Developer Satisfaction Survey 2015

Industry Trends and Future Outlook Report

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Introduction

As the largest professional association for game developers worldwide, the International Game Developers Association has been in a unique position to know and understand individual game developers on a level that most companies and organizations cannot. While we've always had a very good pulse on how developers anecdotally feel about their work and their industry, we haven't always been consistent in capturing and conveying that insight.

To that end, we launched this annual research survey called the Developer Satisfaction Survey (DSS) in 2014. The Developer Satisfaction Survey, open to anyone involved in the video game industry in a professional or academic capacity, is the evolution of our previous survey efforts.

The 2014 DSS was a great success for an inaugural effort, yielding over 2,000 responses worldwide. Besides my own presentations of the results at numerous events worldwide, the data from the DSS was quoted in many media sources, including the New York Times and Washington Post, and referenced by many in the academic community. The efforts also resulted in two follow-up reports on Industry Trends and Employment, both of which dove deeper into the data and revealed more insights about the current state of our industry. The results also provided an impetus for new initiatives, such as the IGDA's declared goal to double the number of women working in the industry by 2025.

For the 2015 DSS, we aimed to expand our reach and succeeded with nearly 3,000 respondents. Part of this success was due to the availability of localized versions of the DSS in the following languages beyond English: Chinese, French, German, Italian, Japanese and Spanish. The IGDA thanks Keywords International as well as volunteers from IGDA Japan for their valuable contribution of the localized language versions.

We're thankful for the strongly positive reception for this research and moving forward, the DSS will serve as the IGDA's core method by which we inform ourselves and the industry about the critical questions around developers' satisfaction. For the sake of the long-term health of our industry, we will continue to strive to discern the demographic composition of game developers worldwide and tap into their knowledge, experiences and opinions on their well-being and on the state of the industry.

Thank you,

Kate Edwards, Executive Director
International Game Developers Association (IGDA)

Executive Summary: Comparing 2014 to 2015

Few Differences in the Sample Composition
More people took the survey in 2015 than 2014 which is an excellent trend for increasing the generalizability of the results. Otherwise, the general composition of the survey respondents is roughly the same. This is important in determining the comparability of the data over the two years.

Table A: Sample Composition for 2014 & 2015

	DSS 2014	DSS 2015
Sample size	2198	2928
Language of survey	100% English	93% English
Respondent roles	40%	39%
Developers	40%	54%
Managers	40%	39%
Students	11%	20%
Administrative roles	18%	7%
Respondent demographics		
Gender	76% male	75% male
Ethnicity	79% white	76% white
Age	Largest category: 30-35 (27%)	Largest category: 25-29 (26%)
Source: IGDA DSS 2014 & 2015		

Quality of Life and Job Satisfaction Slightly Higher in 2015

- In 2014, 63% felt their quality of life was “somewhat positive” or “very positive”; this increased to 68% in 2015
- In 2014 20% felt their quality of life was “somewhat negative” or “very negative”; this decreased to 15% in 2015

- In 2014, 60% rated job satisfaction as “somewhat” or “very positive”; this increased to 67% in 2015
- In 2014, 21% held a “somewhat” or “very negative” viewpoint; this decreased to 18% in 2015

Little Change in Current State and Future Outlook

Between 2014 and 2015, the data shows negligible change in respondent views on the current state of the industry and in their one year forecast for the industry. In both cases, respondents are slightly more positive than negative in both years, but uncertainty remains.

Uncertainty about Job Opportunities Remains

Respondents are more negative about job opportunities in both years than they are about quality of life and job satisfaction. Two-thirds of respondents were neutral or negative toward job opportunities in both 2014 and 2015.

Negative Social Perception of the Industry: Impact of Gamergate?

Survey respondents were much more negative in 2015 in their sense of how the game industry is perceived by society. It is very likely that some of this shift is due to the Gamergate incidents and discussions throughout 2014-2015. Though no questions were asked directly about Gamergate, a number of survey respondents made comments in open-ended sections of the survey that indicated it was on their mind.

Table B: Views on the Social Perception of the Game Industry

	2014	2015
Positive view on social perception	42%	24%
Negative view on social perception	32%	52%
Source: IGDA DSS 2014 & 2015		

Company Growth Rate

The majority of respondents (over half) were more likely to report that their company or their school had experienced growth in the last three years for both the 2014 and 2015 surveys, but downsizing was reported in both years as well. Where 17% reported downsizing in 2014, 14% reported downsizing in 2015. Survey respondents reported an overwhelmingly positive view on the stability and growth of their company over the next three years. In both 2014 and 2015 about 90% reported that they expected either "no change," "moderate growth" or "considerable growth."

Factors Important to Industry Growth

When asked to rate the importance of a variety of interventions in terms of their importance to the growth of the industry, between 2014 and 2015, there is no disagreement in terms of what the top three interventions are (though there is some discrepancy in terms of order). In 2014 across the whole sample, the top response was "advancement of game design" (74%), followed by "more diversity in game content" (65%) and "advancement of storytelling" (60%). For 2015, the top response was again “advancement of game design” (71%), followed by “advancement of storytelling” (54%) and “better diversity in game content” (53%).

In both survey years, managers rated financial factors such as “better monetization” and “more funding” as important factors more often than developers. Developers focused on game design, storytelling and content diversity. There seem to be slight differences in opinion between those who work at AAA studios versus independent studios where “better discovery of games” was selected more often by indies.

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. The data are not directly comparable because the list of platforms offered to survey respondents changed slightly from 2014 to 2015. However, in both years it can be concluded that PC, consoles, Android and iOS platforms are dominant in all domains. Microconsolses was added as an option in 2015 and also ranks highly in terms of current and future development, but is lowly ranked in terms of importance to the future growth of the industry.

Evolution in Game Mechanics & Technology

Though the questions in each year were phrased differently, overall the data from 2014 and 2015 indicate that respondents are happy with the evolution/innovation that they are seeing in game mechanics and in the advancement of game technology and tools.

Table C: Views on Evolution/Innovation in Game Mechanics and Technology

	2014			2015		
	Positive	**Neutral**	**Negative**	**Some or significant innovation**	**Don't know**	**No innovation or don't like it**
Game mechanics	59%	24%	17%	82%	2%	16%
Game technology/tools	85%	11%	4%	92%	2%	6%
Source: IGDA DSS 2014 & 2015						

Importance of Localized/Regional Versions of Games

Between 2014 and 2015, there an overwhelming agreement that having localized versions of the games that are linguistically and culturally sensitive to specific audiences. However, this sentiment is less strong in the 2015 data. In 2014 10% felt that localization was not important while in 2015 17% felt localization was not important. This could reflect a trend or simply a difference in the respondents in the sample.

Is Crunch Necessary?

The question of crunch was presented slightly differently in 2014 to 2015, but the data are still broadly comparable. In 2014 24% of respondents agreed or strongly agreed that crunch was a necessary part of game development. In 2015 58% answered 'yes' when asked if crunch time is a necessary part of game development. Similarly in 2014, 52% responded in the negative while 30% said 'no' in 2015. The proportion of the sample that was neutral or unsure was also greater in 2014 (24%) than 2015 (11%). If this represents a trend and not just differences in the sample population, it is a trend that is moving in the wrong direction. Of note, people who work in QA are the most likely to report that crunch is a necessary part of their jobs and their upward trend is most pronounced (29% in 2014 and a whopping 75% in 2015).

NEW FOR 2015

Distributions Platforms

The 2015 survey asked a new question about which distribution platforms were used by the companies of survey respondents. In 2014, Steam was listed as an option under development platforms and ranked the highest in terms of its importance for industry growth, but less highly ranked for current use. In 2015, the top response for distribution platform was Apple iOS (54%), followed by Google Play (50%), Steam (47%) and personal or studio websites (42%). Retail chains came in fifth at 32%.

Game Genres

Another new question in 2015 asked about the genres of games made. The most common response by some margin was action games (51%), followed by casual games (38%), role playing games (35%) and strategy games (33%). Analysed by employment type we see that self-employed developers and freelancers report making more casual games. In general, this likely reflects the smaller size and budget of the studios where they work as well as reduced access to consoles as a development platform and the increased focus on online distribution mechanisms.

Overview and Background

The IGDA's Developer Satisfaction Survey for 2015 was opened for responses in March and April, 2015. A preliminary summary report on this raw data was released on September 2, 2015. The survey produced a final valid sample of 2,928 responses.

What follows is a detailed report on a sub-set of the survey about industry trends and the future outlook of the industry. As such, this report presents survey data on topics like the relative importance of game platforms, on perceptions of industry growth and on the image of the game industry to society. It can be read in comparison to the IGDA Industry Trends report released on January 20, 2015 for the 2014 data, although the survey questions were not completely identical in all cases.

When reading this report it is important to keep in mind that 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 (see Table 1). That said, the majority of respondents are directly involved in game development (77%). Most (51%) reported that their primary work was to make games in a core creation or development role (including QA). A further 9% reported that a portion of their primary work is to make games, 6% said they made games for commercialization in their off-time, 3% were academics who make games as a core part of their job and 8% supported the development of games in administrative, support or ancillary roles. Of this dominant game development group 39% held managerial, project manager or team lead roles; 54% held core development roles (programming, art, audio, design, QA, etc.) and the remaining 7% held administrative or ancillary support roles (HR, marketing, community management, technical support, etc.).

Across the whole sample, 20% of respondents were full- or part-time students and 5% were unemployed at the time of the survey. Among those who were employed, 85% 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 (see Table 2).

Table 1: 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)	51%
A portion of my primary work is games-related or to make games	9%
Work is to support the development of games in administrative, support or ancillary roles not involve game creation	8%
I make games as a hobbyist with no intention to make money from games	6%
Work is not to make games, but I work on games for pay or with the intent of commercialization in my off-time	6%
I am currently unemployed in the game industry	5%
I am looking for my first job in the game industry	4%
Academic or educator who studies/teaches about games/the game industry and also makes games as a core part of my job	3%
I am an external investor to the industry	3%
I am an academic or educator who studies/teaches about games/the game industry	2%
I am a game journalist or critic	2%
I am a fine artist working in the games medium and display my games as art pieces	1%
I am involved in the production of game related events, but I do not make games	1%
Source: IGDA DSS 2015	

Table 2: How you would label your employment status

Employment Status	% of respondents
Permanent employee (part-time or full-time)	65%
Temporary employee (part-time or full-time)	4%
Independent contractor or freelancer (i.e., paid through contracts with 1 or more clients/companies)	12%
Self-employed (i.e. owns a company/studio/business and paid by self)	19%
Source: IGDA DSS 2015	

With respect to gender, 75% of respondents identified as male, 22% as female, 2% as transgender, and 1% as "other." Regarding ethnicity, over three quarters of respondents identified as Caucasian (76%). The next highest group was East/South-East Asian (9%) followed by Hispanic or Latino (7%). While the age range of respondents was quite large (16-81 years), the majority of respondents were fairly young; 26% of respondents were between 25-29 years of age. The second largest group of respondents was the 30-34 year olds (25%), and the third largest was the 35-39 year olds (16%).

New to the 2015 survey was the option to choose the preferred survey response language from seven options. While English was the dominant response language, there were responses gathered from each language offered: English (93%), Spanish (2%), German (1.8%), Japanese (1.6%), French (1.5%), Italian (0.4%) and Chinese (0.1%).

Throughout the report, 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 3 below.

Table 3: Sub-sample Descriptions

Sample	Inclusion Criteria
Whole	• all survey respondents • 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
Manager	• all survey respondents who identified as holding a management role: founder, owner, senior manager, middle manager, producer/project manager, team lead • this includes only people working to make games for pay, in whole or in part, and in core development or support roles
Developer	• all survey respondents who identified as holding a non-managerial role in core development areas: programming, art, audio, design, writing, localization, UX • this sample does not include QA and testing • this includes only people working to make games for pay, in whole or in part, and in core development or support roles
Employee	• all survey respondents who identified as being permanent or temporary employees of a game company • this includes only people working to make games for pay, in whole or in part, and in core development or support roles
Freelance	• all survey respondents who identified as being independent contractors or freelancers (i.e., paid through contracts with 1 or more clients/companies) • this includes only people working to make games for pay, in whole or in part, and in core development or support roles
Self-employed	• all survey respondents who identified as being self-employed (i.e., owns a company/studio/business and is paid by self) • this includes only people working to make games for pay, in whole or in part, and in core development or support roles
Male	• all survey respondents who identified as male • 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 their first job in the industry
Female & Transgender	• all survey respondents who identified as female or transgender or selected 'other' for their gender • 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 their first job in the industry

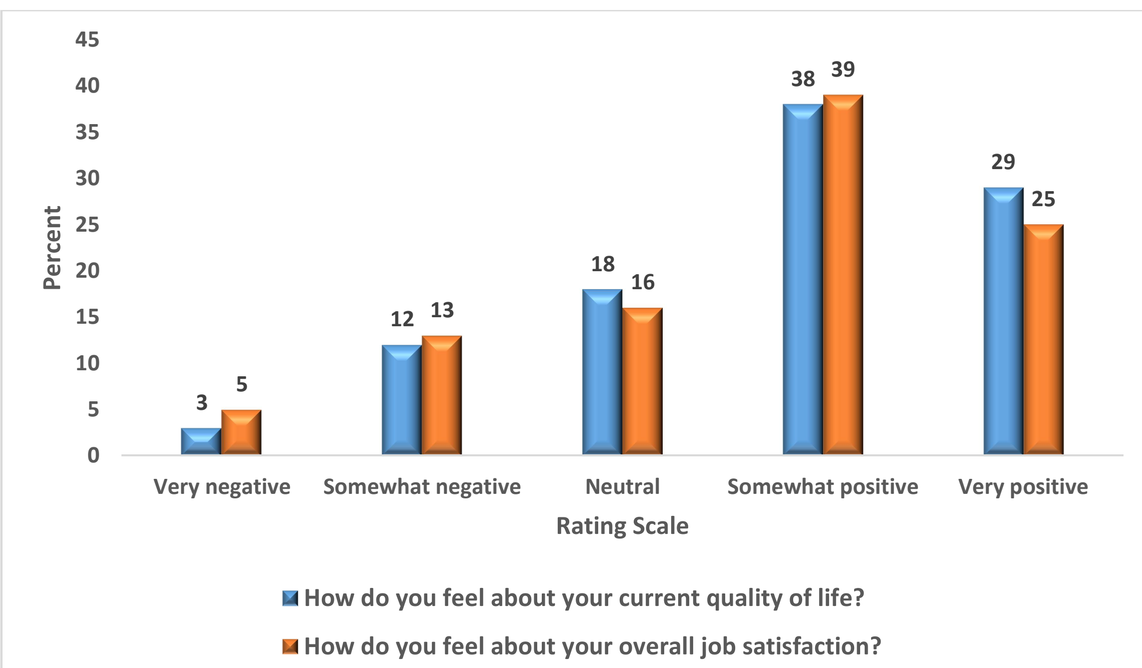
Source: IGDA DSS 2015

Quality of Life

The 2015 DSS contained a general question about both quality of life and job satisfaction (Figure 1). Respondents seem to be a relatively happy bunch. The majority (68%) reported that their quality of life was "somewhat positive" or "very positive." That said, nearly 15% of this sample expressed "somewhat" or "very negative" quality of life. The data for overall job satisfaction show a similar pattern. A majority (67%) reported their satisfaction as being "somewhat positive" or "very positive" while 18% considered it to be "somewhat negative" or "very negative." These variables are strongly 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.

Job satisfaction was also found to be positively correlated with age, being self-employed, having a consultant or managerial role and working at an independent studio. Job satisfaction was negatively correlated with being an independent contractor/freelance, being a programmer or a game designer and working for a publisher either fully, under partial ownership or as a subsidiary. No significant correlations were found for binary variables representing gender or ethnicity.

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

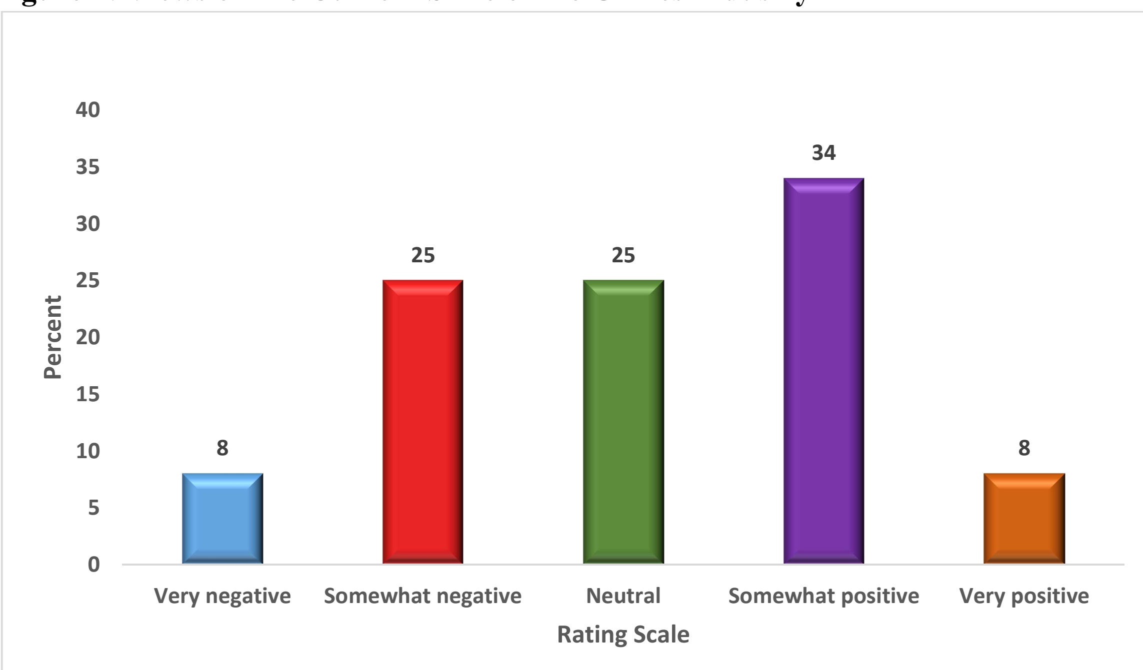


Current State of the Games Industry

The data show mixed opinions from respondents who were asked to rate their views on the current state of the games industry (Figure 2). While more respondents indicated a "somewhat positive" or "very positive" view than those with a negative view, when the neutral category is considered, more than half the sample expresses a less than positive viewpoint about the industry.

Following additional analysis, positive assessment of the current state of the games industry was found to be positively correlated with company size, age and job satisfaction. Assessment of the current state of the games industry was negatively correlated with working as an independent contractor/freelance and being a woman or transgender. No significant correlations were found for other variables such as the type of game studio (i.e., 1st party, 2nd party, 3rd party, independent) or for job discipline/role.

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

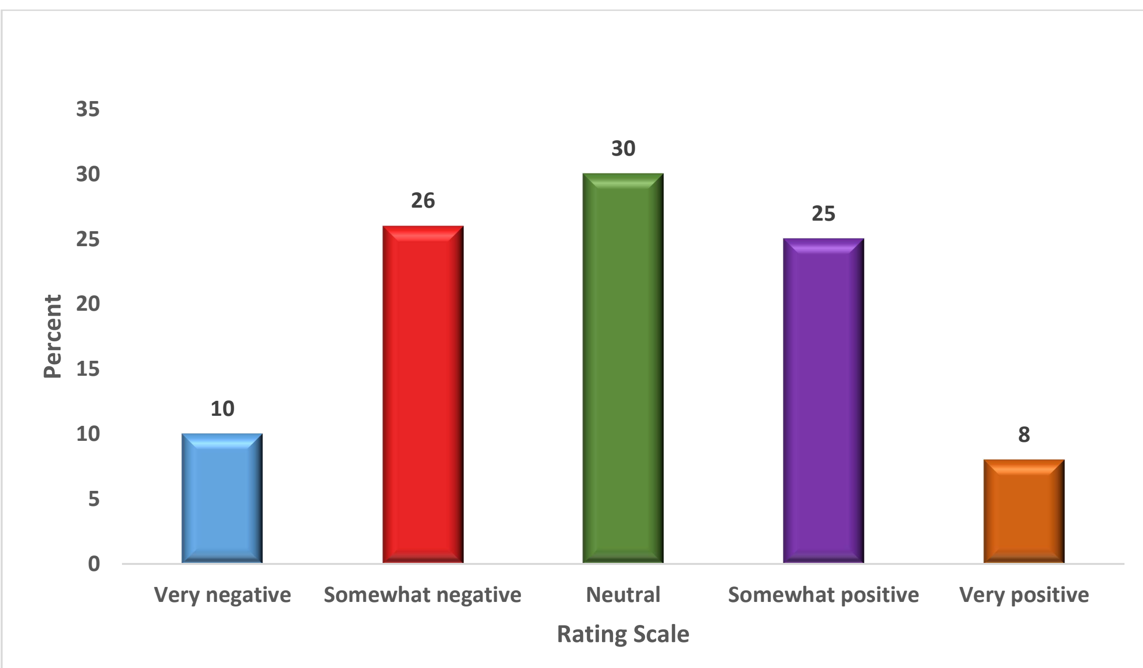


Job Opportunities in the Games Industry

When respondents were asked to rate their perspective on job opportunities in the game industry there was a more negative outlook than for general quality of life and job satisfaction. As Figure 3 shows, 36% rated job opportunities as either "somewhat negative" or "very negative" and 30% selected the "neutral" option. The remaining third answered either "very positive" or "somewhat positive."

Additional analysis revealed that respondents who reported positive job satisfaction also tended to report a favorable outlook on job opportunities. Current outlook on the game industry is also positively correlated with views on job opportunities. This makes some sense as those who are happy in their jobs likely generalize that others are having the same experience or at least have access to such an experience. As well, a rosy perception about the state of the industry would likely include the sense that there are opportunities for growth through employment. However, some have a much less optimistic view. Not surprisingly, those who were currently unemployed were more likely to report a negative sense of job opportunities. Programmers were more likely to report a positive outlook on job opportunities than those in other roles. Those in visual art, game design and writer roles were more likely to report a negative sense of job opportunities than those not in these roles. We also observed small positive correlations between job opportunities in the industry and working at a second party studio (i.e., for publishers) and working in middleware.

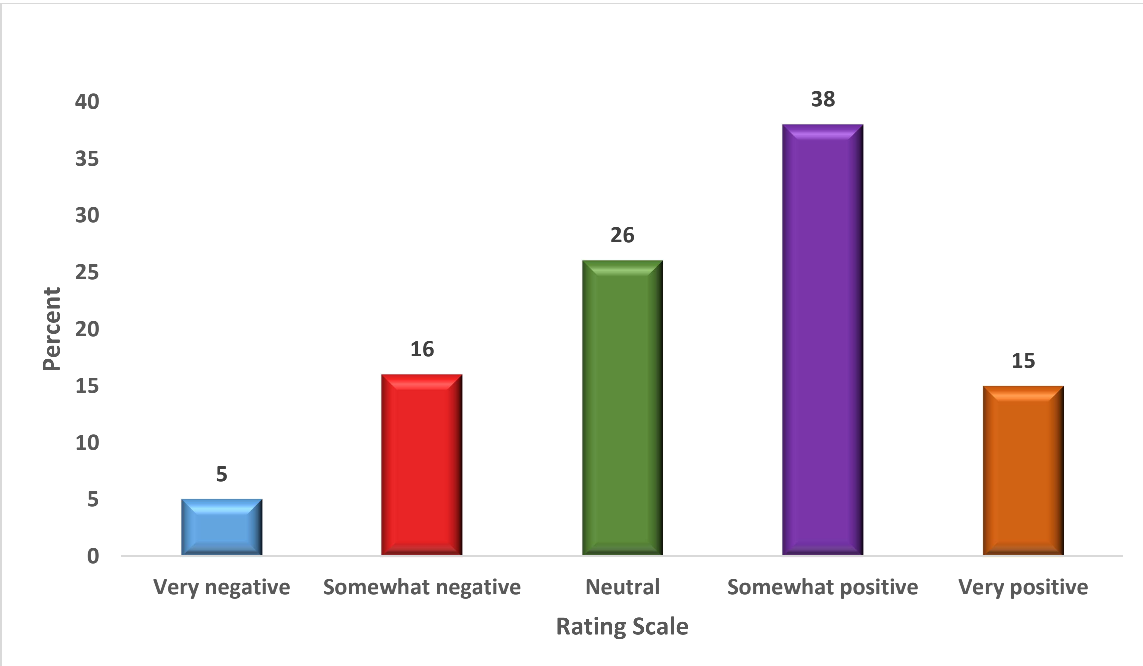
Figure 3: Views on Job Opportunities in the Games Industry



The Outlook for the Industry – Looking 1 Year Ahead

When asked to rate their views on the outlook for the industry in one year, over half of the respondents (52%) reported a positive outlook (Figure 4). Only 21% held a negative outlook. This difference is made more stark by examining the responses to the extreme poles. While 15% rated the future outlook as "very positive," only 5% considered the future outlook to be "very negative."

Figure 4: The Outlook for the Industry in 1 Year

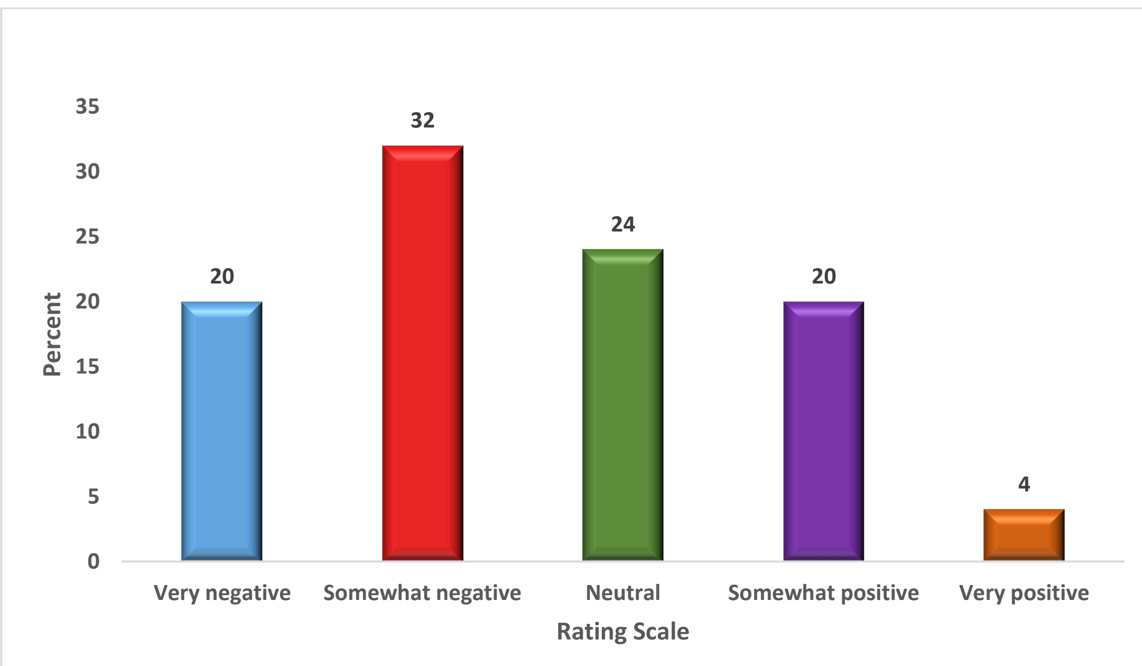


The Social Perception of the Games Industry

Respondents were also asked about their views on the social perception of the game industry (Figure 5). Over half of respondents felt there is a negative societal perception of the games industry (52%), while 24% felt there is a positive perception. There is a noticeable negative shift when comparing this data to that of 2014. In 2014, only 32% felt that there was a negative perception of the industry (26% felt the perception was “somewhat negative” and 6% felt it was “very negative”). Correspondingly, in 2014 nearly twice as many respondents felt there was a positive perception of the industry (42%) as compared to the 24% from the 2015 survey.

Throughout 2014 and 2015 up to the time when the survey was live, the events and discussions associated with Gamergate were receiving considerable attention within the game community and also in broader media and online outlets. It is likely that many respondents responded to the question of societal perception of the game industry with the events and impact of Gamergate in mind.

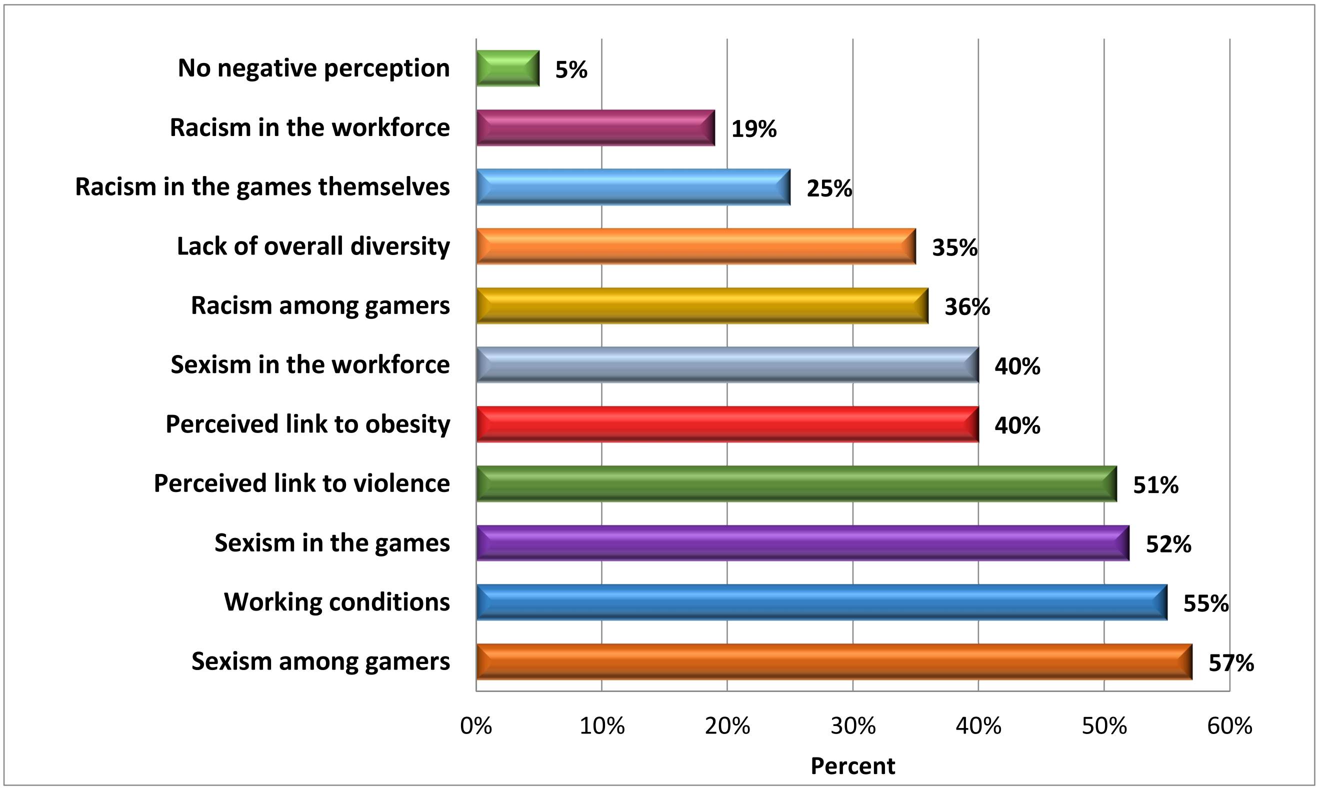
Figure 5: Views on the Social Perception of the Games Industry



Survey respondents were asked a subsequent question to better target the factors that might be associated with a negative perception of the industry (Figure 6). Note that the 2015 survey included more options than the 2014 survey; sexism among gamers, racism among gamers, racism in games and racism in the workforce were new options in 2015. This does not impact the comparability of the two years on items that were present both times as respondents were able to check as many boxes as they wished. 'Working conditions' (55%) and 'sexism in games' (52%) retain their top spots, but they are both superseded by 'sexism among gamers' (57%).

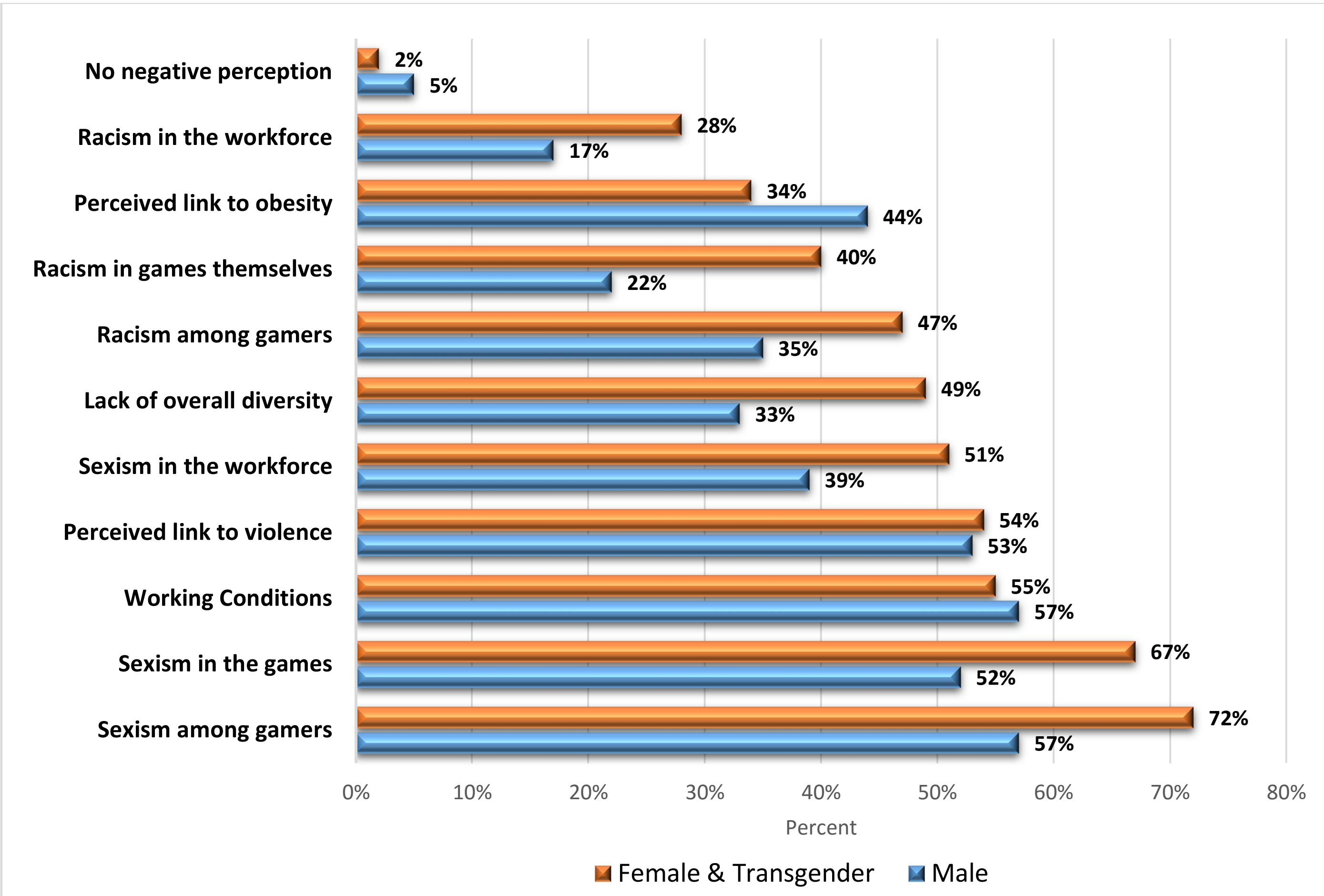
The influence of Gamergate might be an explanatory factor here; however, it is hard to know without a 2014 comparison. What is also interesting and perhaps disheartening to note is that only 5% of respondents believe that there is no negative perception of the game industry. This is a hard message coming from industry insiders and community members.

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



Analysing this set of questions by gender revealed variation in the frequency pattern (Figure 7). Respondents who self-identified as female, transgender, or other were grouped together to collectively represent the minority gender in the industry and then compared to the responses from males. There were differences in response frequency for these two groups for most questions except racism in games themselves (a 1% difference), working conditions (a 2% difference) and in not thinking there is a negative perception (3% difference). Most notably, female, transgender and other gender respondents were much more likely than males to report that racism in the games themselves, sexism in the games and sexism among gamers were contributing to a negative perception of the industry.

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

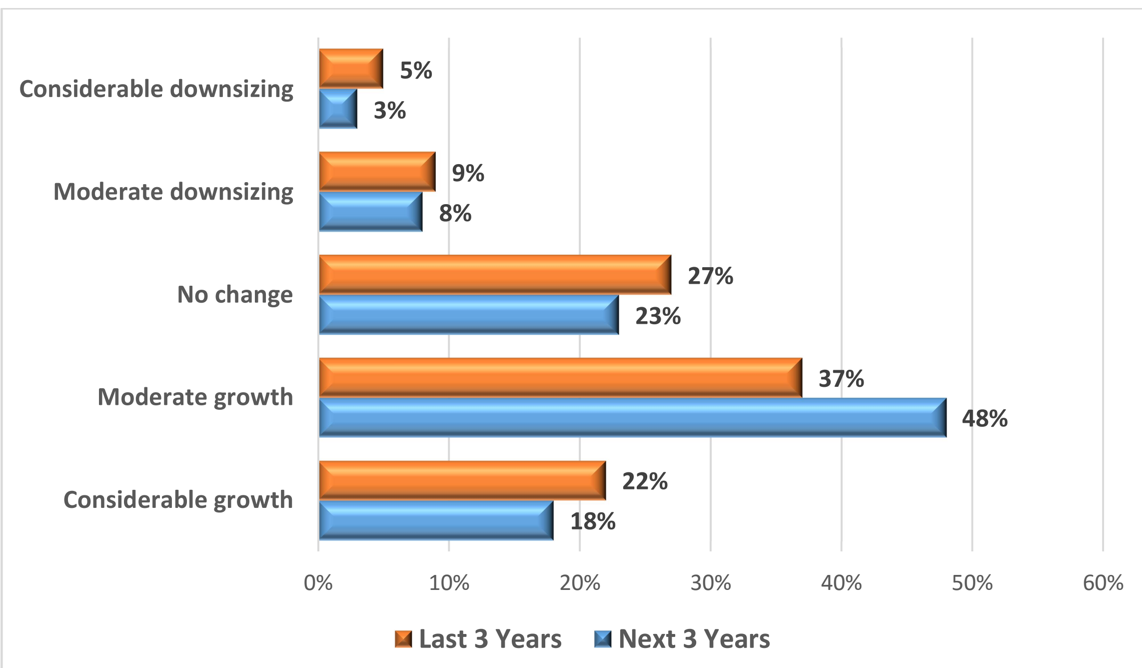


Company Growth Rate

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. The data tend to be positive overall. Over half reported moderate to considerable growth at their company (59%) while 14% said their company experienced moderate to considerable downsizing. Unlike the 2014 data which indicated slightly more growth for indies than other company types, there were no substantive findings to that effect in the 2015.

When asked to think about the next three years, respondents were optimistic. Only 11% projected downsizing while a comparable number anticipated no change. Where almost 60% reported moderate to considerable growth over the *last* three years, 66% 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 (89%) had a positive outlook with respect to growth. The data for both of these questions are displayed in Figure 8.

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



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 (Table 6). PC was the platform chosen by an overwhelming majority of respondents (75%). The second and third most chosen platforms were consoles and android, respectively. This list contrasts in many instances to the list of the platforms that companies currently develop for or support. Table 6 shows the difference. Consoles were highly ranked as very important to the industry, yet this is not reflected in the number of companies developing for consoles. 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. Other notable differences are microconsoles where 39% of respondents are currently developing them, but only 6% rank them as very important to industry growth. Similar oversubscription can be seen for Android and iOS systems which could indicate that the hype of mobile devices has reached its maximum.

Table 6: Ranking of Platforms Deemed "Very Important" for Future Growth vs. Those Currently Supported

Platform	Ranked as Very Important	Currently Supported	Difference: Importance minus Current Use
PC	75%	78%	+3%
Consoles	57%	39%	-18%
Android	47%	58%	+11%
iOS	46%	60%	+14%
Proprietary Platforms	33%	8%	-25%
Mac	26%	40%	+14%
Web-based Application	25%	31%	+6%
Linux	25%	21%	-4%
Analog games	24%	5%	-19%
Dedicated handhelds	20%	9%	-11%
Wearables	19%	3%	-16%
Social network games	16%	11%	-5%
Pervasive/big games/ARGs	15%	2%	-13%
Mobile – Other	14%	11%	-3%
Windows mobile	10%	18%	+8%
Interactive TV	8%	3%	-5%
Microconsoles	6%	39%	+33%
Custom platform/Installation	6%	3%	-3%
Source: IGDA DSS 2015			

In addition to the rankings presented in Table 6, respondents were asked their opinion of the platforms that their employer would develop or support in the next 12 months. Table 7 shows the statistics for future development again contrasted against current development with the difference between the two. This data show that the projections for the coming year were quite mixed and often quite different from the platforms currently supported. However, where there are declines in support, these are much more drastic than any noted increases. The platforms that had the largest decline in support over the next 12 months were PC and iOS (both a 13% drop), which is curious considering these were the top platforms when asked what was currently supported. The one platform that had the most increase in support, albeit small, was in "mobile – other" (an increase of 6%). The platforms that show the next highest increase are tied at 3%: consoles, microconsoles, and wearables.

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, their relative weighting differed and the degree of anticipated change vis a vis current and future development differed.

Self-employed respondents reported a greater commitment to all three top platforms when compared to the whole survey sample; 85% were currently developing for PC, 64% for iOS and 63% for Android. However, in the next 12 months this group reported sharp declines in these traditional platforms in favour of newer platforms. Projected development for PC dropped to 33% (52% decline overall), iOS dropped to 3% (61% decline) and Android dropped to 58% (5% decline). On the incline was Windows Mobile; 58% of self-employed respondents anticipated developing for this platform in the next 12 months (a 37% increase from current development levels). Similarly, the self-employed suggested that they will move toward Microconsoles with a projected increase of 30% (from 9 to 39%). Linux also showed an increase; 35% of self-employed respondents reported that they currently develop for Linux and 52% reported that they will develop for Linux in the next 12 months (17% increase).

The responses for independent contractors/freelancers follow the pattern of the whole sample responses more closely and show less overall fluctuation than the self-employed group. It is likely that the work of freelancers/contractors is more similar to salaried employees whose responses dominate the whole sample data. For contractors/freelancers the top current platforms were PC (76%), iOS (61%) and Android (55%). Android showed a 5% projected increase in support over the next 12 months while Web-based Applications showed a 7% projected decline in support (from 42% to 35%).

Perhaps the most surprising result from this question is the large increase in the "don't know" option, jumping by 9% for projections over the next 12 months. There are a variety of explanations for this. It may be that the majority of survey respondents are not privy to such information about company direction or strategy. It may be that the proliferation of platforms and their rapid iteration – from the rise of mobile gaming to the increased accessibility of developing for dominant consoles - presents a world of possibility for developers. It could also be that many studios live hand to mouth and cannot anticipate future projects.

Table 7: Difference between Platforms Currently Supported and those to be Supported in the Next 12 Months

Platforms	Currently Supports	Will Support in Next 12 Months	Difference
PC	78%	65%	-13%
iOS	60%	47%	-13%
Android	58%	57%	-1%
Mac	40%	47%	-7%
Consoles	39%	42%	+3%
Web-based Application	31%	23%	-8%
Linux	21%	27%	-6%
Windows Mobile	18%	27%	-9%
Mobile – Other	11%	17%	+6%
Social Network Game	11%	9%	-2%
Dedicated Handhelds	9%	9%	-
Proprietary Platforms	8%	9%	1%
Analog Games	5%	5%	-
Microconsoles	39%	42%	+3%
Interactive TV	3%	5%	+2%
Custom Platforms/Installation	3%	4%	+1%
Wearables	3%	6%	+3%
Pervasive games/ARGs/Big Games	2%	2%	-
Don't know	1%	10%	+9%
Other	0.2%	0.2%	-
Source: IGDA DSS 2015			

Important Distribution Platforms

When asked "What distribution methods are used by your company/client?" the top response was Apple iOS (54%), followed by Google Play (50%) and Steam (47%) (Table 8). Given the preponderance of employees in the whole sample data, it is again illustrative to analyse the 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 Google Play coming out ahead of Apple iOS. But the self-employed were much less likely to report using Retail Chains (3% versus 32% for the whole sample), Playstation (13% versus 26%), Xbox Live Arcade (14% versus 24%), and Retail Independent (8% versus 18%). On the other hand, self-employed developers were more likely to report using Desura (17%), Fan Conventions and Kongregate (at 12% and 10% respectively versus 6%). The contractor/freelance group had noticeably more respondents select Steam at 58%, while Retail Chains were also used less frequently at 20%.

Table 8: Important Distribution Platforms across All Respondents

Distribution Platform	% of Respondents
Apple iOS	54%
Google Play	50%
Steam	47%
Studio or Personal Website	42%
Retail Chains	32%
Amazon	27%
Playstation Network	26%
Xbox Live Arcade	24%
Retail Independent	18%
Windows Mobile	15%
Fan Conventions	6%
Kongregate	6%
Desura	5%
Ouya	2%
Source: IGDA DSS 2015	

Factors Important to Industry Growth

Respondents were asked to rate a number of interventions in terms of their importance to the growth of the industry. Table 9 presents them in rank order according to the number of respondents who said they were "very important" and with data isolated into three sub-samples: whole sample, managers and developers. The largest differences between managers and developers occurred regarding the financial factors. Overall, managers rated more funding and better monetization more highly than developers while developers placed slightly more emphasis on game design, storytelling and content diversity.

Table 9: How Important are the Following to the Future Growth of the Industry?

Future Growth of Industry	Very Important		
	Whole Sample	Managers	Developers
Advancement of Game Design	71%	65%	68%
Advancement of Storytelling	54%	46%	52%
Better Diversity in Game Content	53%	54%	65%
Better Discovery of Games	42%	48%	44%
More Funding in Game Development	30%	36%	28%
Better Monetization of Games	14%	20%	13%
Source: IGDA DSS 2015			

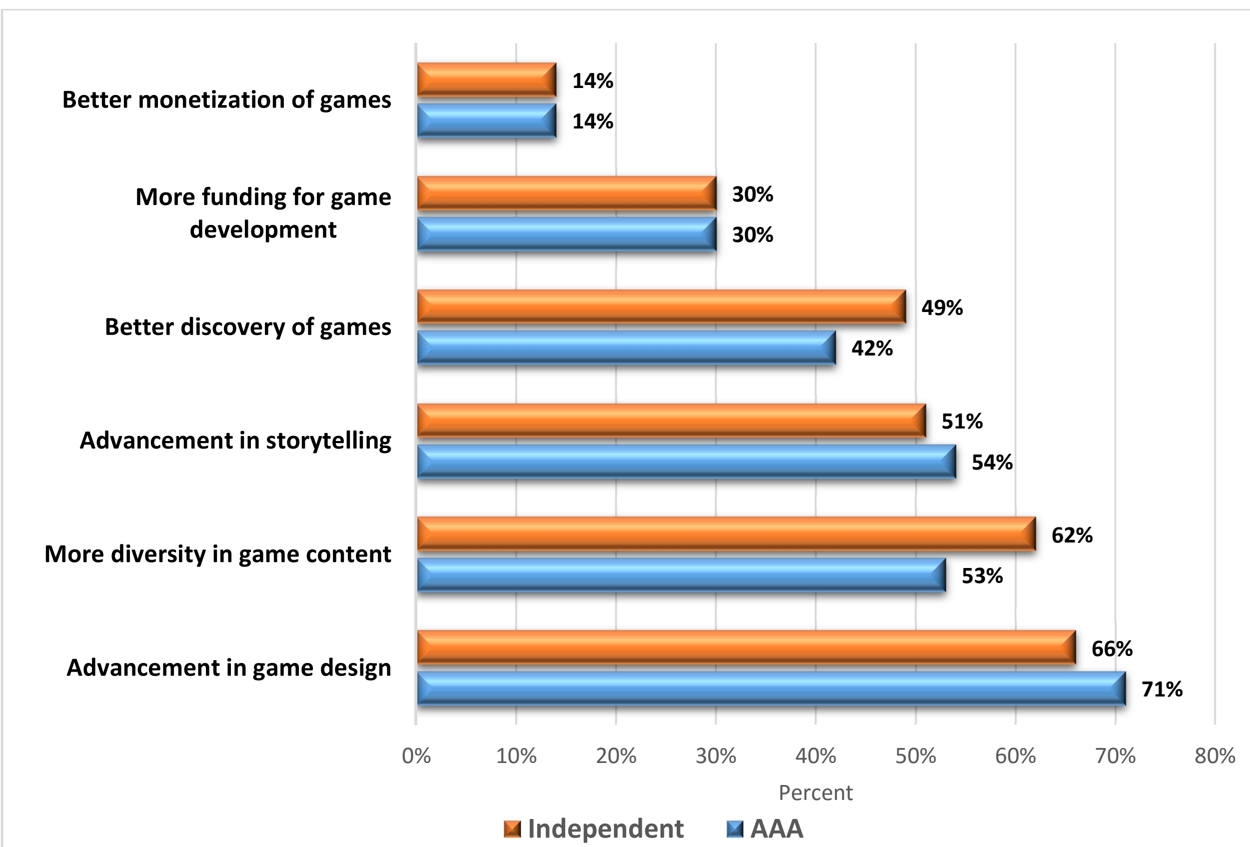
The responses changed slightly when examined separately for salaried employees, self-employed respondents and contractors/freelancers (Table 10). Self-employed respondents placed more importance on better game discovery and more funding in game development than did employees. This makes sense as these are bread and butter issues for someone who runs their own company in a crowded market. Freelancers placed a strong emphasis on advancement in storytelling relative to the other two groups while employees of studios focused on advancements in game design.

These questions were also analyzed with respect to company type, 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 similar for the self-employed and employee distinctions above. "Better discovery of games" and "more diversity in game content" seemed to be more important to indies than AAA companies while "advancement in game design" was reported more often for AAAs. 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.

Table 10: Features Important to Future Industry Growth by Employment Type

Future Growth of Industry	Very Important		
	Self-Employed	Freelance	Employee
Advancement of Game Design	65%	50%	70%
Advancement of Storytelling	45%	66%	51%
Better Diversity in Game Content	52%	61%	63%
Better Discovery of Games	52%	45%	42%
More Funding in Game Development	38%	36%	28%
Better Monetization of Games	13%	13%	17%
Source: IGDA DSS 2015			

Figure 12: Interventions Important to the Future Growth of the Industry by Broad Studio Type



Game Genres

Respondents who make games directly were asked which genre best fit their company. As Table 4 indicates, the most common response by some margin was action games (51%), followed by casual games (38%), role playing games (35%) and strategy games (33%).

Table 4: Game Genres Being Developed by All Respondents

Genre	% of respondents
Action Game	51%
Action Adventure Game	28%
Adventure Game	21%
Role Playing Game	35%
Sports Game	11%
Strategy Game	33%
Simulation Game	19%
Serious Game	15%
Casual Game	38%
Art Game	4%
Party Game	10%
Exercise Game	8%
Other	4%
Source: IGDA DSS 2015	

When broken down by the employment type of those currently working, action games remained at the top of the list for those working as employees (52%), the self-employed (51%) and among independent contractors/freelancers (49%). From there we see some diversion. Among employees, role playing games and casual games were tied for the second most common genre (36% each), but among the self-employed group, the second most common genre was casual games (44%) followed by strategy games (36%). Lastly, independent contractors/freelancers reported developing casual games (47%) and role playing games (38%) as the second and third most common genres.

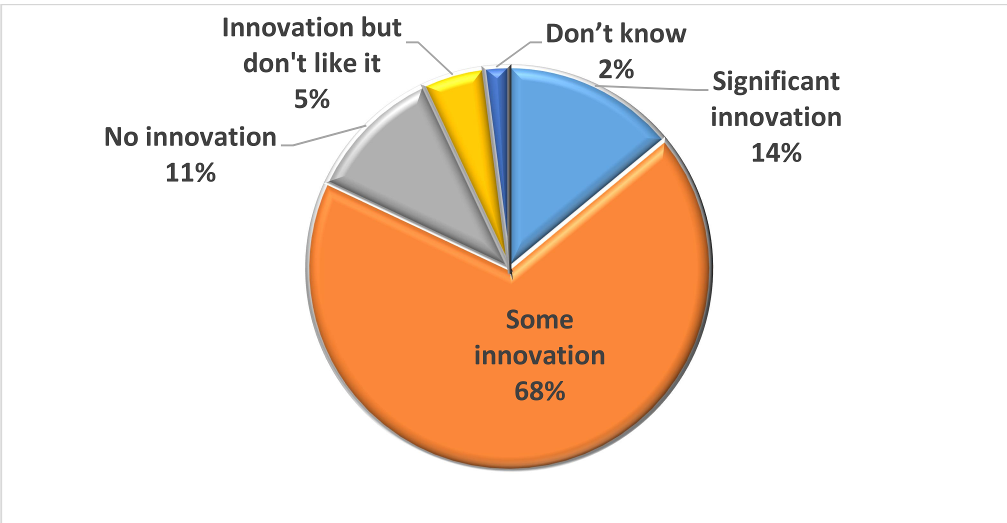
Table 5: Game Genres Being Developed by Employment Type

	% Respondents by Employment Type		
	Employee	Self-Employed	Freelance/Contract
Action Game	52	51	49
Action Adventure Game	27	29	32
Adventure Game	18	30	28
Role Playing Game	36	32	38
Sports Game	13	6	8
Strategy Game	32	36	35
Simulation Game	17	24	23
Serious Game	12	24	23
Casual Game	36	44	47
Art Game	6	19	19
Party Game	8	7	6
Exercise Game	5	1	2
Other	4	7	1
Source: IGDA DSS 2015			

Innovation in Game Mechanics & Technology

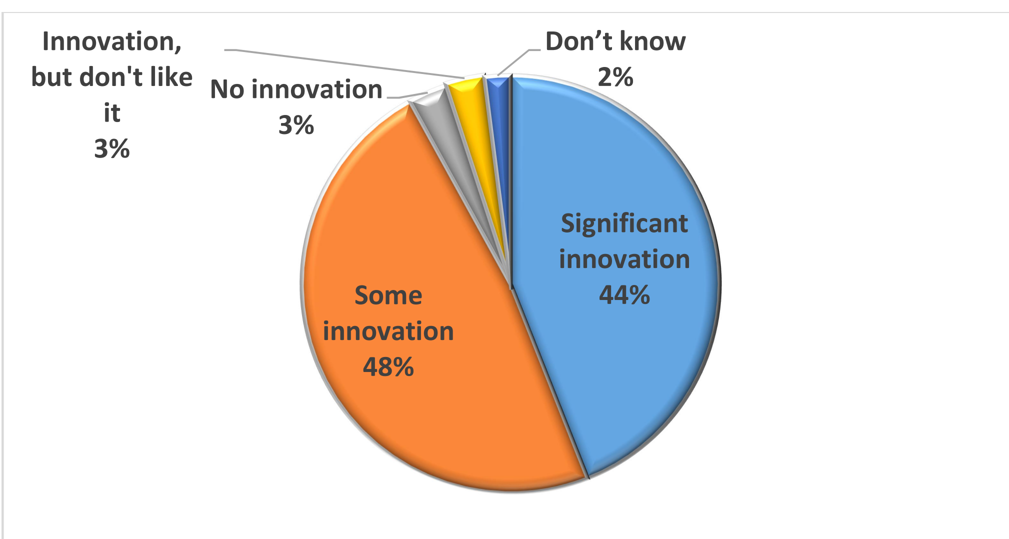
As can be seen in Figure 9, an overwhelming majority felt that there was 'some' innovation or 'significant' innovation with regard to the evolution of game mechanics (82%). A number of respondents felt that there was no innovation happening (11%) and 5% reported that they did not like where the innovation was heading.

Figure 9: The Overall Innovation of Game Mechanics



Similarly, the data presented in Figure 10 show overwhelmingly positive feelings regarding the overall advancement of game development technology/tools. Only 3% felt negatively about the innovation being seen in game development technology/tools and only 3% felt that there was no innovation happening.

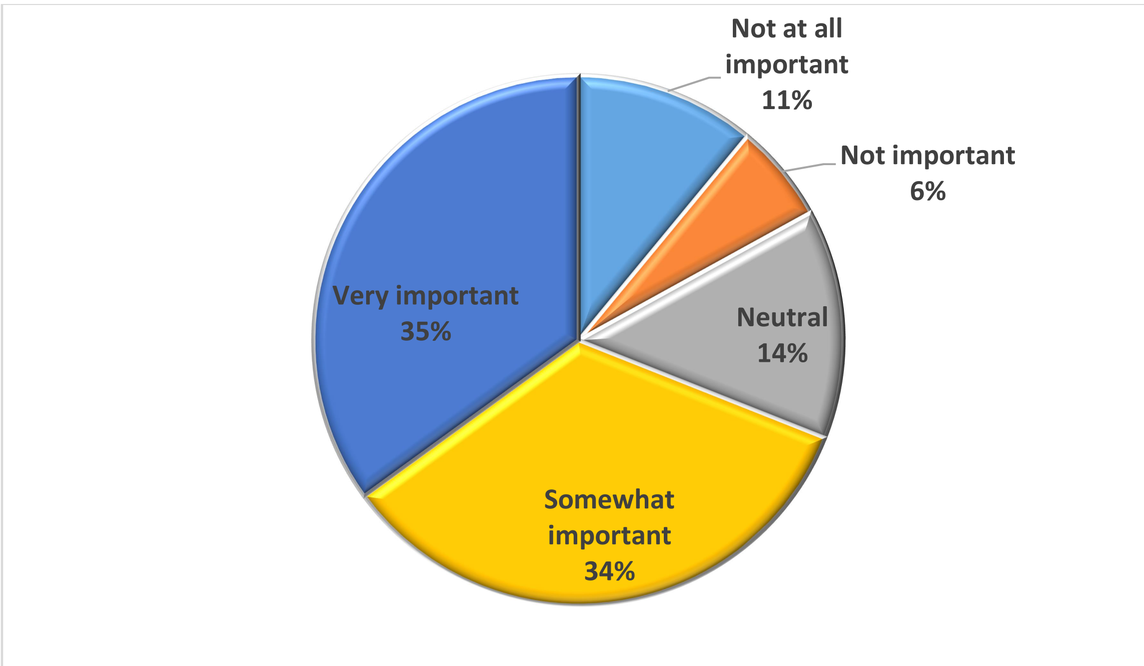
Figure 10: The Overall Innovation of Game Development Technology/Tools



Importance of Localized/Regional Versions of Games

Most respondents reported that having a localized version of a game that is linguistically and culturally sensitive to specific audiences is important (Figure 11). However, there was a significant minority (17%) who felt that this sensitivity and regionalization was not important for the success of a game.

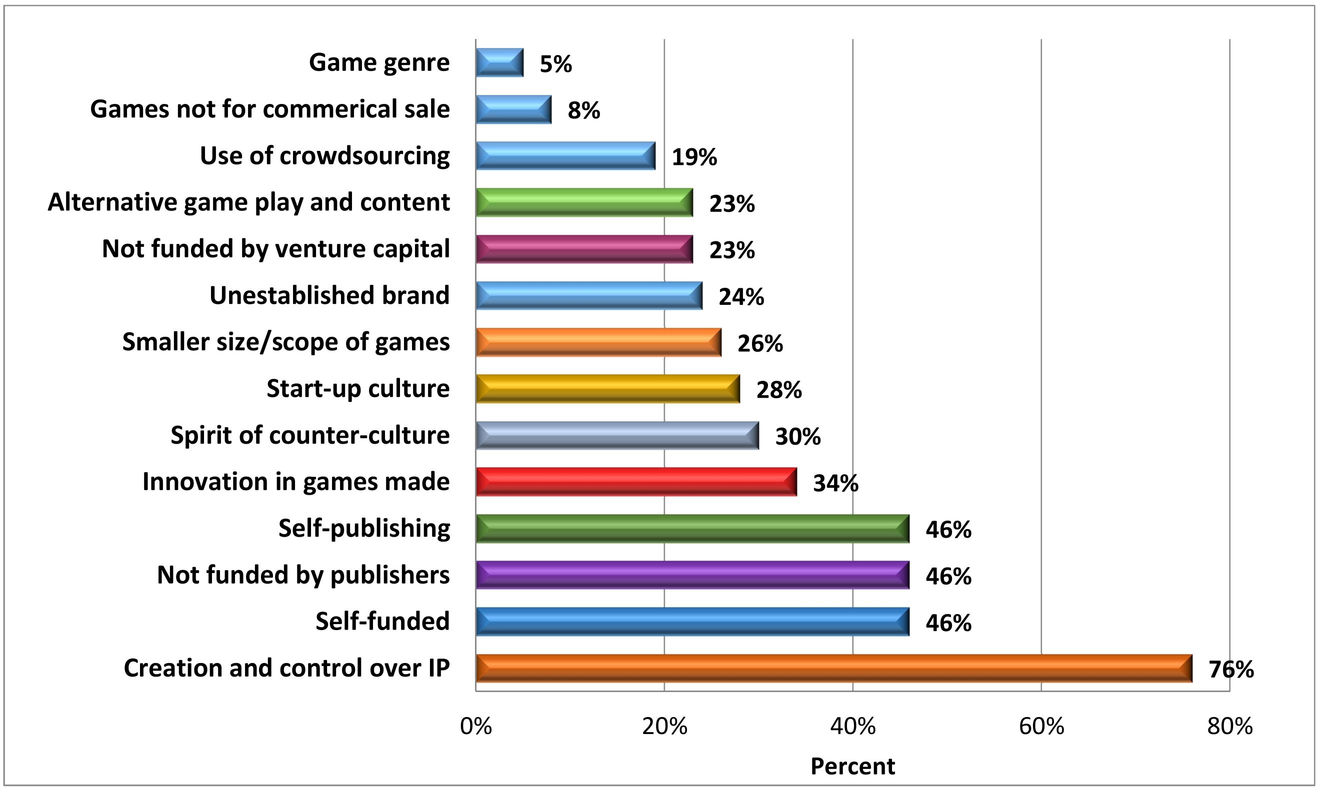
Figure 11: How Important are Localized/Regional Versions of Games?



Indies Defined

With the rise of indies or independent studios and their expansion in the market have come spirited debates about what an indie developer really means. The DSS 2015 offered a list of factors that might define indie development and respondents were invited to select all that they felt applied. As Figure 12 shows the creation and control over IP tops the list and is followed by independence in publishing and in financing.

Figure 12: Major Factors Defining and Independent or Indie Developer



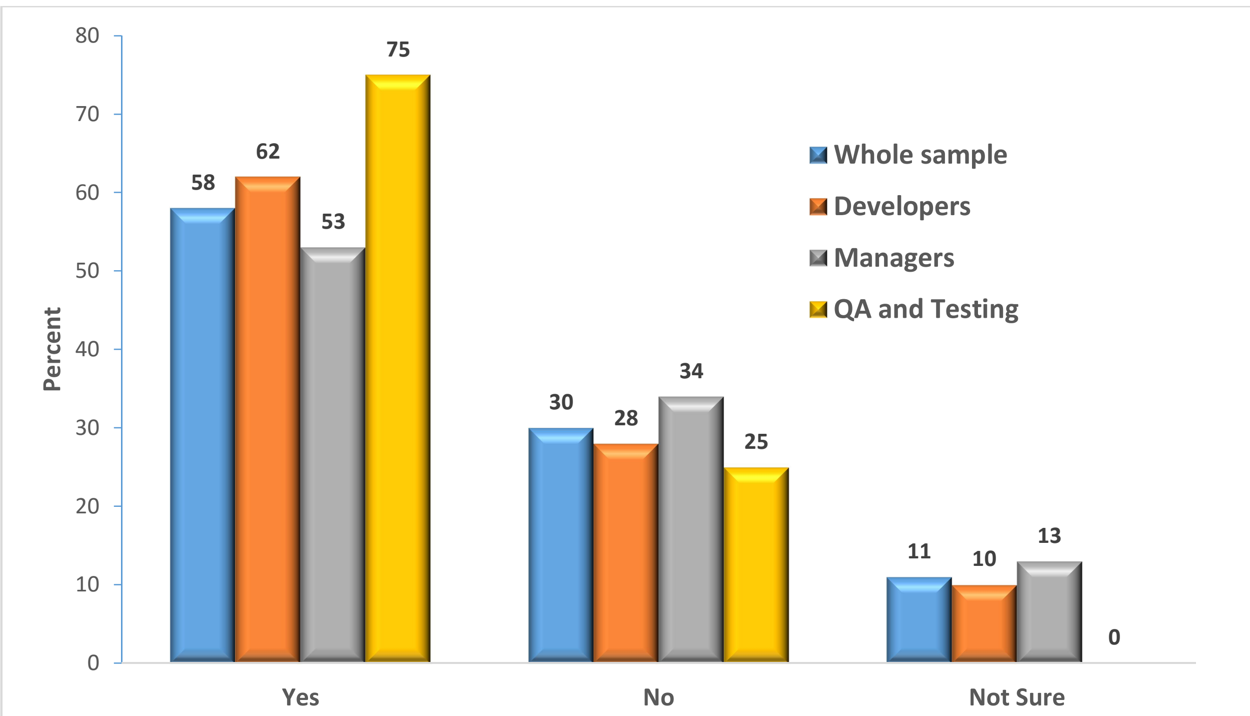
Preferred Employers

We provided respondents an opportunity to give an open-ended answer and asked them what developer or publisher they would most like to work for. Like last year, Valve was ranked as the company most wanted to work for with 14% of the vote. Blizzard (as listed separately from Activision) came in second place with 8% and Riot Games came in third with 6%. For a complete list of preferred employers, see our report at: http://gameqol.org/discussions/.

Crunch Still Pervasive

Though we will report on working hours for currently employed respondents in much more detail in a subsequent Employment Report, the DSS 2015 also asked whether crunch time or long hours were expected in the workplace as a normal part of the job. Unfortunately, the answer remained yes across sub-populations of developers, managers and those who work in QA and testing. QA workers seemed to experience the most extreme hours as 75% said that crunch is a necessary part of game development. QA respondents were also clear on their responses to this question as none selected 'not sure.' Managers were the least likely to assert an expectation for crunch or long hours with 53% responding 'yes'.

Figure 13: "Crunch Time is a Necessary Part of Game Development"



The response pattern in the figure above holds true across the various employment types captured in this survey (employees, self-employed, contractor/freelance) as well as the currently unemployed. The greatest variation was among the self-employed. While most did say that crunch or long hours were expected (44%), nearly an equal number said that it was not (38%). This group also seemed to have the most uncertainty about whether crunch was indeed necessary; 18% reported they were 'not sure'.

Conclusion

The IGDA administered the 2015 Developer Satisfaction Survey (DSS) in March and April of 2015. 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 2015 were people working as employees in game development studios. Just fewer than 3,000 people responded to the survey, primarily in English and from the United States. The questions on the DSS 2015 gathered data about demographics, diversity and quality of life as well as employment experiences, structures and practices, industry trends and future outlook. The data presented in this report represent 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 IGDA Industry Trends Report (dated January 20, 2015) that was released by the IGDA on March 2, 2015.

The overall conclusions from the 2015 data are not widely different from 2014. Overall, members of the broad game community seem satisfied with their industry in terms of industry growth and employment opportunities, advancement and innovation in game mechanics, development tools and storytelling, and individual perceptions of job satisfaction and quality of life. That said, respondents identify various challenges such as the need for greater advancement in game design, more diversity of game content and better discovery mechanisms for emerging games (particularly with the growth in casual games, digital distribution and self-publishing). 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.

The 2015 data revealed that negative perceptions of the industry may be a growing challenge. In 2014, one-third of respondents felt that there was a negative perception of the game industry in society. In 2015 this number had increased to half of the sample. Of the top cited reasons for a negative perception, two were related to sexism (sexism among gamers and sexism in games) and the third was working conditions. Racism was also revealed to be a concern for many in the 2015 survey as questions about racism were not included in 2014. It is important to note that respondents who identify as female, transgender or of non-binary gender are 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 as these groups remain a representational minority. It is important to note that developer responses to these questions in 2015 were very likely influenced by Gamergate which raised the profile of discussions about sexism in particular.

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 significant minorities of respondents reported either a degree of ambivalence or direct negativity regarding various questions on the overall health and outlook of the industry. The concerns and experiences of these dissenting groups or minority groups are important in building and maintaining a strong industry for the future. In particular, the DSS 2015 was able to isolate people working under different employment regimes (i.e., employees of a studio, self-employed, freelancers/contractors) and highlight their unique experiences, views and challenges. Acknowledging the different industry forms and developer experience are crucial to any interventions to improve the industry as a whole.

Keep watch for the 2015 Employment Practices report that will cover topics such as hours of work, compensation and benefits, and employment and workplace profiles.

Keep watch for the launch of the IGDA 2016 Developer Satisfaction Survey in early spring. As always, the more respondents who answer the survey, the more generalizable the data become to a true reflection of the population's experiences.

If you wish to sign up for the mailing list for future surveys please visit: http://gameqol.org.