igda international game developers association

Developer Satisfaction Survey 2014

Summary Report

25 June 2014

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Acknowledgements

The International Game Developers Association (IGDA) would like to thank the tremendous support of our actively engaged volunteer community for their many contributions to this report. From all the survey respondents to our many Chapter and Special Interest Group leaders who helped disseminate the survey, as well as our studio affiliates and media partners – we appreciate your help in making this research possible.

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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.

In 2004, the IGDA launched its initial Quality of Life survey in an effort to gain a much clearer understanding of the issues that affect life as a game developer – from "crunch time" to compensation issues. In 2009, the IGDA repeated the Quality of Life survey in partnership with researchers at Western University in Ontario, Canada and TÉLUQ in Québec, Canada. The survey once again provided more insights into how the issue was evolving in our industry, and then a few years ago the IGDA conducted a separate diversity survey to help us obtain a clearer perception of developer demographics.

In 2014, as the time approached to repeat the Quality of Life survey, we opted to take a different approach, one that is more systematic in how we understand game developers worldwide, including both IGDA members and non-members. It's not just an issue of gathering basic knowledge for its own sake, but it's about knowing developers' priorities and the most pertinent issues affecting their overall satisfaction. Most critically, these insights will be leveraged to help prioritize the IGDA's advocacy efforts and initiatives.

To that end, we launched this new annual survey called the Developer Satisfaction Survey (DSS), which remains a partnership with Western University and TÉLUQ, as well as our new partners M2 Research and the Georgia Institute of Technology. The DSS which was open to anyone involved in the video game industry in a professional or academic capacity, is the evolution of our previous survey efforts. Moving forward, the DSS will serve as the IGDA's core annual 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)

Overview

The IGDA's Developer Satisfaction Survey for 2014 was opened for responses on 17 March 2014 and closed on 28 April 2014. By the conclusion of the survey period, the survey accrued 2,202 responses.

This report is a preliminary summary of the primary observations from the survey data in each of the core areas of the survey:

- Demographics
- Diversity
- Education
- Employment Status
- Employment Profile
- Workplace Overview
- Hours of Work
- Compensation
- Benefits
- Career and Advancement
- Employment Relations
- Future Outlook

This report concludes with an overview of the IGDA's plans for releasing more detailed reports on each of these topics in subsequent months.

For 2014, the DSS included additional Quality of Life questions that are asked every 5 years as a research benchmark, thus the "typical" DSS conducted each year will contain only a sub-set of the larger survey design.

Demographics

The demographic makeup of the games industry is important to understand. We asked a wide range of questions to respondents of the Developer Satisfaction Survey in the hopes of obtaining valuable insights of the industry. The breakdown of survey representation shows that the majority of respondents (76%) are male, between the ages of 30-35, live in North America and have some form of University degree. Half of all respondents were single while half were married, with less than a third having children.

Snapshot: Age

The age range of survey respondents was large with the ages ranging from 14 to 82. However, the majority of respondents were in the 30-35 year range making up 27% of the sample. The next largest age group was 25-29 which represented 25% of survey respondents. The third largest age group was made up of 35-39 year olds at 17%.

Snapshot: Country of Origin

As seen in Figure 1, the majority of respondents were from the United States and made up a total of 48%. Canada was second with 17% and with Mexico (0.6%) they bring the overall North American representation to 66%. Europe represented 20% of survey respondents, Latin America made up 6.7% and Asia represented 5%. It is important to note that the survey was only released in English, which may have been a language barrier for many non-English speakers. In all, 14% of respondents consider themselves to be immigrants to the country where they currently reside, while the remaining 85% are native born to the country where they reside.

Snapshot: Marital Status

Marital status is one question that seems equally split. There are as many people single as there are married, with each representing 37% of survey responses. Another 19.5% list themselves as partnered, while the remaining 5.5% are either separated, divorced, widowed or in polygamous relationships.

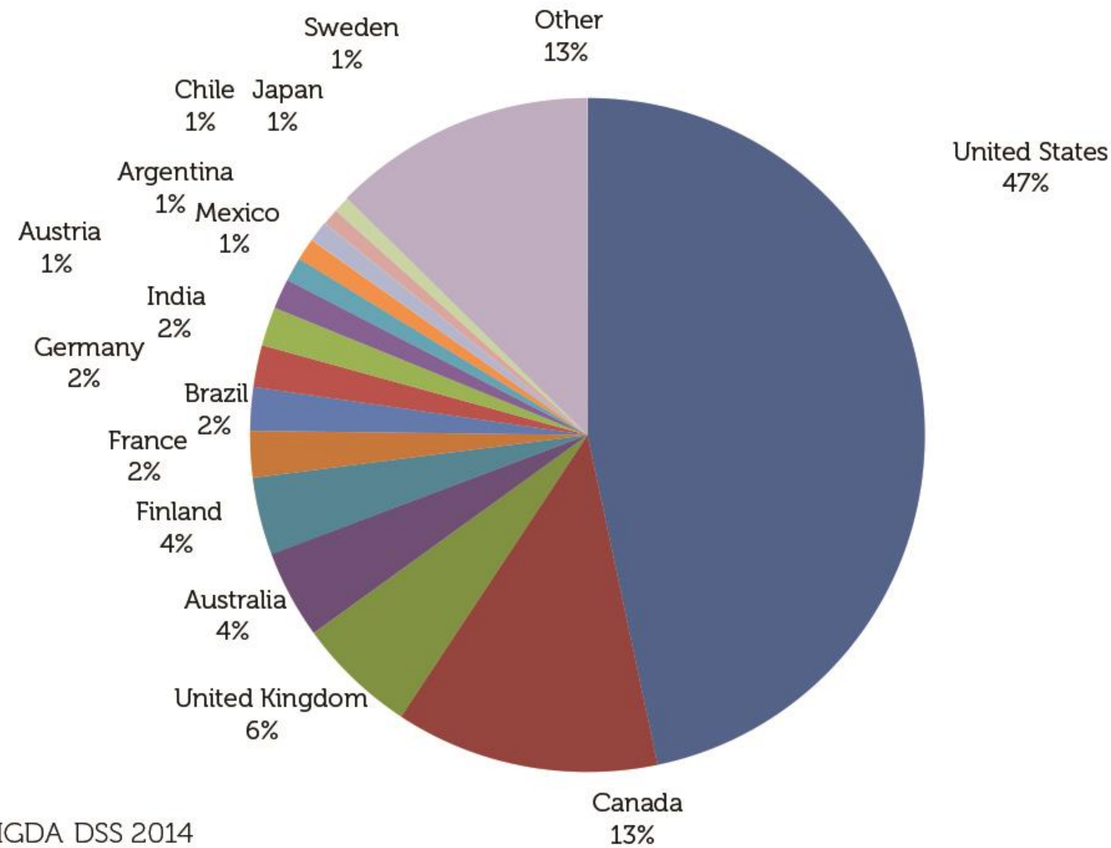
Snapshot: Children

Perhaps not surprisingly given the young age of the sample, 70% of the survey respondents do not have children. Of the 30% of respondents that do have children, 15% have pre-school children while 13% have children attending school and 6% have grown children.

Snapshot: Elderly Care

Again as expected given the age of the sample, 87% are not responsible for elder care. There is however a group of 10% that is responsible for their older family members who either live with them or live separately. Roughly 3% commented that the question was not applicable to them.

Figure 1: Country of Origin



Source: IGDA DSS 2014

Diversity

Snapshot: Gender

As the demographic section of the survey shows, 76% of respondents identified their gender as male, with 22% identifying as female. Only 0.5% identified as male-to-female transgender, and 0.2% as female-to-male transgender. An additional 1.2% selected "other" as their response to this question. This is a significant change since the IGDA's 2005 Diversity Survey, in which women made up 11.5% of the sample. The prior survey did not track for transgendered, androgynous or other gender identification. It is also interesting to note that of the 12% of respondents identifying as students, 30% identified as female; 0.7% identified as male-to-female transgender and 1.4 as androgynous. This could reflect bias or over-sampling of these groups, or it could suggest that game education programs are doing a reasonably good job of attracting women and that we might be able to anticipate a shift in gender distribution in the coming years as these programs grow in influence.

Snapshot: Race and Ethnicity

In terms of race or ethnicity, the overwhelming majority identified as Caucasian at 79%.The next highest group identified as Hispanic/Latino (8.2%) followed by East/South-East Asian (7.5%); Africans and African Americans constituted 2.5% of respondents. This represents a slight overall increase in ethnic diversity since the 2005 Diversity Survey, whose respondents were 83.3% white, 7.5% Asian, 2.0% black, and 2.5% Hispanic/Latino.

Snapshot: Sexual Orientation

Regarding sexual orientation, 86% of respondents identified as heterosexual, 2.8% as homosexual, 6.5% as bisexual and 4.7% as "other." Those that provided additional detail to the 'other' category identified themselves as asexual, pansexual or used this option to decline answering the question as they felt it to be too personal and not relevant to the survey and their work. The percentage of developers identifying as homosexual remained virtually unchanged; however more respondents identified as bisexual, 6.52% in the 2014 survey in contrast with 2.7% in 2005.

Snapshot: Disabilities

17.5% of respondents identified as having a disability, as compared with 13% in 2005. By comparison, 19% in the U.S. are identified as disabled (U.S. Census, 2010), 16% of adults in the U.K. (Office for Disability Issues, 2014), and nearly 7% reported in Japan (Ministry of Health, Labour and Welfare, 2011). The largest disability listed was psychiatric and mental illness, which represented 5% of respondents. The next largest disability category was for visual impairment and represented 4.4%. The third most listed disability was a learning impairment at 2.7%.

Snapshot: Attitudes toward Diversity

The survey contained a preamble to the set of diversity questions indicating that diversity meant the differentiation between individuals in regards to age, ethnicity, gender, physical ability, race and sexual orientation. The overwhelming majority of respondents - 75% - felt diversity was very or somewhat important in the workplace, and 79% felt it was very or somewhat important for the industry. A little over a third of developers surveyed (34%) felt the game industry had increased in diversity over the past two years, while 28% said it was the same, and 3% said it was less diverse. But another third (35%) said they were not sure, or that the question was not applicable to them.

Although diversity may have improved since 2005 with female participation in the survey nearly doubling and modest gains in most ethnic groups, companies could be doing a better job of implementing, enforcing and communicating diversity and discrimination policies to applicants and employees.

In terms of diversity in outreach and recruitment, 33% of respondents reported not knowing of any diversity programs within their companies, and a little less than a third (29%) said their employers have no diversity programs at all. However, smaller numbers ranging from a little under 20% to a little under 10% reported that their companies had some type of diversity programs or partnerships to foster diversity. Also, 15% reported retention and professional development programs for diverse talent and 11.5% reported targeted advertising aimed at recruiting diverse applicants. Less than half of respondents (46.5%) reported an equal opportunity hiring policy. One-quarter did not know if their company had such a policy or not. Just over 40% said their companies did not consider diversity, but only qualifications in hiring decisions, while a further 40% were neutral on this question.

In terms of perception of diversity issues, although nearly 80% of respondents felt that diversity was important, diversity appears “off the radar” for a significant percentage of game developers. When asked whether or not their companies pursued diverse candidates, 45% were neutral and the same number were neutral about whether their companies supported diversity initiatives. Similarly, 43% had a neutral opinion about whether or not obtaining diverse candidates was challenging but 39% felt that it was.

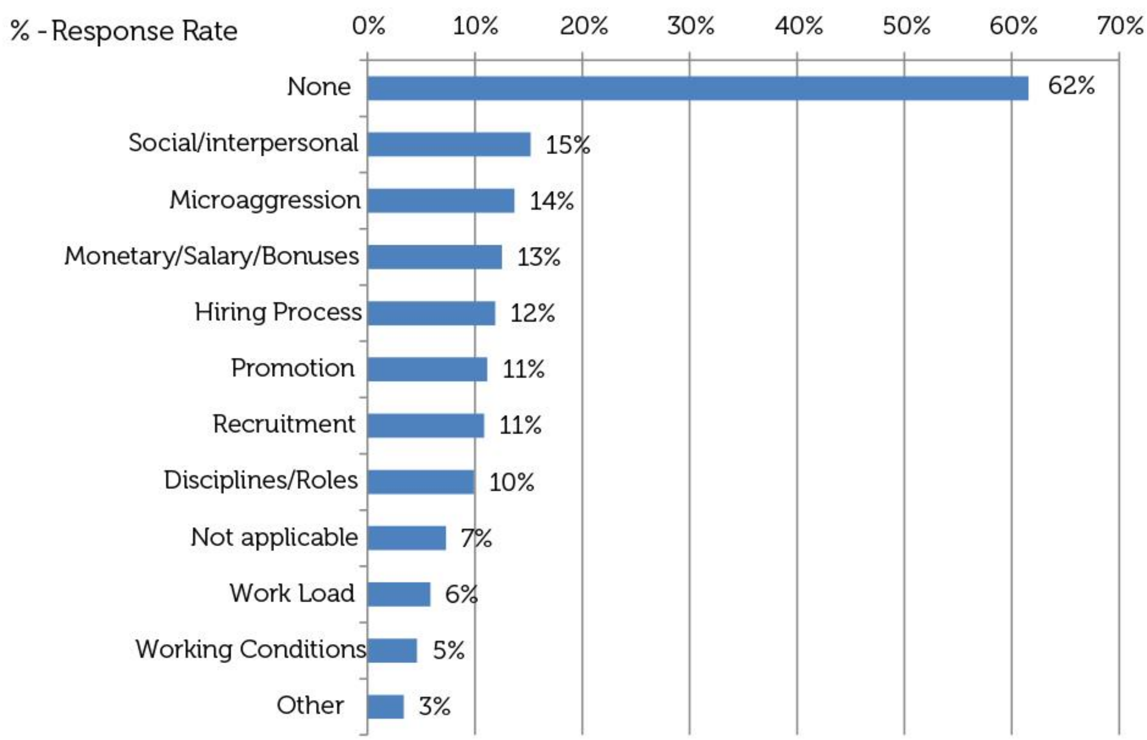
Snapshot: Discrimination

The industry appears to be doing slightly better in terms of discrimination policies for workers once they are hired, but are faring poorly at keeping employees informed about these policies, as well as putting procedures in place to enforce them. While 55% of respondents reported having a discrimination policy and 48% reported having a sexual harassment policy, only 30% said their companies actually had a complaint procedure and only 28% had a disciplinary process. One-quarter of respondents were completely unaware of policies in any of these areas. Just over one-third of respondents felt these policies were adequately enforced, 6.5% said they were not and 36% were not sure.

It is therefore not surprising that when asked "Do you feel there is equal treatment and opportunity for all in the game industry?" 47% of respondents definitively answered "No," while only 28% answered "Yes," and 25% answered "Not sure" or "Not applicable."

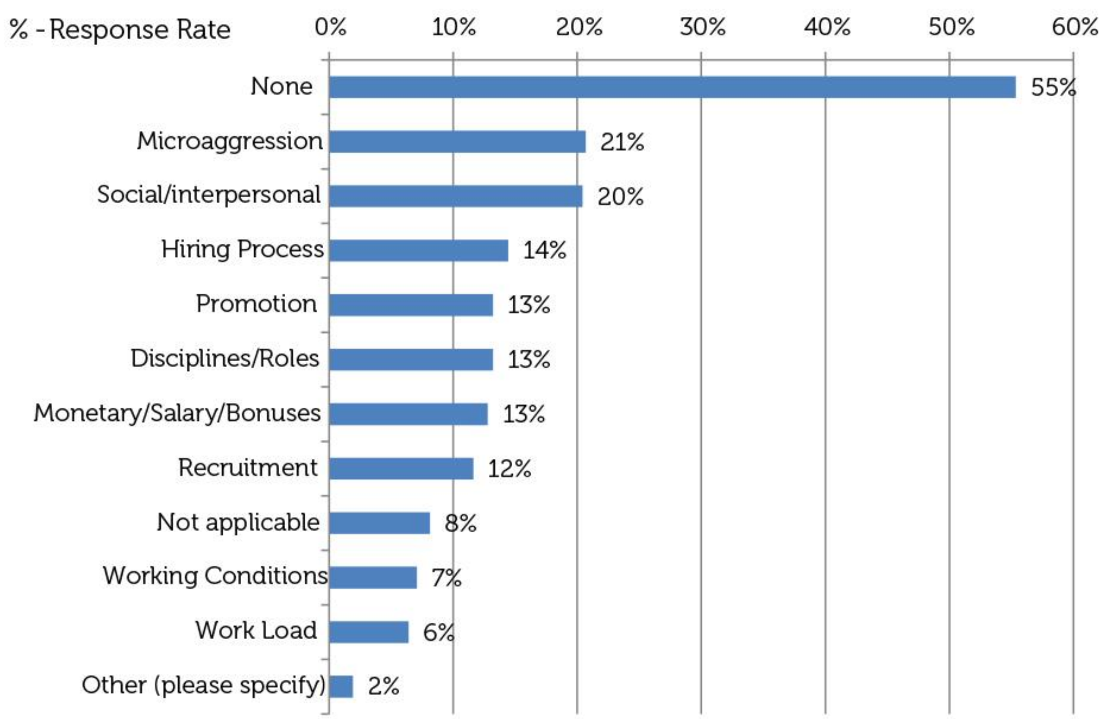
The following charts show responses to the questions "Have you perceived inequity towards YOURSELF (Figure 2) or towards OTHERS (Figure 3) on the basis of gender, age, ethnicity, ability, or sexual persuasion in any of the following areas?" The majority of respondents (60% and 55%, respectively) answered "None" to both questions. However, of those who identified forms of discrimination, 20% of respondents reported *observing* both social/interpersonal discrimination and microaggression, while 15% and 14%, respectively, reported experiencing these discriminatory behaviors firsthand.

Figure 2: Discrimination against SELF



Source: IGDA DSS 2014

Figure 3: Discrimination against OTHERS



Source: IGDA DSS 2014

Through an open-ended question respondents were invited to tell their stories about discrimination they had witnessed or experienced firsthand. The majority of the comments pertained to gender discrimination in a variety of forms. Some of these forms were very tangible, such as: preferential treatment of males in hiring, and promotion, females experiencing insubordination from subordinate male colleagues, lack of respect or consideration of opinions or suggestions, especially concerning inclusion or representation of female characters in games, and an overwhelming preference for white males in management positions. More subtle social discrimination was more pervasive in the data. Many women complained of the “frat boy,” “locker room,” or “boys club” ethos, which included inappropriate sexual or discriminatory jokes, belittlement of skills and ‘gamer cred’, T&A imagery throughout the office setting, assumptions that women are in administrative roles, comments about women’s appearance (including specific reference to their breasts), and explicit sexual harassment including being hit on and being invited to “meetings” that were actually dates. Several women told stories of complaints that led to reprimands of the complainant, reprisals or firing, although there were a few incidents of severance and compensation to victims of such behavior.

A small number of men also said they felt discriminated against in favor of female colleagues. However, a larger number of male respondents remarked that they felt their position as straight white males put them in a position of privilege in which they did not have to deal with these sorts of issues.

Ageism was cited as the second most common form of discrimination. Older professionals felt that they were passed over for jobs in favor of younger candidates who didn’t have family obligations, were willing to work longer hours and expected lower compensation than their older counterparts.

Discrimination on the basis of race and ethnicity was also mentioned. Some respondents felt that being foreign (e.g., non-Japanese at a Japanese company) put them at a disadvantage. Language discrimination was also cited as an issue, most notably in French-speaking Quebec where English-speaking developers felt discriminated against. One African American developer was shocked that a colleague used the “n” word at work without repercussions. One Hispanic respondent reported submitting two resumes for the same job, one with the real, Hispanic sounding name and one with an Americanized name; recruiters selected the Americanized name, even though the resumes were otherwise identical.

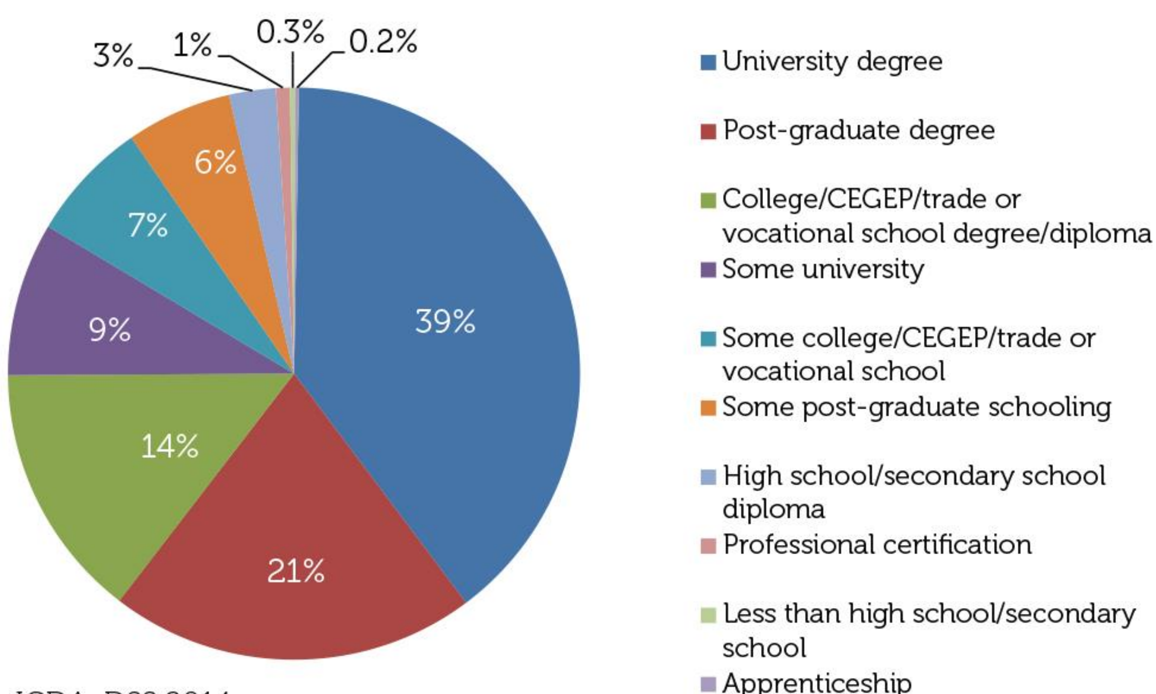
Education

Snapshot: Educational Background

As more game education programs are being launched internationally, both in vocational and university contexts, it is important to get a snapshot of the educational backgrounds of developers. We also collected data on currently enrolled students in game or game-related programs, which had not been collected in past surveys.

As Figure 4 illustrates, nearly 40% of the sample hold a university degree, a surprising 20% hold graduate degrees, and 15% hold college, CEGEP or trade diplomas.

Figure 4: Educational Background



Source: IGDA DSS 2014

Snapshot: Specialized Degree in a Game Related Discipline

Over one third of survey respondents, 35% have a specialized degree that is somewhat relevant to game design and development. Another third, 32% have degrees that are directly related to game development. The remaining either do not have relevant educational backgrounds (17%) or it is not applicable to the work they do (15%). It is important to note here that a number of survey respondents do not work directly in game development, but rather work in occupations related to the game industry more broadly. A little over half of respondents had also taken supplemental training in game design, including high school and college courses, as well as training by their employers; 26% reported that this training was accredited.

Snapshot: Students

An important sub-sample (11%) of our respondents identified as being either full (8.5%) or part-time (2.5%) students. Almost 10% of respondents also identified as working in academia or research. These figures were not captured in previous surveys, so they represent a first baseline. A little under a third of those identifying as students (30%) were women.

It is interesting to note that in a question targeted to people not currently employed in the game industry, 46% said they were looking for their first industry job. From this we can surmise that a little under half of the people currently in the games job market are recent college graduates. This suggests a high demand for entry-level jobs.

Respondents identifying as students were also asked to specify the type of job they are pursuing. Nearly a third (30%) indicated that programming was their primary interest. Design was the second most popular discipline at 19%. Art ranked third at 13% and Production and Writing each captured 5.5% of the sample. A number of students (6.5%) said they wanted to start their own companies, 1.0% said they wanted to be game journalists and 3% are interested in teaching. Smaller numbers said they were interested in quality assurance (2%), audio (1%), business management (1%) or wanted a game-related position at a non-game company (2%).

Students cited a variety of company types they wanted to work for, including: First-party developer/publisher (38%), third party developer (5.5%) and publisher-owned second party developer (4.5%). Perhaps not surprising given the anecdotal reports of the rise of independents, the second highest company selection was an independent game studio with 34% citing that as their target company. Smaller numbers of respondents wanted to join a serious games studio (3.5%), 7% said they were interested in going into academic research, and 1.5% each said a tools company or a non-game company was their desired employer.

Table 1 below shows the priorities of developers when they're seeking a new job. Respondents were asked to check all the options that applied. Note that 73% said that learning new skills was their top priority. Location was number two at 68%, followed closely by salary at 63%. Other priorities cited included potential for advancement (58%), creative freedom (54%) and a family-friendly environment (42%). Interestingly, over a third cited diversity in the workplace as a priority (38%). Flexibility and mobility (40%) and insurance/retirement benefits (29%) were also selected by a large minority. Reflecting the high percentage that said they wanted to work at an independent studio, one-quarter said that building a start-up was a priority in seeking employment. The same percentage also cited crunch time as a consideration.

Table 1: Priorities When Considering a New Job

	Ranking
Learning new skills	73%
Location	68%
Salary	63%
Potential for advancement	58%
Autonomy/creative freedom	54%
A family friendly environment	42%
Flexibility/mobility	40%
Diversity in the workplace	38%
Insurance/retirement benefits	30%
Amount of crunch expected	25%
Build a start-up/studio	25%
Stock options/ownership	9%
Source: IGDA DSS 2014	

Employment Profile

Snapshot: Job Roles and Discipline

Unlike previous iterations of IGDA surveys, this time respondents were asked to list their primary and secondary roles/disciplines and they were instructed to choose all the options that applied. For primary role, the largest percentage of respondents listed themselves as programmers/software engineers, making up 33% of the survey population. The second and third largest groups for primary position were game designers (27%) and team leads (21%). In line with other data presented in this report about the prevalence of indies and the self-employed, 21% of the respondents listed themselves as founders of their company. Game Designer was listed as the top secondary discipline at 17% followed by Quality Assurance (13%) and Team Lead (12%).

Snapshot: Job Tenure and Experience

The average survey respondent has worked in the game industry for 9 years, been at their current job for three and a half years, worked on 16 distinct projects and has had between 3 and 4 employers in the past five years. However, we believe those averages hide a degree of skew and some misrepresentation in the data at both the high and low ends. As a result the median and mode are likely more accurate representations of the data. The following table indicates the descriptive statistics for these questions.

Table 2: Descriptive Statistics of Job Tenure Variables

	Years in industry	Years in current job	Number of projects[1]	Number of employers[2]
Mean – the average	9.0	3.5	16.0	3.8
Median – mid-point of the distribution	6	2	7	2
Mode – the most frequent response	3	1	4	1
Range – the lowest and highest response	0-38	0-72	0-3000[3]	0-500[3]
Source: IGDA DSS 2014				

Notes: [1] People who do not work on a project-basis were instructed to enter 0
[2] In the past five years
[3] There were a number of very high and perhaps questionable values in this distribution. They were retained for this preliminary report, but extra caution should be used in interpreting the mean.

Snapshot: Reasons for Joining/Leaving the Industry

When individuals were asked to indicate their primary reasons for wanting to join the game industry, the great majority of respondents indicated it was to "earn a living doing what I enjoy"

(41%) or “share my passion for games by working in the industry.” (40%) This reinforces the notion that game developers are very enthusiastic and passionate about their craft.

By contrast, when asked for the top reasons for wanting to leave the game industry, the top reason from respondents was “I want a better quality of life” at 39%. This was followed by “found a job with better pay and hours” at 15% and “burned out”, also at 15%.

Snapshot: Worker Commitment to the Industry

Reports on past IGDA Quality of Life surveys (2004 and 2009) have indicated high levels of industry turnover and high numbers of people who intended to leave the industry in the near future. From a preliminary standpoint, the data in this survey is somewhat mixed. As noted elsewhere in this report most of those currently unemployed intend to rejoin the industry, yet many of those currently employed express dissatisfaction with key features of the industry. When asked directly, 61% of employed respondents said they planned to stay in the industry indefinitely. Only 5% said they planned to leave after 3 years or less, 8% after 4-10 years, 8% after 10-20 years and 15% did not know. On the face these numbers seem to be an improvement on past data, however more analysis is needed to isolate the sentiments of specific sub-groups of the sample.

Overall, 50% of the sample indicated that their job in the game industry was their career and a large part of their life. Sixteen percent expressed an even stronger sentiment that their work in the game industry was their career and their career is their life. An important minority expressed that their career in the game industry was just one part of their life (21%) and 11% said it was just a day job amidst other career ambitions. Only 2% stated that their job in games was just a job and nothing else.

Snapshot: Mobility

With respect to the employment profile of currently employed respondents, the majority (75%) had not been laid off in the past two years, but 17% had been laid off permanently. As well, 41% of the sample had relocated for work at least once in the past five years. This somewhat supports the picture of an industry with high churn and job instability, and the necessity of worker mobility.

Employment Status

Snapshot: Employment Status

The majority of people who answered this survey work in the game industry either as full-time (76%) or part-time employees (10%). Ten percent of the sample indicated that they are currently unemployed in the game industry and 11% indicated that they were full-time or part-time students.[1]

Snapshot: Types of Contracts – Reality versus Preference

Survey respondents were asked about the nature of their employment contract (the reality) and they were also asked about the type of employment that they would prefer. We have not yet conducted a direct comparison of reality versus preference per respondent to determine level of match, but a quick overview shows a great deal of overlap between what is desired and what workers experience. Seventy percent are in permanent full-time or part-time positions and 70% prefer permanent full-time work arrangements. There is some indication of mismatch for other employment forms. Only 5% of respondents said that they prefer temporary, freelance or contract work and only 4% preferred part time work; yet 15% and 10% of workers are employed under those terms, respectively. More respondents would like to be self-employed than the current distribution: 23% versus 15%.

Snapshot: Number of Employers

While over 70% of respondents indicated being full-time, permanent employees, it is surprising to see that when asked about the number of employers they've had in the past 5 years, the response average is 3.75. This could be speaking to a high volatility within the game industry in recent years, with studio closures and acquisitions and frequent movements of employees. It could also indicate a high propensity for churn in a project-based creative industry where individuals move on (either by force or by choice) once their work on a specific project is completed.

Snapshot: The Unemployed

A relatively small number of respondents (166) indicated that they are currently unemployed in the game industry. As noted in the Education section, just under half of these are people looking

[1] As some students also indicated that they work in the industry, these totals do not add up to 100%.

for their first job in the industry. Among the remainder, 25% were recently laid off, 15% recently ended a contract, 11% quit and 2% retired.

The resulting group of 91 unemployed respondents is quite small to draw any strong conclusions, but it is worth noting that most wanted to stay in game development. It is likely that these are the respondents who were recently laid off or reached the end of their contract, though we have not yet conducted that specific analysis of the data. This cyclical unemployment is a common feature of the industry's current structure that causes uncertainty for some workers.

Snapshot: Why Freelance or Self-Employed?

Sometimes people choose to be self-employed or work on a temporary or contract basis. Other times this is the only option given their unique circumstances and the realities of their regional or national labor market. This survey captures both of these dimensions. Many respondents said they work freelance or are self-employed for reasons related to personal control over their work and life (they could select more than one answer):

- To have more control over working conditions like hours (58%)
- To have more control over the content of the work (56%)
- To make the games you want to make (55%) and work on more varied projects (44%)
- To have more control over employment stability/risks (32%)

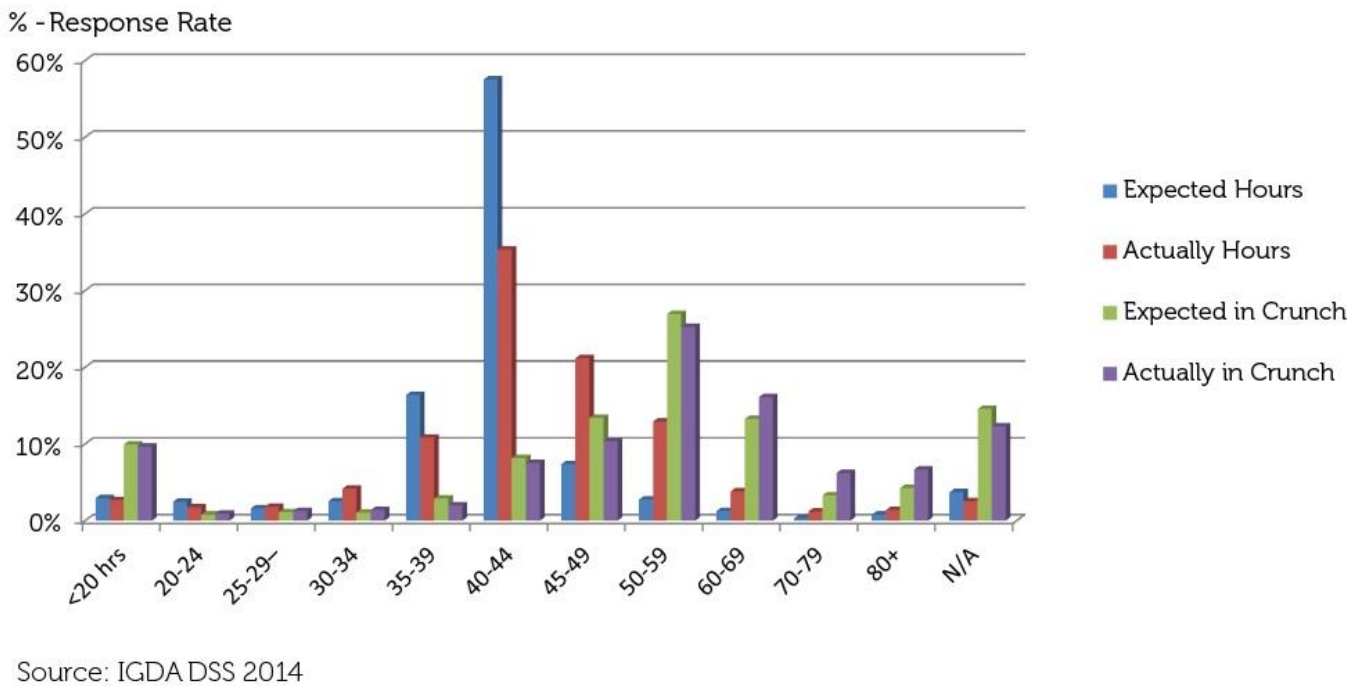
But over one-third stated that they freelance or are self-employed because they have not been able to find a permanent job at an established studio where they live. This shows that for some, this was not purely a personal choice. Additional analysis will identify any patterns in who experiences this mismatch.

Hours of Work

Snapshot: Regular versus Crunch Hours

Similar to the findings from the 2009 IGDA Quality of Life survey, respondents tended to report working more hours during a regular schedule than are specifically required or expected. The same seems true during a period of crunch though to a lesser extent. For instance, Figure 5 shows actual hours versus expected hours in the core distribution range of 35-69 hours per week for both regular and crunch periods. This shows the general tendency to work longer hours overall as well as the upward shift in hours during crunch times.

Figure 5: Regular Hours Worked vs. Crunch Hours



More on Crunch

Only 19% of the sample had not crunched at least once in the past two years. Almost 45% experienced more than two crunch periods in the past two years. Half of the sample felt that crunch was expected at their workplace as a normal part of the job; 37% said they did not feel this way and 10% were not sure.

Snapshot: Necessity of Crunch

The practice of crunch within the games industry has been in use for many years and has had many critics. The idea of working endless hours to ship a product without additional compensation, bonuses or other incentives is well known in the industry. When asked specifically about whether crunch was a necessary practice of game development respondents agreed that it is not. Over half of all respondents (52%) either do not agree (27%) or strongly disagree (25.5%) that it is necessary. Only about one-quarter agree (19%) or strongly agree (5%) that crunch is necessary to game development.

Snapshot: Top Reasons for Crunch

Respondents were asked to list the top three reasons why crunch or extended overtime occurred at their place of work. Poor/unrealistic scheduling was the most frequent choice (53%), followed by feature creep (36%), unclear expectations (35%), insufficient staffing (31%) and inexperienced management (25%). Many of these are related to the project-based system of game development where the budget, scope and schedule are paramount drivers and deviations or inadequacies in the system or in the management of the system result in time intensification for the project team. Also, the relatively lower age of game developers could potentially account for less experience in managing project schedules.

Compensation

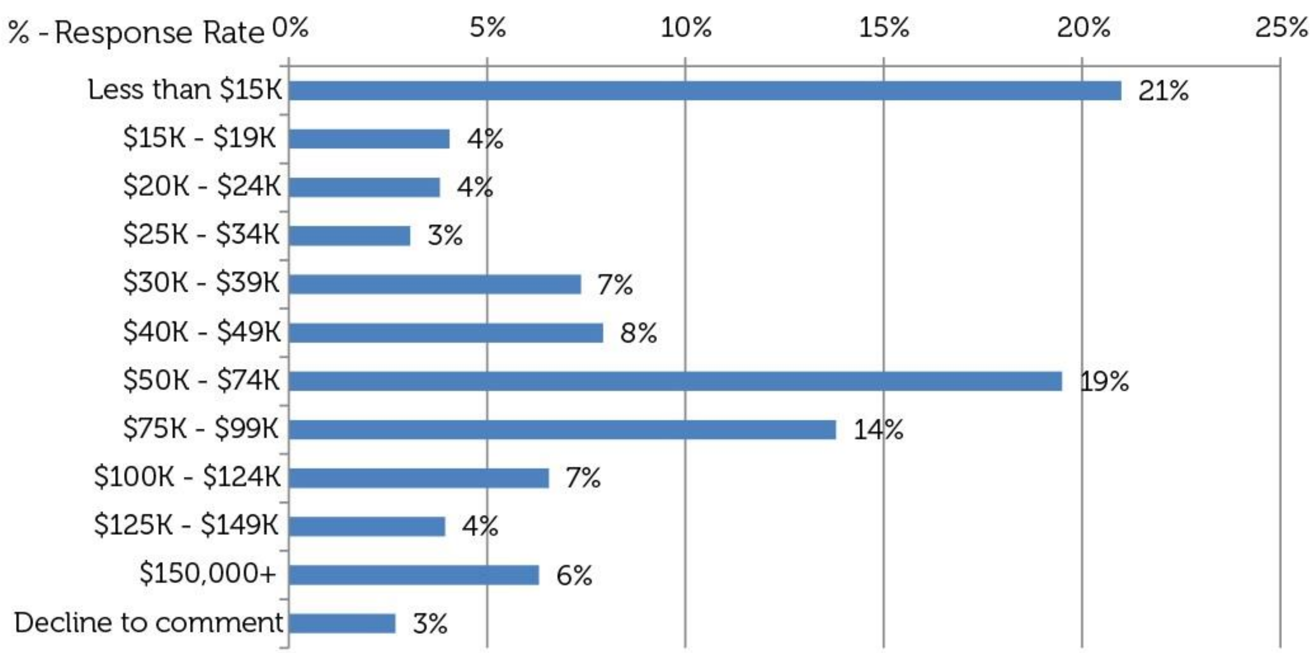
All of the survey respondents except students and those who had permanently left the industry were asked questions about compensation. Unemployed respondents were asked about their most recent job.

Snapshot: Total Income

Most respondents were paid on salary (66%). Approximately 10% reported being paid by the hour and 4% were paid per deliverable. Approximately 8% reported some combination of those three components. Perhaps surprisingly 8% of the sample reported that they had not yet been paid for the work on their current project. More detailed analysis is required to isolate this sample but it could reflect a start-up situation.

As seen in Figure 6, the annual income of respondents was generally distributed around $50-74,000. However, this discounts over 20% of the sample who reported that they earn less than $15,000 per year from sources related to the game industry. Again, additional analysis is required to understand this figure. Other questions indicate that 22% of respondents were not primarily employed in the game industry and that for almost 22% of respondents, less than half of their game-related activity/work generated income.

Figure 6: Personal Annual Income



Source: IGDA DSS 2014

Snapshot: Raises and Incentives

There seems to be great variation and perhaps a lack of transparency when it comes to raises, bonuses and other incentives. Among respondents, 20% received no raises as part of their compensation and a further 10% were not sure if they did or not. One-third of respondents received no incentives and a further 7% did not know. Others received lump sum bonuses (32%), stock options (23%), or royalties (16%).

Snapshot: Satisfaction with Compensation

Most respondents felt they were compensated fairly for the amount of experience they have and the responsibility of their job title. Approximately half (47%) of the sample agreed or strongly agreed to that statement, while 28% disagreed or strongly disagreed and 20% were neutral.

Yet, 32% of respondents felt that they are not equitably compensated with respect to over-time/crunch; 30% said compensation for crunch is sometimes equitable and 26% felt that it was equitable.

Benefits

Snapshot: Health Coverage

One-quarter of the sample of employed or recently employed respondents either received no health coverage, did not know if they received health coverage, or they felt this question did not apply to them. The remaining three-quarters received health coverage from a variety of sources. Of all the options available to respondents, an employer provided plan was chosen 56% of the time, a government plan was chosen 22% of the time and an individual plan through a private insurer was chosen 12% of the time. The numbers for government plans are likely fueled by respondents who live in countries with universal publicly-funded health care such as Canada or the more recently implemented Affordable Care Act in the U.S. A very small number received health coverage through a group provider such as a professional association and almost 10% received coverage through a partner or parent. Additional analysis is necessary to determine the precise characteristics of game workers who have coverage versus those that do not and employers that offer coverage versus those that do not.

Snapshot: Retirement Savings

Retirement savings in most industrialized countries come from three sources: 1) government plans paid through employer payroll taxes such as Social Security in the US, the Canadian Pension Plan in Canada, or the State Pension in the UK; 2) employer-sponsored plans that often require employer and employee contributions; and, 3) individual savings through registered retirement savings accounts (i.e., RRSP, IRA). The survey data indicates that workers in the game industry are utilizing each of these sources, though to varying degrees and not to a high extent. Respondents were asked to indicate all of the retirement plans that applied to them. Employer plans were selected 37% of the time, individual plans were selected 25% of the time and government plans were selected only 16% of the time. This latter figure is interesting because all people who have been in dependent employment relationships should have access to their state pension plans where they exist. Though this often excludes the self-employed, given the high number of respondents from the US and Canada, one would expect higher numbers. This could, therefore, reflect a lack of understanding of the pension system. What is most striking is that “I have no retirement plan” was chosen 30% of the time.

Snapshot: Pregnancy and Parental Leave

Awareness of pregnancy and/or parental leave seems somewhat limited among respondents; 27% indicated that they did not know if their employer provided these benefits in any way. As well, few respondents reported having these benefits. Only one-quarter reported employer-paid leave, about 15% reported a combination between government and employer-paid leave and 9%

reported unpaid leave. Having children may be off the radar for this young population; however, this does not do much to support women, families or the aging of the industry.

Snapshot: Time-Off

The majority of respondents have packaged time-off policies where time can be allocated toward some combination of vacation, sick days and/or other personal days off for a variety of reasons. Just under 20% of respondents work at companies that treat vacation and sick days separately and 13% felt that this question was not applicable to their work situation. The majority of respondents received 2, 3 or 4 weeks (18%, 19% and 15%, respectively) while 12% reported that they can take as many days as they want or need.

Career Direction and Advancement

Snapshot: Performance Reviews

According to the compensation data, decisions about whether or how raises or incentives are given to workers in the game industry are based primarily on managerial discretion in merit assessments. Performance reviews are a common tool in many organizations beyond game development for both development and assessment; however, according to a preliminary reading of this data, formalized assessment might be somewhat sporadic in the game industry. In this sample, 14% of employed respondents said that their company did not conduct performance reviews and another 8% were not sure if their company conducted performance reviews. Forty percent received annual performance reviews, 11% were reviewed every six months and 6% were reviewed quarterly.

Snapshot: Career Progression

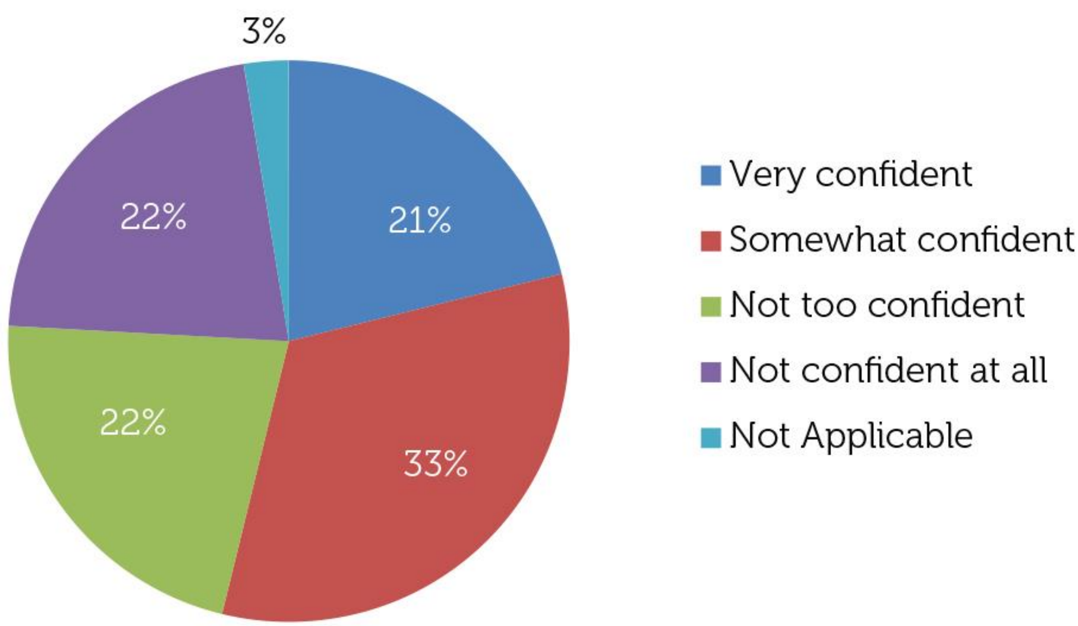
Based on this data, the game industry could improve in promoting career development and longevity within companies. Just over one-third of respondents said that they did not have a clear career path in their company and 19% were not sure, while 38% said they did feel that they had a clear career path in their company. When asked to rate their company on opportunities for promotion and advancement, 27% selected ‘poor’ or ‘fair’, 30% selected ‘neutral’, 27% selected ‘good’ and only 16% selected ‘excellent’.

When asked about their employment, 18% chose ‘I feel stuck and will have to change companies for my career to grow’ and 5% indicated that they were not happy with their company, but did not feel that changing companies would be better. In line with the data about the preference for self-employment (in the **Employment Status** section), 6% indicated that they were earning money so that they could start their own company. That said, many respondents seemed satisfied with their positions. One-quarter felt there was ample room for growth at their company and one-quarter said they were happy with what they were doing and did not see a need to move. A further 12% reported being happy at their company but did not feel that they had job security.

Snapshot: Job Security

High worker mobility is taken as normal in the game industry. This is apparent in the data above on limited career advancement within companies and in the data elsewhere in this report on short job tenure and multiple employers. The survey also asked some specific questions about job security. A startling one-quarter of respondents expressed worry that their job won’t be there next month and 16% were neutral on that question. As seen in Figure 7, many were not very confident that they could find a similar job without having to move if they lost their current job.

Figure 7: Confidence in Finding a Similar Job



Source: IGDA DSS 2014

Workplace Overview

The Workplace Overview section provides a snapshot of the size, location and general makeup of companies that were surveyed. Over half of the survey responses came from North America, representing 58% of respondents. Many respondents were working for smaller independent studios which made up 48% of survey responses. They were working in large and small teams and were currently building games for the iPhone, iPad and PC online. By next year they will be looking to develop more games for Steam and Android platforms. There is a general confidence in the industry that most companies will see considerable growth in the next three years.

Snapshot: Country of Work

In terms of where survey respondents work, almost half (48%) were located in the United States. The next largest representation is Canada where 17% of survey respondents work. Rounding out the next top five countries in which people work are the United Kingdom at 5.4%, Australia at 4.3%, Finland at 3.7%, India at 2.3% and Germany at 2%. Overall, there were a surprisingly high number of countries represented in the survey given that it was distributed only in English. Collectively, survey respondents work in 55 countries.

Snapshot: Type of Business

The shift away from large publishers to the growing predominance of independent developers has happened at a significant pace. Roughly 48% of respondents said they work at independent studios while first party publishers represent only 27% of where people are working. Though there is the danger of response bias in who answered the survey, this could be a telling sign of the evolution of game studios. With the explosion of mobile and free-to-play games, self-publishing portals such as Steam and Desura, and versatile, inexpensive game engines such as Unity, fewer development studios need large productions budgets, publishers and marketing teams to sell their games. The third largest group was made up of game studios for hire which represents 17% of survey respondents.

Snapshot: Company Size

The number of people working in large companies is surprising. Overall, 20% said they work for companies that have between 101-500 employees and an additional 17% said they work for companies with over 500 employees. Rounding out that top three, 19% reported working for companies with between 11 and 50 employees.

If we look at part-time workers the numbers change significantly with 38% of part-time workers employed at companies with 2-5 people and another 33.5% saying that they work for themselves. This represents a degree of polarity in the types of jobs available.

Snapshot: Growth Rates

For the most part game companies and schools appear to be on a positive growth pattern. When asked about the growth of their company or school for the past three years 46% stated there had been considerable growth. Looking ahead, respondents were also asked about the next three years. About the same number (45%) believed the companies they work at and the schools they attend will have considerable growth while only 10% believed there would be considerable downsizing. This demonstrates that there is generally confidence in and positive economic outlook for both companies and education facilities for the coming years.

Snapshot: Development Teams

Development teams are the life source to game development and understanding the size of teams is important. Team sizes definitely vary in the survey. The largest group of respondents (29%) worked on teams of between 2-5 people and 22% worked on teams of between 11-50 people. The frequency then fell off with 17% of the sample working in teams of 6-10 people.

Snapshot: Game Platforms

The majority of respondents were working for companies that are developing for the iPad (59%) and the iPhone (57%). The next most popular platform was PC online which represented 54% of total responses. Respondents were also asked what platforms their company would develop for in 12 months and the answers were quite different. Android tablets came out on top, representing 16% with iPhone, iPad and Android phone all coming up at 15%. Development for consoles and Steam also had significant representation, each making up 14% of the total.

Employment Relations

It is good news that 52% of survey respondents rated the relations between employees and management at their places of work as good or excellent. However that leaves one-third rating employment relations as only fair or poor (16.5% indicated that this question was not applicable to them – likely due to self-employment or small or informal 'companies' with no clear managerial distinctions). It is also important to note that this sample includes people in managerial and non-managerial roles and the opinions of these two groups on these issues are often quite diverse. More detailed analysis on these distinctions will follow in subsequent reports.

Snapshot: Legal Protections

In all employment situations it is necessary to acknowledge that problems can arise and sometimes workers want and need additional support. Employment standards laws are one avenue, however 50% of this sample said they knew the labor laws where they live "only a little" and 17% said they did not know them at all. To add to this, 38% did not know whether the labor/employment laws where they live offered sufficient protection should a grievance or problem arise between an employer and employee and 24% said that the laws did not offer sufficient protection.

Snapshot: Employee Voice

Individual workers can raise concerns or issues with their working conditions directly to their managers. Just over one-quarter of the survey respondents felt comfortable with this approach. A larger group (43%) felt more comfortable raising issues as a collective through a group like a professional association, an employee association, or a union. One-quarter responded neutrally to this question and 4% felt it was not applicable.

Snapshot: Unionization

The 2009 IGDA Quality of Life Survey asked game developers what they would do if a vote to join a union was held at their workplace tomorrow. The responses were almost a perfect split into thirds for "vote yes", "vote no", and "prefer not to say/don't know." In the 2014 survey an additional category was added to better capture the options workers have in a certification vote. Just over one-third said that they would vote for the union, 20% said they would vote against the union and 10% said they would not vote at all. One-quarter felt this question was not applicable to their work situation and 9% preferred not to say.

But unions that represent workers workplace by workplace are not the only model. Some unions represent workers and negotiate issues across an entire industry rather than workplace by workplace. Examples of these unions are the Writer's Guild of America or the Alliance of Canadian Cinema, Television and Radio Artists (ACTRA) in Canada. More of the survey respondents seemed to prefer this kind of union. Over 55% said they would vote in favor of an industry-wide union, 14% said they would vote against, 9% would not vote at all, 8% preferred not to say and 13% felt that this question was not applicable to them.

Future Outlook

The Future Outlook section is where we look to gauge the general feelings of respondents toward certain topics. We are also interested in certain trends and capturing the broader views that could impact the industry in the future.

Snapshot: Important Platforms for the Future

There were some interesting results when respondents were asked what platforms were most important to the future growth of the game industry, as seen in Table 3. Steam, by far seems to be the platform preference for developers at the moment. This may be due to the issues of discoverability facing some of the mobile platform providers. This sentiment could change if discoverability opportunities evolve.

Table 3: Top Platforms for Future Growth

Most Important Platforms	Ranking
Steam	72%
PC Online	62%
Android phone	50%
iPad	50%
Android tablet	50%
Consoles	49%
iPhone	48%
Source: IGDA DSS 2014	

Snapshot: Preferred Type of Company/Studio to Work For

As a follow-up question we asked survey respondents at what kind of company they would most like to work. Almost half (48%) would prefer to work with an indie company and another 36% want to work for a ‘AAA’ company.

Snapshot: The Future of Game Development

As Table 3 below indicates, advancement in game design topped the list of topics that respondents felt were most important to the growth of the industry. What is interesting and perhaps surprising is that the topics respondents believed to be most important have more to do with content, storytelling and overall design. Respondents seem to place much less importance on the financial aspects such as finding better funding options or monetization strategies.

Advancement of game design ranked first in importance at 74%, while more diverse game content at 65% was listed as the second most import factor and advancement in storytelling received 59% of the vote for future industry growth.

Table 4: Most Important Factors for Future Industry Growth

Future Growth of Industry	Very Important
Advancement of game design	74%
More diversity in game content	65%
Advancement of storytelling	59%
Better discovery of games	57%
More funding for game development	52%
Better monetization of games	28%
Source: IGDA DSS 2014	

Snapshot: Age Ratings for Games

When asked about the importance of age-ratings on games, some 40% of respondents felt it was somewhat useful while 23% felt it was very useful. Fifteen percent felt neutral to age ratings and the remaining 13% and 7% felt it was not useful and not at all useful, respectively.

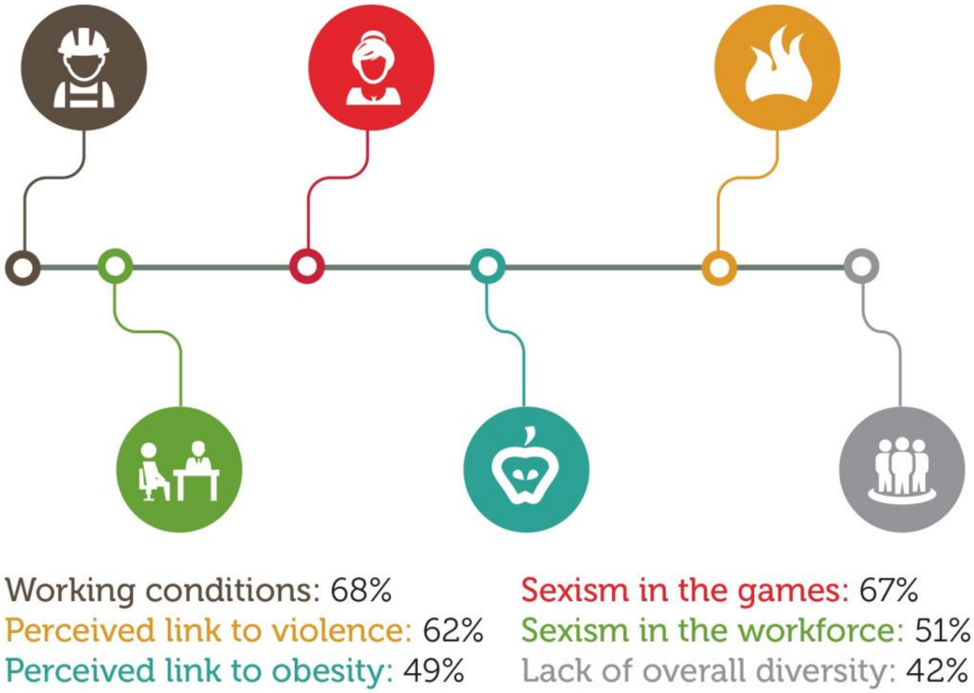
Snapshot: Localized Versions of Games

Respondents reported that having a localized version of a game is critical to its success; 76% said it was either somewhat important (40.6%) or very important (35.5%).

Snapshot: Society's Negative Perceptions of Industry

Interestingly, when asked which factors create a negative perception of the game industry the top response was "Working conditions" at 68%, as shown in Figure 8. "Sexism in the games" ranked a close second with 66%. That there is a "Perceived link to violence" ranked third on the list with 61% of respondents believing it gave the industry a negative perception, while 51% believed that "Sexism in the industry" is a negative factor.

Figure 8: Factors Influencing Society's Negative Perceptions of the Game Industry



Conclusions and Next Steps

For being an inaugural effort, we're pleased with the overall outcome of the Developer Satisfaction Survey and believe it will continue to be a vital source of actionable information for the game development community. These data points also provide the IGDA with a better indication of who the association represents and their concerns, interests and issues, empowering us with a better foundation for how the IGDA can increase its effectiveness.

Insights from 2014 show that without question, those who work in the game industry are extremely passionate about their jobs and their desire to contribute to the industry for the entirety of their careers. The global workforce is slowly increasing in its diversity while developers are generally gaining better wages and benefits.

However, significant challenges remain, such as these stand-out issues as examples:

- The demands on employees' contributions versus fair compensation for their time spent at work (i.e., compensation for "crunch" time).
- A broad recognition of the problem of sexism, not only in the workforce but in the games themselves – combined with a perception that the industry doesn't provide equal opportunity for all.
- A strong desire by employees to give their time and passion to an employer, sharply contrasted by high rates of job changes over short periods of time.

The IGDA aims to leverage these insights to help the organization focus its energies on key issues that can be improved for the sake of individual developers as well as for the overall health of the industry. In subsequent months, the IGDA will release more detailed reports on key thematic areas of the survey, including the topics of Diversity, Employment Practices and Compensation/Benefits.

For 2015 and beyond, we have the following goals to improve the reach of the survey as well as the effectiveness of the survey results:

- Increase the number of respondents by continuing to partner with major media outlets, studios and other avenues for reaching game developers.
- Improve the international reach of the survey by providing localized versions in as many major languages as feasible.
- Engage in continual improvement to survey design and language based on respondent feedback.
- Incorporate the survey results into a regular annual report on game developer satisfaction and well-being.
- Create prescriptive guidelines and best practices to help both employers and employees understand their respective pain points and discern ways to better balance the need for results and the need for long-term employee happiness and productivity.