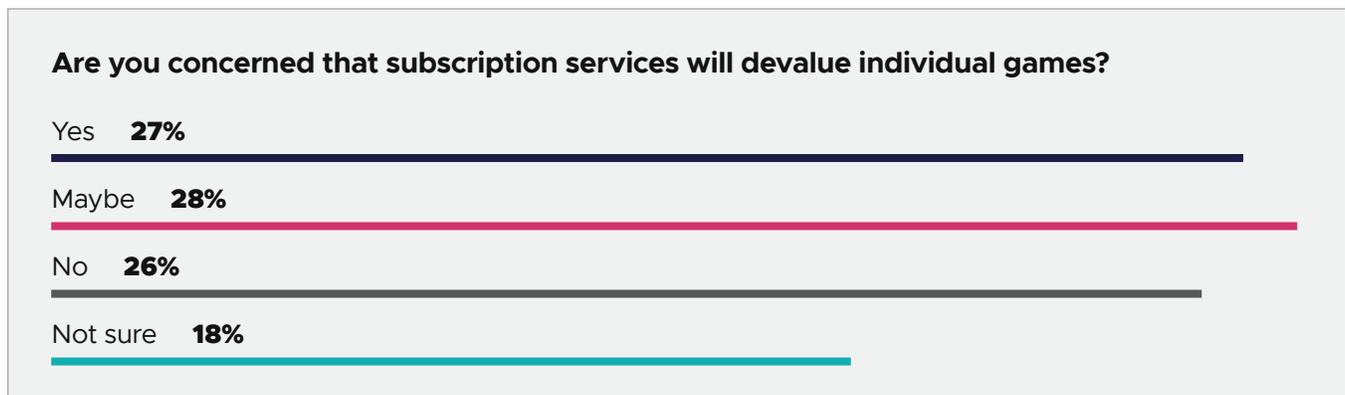
However, we also added some new response options this year to help account for the growing popularity of new business models like game subscription services (e.g. Apple Arcade) and games with premium-tier subscriptions (a la Fallout 76).

Game subscription services proved the most popular of the three among our respondents; we saw 8 percent say they're currently working on a game that will be part of a paid subscription service, 6 percent say they're working on a game with a monthly subscription (like World of Warcraft), and 4 percent say their current game will offer premium-tier subscriptions.

## Game makers are torn on whether subscription services will devalue individual games

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As more and more game subscription services debut, we wanted to poll our audience of game industry professionals to get a sense of whether they think these services (like Apple Arcade, Xbox Game Pass, and others) will diminish the value and market potential of individual games.



Game makers appear to be torn; 27 percent said they think subscription services will devalue individual games, 26 percent said no, and 28 percent said maybe. Another 18 percent said they weren't sure, suggesting the game industry at large is just as curious as we are to see how these services affect the market.

"I feel the f2p ad-based strategy is driving the mobile market into a crappy one, full of clickbaity small experiences," wrote in one respondent. "A fixed price for a huge list of free games to play might be a good way to give the video game art form some freedom back, so we can make good experiences that don't need to last more than it asks for just to make more money, engage, retain, monetize, and so on."

“The payback rates for most content creators in subscription-based models cannot justify the cost to make the products subscribers use,” wrote another. “This is true in every medium that has taken this approach in the last decade. Music artists do not make enough from Spotify, et al, to finance the production of future music... even the top tier artists. Why would games be different? Unless the lion's share of revenue from a subscription service goes to the game creators, it's untenable in the long term. And, even if the bulk of revenue diverts to the creators, it will still create a situation where large AAA studios able to create blockbuster-style hype will end up succeeding, while indies will receive even less than they already do.”

*“A fixed price for a huge list of free games to play might be a good way to give the video game art form some freedom back, so we can make good experiences that don't need to last more than it asks for just to make more money, engage, retain, monetize, and so on.”*

“Subscription-based models enable certain product types that a standard boxed-product model does not,” added another respondent. “I expect a variety of purchase models will continue to exist, and I'm hopeful that enough developers are choosing the right model for their games.”

## Over half of devs hail from North America, and another quarter come from Europe

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When asked which region of the world they reside in, a majority of survey respondents said either North America (55 percent) or Europe (25 percent). With 9 percent of respondents, Asia proved a distant third; another 6 percent said South America, and 2 percent said Australia or New Zealand.

This is in keeping with survey results from prior years and is to be expected, given that GDC is based in the United States. Still, it's intriguing to see where attendees are coming from, and this year we saw a minor uptick in devs from Asia alongside a small but noticeable downturn in the percentage of devs who hail from North America.

## Men still dominate game development, but their hold is slipping

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We always check in to see what gender(s) respondents identify with, and as in years past, the majority (75 percent) said they identify as male. 21 percent said they identify as female, while another 2 percent said “Other” and the last 2 percent declined to answer.

This is a slight but welcome shift from last year, when the split was closer to 77/19 male to female. The year prior it was 80/17, suggesting that women are slowly expanding their presence, impact, and influence in the game industry.



## Most respondents have spent less than a decade making games

Every year we survey respondents about how long they've been involved in game development, and every year we find the majority have been making games for 10 years or less. This year was no exception; when we checked in to see where our survey respondents were at in their careers, the largest share (30 percent) said they'd been involved in game development for 3-6 years.

The next most popular response (at 17 percent of respondents) was 7-10 years, with 11-15 years and 1-2 years shortly behind at 13 percent and 12 percent, respectively. All told, over 60 percent of this year's survey respondents said they'd been making games for 10 years or less.

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

Under a year **4%**

1-2 years **12%**

3-6 years **30%**

7-10 years **17%**

11-15 years **13%**

16-20 years **9%**

21-25 years **4%**

26-30 years **2%**

More than 30 years **3%**

N/A - Not involved in development **5%**

These results match up very closely (within a few percentage points) to past surveys, reinforcing our understanding of game development as an industry driven by young workers who tend to depart within a decade.

In last year's survey, for example, 33 percent of respondents said they'd been making games for 3-6 years, 18 percent said they'd been making games for 7-10 years, and 13 percent said they'd only been making games for 1-2 years.



# Most respondents still work either alone or at very large companies; nearly half saw their company expand in 2019

Almost half (49 percent) of the game makers we surveyed said they saw their company expand (in terms of staff) in 2019, while 36 percent said their company stayed roughly the same size and 10 percent said their company diminished. 1 percent said their company closed entirely during the year, which is all roughly in line with surveys from prior years.

## Did your company expand or contract in terms of staff in 2019?

Expanded **49%**

Contracted **10%**

Stayed the same **36%**

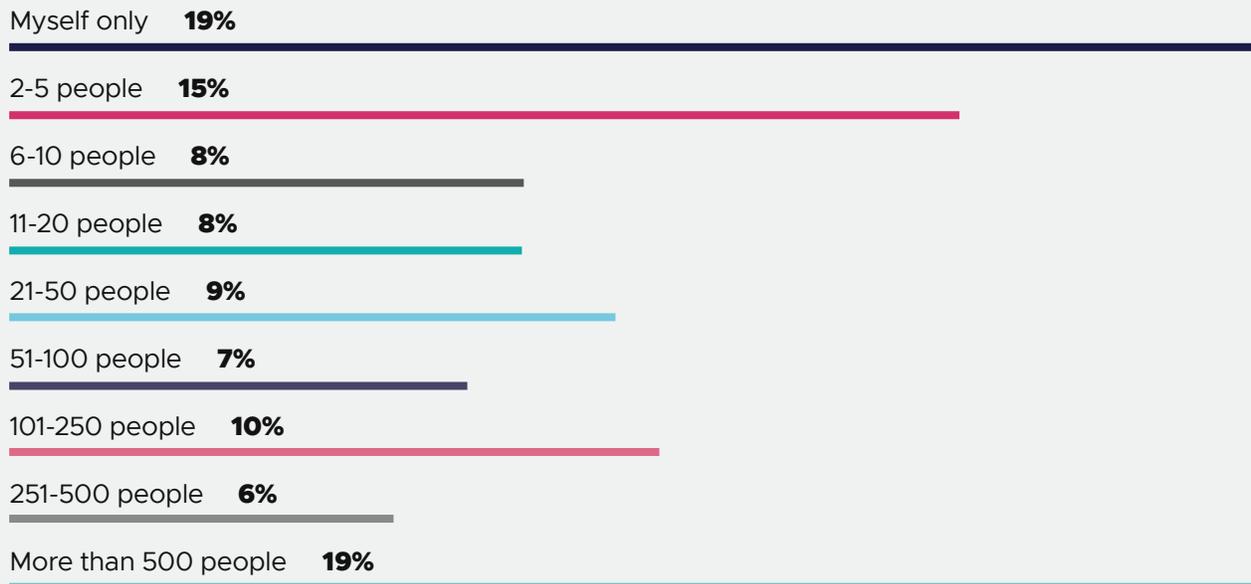
Closed entirely **1%**

Other (please specify) **4%**

While it's always nice to hear that game companies are growing, we also like to get a sense of how large they are, and so we also ask respondents to tell us how many people work at their company. The most popular responses are typically either 1 person or over 500, and this year was no exception; 19 percent of respondents said they work alone, and another 19 percent said they work at companies boasting 500 or more people. 15 percent of respondents said their company is just 2-5 people, and 10 percent said they work alongside 101-250 people.



## How many people work at your company?



We've seen a very similar (down to a few percentage points) spread in surveys from years past, deepening our conviction that the game industry is capable of supporting a broad variety of team sizes.

## Social media still a big investment for devs, though word of mouth and storefront promotion seen as best investments

It's critically important that game makers understand the best ways to get their work in front of the players who will appreciate it most, so we like to ask our survey-takers what their favorite methods are to get the word out about their games.

This year we asked respondents to tell us if they made a small, moderate, or large investment (of time or money) in a variety of discovery methods, from paid advertising to live events to traditional press coverage.

Most respondents made small investments in multiple avenues, most commonly social media (26 percent made a small investment), YouTube videos (25 percent), and email marketing or word of mouth (24 percent each). Medium investments in social media and boosting word of mouth were also common (25 percent each), but when it came to big investments of time or money, the most common choices were again social media (15 percent), word of mouth (15 percent) and live events (13 percent).

The least common choices were Mixer streamers (74 percent of respondents said this form of promotion was not applicable for them) and Twitch streamers (61 percent N/A), though nearly 1 in 5 respondents (19 percent) did make a small investment in promoting their game via Twitch streamers.



When we assigned a weighted average to each form of game promotion to get a general sense of where the game industry is investing the largest share of their time or money, live events actually won out, since we saw a smaller number of respondents investing in them at all – and a decent percentage of those that did made moderate or large investments. Paid advertising, word of mouth, and promotion on a platform’s digital storefront all followed close behind, suggesting that these are some of the most popular ways for game makers to invest their time and money.

Of course, we also wanted to know how valuable our respondents actually found such investments to be, so we also asked them to rank (via similar criteria) how effective the same discovery methods had been for their last completed game.

Here, the big winner seems to be word of mouth – 20 percent of respondents who invested in word of mouth said they found it very effective for promoting their last game. Promotion on digital storefronts also seems to have paid off well; by weighted average it actually ranked slightly higher than word of mouth, likely due to the fact that comparatively few respondents invested in such promotion at all and the largest share of those that did (17 percent) said it proved very effective.

Social media was also seen to be very worthwhile; more respondents invested in it than any other form of promotion, but it was more often ranked as slightly or moderately effective than very effective, suggesting it’s a common, accessible means of promotion with less potential for big payoffs than storefront promotion or viral word of mouth.

It’s important for game makers to create work accessible to as many players as possible, so every year we ask our survey-takers to tell us whether they’ve implemented any accessibility features (for those with sensory impairments, motor issues, etc.) in their current project.

## Nearly half of game makers still aren’t incorporating accessibility features into their work

Nearly half (48 percent) said no, they haven’t, while 28 percent said they have and 23 percent said they weren’t sure. This matches up almost exactly with the results from our last survey, suggesting the game industry hasn’t made much progress in expanding the number of games which ship with accessibility options.

### Have you implemented any accessibility measures (for those with sensory impairment, motor impairment, or other impairments) into your current game?

Yes **28%**

No **48%**

Don't Know / N/A **25%**



We gave those who said yes the option of sharing how they made their game more accessible, and got some intriguing responses.

“The entire game was developed to be easy for anyone to play with a single digit, and it was turn-based,” wrote in one respondent. “Colors were not used for information, [and] every mechanical component has a unique icon.”

“We have made specific design choices to accommodate those with color blindness,” wrote another. “We discussed further accessibility potential, but as we are a student group we are limited in time and funds to implement accessibility measures for those with motor or full vision impairments. At this time we don't have dialogue, but if that changes we will use captioning as well.”

“As someone who personally has a disability, I worked hard with my team to add various methods of play (video controller options) to our titles,” wrote in someone else. “We've also included options such as colorblind modes, text size adjustments, and more to some of our titles.”

*“As someone who personally has a disability, I worked hard with my team to add various methods of play to our titles.”*

## Over a quarter of studios don't invest in diversity and inclusion efforts; those that do report significant success

This time around we also asked our pool of game industry professionals to gauge how much (if any) time and attention their studio has focused on staff inclusion and diversity initiatives.

Nearly a quarter of respondents (24 percent) reported their studio had invested at least a moderate amount of in diversity and inclusion efforts, but the largest share (28 percent) said their studio hadn't focused any time or attention on such initiatives.

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

A great deal **18%**

A lot **14%**

A moderate amount **24%**

A little **16%**

None at all **28%**



However, when we followed up by asking those who did see such investments to tell us how effective they thought their studio's efforts had been, almost all (96 percent) said they were at least slightly successful. Nearly three-quarters said they were at least moderately successful, and 1 in 3 (30 percent) said they were very or extremely successful.

We also asked those who had seen some success in this area to tell us (if they chose to) what they saw as some of the biggest issues facing studios which invest in diversity and inclusion initiatives, and we received some insightful responses.

"The staff who aren't cis white males seem to be disproportionately a) contract employees and/or b) affected by layoffs. On paper our numbers are better now than a few years ago, but I'm not sure if retention is going well," wrote in one respondent.

"Due to the candidate pools available to us, if we're not consistently diligent at pushing forward diversity candidates we go from being diverse to a pile of white dudes in three months if we don't pay attention," added another.

"Prioritizing gender or racial diversity over craft skills simply to fill an unspoken quota or improve industry/public perception is rarely in the best interest of a development team, especially for hard-to-fill positions," wrote another respondent. "That being said, we are an equal opportunity studio and strive to promote acceptance, positivity, and interdependent collaboration in the workplace."

*"If we're not consistently diligent at pushing forward diversity candidates we go from being diverse to a pile of white dudes in 3 months."*

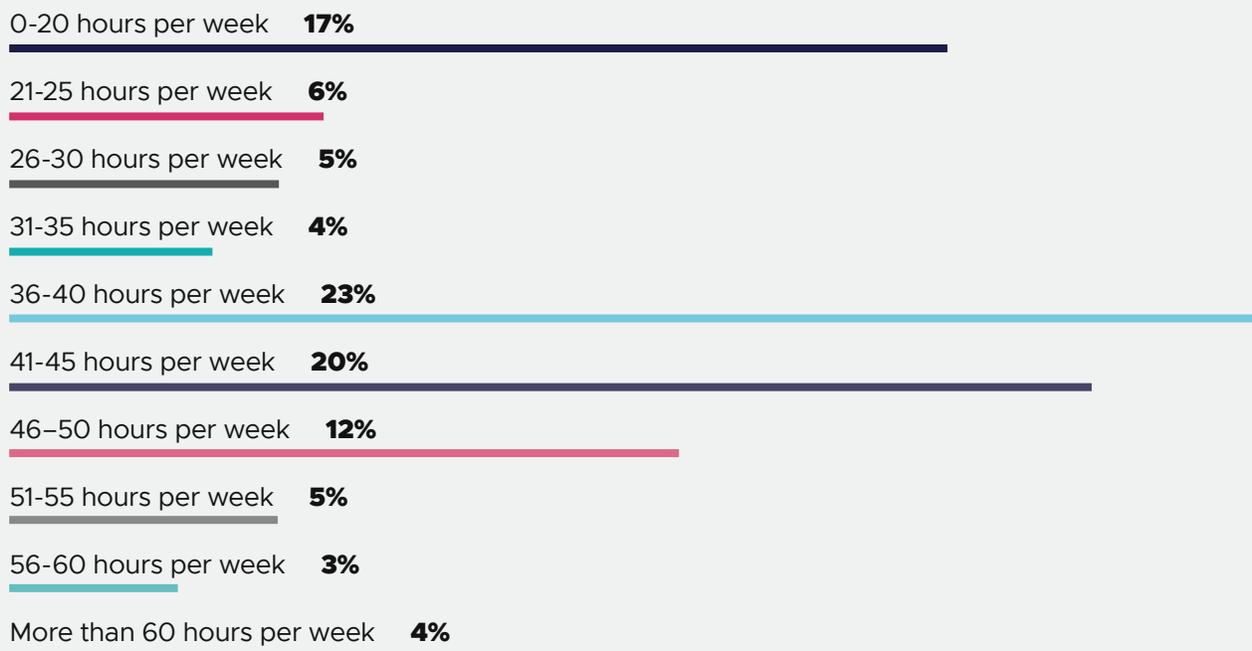
"I think genuine efforts are being made but it's still an impossible conversation for the games industry to have well unless they are willing to be very candid about the idea of harassment," another wrote. "For example, even when talking about the disproportionate number of women working in gaming, higher-ups seem to be a little nervous about openly admitting some of the reasons why there might be such hostility directed towards women in gaming. I think many individuals still think that if they are generally liberal-minded, socially conscious individuals, diversity just 'happens' because they're not worried about it — not stopping to think about unconscious bias or recognizing that clear-cut initiatives still really matter. I think there are also just bigger gaps in knowledge. When I came out as nonbinary, for example, everyone I worked with was supportive and kind. Absolutely no one in my studio honors my request with regard to they/them pronouns, though. So it's sort of like: great first steps, iffy follow-through."



## Nearly half of game makers are still working over 40 hours a week

We asked respondents to tell us how many hours per week (on average) they'd worked on video games over the past 12 months, and as in years past, we saw nearly half (44 percent) report working 40+ hours per week. The other 54 percent worked somewhere between 0-40 hours per week, and a 36-40 hour workweek proved to be the most popular answer (23 percent) among respondents.

### What is your average amount of hours worked per week in the last 12 months on video games?



These results are right in line with those we saw from our last survey, when 46 percent of respondents were working 40+ hours/week, suggesting that little has changed in average game industry working hours over the past year.

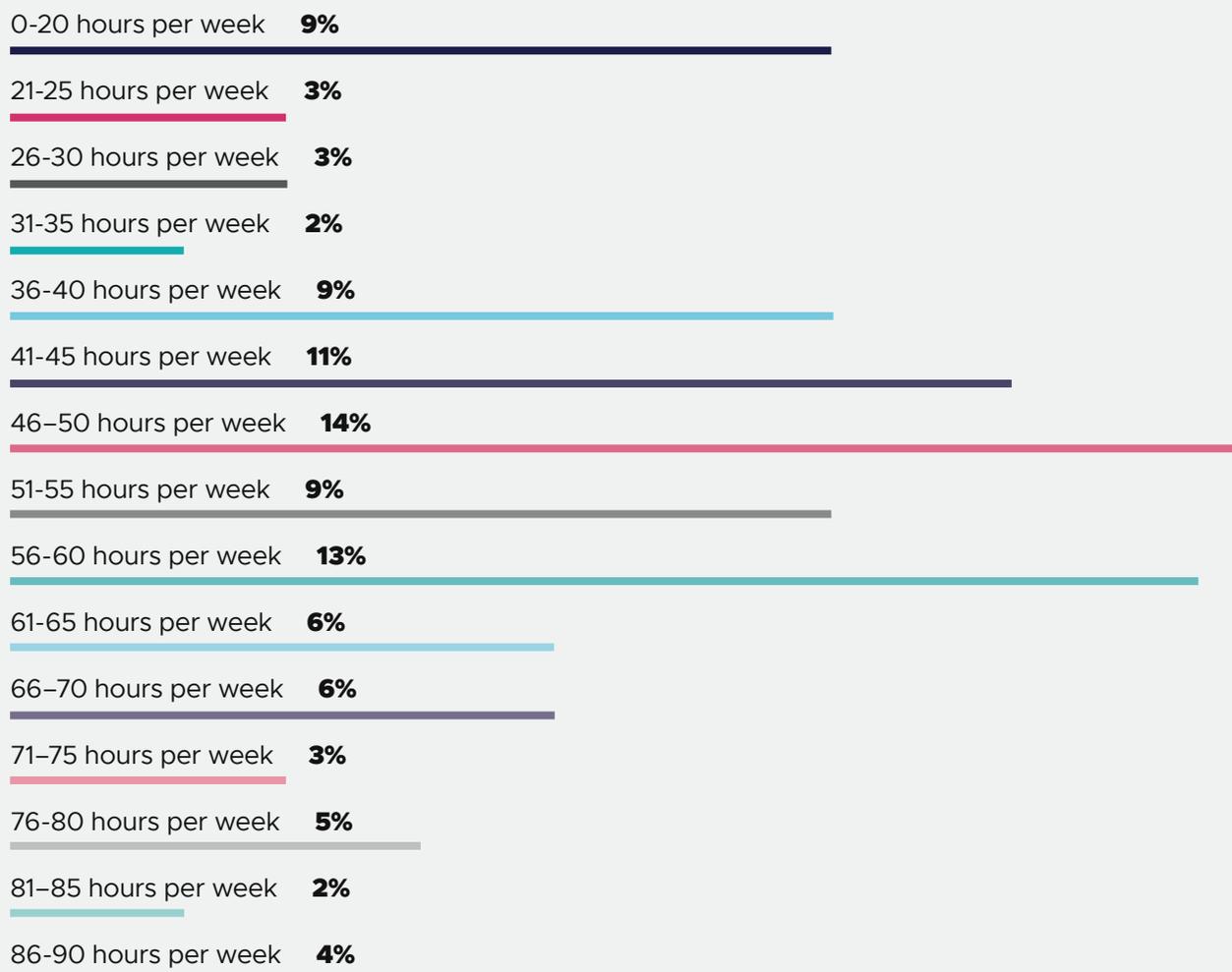
We also asked respondents to tell us the maximum amount of hours they'd worked on games in a single week over the past 12 months, to better gauge how severe crunch and overwork can be in the industry. Responses were broadly distributed, with the most popular response being 46-50 hours per week (14 percent), followed by 56-60 hours/week (13 percent) and 41-45 hours per week (11 percent).

Notably, we saw some remarkable outliers: 4 percent of respondents claimed to have worked an 86-90 hour workweek in the past year, while nearly one in 10 (9 percent) said they topped out at under 20 hours of game dev work a week this year, even in their most intensive workweeks. 1 percent of respondents said they worked more than 90 hours in a single work week over the last year, with 5 respondents claiming to have worked 120 hours in one week, which averages out to over 17 hours a day, for 7 days straight.

## Self-pressure is still game makers' most common reason for overwork

As in years past, we also gave respondents a chance to tell us why they thought they'd worked those maximums. Once again the most popular answer was self-pressure; 59 percent of respondents said so, while 40 percent said they didn't think the amount of time they'd worked was excessive at all.

### What are the maximum hours per week you worked during a single week in the last 12 months on video games?



14 percent felt they'd worked so hard (at least in part) because of pressure from management, while 9 percent said they'd done so because of peer pressure and another 9 percent (perhaps including some of the same people, since respondents could choose multiple reasons) said they really didn't know why they'd worked those hours.

**What were the reasons you believe caused you to work those maximum number of hours per week? (Choose all that apply)**

I don't consider the amount of time I worked to be excessive **40%**

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

Peer pressure (everyone else was working those hours) **9%**

Self-pressure (I was personally working hard and felt I needed/wanted to) **59%**

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

Other (please specify) **14%**

## The majority of game makers think game devs should unionize; few think they will

Unionization and labor practices remain hot topics in the game industry, and this year we again found that when we asked our survey-takers whether game industry workers should unionize, the largest share (54 percent) said yes. 21 percent said maybe, 16 percent said no, and 9 percent said they weren't sure.

However, when we asked whether they thought game industry workers would unionize, only 23 percent said yes; 22 percent said no, and the largest share (43 percent) said maybe. 12 percent said they just didn't know.

When we compare this data to the results of last year's survey, when we asked these questions for the first time, we find a small but significant uptick in confidence that the game industry should and will unionize.

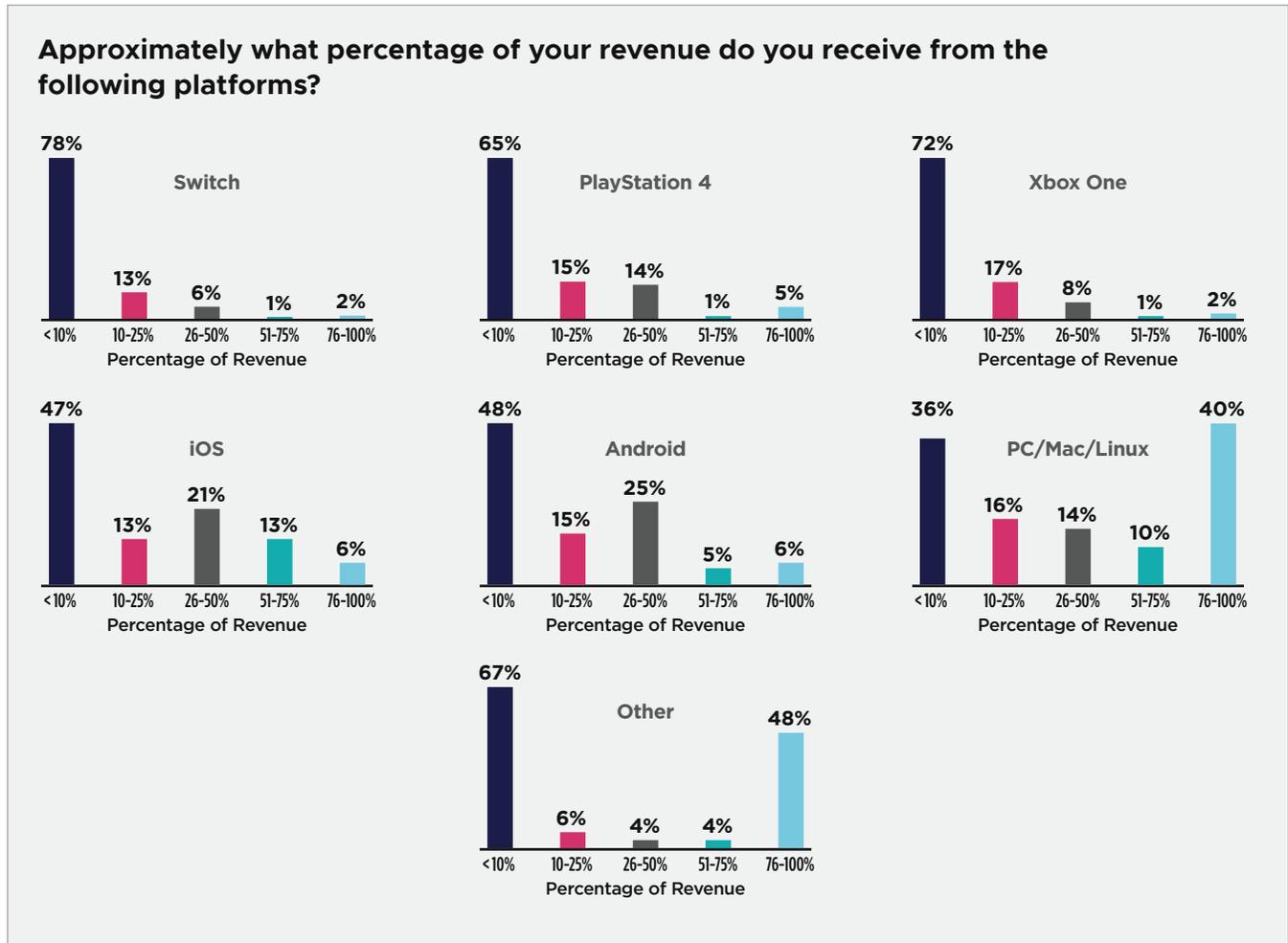
Last year, we asked the same pair of questions and found that just 47 percent of respondents said yes, game industry workers should unionize; only 21 percent of respondents then predicted they would unionize, while 24 percent felt they wouldn't unionize.



# Most devs aren't selling games on Switch, and many make most of their money on PC

To better understand how game makers are making money across the major game platforms, this year we asked survey respondents to tell us approximately what share of their revenues was generated by each of the major platforms.

Most of those who responded (72 percent) said they aren't making any money on the Nintendo Switch, suggesting this remains a comparatively smaller market than something like the PC, where roughly 70 percent of respondents say they generate at least some of their revenue.

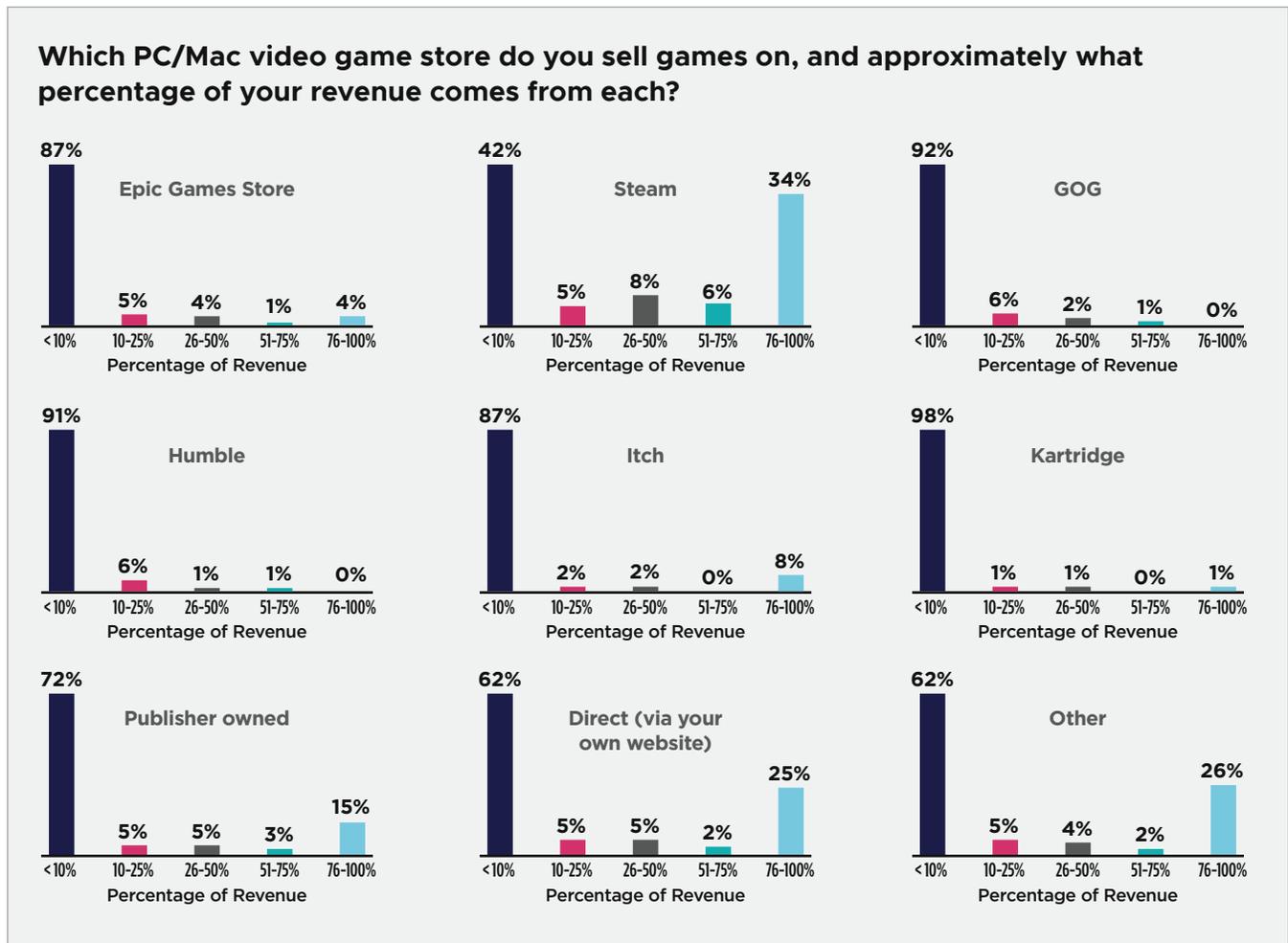


The PC also proved to be the most common platform for respondents to make 100 percent of their money, reinforcing our understanding of the PC (encompassing Windows, Mac, and Linux personal computers) as the most broadly accessible platform for game makers.

# PC offers devs unmatched direct access to customers, but Steam is still the most common way of making money

Of course, the PC platform also has its own suite of accessible game platforms, each of which has its own audience. In an effort to better understand how PC game devs make money, we asked respondents to tell us how of their revenue (if any) was generated across storefronts like Steam, the Epic Games Store, Itch.io, and more.

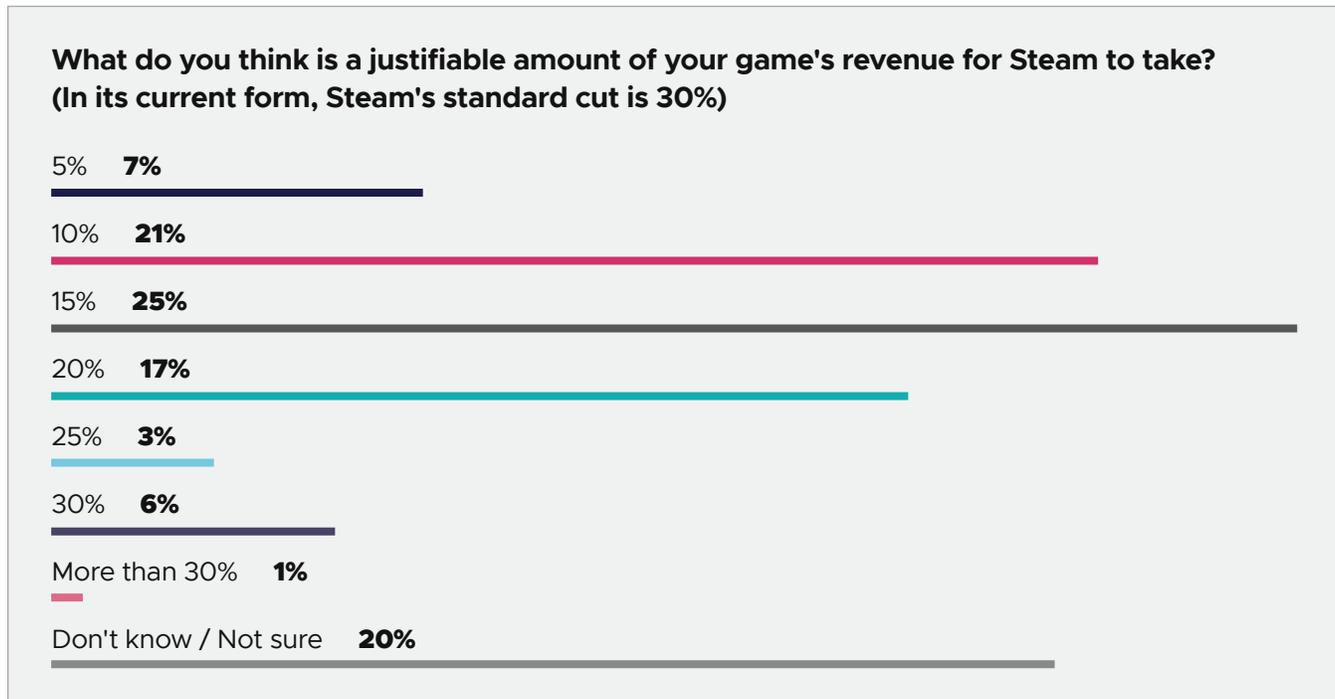
The least common sources of sales appear to be Kongregate’s Kartridge storefront, the Epic Games Store, and GOG, as each generated no revenue for the majority of respondents.



By comparison, most respondents (~60 percent) made at least some money selling games on Steam, and almost half (41 percent) generated at least some revenue selling games directly to customers. These two sales options also proved the most popular places for devs to generate 100 percent of their revenues, suggesting that Steam continues to be the dominant storefront on PC even as the platform itself offers devs unparalleled direct access to customers.

## Most devs don't think Steam justifies its 30 percent cut; many suggest 10-15 percent instead

Each of the storefronts accessible to PC game makers offers its own terms and opportunities, and many offer standard revenue-split rates better than Steam's standard 30 percent take.



With that in mind, we thought it would be interesting to ask our survey respondents what they thought a justifiable amount of revenue would be for Steam to take; 25 percent said 15 percent, making that the most popular response. 10 percent was the second most popular answer (with 21 percent of respondents), while 17 percent would be comfortable giving 20 percent of revenue to Steam.

Only 6 percent of respondents felt comfortable with Steam's cut remaining at 30 percent, while one in five admitted they weren't sure what cut made sense for Valve's storefront.

## 40% of devs think the Epic Games Store will be a long-term success

This year we asked our pool of game industry professionals to tell us whether they thought the Epic Games Store will be a long-term commercial success, since it was less than a year old at the time this survey was taken.

Nevertheless, 40 percent of respondents said yes, 35 percent said maybe, and 18 percent said they didn't know. Only 7 percent said no, suggesting that Epic's expanding storefront is already gaining traction among (and earning the confidence of) PC game makers.



## Do you think the Epic Store will be a long-term commercial success?

Yes **40%**



Maybe **35%**

No **7%**

Don't Know **18%**

“Epic has proven to be a solid platform provider in its Unreal Engine,” explained one respondent who answered affirmatively. “I can easily see the Epic Store using lessons from its engine to ensure their store is also successful. Even if it is not initially profitable, their engine income will allow them the time to ensure it meets expectations.”

“Epic needs to do much more marketing to gain awareness for the store outside of Fortnite players and game industry folks,” wrote someone who fell in the maybe camp. “If they do not increase their market share by a vast margin, games will not sell enough to be successful. I’m happy that Epic is providing a competitor in the market against Steam, and lowering the platform fee is great for everyone, but the Epic Store needs improvement and marketing.”

*“I can easily see the Epic Store using lessons from its engine to ensure their store is also successful. Even if it is not initially profitable, their engine income will allow them the time to ensure it meets expectations.”*

“Between the bad reactions from customers when it is brought up, and the number of security issues Epic has had in the past, I personally do not believe their store is going to last,” wrote one respondent who said no. “Initially I was very excited about them launching a store, but it seemed to be handled very poorly as they continue to miss big milestones and cause controversy among customers.”

## Most game makers aren’t confident Google Stadia will succeed

We also checked in to see how many of our respondents felt Google’s new Stadia game streaming service would be a long-term commercial success, and overall confidence appears to be low. 11 percent of respondents said yes; the largest share (36 percent) said maybe, while 33 percent said no and 20 percent said they didn’t know or weren’t sure.

“Depends on how well the tech works,” wrote in one respondent who said maybe. “If everything is as smooth and performant as promised, then yes, absolutely I think it would be a long-term commercial success.”

“[I’m] unsure whether latency and internet service provider data caps will ultimately doom the business. Also, paying \$60 for a non-physical copy of a game seems like a dubious proposition on an unproven platform,” wrote one respondent who said they didn’t know. “Sony and MS

have history in the games business and Google abandons initiatives that don't work.”

“Complex question but I think the infrastructure isn't there outside of major cities,” wrote another who said no. “I think the pricing model (full price titles you never own?) is bizarre. It's a hard sell to people who own consoles/PCs and we are the core who you need to adopt new tech. I've never heard anyone outside the gaming industry even mention it.”

“As a technology they will get the bugs worked out over the next 1-2 years,” opined someone who said yes. “Then other media companies will use Stadia as their backend to deliver real-time content to their own customers - no Google front-end anymore. Think Netflix with interactive content powered by Google.”

*“If everything is as smooth and performant as promised, then yes, absolutely I think it would be a long-term commercial success.”*

## One in five devs think Apple Arcade will succeed, but many are still unsure

The debut of the Apple Arcade game library subscription service was a big deal in 2019, so we didn't want to let survey-takers go without giving them an opportunity to tell us whether they felt it would succeed in the long-term. One in five (21 percent) said yes, but almost as many (19 percent) said no, while the largest share (35 percent) said maybe and a quarter (26 percent) said they just weren't sure.

### Do you think the Apple Arcade subscription service will be a long-term commercial success?

Yes **21%**

Maybe **35%**

No **19%**

Don't Know **26%**

“Apple Arcade is a less confusing business model than hybrids like Stadia,” explained one respondent who answered yes. “I also think Apple is doing a much better job of marketing the service and making good on their commitment to providing high-quality games that don't make use of predatory business practices or gate content behind manipulative in-app purchases.

“They seem to be delivering quality games as exclusives, but the fact that doing so has been a surprise to some means this probably won't be more than an experiment,” wrote in a respondent who said no. “It's hard as a developer to see how my game would break out from the competition; we're just another sock in their sock drawer. It's nice to take their money, but I'll never commit more than a side team to develop for the platform. That spells doom.”



“It probably depends on if they continue to fund development of games for their service specifically. Without as many exclusives, it's hard to tell what would happen,” stated a respondent who fell in the maybe camp. “I like that there's a place for ‘premium-style’ mobile games, but I'm worried it'll become less profitable for developers over time. If that happens, they might have to move somewhere else – or maybe Apple will have such a stranglehold on the mobile market that studios will be forced to close down. Tough to know.”

*“I like that there's a place for ‘premium-style’ mobile games, but I'm worried it'll become less profitable for developers over time. If that happens, they might have to move somewhere else — or maybe Apple will have such a stranglehold on the mobile market that studios will be forced to close down.”*

With a sample size of nearly 4,000 game industry professionals, this 2020 State of the Industry Survey is the eighth 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 Informa Tech, GDC 2020 will take place this year March 16th through the 20th at the Moscone Convention Center in San Francisco, California.



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