Developer Satisfaction Survey 2014

Employment Report

AUTHORS

Johanna Weststar

Assistant Professor, Department of Management and Organizational Studies
Western University, Ontario, Canada

Marie-Josée Legault

Full Professor, Labor Relations
Téluq-Université du Québec, Québec, Canada

ACKNOWLEDGEMENTS

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PREAMBLE

As the largest professional association for game developers worldwide, the International Game Developers Association (IGDA) 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 research survey called the Developer Satisfaction Survey (DSS). The Developer Satisfaction Survey, 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)

INTRODUCTION

About this report

The international video game industry's revenue was estimated to be 81.5 billion US dollars in 2014. Game making generates a fair share of employment, though comprehensive international figures still need to be documented as the sector is both new and rapidly changing. Just in the United States and Canada, the video game industry generates close to 60,000 jobs. The annual job growth for the video game industry (9%) increased more than 13 times the rate of the US labor market (0.72%) during the same period.

According to the 2014 Developers Satisfaction Survey (DSS) of the International Game Developers' Association (IGDA), when considering the social perceptions of the game industry, 42% of people working in jobs related to the industry believe that there is a positive perception of the industry, while 32% believe there is a negative perception. In considering some of the factors that might lead to the games industry having a negative perception from the public, it is somewhat surprising, but very important to note that "working conditions" was the top response (68%), before "sexism in the games" (67%) and "perceived link to violence" (62%).

This report is a detailed presentation of a sub-set of the DSS 2014 survey questions that were geared to collect information about these working conditions. As a seemingly inescapable feature of the game industry, long working hours remain a primary issue. We therefore discuss working time first, followed by issues with compensation for working time and then move on to other features of game industry employment such as quality of life and benefits. As the data allows, the report also includes information about the features of the contemporary workplace and the industry job market as well as their evolution.

Before this, however, we will provide a short socio-demographic profile of our respondents to aid the reader in interpreting some results. Due to sampling effects, we cannot assert that our sample of respondents is a complete reflection of the industry population as a whole, particularly on the international scene. The sample may be completely generalizable, but we cannot be sure of it. Thus, data about the sample sheds light on the results and can help to explain or understand them.

Survey Background and Sample Overview

The DSS 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. A preliminary summary report on this raw data was released on June 24, 2014. This report can be found

on both our website (gameqol.org) as well as the IGDA website.

Following this preliminary report, the data was carefully reviewed and cleaned for additional analysis into each of the key thematic areas of the survey. This produced a final valid sample of 2,198 responses. Throughout the cleaning process a number of responses submitted as 'other' were also reincorporated into the base survey options, and occasionally new categories were created. Due to these changes the data presented in this report may not be identical to that presented in the abovementioned Summary Report released as a first glimpse of the survey data. However, no large discrepancies exist.

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 survey responses reflect 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.

In preparing this report we separated the data so that we could isolate those in core development roles from the whole sample when it was meaningful and relevant. Throughout the report we label these two sample groups as the **whole sample** and the **developer sub-sample**. Table 1 on the next page defines each group for reference.

When isolating respondents along these lines, roughly 40% of the respondents held non-managerial roles in core development functions (including quality assurance and testing), 40% held managerial roles (including producers and team leads), and the remaining 20% held roles in supportive functions to game making (such as administration, human resources, legal, marketing), or in academia or journalism. Students not simultaneously working in the industry, those looking for their first job and those who were currently unemployed and did not want to re-enter the industry were excluded from our primary sample for this report simply because the employment questions were not asked of them. Therefore this report does not capture all 2,198 survey respondents for every question. Note that there is a small discussion of the student sample at the end of the report.

In this report our primary interest is to account for the data collected in the DSS 2014. However, here and there we take advantage of the two former IGDA surveys on quality of life to present some trends in the evolution of working conditions over the time period of all three: 2004-2009-2014.

Table 1

Survey Sub-Samples Used in Report

Whole Sample	Developers Sub-Sample
Those in roles both central and peripheral to game development (e.g., programmers as well as game journalists), including:	Those in non-managerial roles in core areas of game development including:
Those in managerial roles including founders, owners, project managers, producers and team leads	Those in programming, software engineering, visual art, audio, game design, writer/editor, localization and user-experience
Those in roles peripheral to game development such as administrative support, customer support, technical support, journalists and academics	Those who are employed on a full-time or part-time basis, either in self-employment[*], as an independent contractor or freelance[**], or as salaried employees
Those in quality assurance and testing roles	Those currently unemployed in core development roles but who responded thinking about their last job
Those employed on a full-time or part-time basis, either in self-employment[*], as an independent contractor or freelance[**], or as salaried employees	
Those currently unemployed in any role but who responded thinking about their last job	
[*]**Self-employment**	Owns a company, studio, or business and is paid by self
[**]**Independent contractor or Freelance**	Paid through contracts with 1 or more clients or companies

Note: The majority of the questions dealt with in this report were asked of employed respondents only, therefore, the small number of respondents who had **left the industry with no intent to return**, who were **students** not simultaneously working in the industry and who were **looking for their first job** are effectively excluded. They do appear in the socio-demographic profile of the whole sample.

INTRODUCING OUR RESPONDENTS

Socio-demographic profile

Based on the respondents of the whole sample, the game industry remains young, white and male. The average age was 34 years, 79% identified as Caucasian and 76% identified as male.

Still, this survey did capture some diversity. In terms of gender, just under a quarter reported being female (22%), 0.6% identified as being male-to-female transgender, 0.1% as female-to-male transgender, 0.6% as androgynous and 0.4% selected "other". In terms of ethnicity, the next highest groups following Caucasian were that of Hispanic/Latino and East/South-East Asian (both at 8%). Here it is important to note that the survey was administered only in English and had a strong North American bias in its distribution.

While the age range of respondents was quite large (14-84 years), the majority of respondents are young; 27% of respondents fell between 30-35 years of age. The second largest group of respondents was the 25-29 year olds (25%), and the third largest was the 35-39 year olds (17%).

Primary employment is in the game industry

In the 2014 DSS all employed respondents were asked whether their primary work was within the game industry. The majority (78%) said yes. When considering just the developer sub-sample this percentage increases to just over 83%. This increase is expected because for some respondents in the whole sample their game related work is a sub-set of their total work. For instance, academics may make games or write articles about the game industry or even help to maintain game incubators, but they are not employed by the game industry. Similarly, journalists who write about the game industry may also write about other things and are not employed by the game industry.

There is no directly comparable data from earlier surveys, but in the 2009 IGDA Quality of Life survey the sub-sample of freelancers was asked if they worked in other industries in addition to games. Within that freelance sample, only 37% said that they worked exclusively in the games industry.

Current employment status and type

In terms of employment status, 75% of the sample reported being full-time and 10% reported being part-time. These individuals could be employed by a company, be self-employed or work as freelancers or independent contractors. Ten percent of respondents reported being currently unemployed, and 11% identified as full- or part-time students. Recall that students

were not asked the majority of questions that follow. It should also be noted that since respondents could select more than one option (for example, a full-time student may also be working part-time in the industry), the totals do not add up to 100%.

Distinguishing by employment type, 70% of the respondents in the whole sample reported being permanent employees – either full-time or part-time. Figure 1 below shows that a further 15% reported being self-employed and 15% reported being a temporary employee, independent contractor or freelancer (for definitions, see the Introduction).

These numbers change somewhat when we consider the developer sub-sample. In this sample, the percentage of permanent employees rises to 81%, the number of contractors stays roughly the same and the number identifying as self-employed drops by about 10%.

A possible explanation for the self-employment difference is that participants who classified themselves as founders or owners or in other managerial roles would have been excluded from the non-managerial developer sub-sample.

Overall, this data suggests that permanent employment is the most common option in the industry, particularly for non-managerial developers.

Figure 1

Typical employment contract or type of employment (Whole & developer sample, 2014)
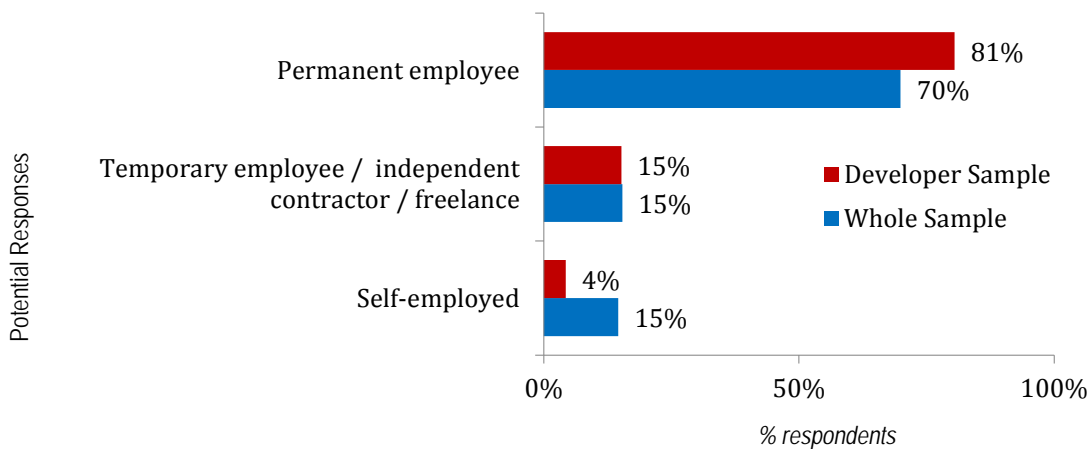
What do they do? Main discipline or role

In surveys it is hard to capture all the response options that apply to each question category. "What is your job or discipline" is particularly tricky in the game industry because these roles

are often defined very differently across studios, or for self-employed or freelance workers. As well, many game developers routinely perform multiple roles or engage in tasks that cross disciplinary boundaries (particularly in smaller studios).

Over time, the IGDA surveys have attempted to refine the approach to this question; therefore, the data from 2009 and 2014 presented in Table 2 (next page) is not directly comparable:
- First, the list of available options was more extensive in 2014 and therefore some trades (identified with data points) were not offered as an option in 2009.
- Second, in 2014 respondents were able to select as many job roles as they felt applied while in 2009 they had to select the one that best described their role.
- Third, in 2014 respondents were able to select their primary and secondary roles.
- Last, just presenting the data for primary roles (below) it can be seen that there are many more responses in 2014 for almost all of the roles/disciplines listed.

This last point cannot be interpreted as a drastic increase in the prevalence of these roles in the industry. Rather it is an artefact of the survey design where respondents could choose multiple options. This produced a 'double dipping' effect and increased the number of responses overall. This is also why these numbers, when totalled, are higher than the percentages listed in the introduction for core developer roles, managerial roles and support or ancillary roles. To create the sub-samples we applied a sorting logic to isolate one role for each respondent; in Table 2 we allow the multi-counting. 'Other' (2%) and 'Not applicable' (1%) are not shown.

Where do they work? Studio Type

In addition to their job role, respondents were asked to identify the type of company or studio where they work. As displayed in Figure 2 (next page), almost half of the sample (48%) said that they worked at an independent game studio. The next largest categories were first-party developers (27%), for-hire studios (17%), third-party developers (15%) and publisher-owned studios (11%).

The pattern of response is similar for the whole sample as for the developer sub-sample, with a few exceptions. Slightly fewer non-managerial developers reported working in independent studios (43%) as compared to the whole sample and slightly more reported working at first-party studios, publisher-owned studios and third-parties.

These numbers make sense given the typical make-up of independent studios which tend to be smaller, involve a higher degree of multi-tasking where developers perform multiple roles, and have greater direct involvement of the 'management team'. In smaller companies and/or independents it is more likely for the owner/founder to also be doing core developer roles.

Table 2

Primary discipline/role (Whole sample, 2009-2014)

	2014 (%)	2009 (%)
Founder or Owner	38	--
Software Engineer/Programmer	33	28
Designer/Scripter	27	4
Middle Manager or Team Lead	26	14
Senior Executive or Upper Manager	19	13
Producer/Project Manager	19	11
Visual Artist	17	16
Writer	10	3
Research & Development	9	--
Quality Assurance	9	6
Consultant	7	--
Marketing/Sales	6	2
Public Relations	6	
User-experience	5	--
Investor	5	1
Audio Artist	4	1
Administrative Support (accounting, legal, HR, office manager, etc.)	4	2
Community Management	4	--
Technical Support	4	--
Beta Tester/Play Tester	4	--
Customer Support	4	0
Academic/Educator	3	--
Localization/Translation	2	--
Retail Owner or Staff	1	--
Hardware Manufacturing	0	--
Journalist	1	--

Figure 2

Types of studio (Whole & developer sample, 2014)

Type of studio	Developers Sample	Whole sample
Independent game studio	43%	48%
First-party game developer/publisher	31%	27%
For-hire game studio (e.g., branded games)	16%	17%
Third-party developer	17%	15%
Publisher-owned developer	13%	11%
Serious game studio	8%	10%
Academic and Research	5%	9%
Tools or developer services	5%	6%
Other	7%	5%
Game-related position at a non-game company	4%	5%
Business services	1%	3%
Support services	3%	3%
Non-profit sector	2%	3%
Government institution/public sector	1%	2%
Media, press or game publication	2%	2%
Events/conference production	1%	1%
Hardware/accessories	1%	1%
Retail	1%	1%

% of respondents

Internationalisation of organisations: Head office and country of work

Survey respondents were asked to report their place of work and their employer's head office. Table 3 lists the countries which garnered a minimum of 1% of the survey sample responses. The data show a very high concentration of game-related workplaces in the United States, followed by Canada. This reflects the traditional depth of the video game industry in North America, but it also reflects a bias in the survey design and distribution to these countries. The survey was distributed in English through the IGDA and through the networks of those involved in its design. The IGDA presence in North America is significantly stronger than elsewhere in the world and the researchers who designed the survey are all based in Canada or the United States.

Presented in Table 3, the data allows for a broad comparison of head office location to country of work. For many countries the numbers are the same; for others they are different. This is particularly the case with Canada and France. In the Canadian case the data suggest a scenario typical of the Canadian context across many industries where there is a home grown component, but also a large presence of international corporations who maintain their head offices elsewhere. The largest studios in the Canadian landscape – Ubisoft and Electronic Arts - are emblematic of this effect. Though the data is more limited, Australia, Chile, India and the UK may also experience this international distribution effect.

The case of France in this data is the opposite. Where a significant number of respondents report that the head office for their employer is located in France, a much smaller number report working in France themselves. This reflects the global activities of French multinationals such as Ubisoft and Vivendi, yet suggests a lack of investment of these companies in their home labor markets. The data for Japan also seem to demonstrate this effect which might be expected due to the large global presence of companies such as Nintendo and Sony.

Table 3

Location of studio head office and country of work (% of whole sample, 2014)

	Location: Head Office	Location: Survey Respondents
United States	49%	48%
Canada	10%	17%
United Kingdom	5%	5%
Australia	4%	4%
Finland	4%	4%
India	1%	2%
Germany	2%	2%
Japan	3%	2%
Austria	2%	2%
Brazil	2%	2%
Chile	0%	1%
France	8%	1%

WORKING TIME

Weekly hours: Expectations and reality

The 2009 Quality of Life survey asked respondents to report separately on the hours that they are formally expected to work per week and the hours that they actually work per week. The data showed that for both regular hours and during crunch – defined as an extended period of overtime required to meet deadlines - respondents were working more hours per week than were formally required or expected by management.

The results are somewhat different in the 2014 data. There still is a gap between what is expected of employees and what they actually work during regular hours; on the whole, respondents still tend to work more hours than they are expected or required to work. However, this gap is decreasing particularly for crunch hours; the hours that survey respondents are expected to work during crunch time now seem more consistent with what they actually work, though there is still a skew toward more actual hours in the 60+ per week range (Table 4).

These observations are consistent for the whole sample and the developer sub-sample therefore the specific data for the latter sample is not shown.

Table 4

Expected and actual hours: regular and crunch (% of whole sample, 2014)

Hours	Expected Regular	Actual Regular	Expected Crunch	Actual Crunch
0 - <20	3	3	12	11
20 – 24	3	2	1	1
25 – 29	2	2	1	2
30 – 34	3	4	1	2
35 – 39	17	11	3	2
40 – 44	60	36	10	9
45 – 49	8	22	16	12
50 – 59	3	13	32	29
60 – 69	1.3	4	16	18
70 – 79	0	1	4	7
80 +	1	2	5	8

If we use a graphic form we can highlight the differences between expected and actual hours of work and the points where both meet (Figures 3 and 4 below). For regular hours, the expected hours are clustered around 40 hours per week, while the actual hours worked show a shift to the higher values. This skew is less pronounced for the crunch hours.
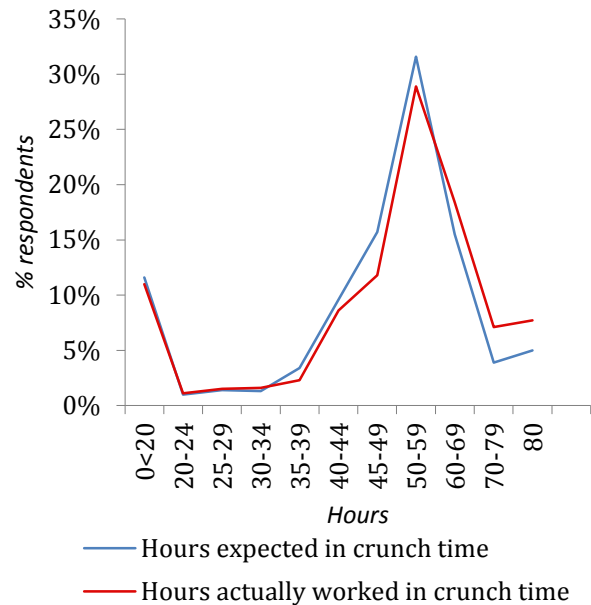
Figure 3

Expected regular hours vs. Actual (Whole sample, 2014)
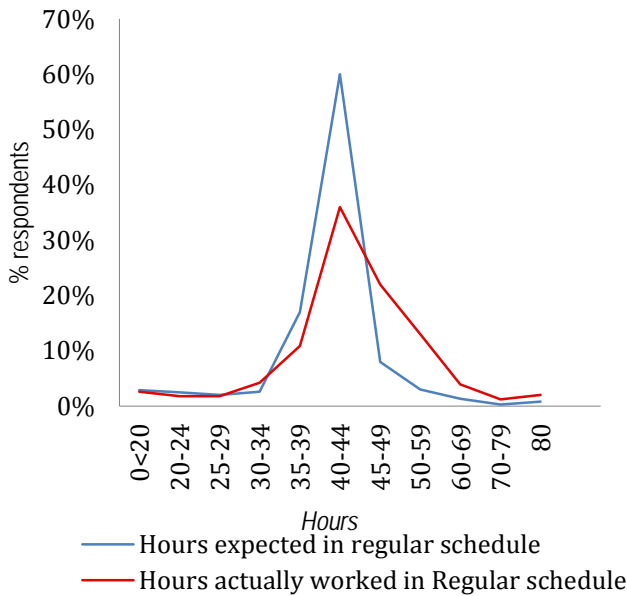
Figure 4

Expected crunch hours vs. Actual (Whole sample, 2014)

A general decrease in regular hours of work

Figure 5 illustrates the actual hours of work in regular schedule among the developer sub-sample for each of 2004, 2009 and 2014.

We can observe a general decrease of the working hours in the long run among developers (2004-2014). This means that there was an increase in the 'normal' 35-44 hours per week bracket between 2004 and 2014. A bigger share of respondents worked these hours instead of longer ones, hence an enhancement in the working conditions.

Mirroring the same trend, there is a decrease in the longer work week categories during the same period. More respondents reported shorter durations (40% worked 44 hours or less in 2004, 60% in 2009, 66% in 2014) and fewer reported long durations (60% worked 45 or more hours in 2004, 41% in 2009 and 34% in 2014).

The game industry is not known as a sector where you can find part-time employees. As

reported above, the numbers are still not high, but if this data is representative, it looks like there are more in this category (0-34 hours per week) than there used to be. Deeper investigation is needed on this topic to confirm such trends.

Figure 5

How many hours per week on average do you ACTUALLY work when in REGULAR schedule? (Developers' sub-sample, 2004 – 2009 – 2014)
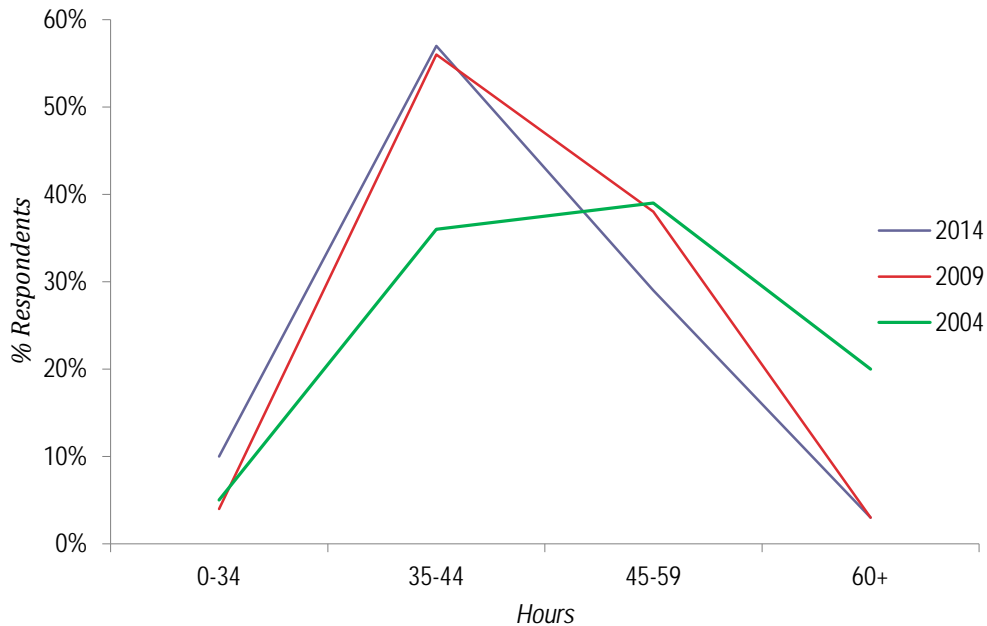
Yearly weeks of crunch time on a downward trend

To have a better picture of the practice of crunch, we have to account not just for the hours per week, but also for the number of weeks in a year during which developers were asked to work in crunch. The question of actual weeks working in crunch was not included in 2004, so we compare 2009 and 2014 only.

Comparing the data for the developer sub-sample shows first and foremost a clear increase in studios that do not crunch, which demonstrates that it is possible! Also, the data shows that crunch time for less than 5 weeks is more widespread, while longer durations are less frequent (Figure 6).

Figure 6

On average how many weeks per year do you crunch?

(Developers' sub-sample, 2009 – 2014)

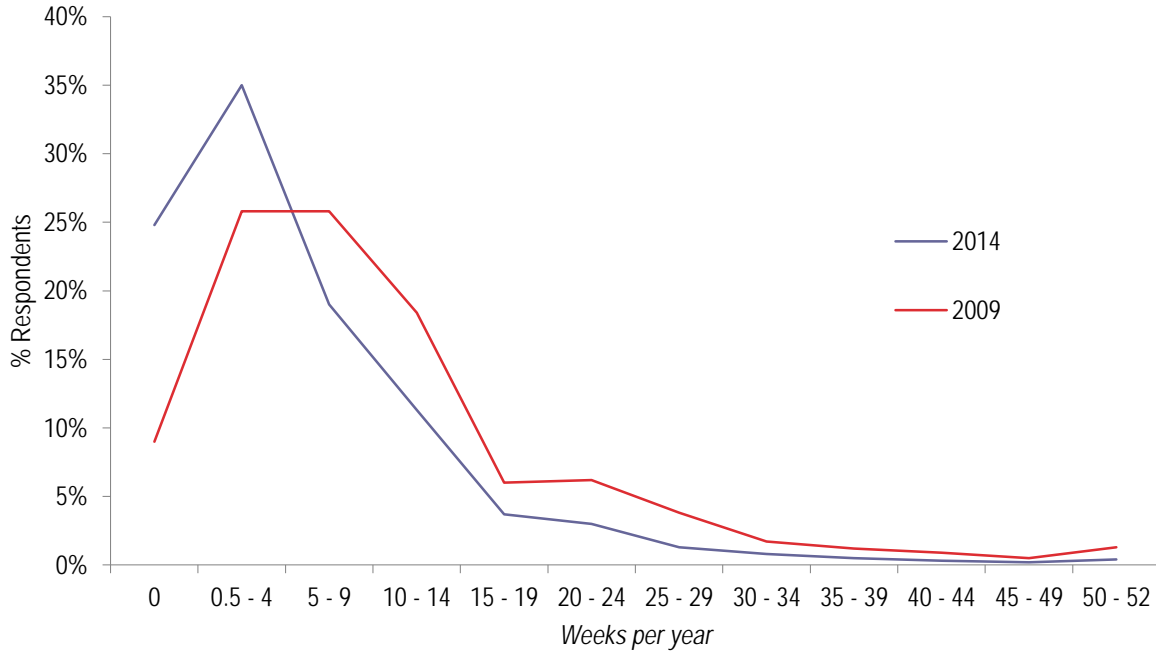Figure 7 compares the number of weeks of crunch time worked in a row for the developer sub-sample across 2009-2014. This shows that fewer respondents are experiencing consecutive weeks of crunch; more responded that they crunch for 0 weeks in a row and more responded with fewer consecutive weeks across the whole distribution.

Figure 7

Weeks of crunch worked in a row (Developers' sub-sample, 2009-2014)
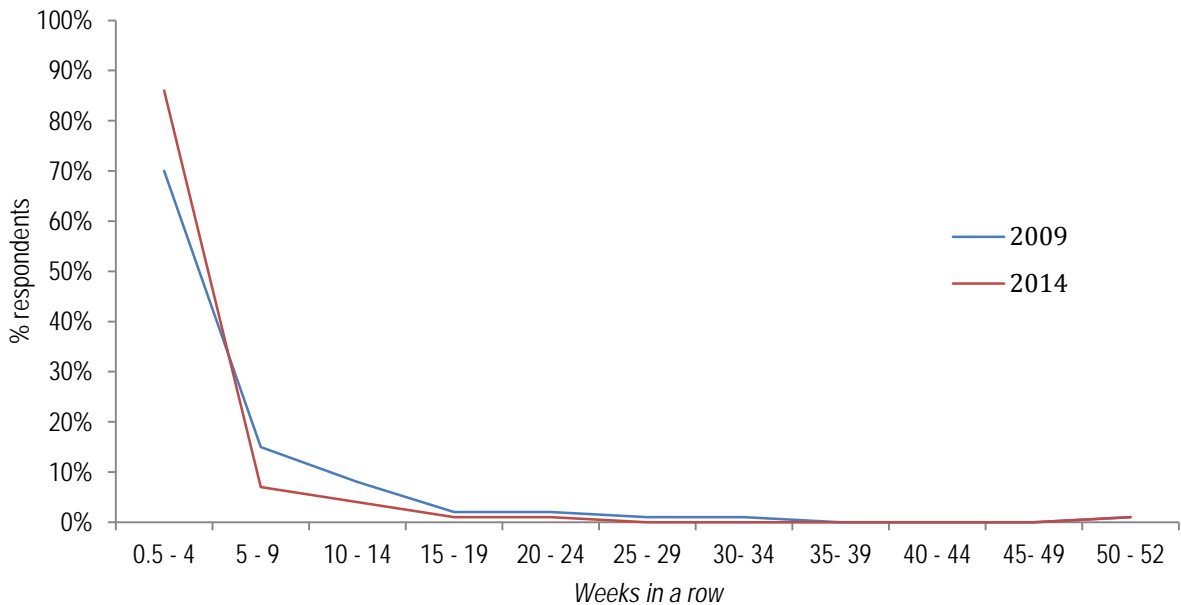
The pattern of response is virtually identical for the whole sample (not shown). Summary data for the whole sample on the average weeks of crunch per year and the average weeks in a row of crunch are provided in Table 5 below.

Table 5

Average weeks of crunch per year (Whole sample, 2009 – 2014)

	2009	**2014**
On average, how many weeks per year do you crunch?	10	6
On average, how many weeks in a row do you crunch?	5	3

But, crunch is still an issue

Though there is a downward trend in the number of hours worked per week in crunch, the weeks of crunch in a row, and the number of weeks per year in crunch, respondents still feel that developers are expected to work in crunch as a normal part of their job (Figure 8).

As shown in Figure 8 below, almost half (48%) of all respondents still believe that crunch is a normal part of their jobs. This increases slightly to 52% for developers. As well, 41% of respondents said they had experienced crunch "more than twice" in the last two years (Figure 9 below).

On average, respondents in the 2014 whole sample crunched for about six weeks per year, three weeks at a time. This is less than 2009, when respondents reported that, on average, they crunched for ten weeks per year, five weeks at a time.

This is an improvement; however, from a quality of life standpoint, three weeks in a row of crunch is still very draining. As well, though the averages in the 2014 data were six weeks per year and three weeks in a row, 25% of the sample reported working more than that in both cases.
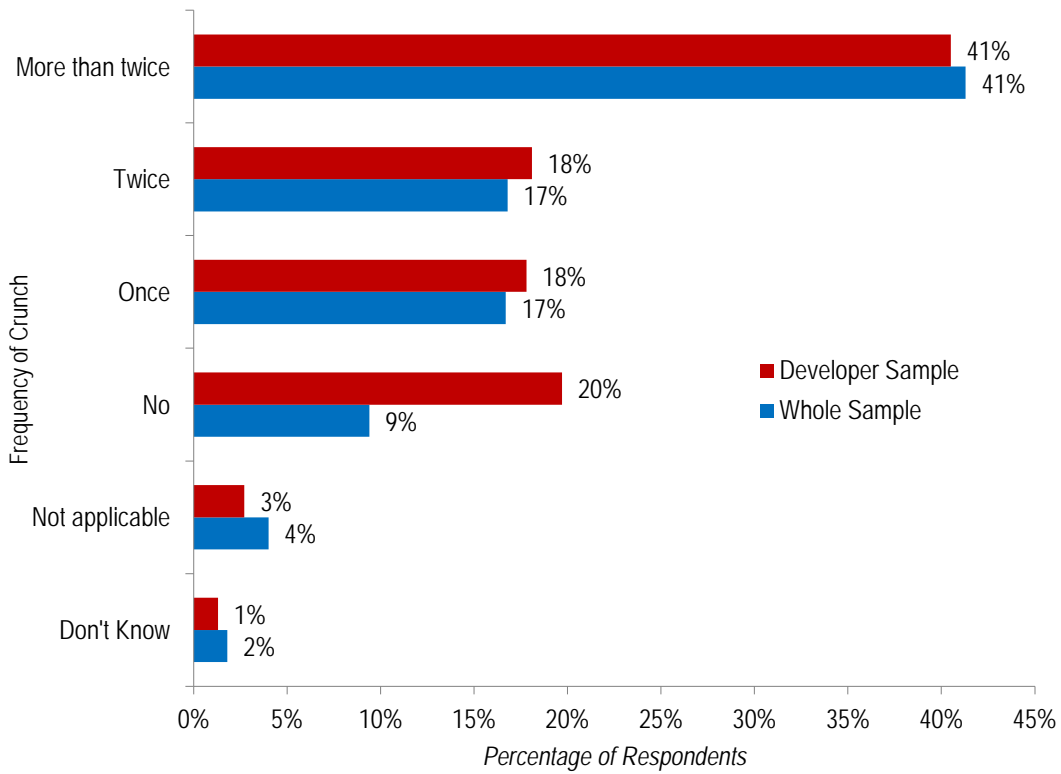
Figure 8

Do you feel that crunch time is expected at your workplace as a normal part of your job? (Whole and developer sample, 2014)
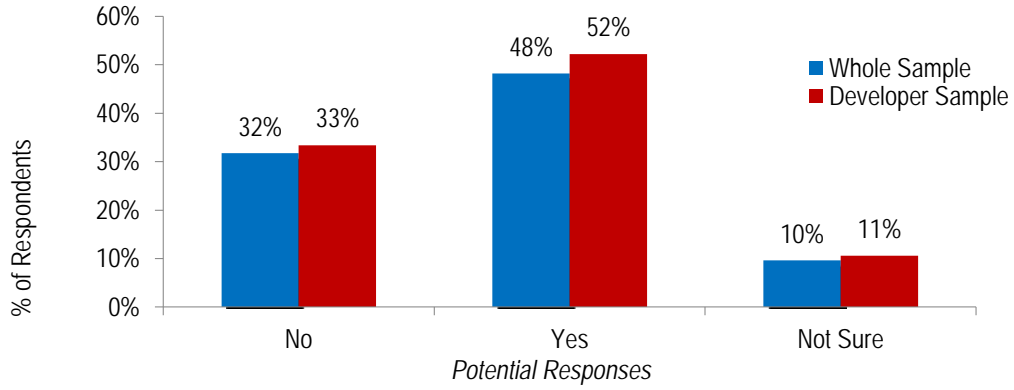
Figure 9

Have you experienced crunch in the past two years? (Whole & developer sample, 2014)

Poor scheduling practices still causing crunch

When asked about the managerial approach to handle crunch, a majority of respondents (44%) suggested that their company tries to manage crunch periods by "doing everything to avoid it." (Figure 10)

When asked to list all the reasons why they thought crunch happened in their company, more than half of respondents chose "poor scheduling" (53%). "Feature creep" (36%), "unclear expectations" (35%) and understaffing ("not enough people on the team") (31%) were also frequent answers. Respondents could choose all options that applied (Figure 11).

Together, the data in Figures 10 and 11, below, suggest that time management and the scope, scheduling and resourcing of projects is still not successful in many cases, despite what seems to be conscious effort on the part of many studios.

Figure 10

Managing crunch time (Whole sample, 2014)
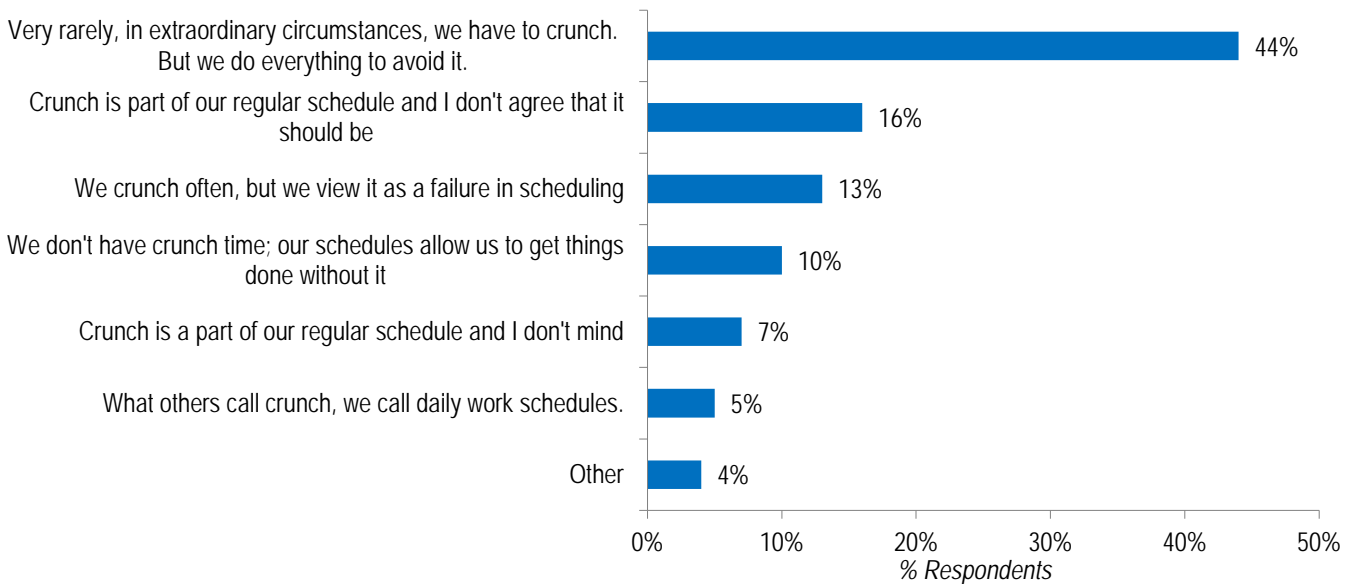
Figure 11

Reasons for crunch (Whole sample, 2014)
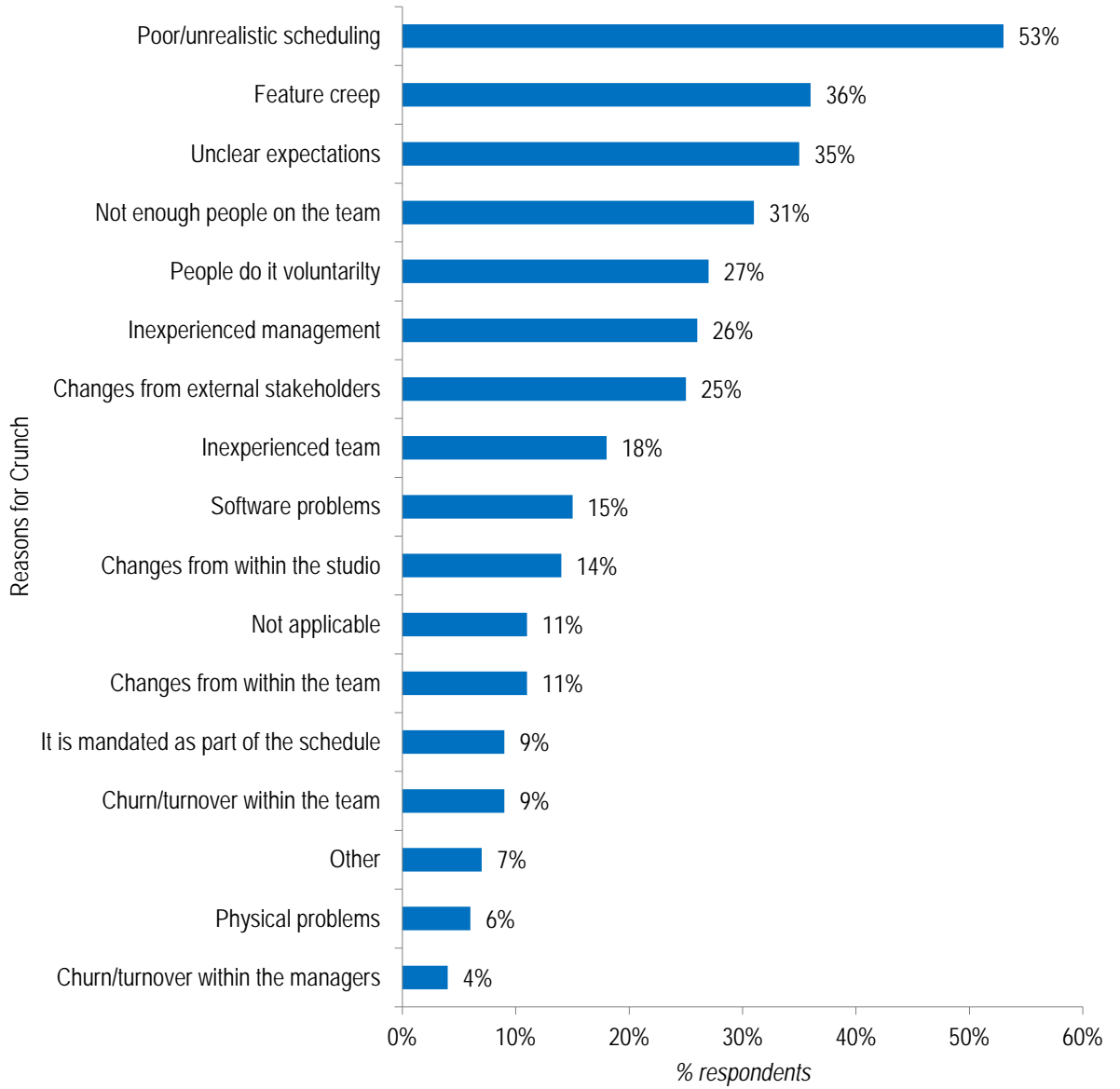
Employee's feelings toward working hours

Survey respondents were asked a number of questions to capture their more subjective feelings toward long hours and their workload. Over half (53%) of the respondents indicated that they have more work than time to do it (Figure 12). This response is perhaps not untypical for the general workforce as a whole; increased workloads and doing more with less are trends in many industries.

What is notable in this sample is that the majority of respondents (44%) also indicated that they would work overtime even if the schedule didn't demand it (Figure 13). This was slightly less true for developers, 37% of whom indicated they would work overtime if the schedule did not demand it. Perhaps this sentiment and behaviours are behind the continued finding that respondents work more hours per week than are expected or required by management, as outlined above (see Figures 3 and 4).

With the above said, respondents do feel the quality of their work is important in the assessment process. Almost 60% disagreed or strongly disagreed with the statement, "I am judged more by the hours I put in than by the quality of my work." According to this data, assessments (formal or informal, this was not specified) do appear to be based on merit as opposed to time employees put in.
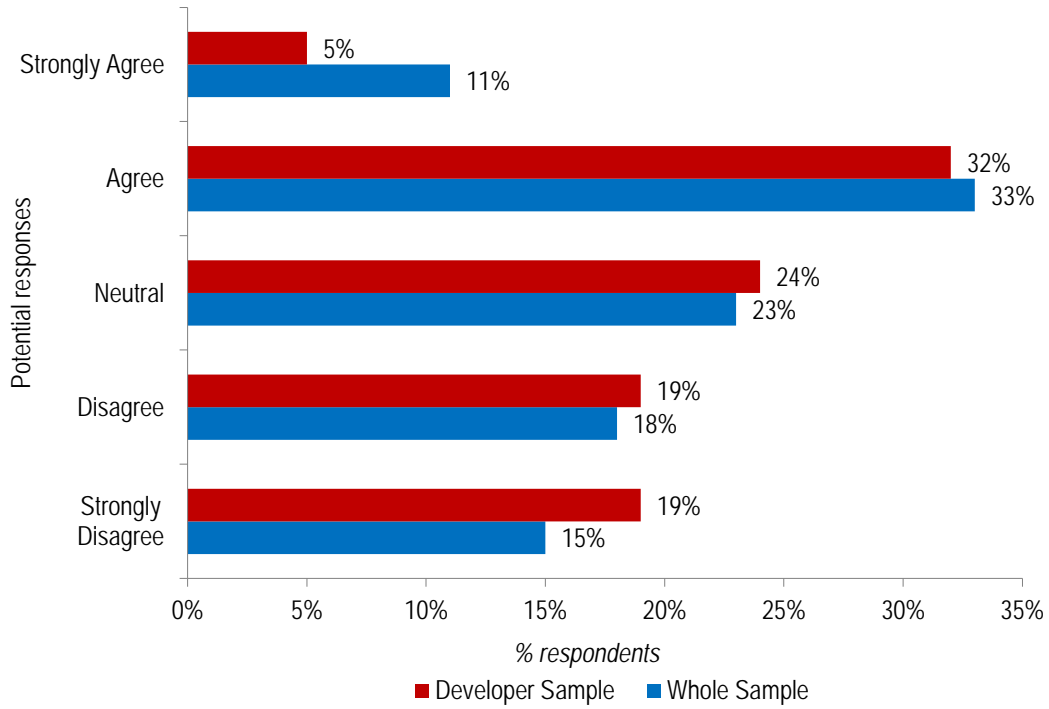
Figure 12

I have more work to do than time to do it (Whole & developer sample, 2014)
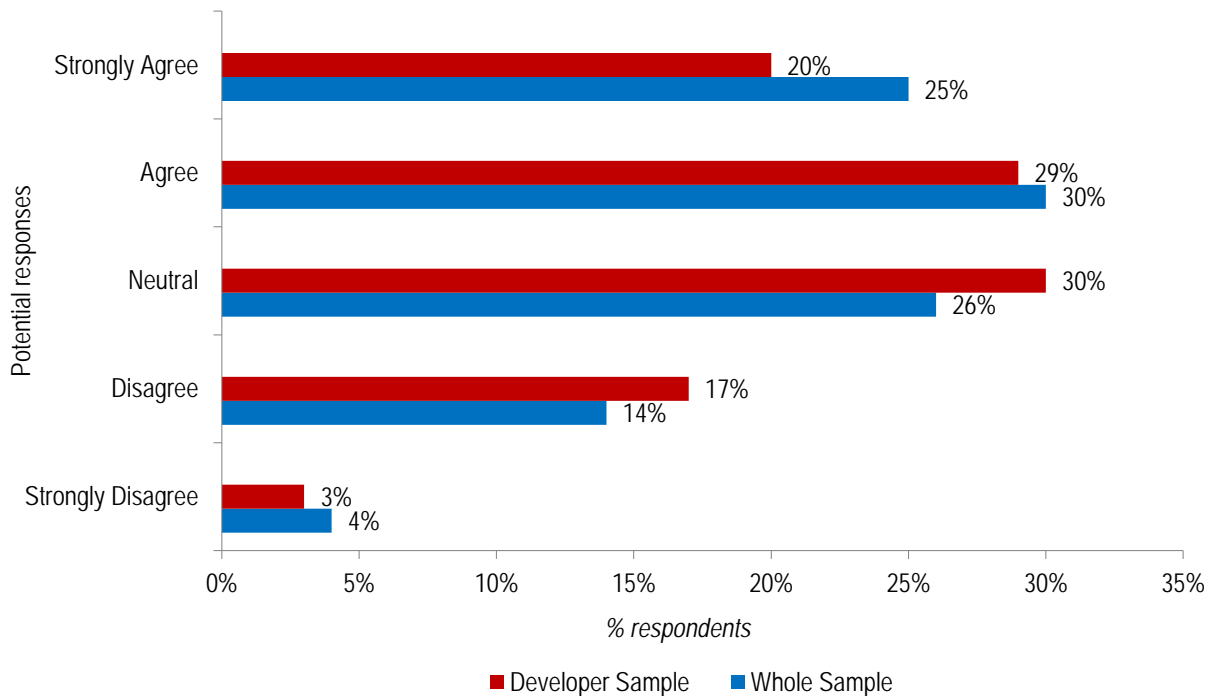
Figure 13

I'd work overtime even if the schedule didn't demand it (Whole & developer sample, 2014)

COMPENSATION

Still a majority of salaried employees

Two thirds (66%) of all respondents indicated that they work on salary at their respective companies. As indicated in Figure 14 below, respondents who work in core development roles are slightly more likely to work on salary than the whole sample, with 75% of participants choosing this response. It is interesting to note that 8% of the whole sample and 6% of the developer sample had not yet been paid for their work on their current project. This could reflect a hobbyist community or perhaps an increased risk in start-ups.

Figure 14

Payment terms: how are you paid for your work? (Whole & developer sample, 2014)

Types of payment arrangements
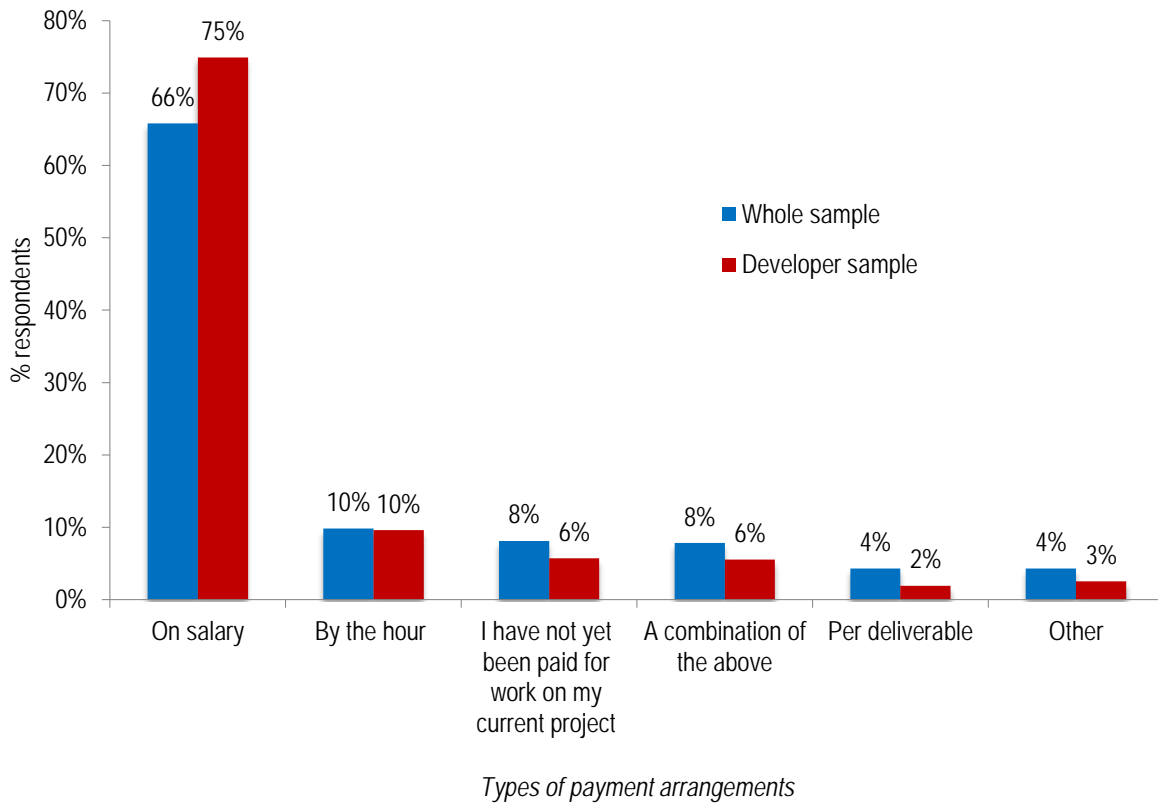
Not getting rich

Further on this topic, when asked "what percentage of your typical work/activity related to the game industry is paid or generates income", two thirds (66%) of respondents reported 75-100%, and 12% of respondents said that 50-74% of their game-related work is compensated. Just fewer than 10% of the sample reported that none of their game-related

work is compensated.

When asked about their total yearly income, the majority of respondents reported earning between $50,000 and $100,000 per year. That said, roughly 10% reported that they do not earn anything from their game-related work and 21% responded that their average income including all bonuses, incentives, royalties and stock options was less than $15,000 (Figure 15).

Figure 15

Annual income (Whole & developer sample, 2014)
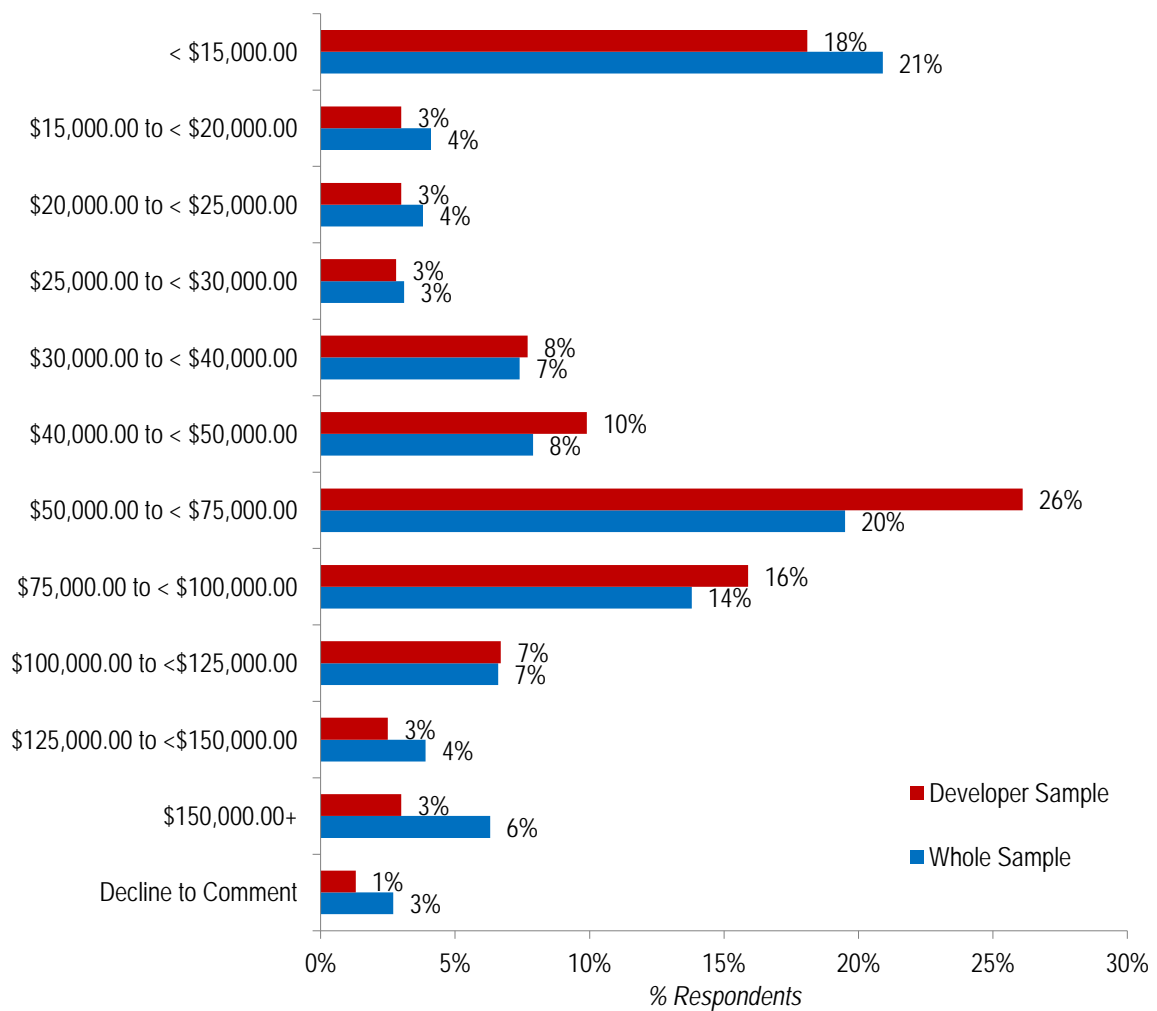
A small majority (35%) indicated that they felt they were compensated fairly considering their experience and the responsibility of their job title. The results were very similar for the developer portion of the sample.

Not much regarding incentives, bonuses and raises

Figure 16 below shows that 22% of survey respondents do not receive raises as part of their compensation and a further 11% are not sure if they do or don't. Those who do are most likely to receive these payments based on a combination of factors that include an assessment of merit, fixed percentage and/or the independent judgment of management.

It is interesting to note that developers are slightly less likely than the whole sample to report raises based on merit alone and less likely to report getting no raises at all.

Figure 16

Does your employer provide raises? (Whole & developer sample, 2014)
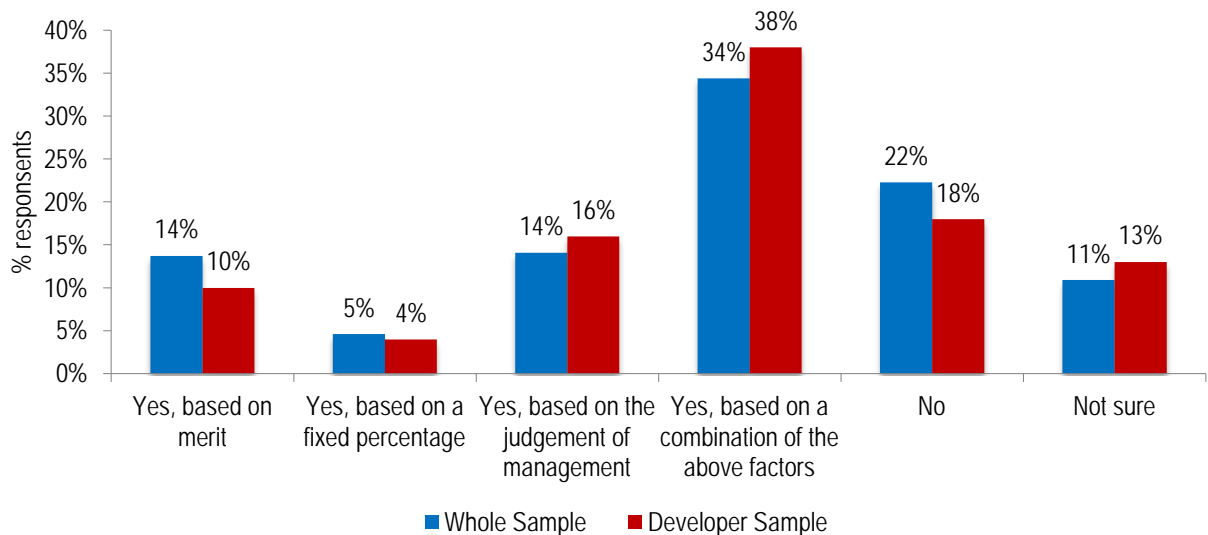
Performance reviews that might result in raises are common with 50% of respondents suggesting they happen annually and 13% responding that they are conducted every six months. Somewhat surprisingly, when taken together 27% of respondents indicated that their company never does performance reviews, reviews are ad hoc/ inconsistent, or that they are not sure whether reviews take place (Figure 17).

The data represented in Figure 18, below, show that just over one-third of respondents do not receive any incentives or bonuses; however, a similar number of employees do report that they receive lump sum bonuses. Company equity/stock options and royalties are received by 26% and 18% of respondents, respectively. Lump sum bonuses were slightly more common than any other option among the developer sub-sample (including "I do not receive any incentives"), with 38% of the developer sub-sample responding this way.

Respondents were able to choose more than one response if they did, in fact, receive more than one type of incentive or bonus and therefore the options do not add up to 100%.

Figure 17

How often does your company conduct performance reviews of its employees?

(Whole & developer sample, 2014)
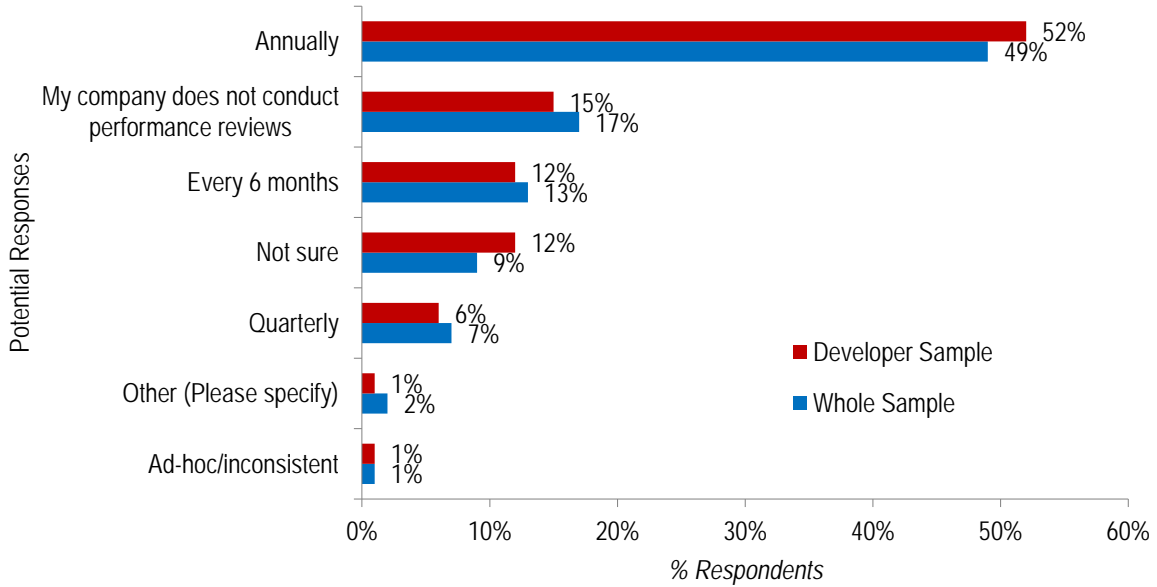
Figure 18

Do you receive incentive/bonus payments or stock options as part of your compensation?
(Whole & developer sample, 2014)
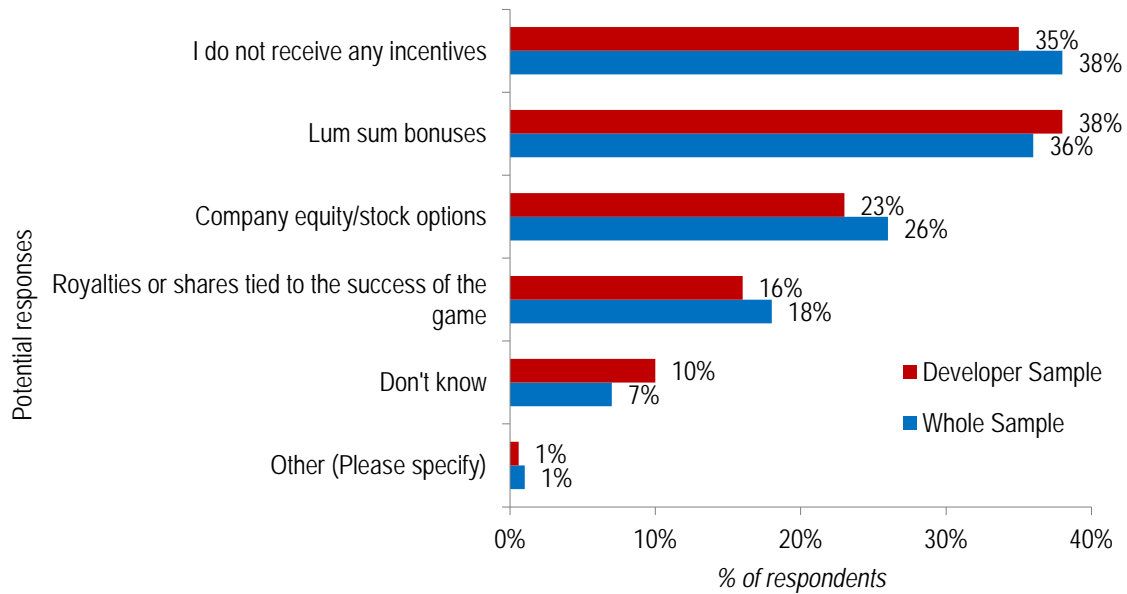
Given the distribution of responses in Figure 18, it is not surprising that respondents' answers were mixed when they were asked whether they share in the profitability of their company. Roughly equal numbers agreed with and disagreed with that statement (Figure 19).

Figure 19

I share in the profitability of the company (whole sample, 2014)
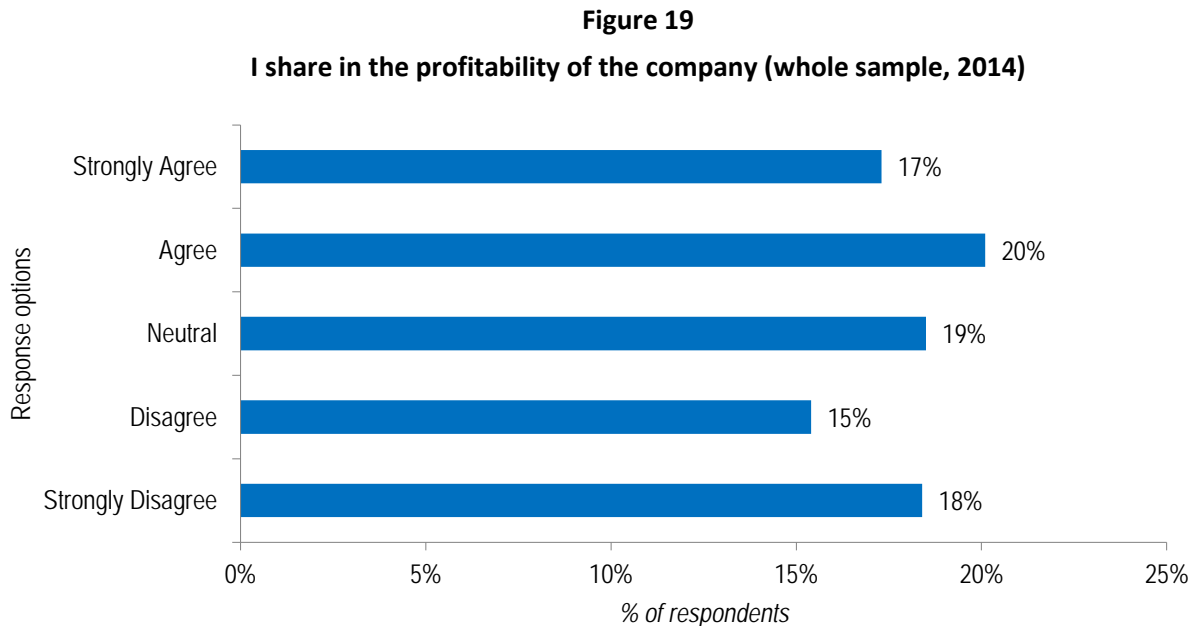
Not enough compensation for crunch

Few respondents replied with a definitive 'yes' when asked if they felt they were compensated equitably for their crunch time. Rather, the whole sample was almost equally divided into thirds on this question, with 'no' winning out slightly (Figure 20).

Similarly, when asked what kind of compensation is offered for crunch, 38% answered, "I do not receive any compensation." However, "some perks" and "time off" were also popular answers among the whole sample (31% and 27%, respectively) (Figure 21).

Figure 20

Is the compensation equitable for the amount of crunch? (Whole sample, 2014)
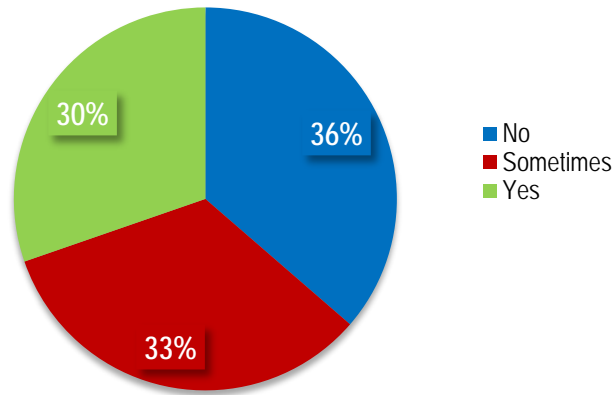
Figure 21

Do you get extra compensation for working beyond normal/stated hours?

(Whole & developer sample, 2014)
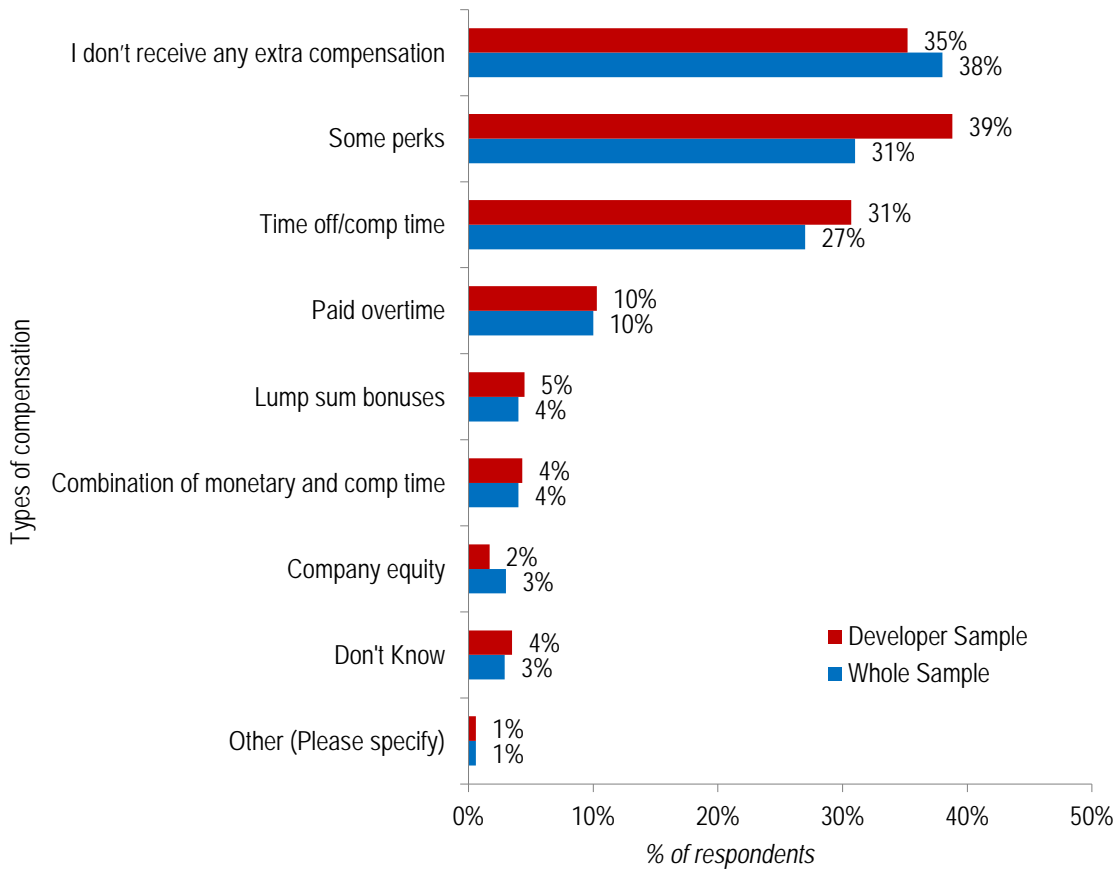
The data was relatively normally distributed when respondents were asked whether bonuses

compensated for the extra hours required during crunch: respondents were almost equally likely to feel that they are compensated as not (Figure 22). The pattern of results is similar for the developer sub-sample (not shown).

Figure 22

Bonuses do not compensate for the extra work hours that are required

(Whole sample, 2014)
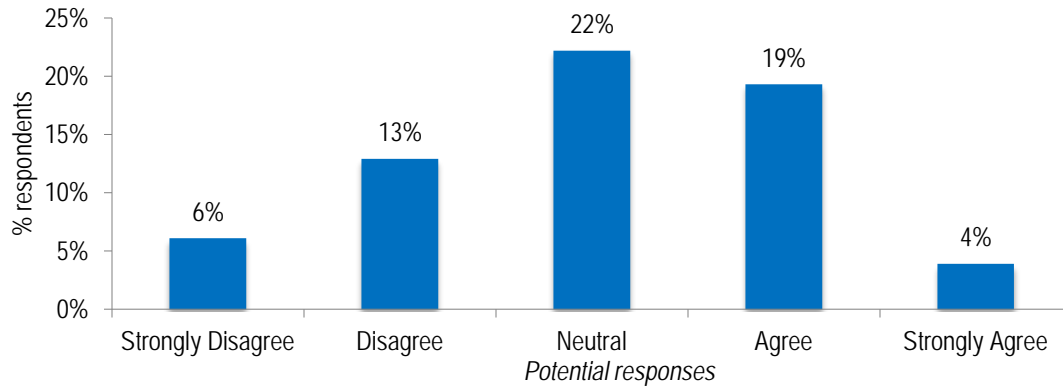
When compared to monetary compensation, compensatory time-off (comp time) at the end of a project is arguably more vulnerable as it could be lost in the shuffle if the studio gets busy with another project and cannot grant the time. The data bear this out for a small population; 21% reported that there had been instances when they were denied comp time or had been unable to use it and 4% did not know if this had happened to them. However, the majority (75%) reported that they had never been denied comp time (Figure 23).

Figure 23

Have you ever been promised comp time and then been unable to use it?

(Whole sample, 2014)
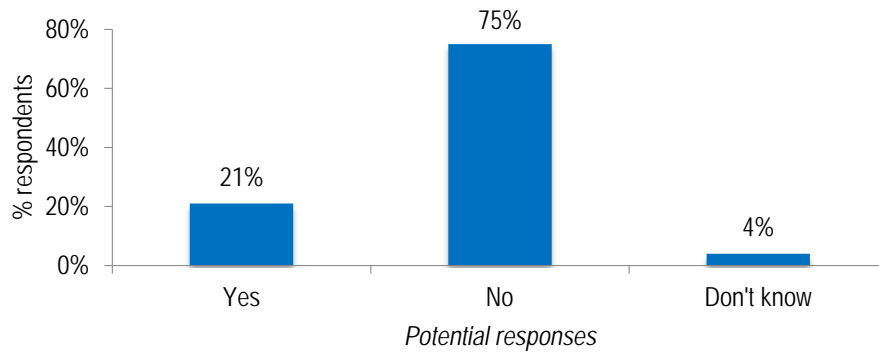
VACATION AND PERSONAL TIME

Packaged policies for paid time off common

It is becoming common in the new media industries for employers to offer more open and flexible time off policies where a bank of days are provided and employees can use them as they wish. This seems to be the case in many game studios, as only 22% of respondents said that their employer allocates days off separately for vacation, sickness or other personal reasons (Figure 24). Of those indicating that they had a packaged paid time off policy, over half of the respondents said sick days and vacation days were included and 42% said that other personal days were included.

Figure 24

If your company has a packaged policy for personal or paid time off, what does it include? (Whole sample, 2014)
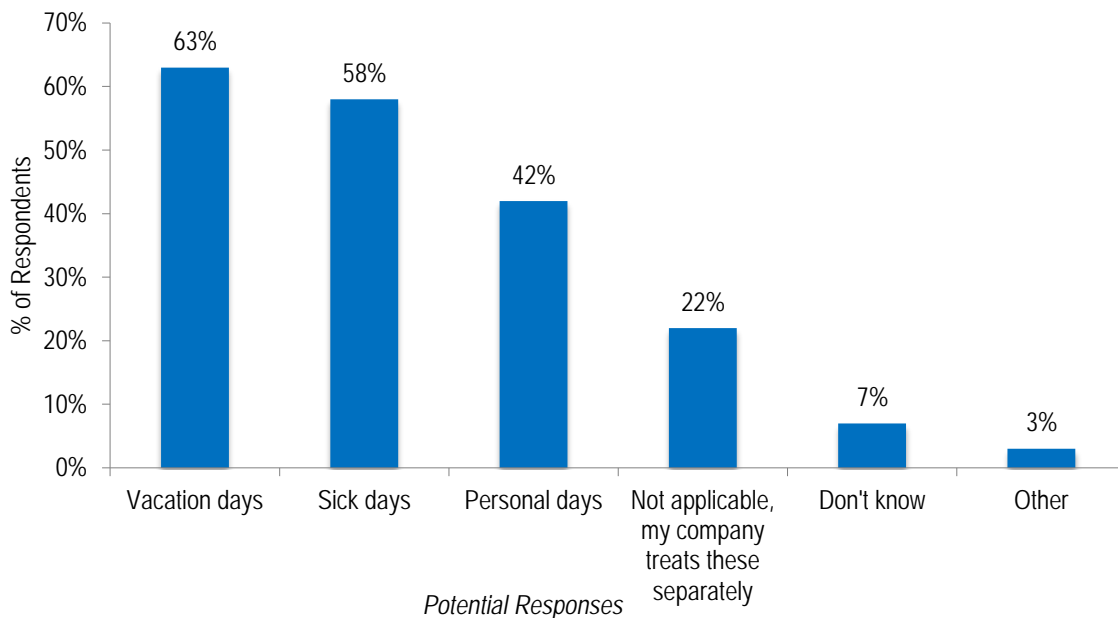
Vacation and personal time offered by employers

Of the respondents who did not report packaged time off policies, almost 30% indicated that they do not receive any paid vacation time (Figure 25). However, 21% reported that they get "all they need or want." An additional 30% receive between 2-4 weeks.

In addition to this paid vacation time, just over half of the respondents reported being able to take additional time off for vacation if it was unpaid. These policies seem to be varied across companies, but generally quite open-ended; 47% indicated that they could take as much

unpaid vacation as they needed or wanted while the remaining 7% were spread evenly across the 1 week to 3+ week options. That leaves 20% who received no option for additional vacation time, even unpaid, and 27% who did not know.

Figure 25

How many weeks per year do you have for paid vacation? (Whole sample, 2014)
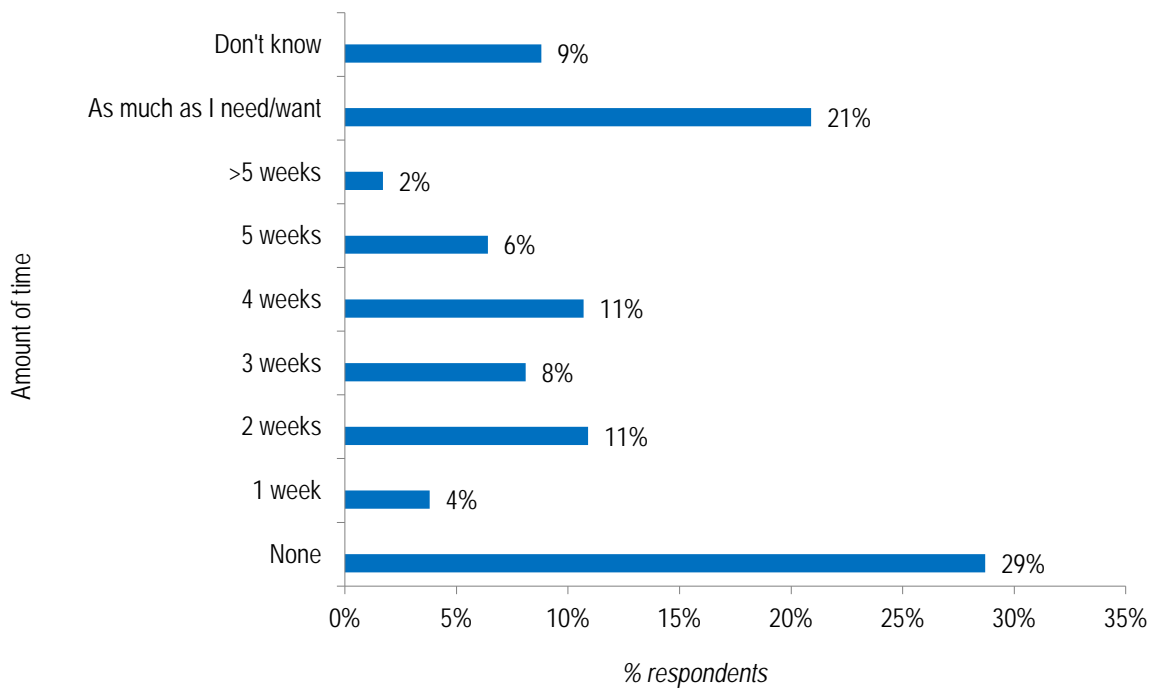
In this same sample, a majority of respondents indicated that they get between two and four weeks of "personal time" per year, with only 4% of respondents indicating that they get "none." (Figure 26)

The average number of paid sick days provided per year is three. However, this average is pulled down by a large number of respondents reporting that they received zero paid sick days or that this question was not applicable to them (which was grouped with 0 in this case on the survey).

Survey respondents were also asked about general unpaid days that they may be allowed. Similar to the response patters above, many (36%) reported that they could take as many unpaid days as they needed or wanted, the majority did not know whether this option was available to them (40%) and 11% said they could not access unpaid days off. The remaining 13% of respondents were evenly distributed across the options provided (1-3, 4-6, 7-8, 8-10 and 10+ days).

Figure 26

How much paid personal time off are you allowed per year? (Whole sample, 2014)
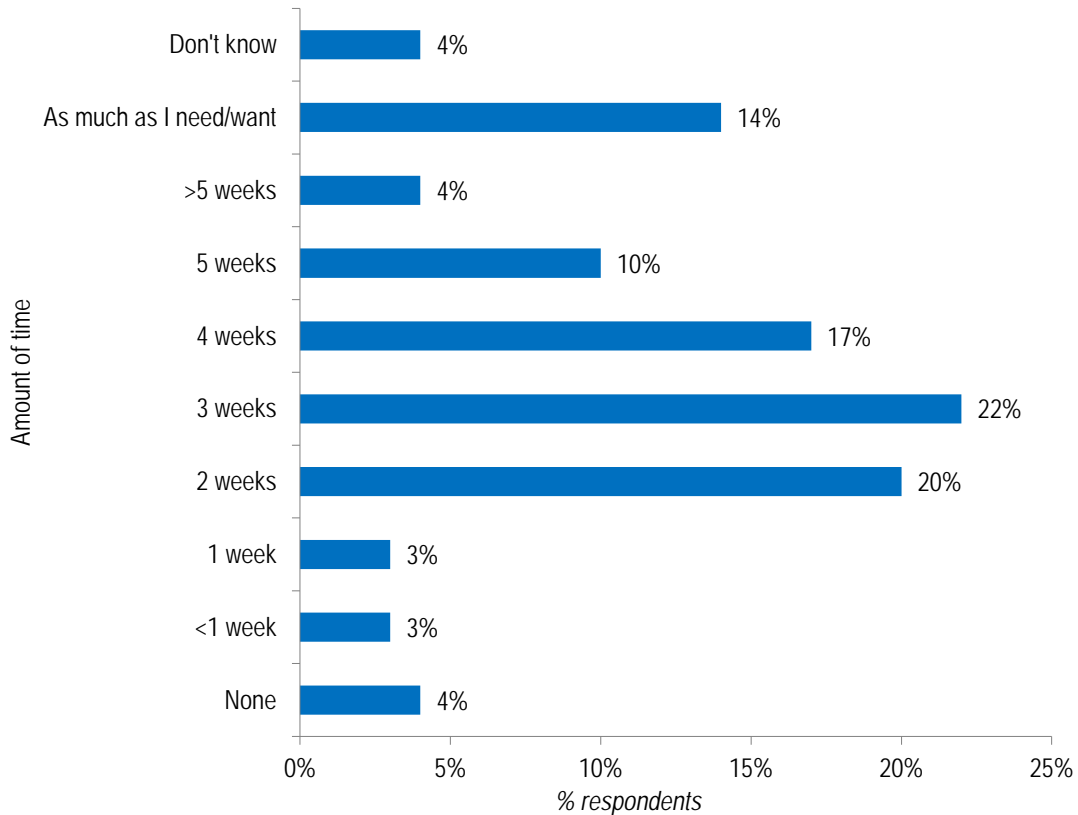
Taking time off: not an issue for employers

Despite its seeming availability, paid and unpaid time off is not universally guaranteed. One in five respondents reported having to cancel a vacation that they had already scheduled, and a similar number reported that they had been denied some of their vacation time (21 and 22%, respectively). However, that leaves most respondents (79%) indicating that their employers did not make requests for them to cancel pre-planned vacations and 78% saying that they had never been denied a vacation (Figure 27). Furthermore, a significant portion of respondents (54%) were allowed to roll vacation from one year to the next.

Figure 27

Ability to take vacations (Whole sample, 2014)
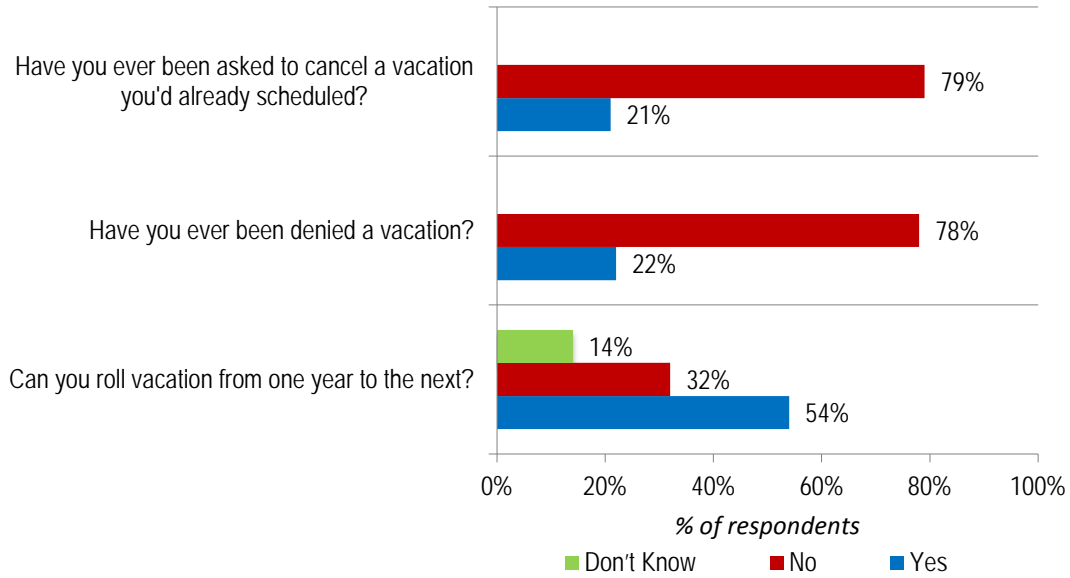
More than a quarter of respondents (28%) indicated they typically take two weeks of paid vacation per year, but three weeks was a close second with 23% of respondents choosing this response. That said, 12% of respondents indicated they take no paid vacation (Figure 28).

Figure 28

On average, how much paid vacation do you take per year? (Whole sample, 2014)
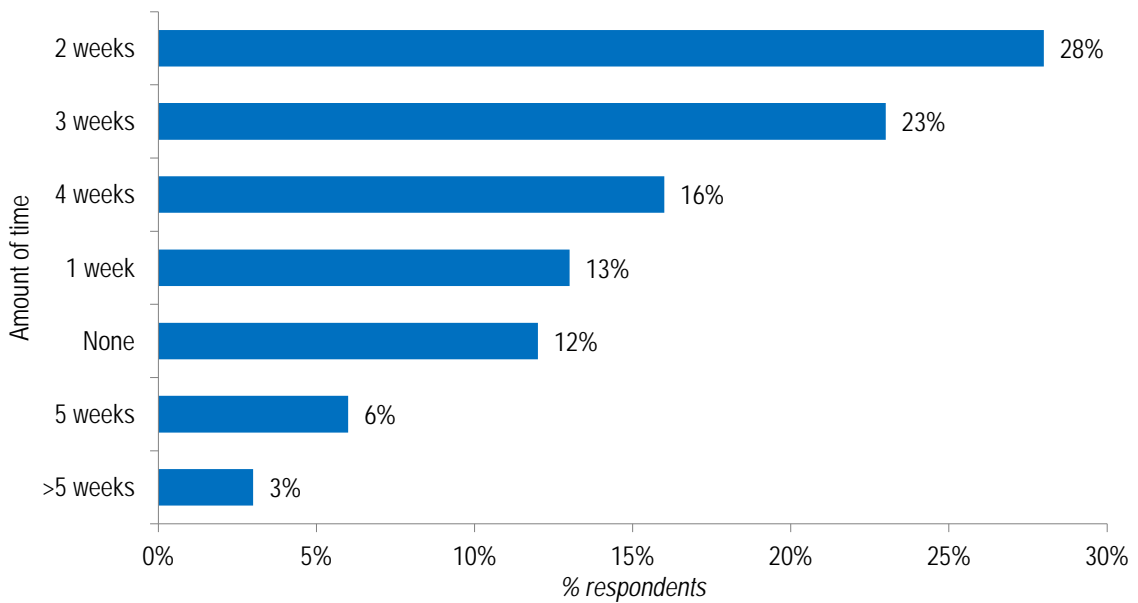
LIFE PLANNING: INSURANCE, CHILDREN AND RETIREMENT

Health coverage and life insurance

Respondents were asked to indicate all the sources through which they had health coverage. Only 11% reported that they do not have health coverage of any sort. Over half (55%) of the respondents indicated that their employer provided health coverage for them and another 21% indicated that they are covered through a government plan. Though not included in Figure 29 below, 3% of the sample indicated that this question was not applicable to them. This could indicate a lack of access.

Figure 29

Do you currently have health coverage? (Whole sample, 2014)
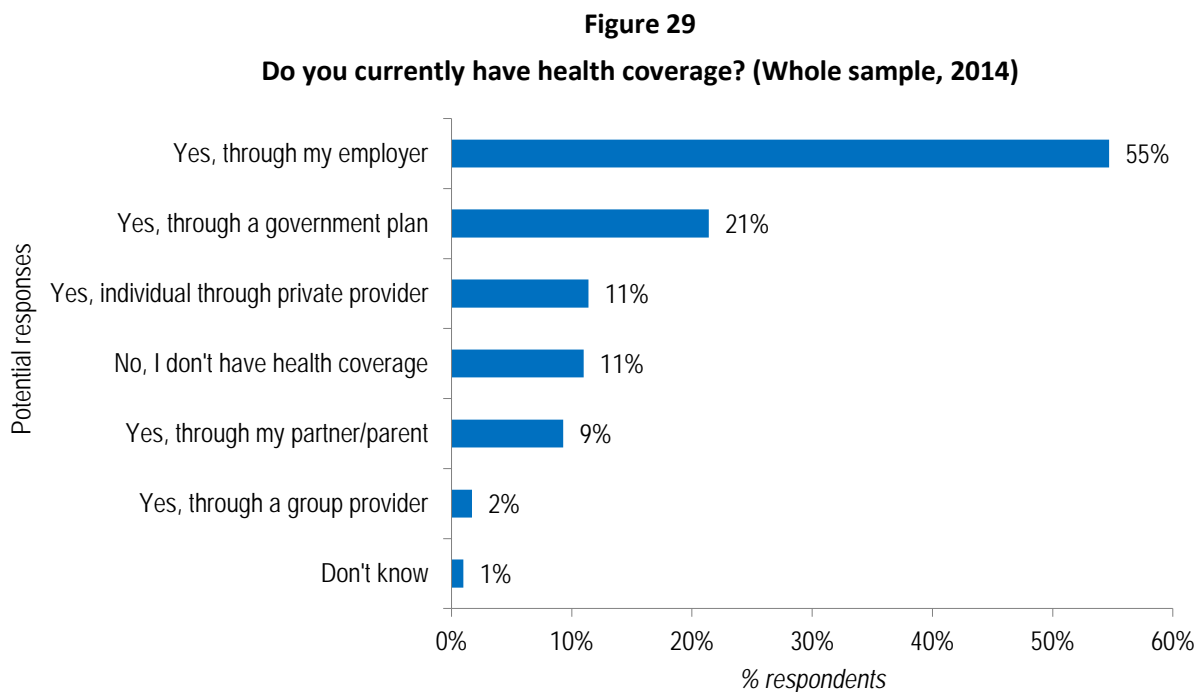
Life insurance is a less common benefit; 35% reported that they do not have any life insurance. For those with coverage, 35% indicated that it is provided by their employer and 24% indicated that they buy their own through a private provider (Figure 30).

Figure 30

Do you currently have life insurance? (Whole sample, 2014)
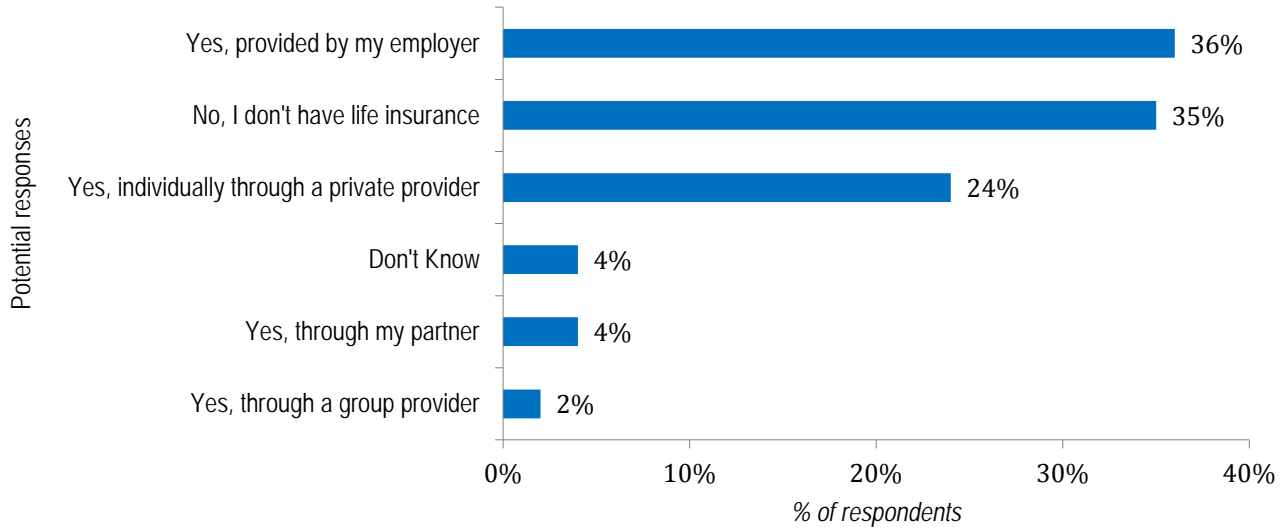
Retirement and pension programs

Similar to life insurance, only a little over a third (36%) of respondents received retirement or pension benefits from their employers (Figure 31). More than 24% of respondents indicated that they pay for their own retirement plan. Almost equal numbers of respondents (29%) do not have a retirement program at all. The percentage of this sample without a pension is quite similar to the statistics for the US labor force as a whole, which is unsettling given the growing consensus of a retirement crisis. That said, this data may also reflect the relatively young age of the people in the sample.

Respondents were allowed to select multiple answers as applicable, so there is also doubling up in this data among those with plans.

Figure 31

Do you currently have a retirement or pension program? (Whole sample, 2014)
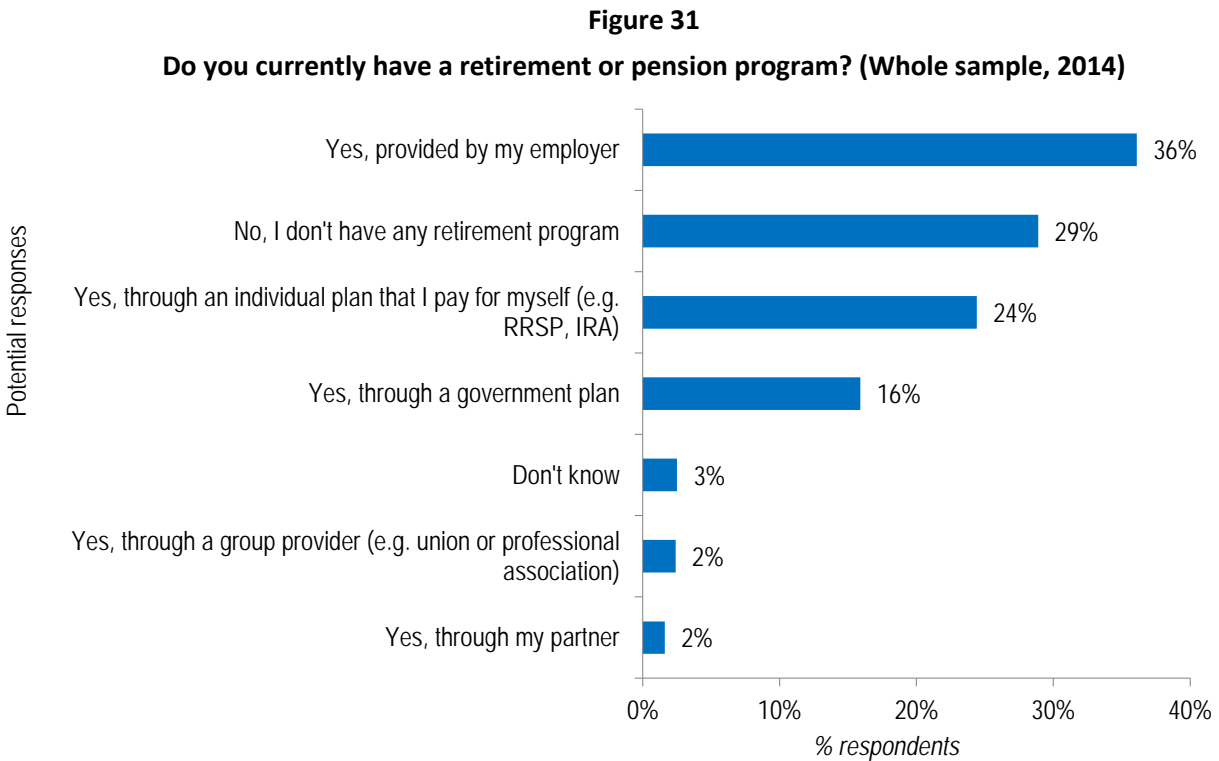
Benefits that support child rearing not a priority

Given that the majority of the survey sample are working in the United States where there are no government programs to financially subsidize pregnancy or parental leave, it is not surprising that just over 10% of the sample reported no leave at all and a further 9% reported only unpaid leave. Almost 30% of the sample did not know whether they have access to pregnancy and/or parental leave (Figure 32).

Though at first surprising, the low number of respondents who have children may explain this general lack of awareness as most respondents to the survey are single, childless males.

This demographic profile also likely explains the low priority given to child rearing benefits overall – employer sponsored access to daycare is also low in this sample (Figure 33). However, while the benefits may fit the current developer population, they do nothing to ease the path into the industry for women.

Figure 32

Does your employer provide maternity/pregnancy and/or paternity/parental leave? (Whole sample, 2014)
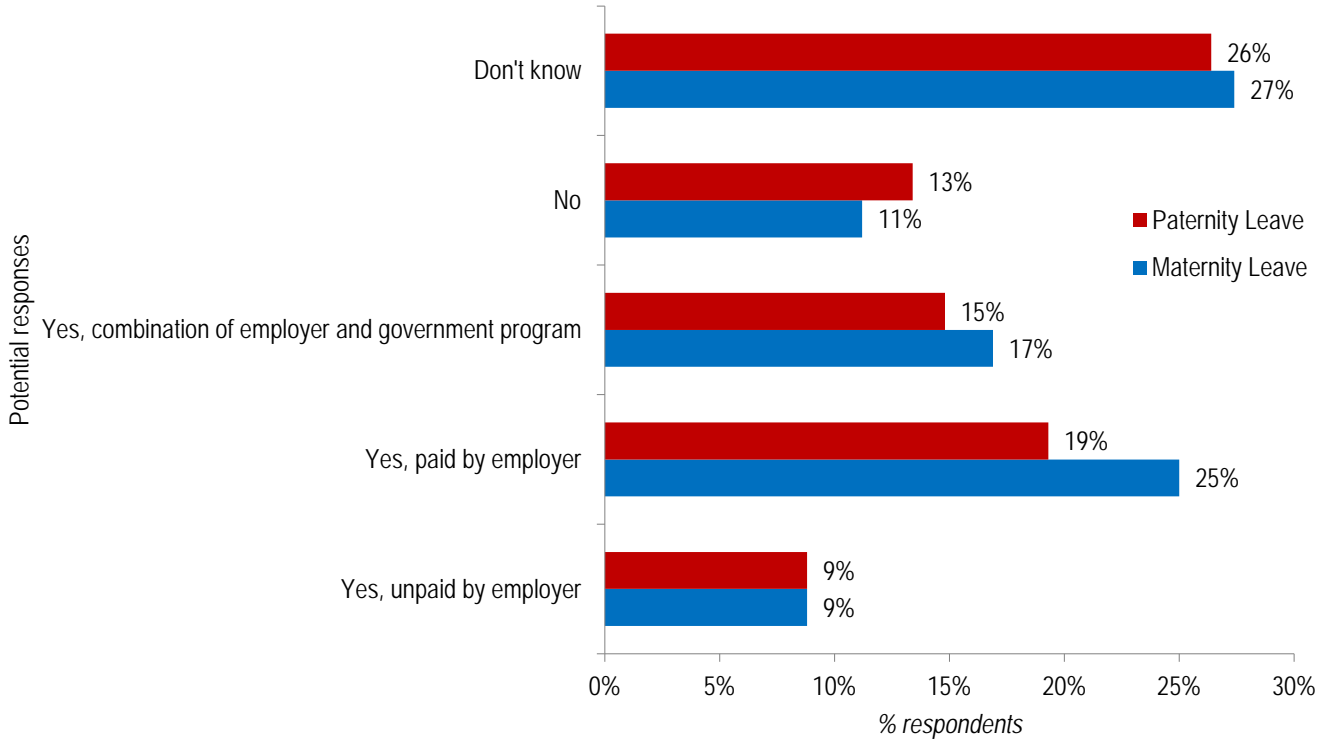
Figure 33

Does your employer provide daycare? (Whole sample, 2014)
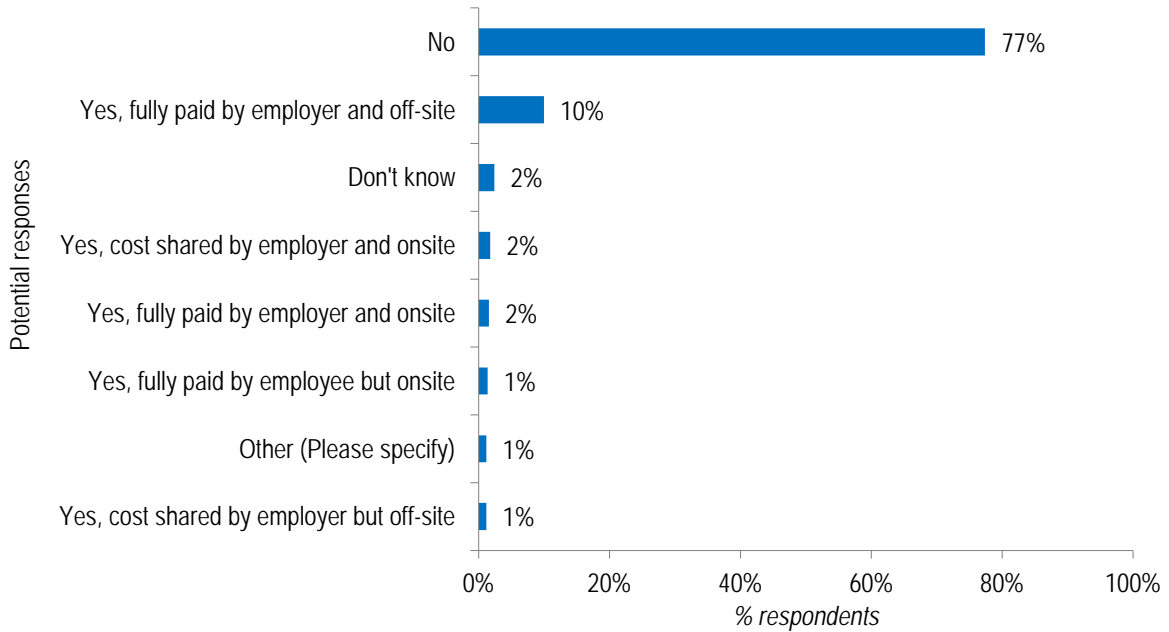
Miscellaneous Benefits

As seen in Figure 34 below, flexible hours are a common benefit of working in the game development industry; 66% of respondents indicated that flex hours are allowed by their employer. Free drinks (water, espresso, etc.) are also a common benefit. However, arguably more substantial benefits like healthcare spending accounts, on-site medical services, wellness programs, and professional development funds are not typically provided by employers. For each of these options, less than a third of respondents said they were provided.

Figure 34

Does your employer provide any of the following incentives or resources?
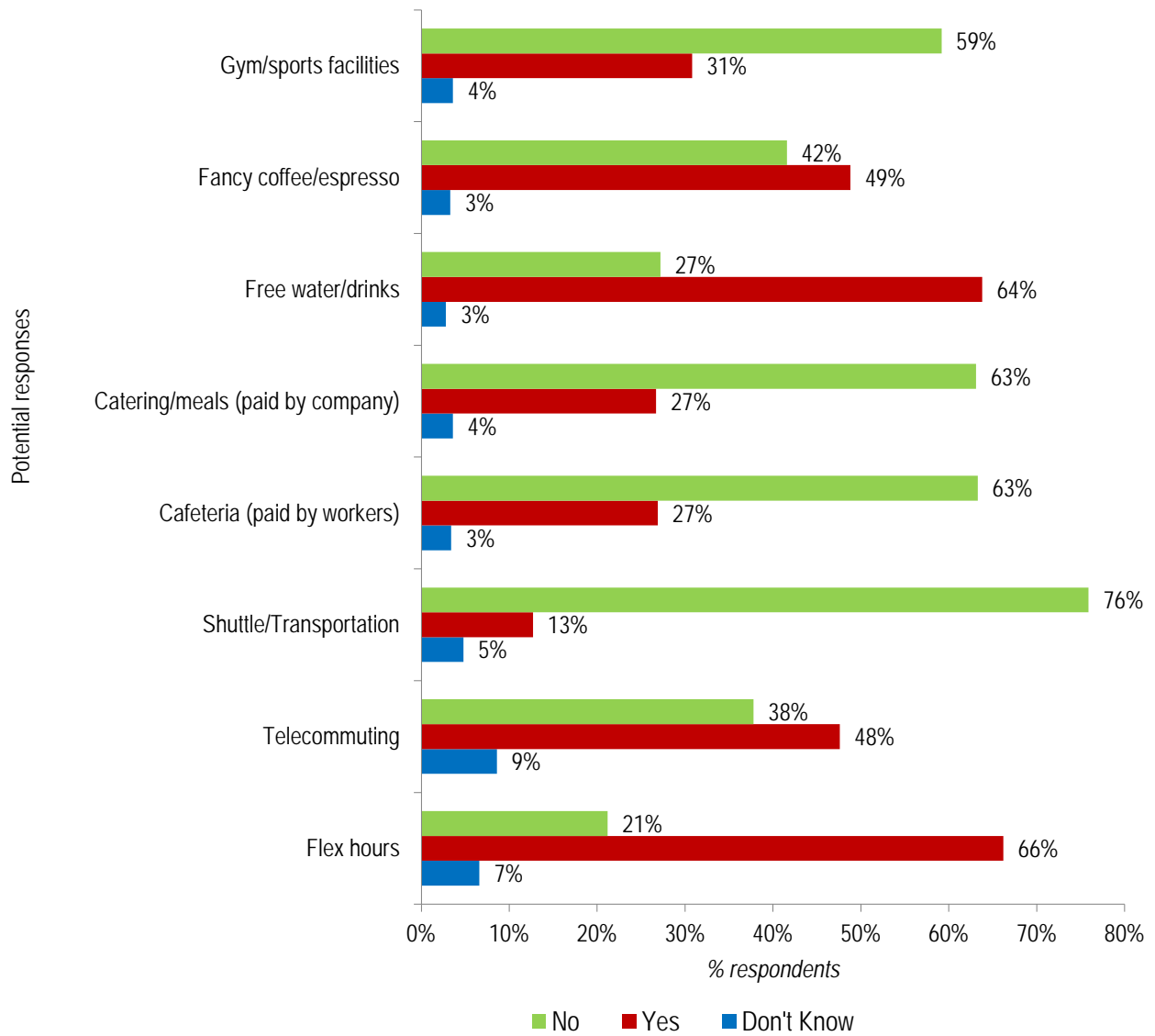
(Whole sample, 2014)

Figure 34 Continued

Does your employer provide any of the following incentives or resources?

(Whole sample, 2014)

Potential responses	No	Yes	Don't Know
On-site medical (e.g. flu shots)	59%	26%	8%
Legal/financial services	59%	26%	8%
Wellness programs/funds	58%	21%	14%
Professional development funds	58%	20%	16%
Healthcare spending account	50%	32%	12%
Employee Assistance Program (EAP)	50%	26%	18%
Pets and/or open pet policy	69%	17%	7%
Massage	72%	17%	4%
Game/arcade lounge	46%	44%	4%
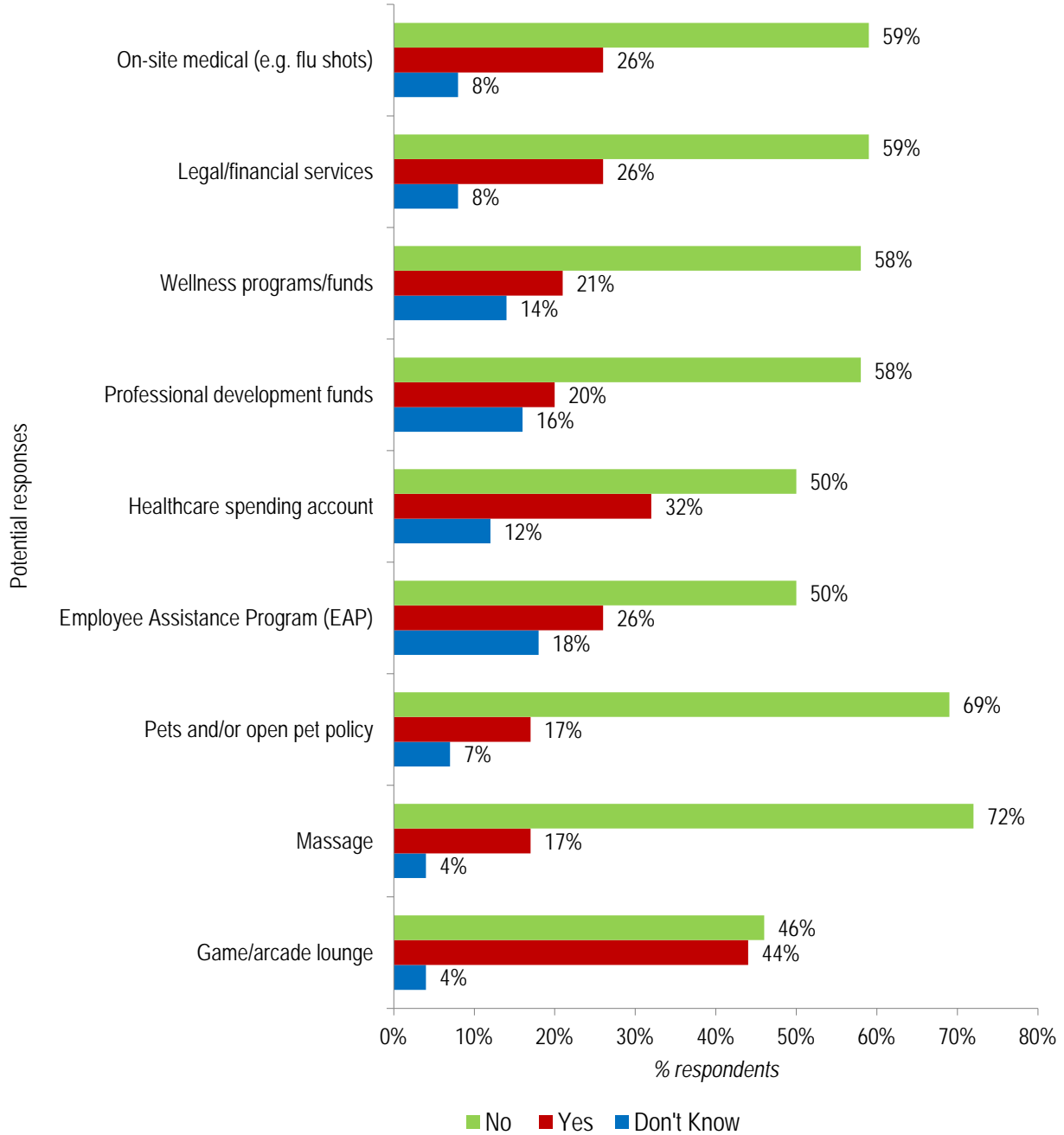
% respondents

UNCLEAR CAREER PATHS

The data reflect varied opinions for questions about career paths and potential for advancement and growth. On the whole, respondents are more likely to report satisfaction with the available career pathways and the career growth opportunities than dissatisfaction. However there are still a significant number of respondents who express dissatisfaction in their career options (Figure 35). This dissatisfaction seems slightly greater among those in core development roles when they are compared to the whole survey sample. Of the developer sub-sample, 44% answered with an explicit "no" when asked whether their profession had a clear career path compared to 39% of the whole sample. A further 24% were uncertain. The number of respondents in the core developer sub-sample who clearly felt that their profession does have a clear career path was much lower than the whole sample (29% versus 41%).

Figure 35

Does your profession have a clear career path? (Whole & developer sample, 2014)
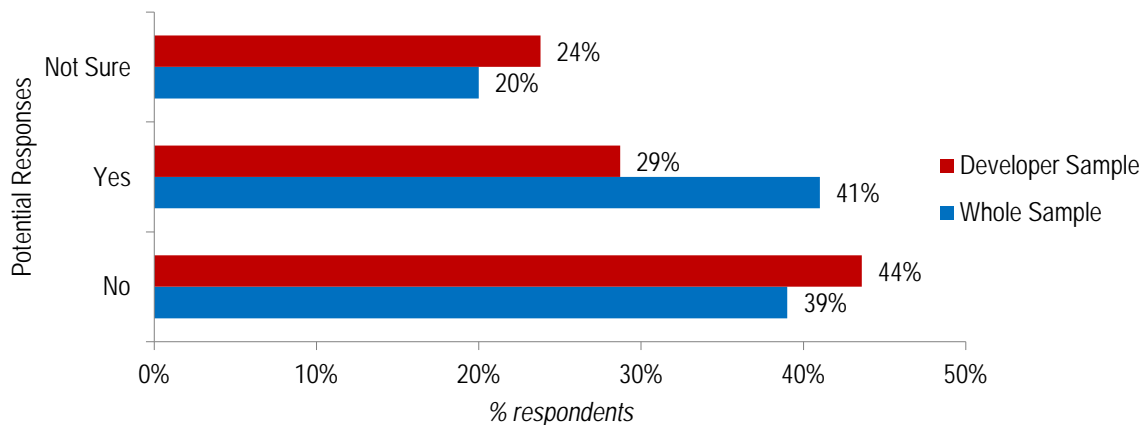
This difference persists across a related question where respondents were asked to rate their company on its ability to provide potential opportunities for career promotion and/or advancement. Almost two-thirds (64%) of the developer sub-sample rated the potential for advancement at their company as "neutral", "fair" or "poor". Comparatively, 57% of the whole sample rated their company as only having "neutral" or "fair" or "poor" potential for promotion or advancement (Figure 36). Respondents in core developer roles were half as likely to rate their company as "excellent" on potential for career promotion and advancement than respondents in the whole sample (8 versus 16%).

There are two related factors that could potentially explain these results. First, workers in

core developer roles are employed on a project-to-project basis and often leverage their careers through inter-firm mobility. As well, outside of large established studios with multiple project pipelines, the life of a studio is relatively unknown beyond the current project. Core developers may not have a clear vision of the longevity of their company or may expect to continue doing the same work on subsequent projects. This is connected to the lack of technical career ladders; an issue that occurs in many high-tech fields. Promotion and advancement often mean taking on managerial duties and this can put a ceiling on the careers of purely technical people.

Figure 36

How would you rate your company on potential for career promotion/advancement (Whole & developer sample, 2014)
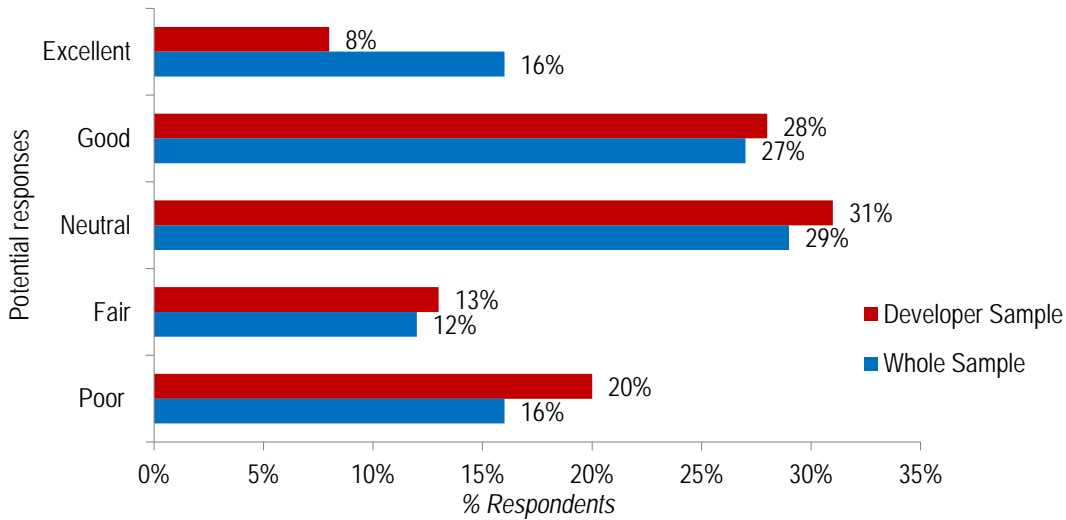
Various opinions about current employment

Figure 37 below showcases the responses for the whole sample and the developer sub-samples across the 2009 and 2014 surveys for a general question about feelings toward current employment. The response options available for this question were related to career growth. Overall, a quarter of the whole sample and 18% of the developer population felt that there was room for growth at their company in 2014. This is notably lower than the 30% of respondents who responded this way in 2009.

In the 2014 data, those in core development roles were almost equally as likely to say they were dissatisfied and would have to move companies to grow as they were to say they were satisfied and did not see a need to move. This was the trend for both the developers and the whole population in 2009. Responses from the whole sample in 2014 indicated that employees were slightly more likely to be happy with their current employment situation (26%), than they were to feel like they needed to move (20%).

Figure 37

Which of the following best describes how you feel about your current employment?
(Whole & developer sample, 2009-2014)
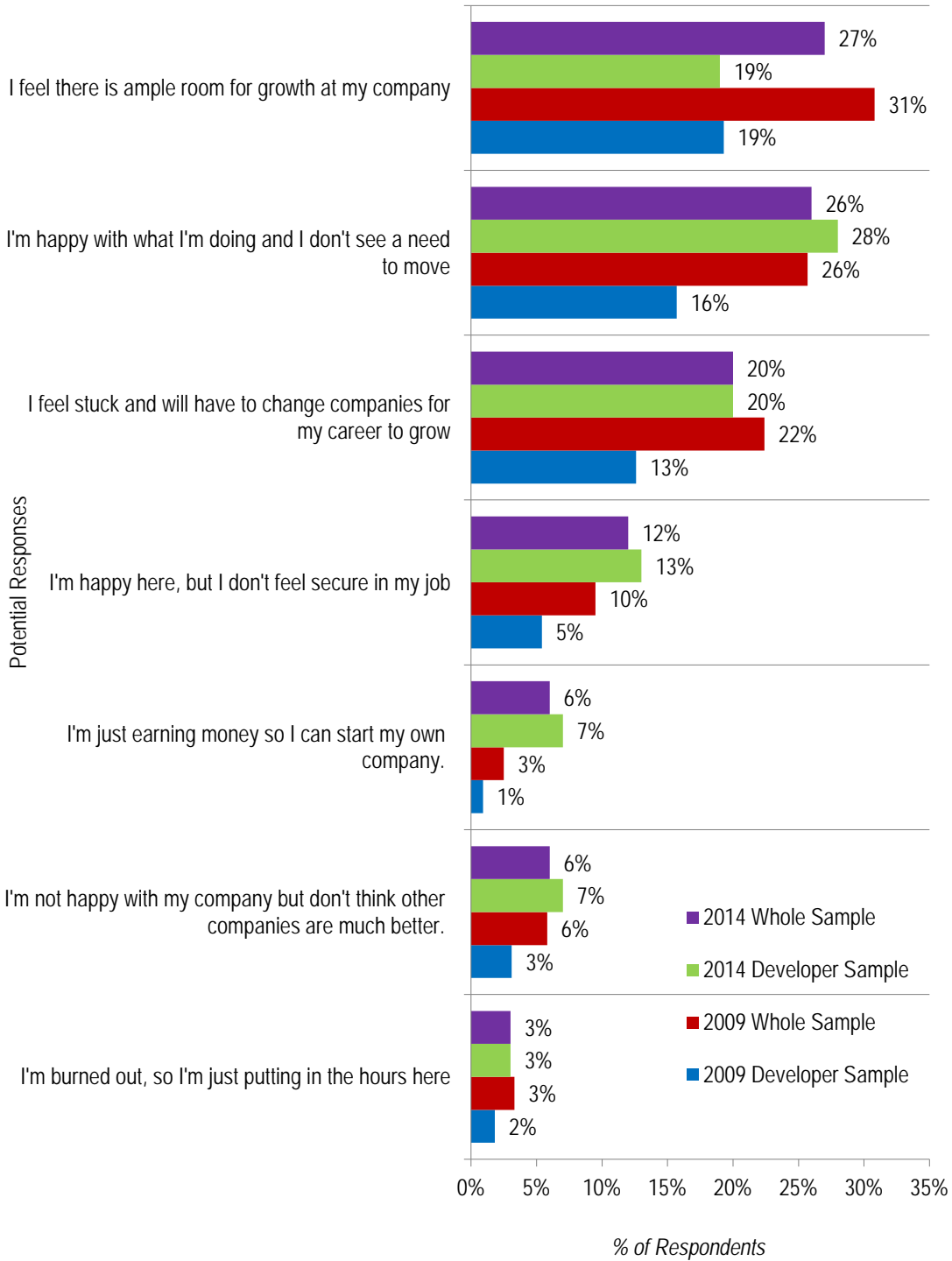
% of Respondents

STILL NOT CONFIDENT IN MANAGEMENT

Managing the many tasks and different types of employees involved in creating a game is a large undertaking that requires a specific set of skills. In 2004, respondents to the IGDA Quality of Life survey suggested that the individuals filling management positions didn't have these skills because they were promoted from within and they saw themselves more as developers, artists and designers, than managers. In some respects this is connected to the discussion of career path and the need to go the management route in order to progress that was noted above. While their ability to understand their subordinate's jobs may be excellent, their inability to manage interpersonal relations and large scale organization is detrimental to the overall work conditions in the game industry. Workers depend on management's competence in organizing and managing a project so that each individual understands his or her role in the context of the large project. Managers also ensure that individual team members have the necessary tools, resources and support to effectively meet deadlines and milestones and avoid stressful crunch periods.

Keeping this in mind, the following data in Figure 38 (next page) can give insight into the development of this issue since the 2004 report. The whole sample data from the 2014 survey indicates that only 40% of respondents felt that they could trust in the competence of the management, despite the fact that 56% indicated that management seeks their input and acts on it. With regard to the effectiveness of planning, 45% of respondents indicated that they *did f*eel that they knew what was going on outside of their own workspace and approximately the same number felt that they were not consistently refocusing their work.

This data is largely similar to that collected on these questions in 2009 with a few small exceptions. In 2014 more respondents reported that management seeks their input (6% difference) and fewer respondents felt that they are continually pulled from their work to do other tasks (6% difference).

There are also a few differences between the whole sample in 2014 and the developer sub-sample. Figure 39 (next page) replicates Figure 38, but for the developer only sub-sample. This data suggests that core developers hold less trust in management and have less sense of the big picture of their work than the whole sample.

Figure 38

Perceptions of studio management (Whole sample, 2014)
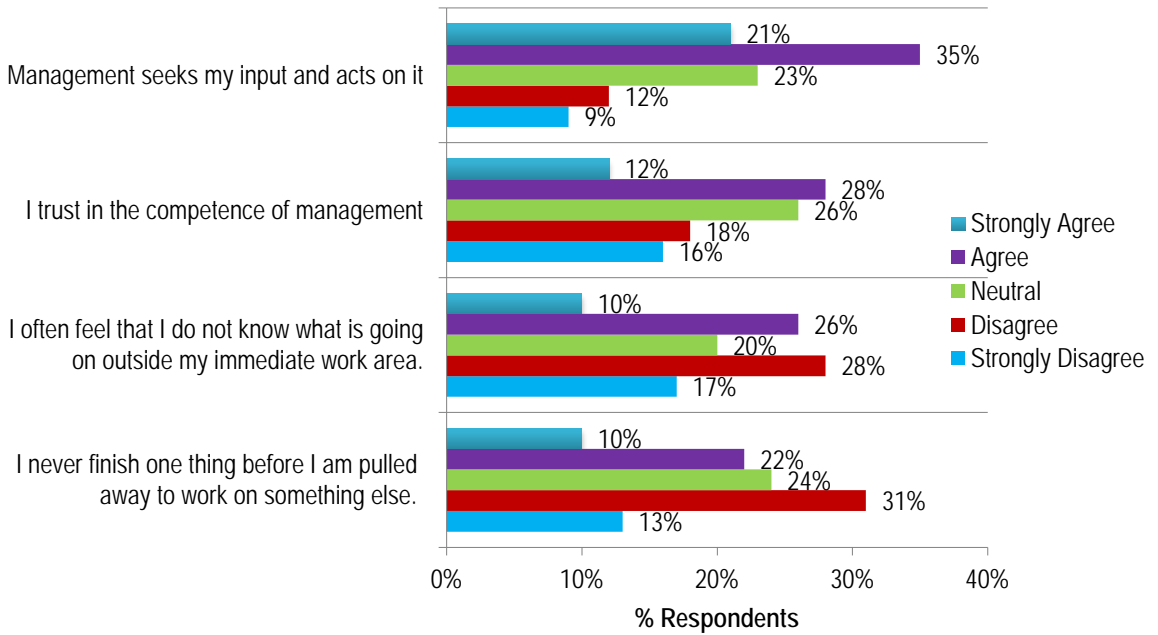
Figure 39

Perceptions of studio management (Developer sample 2014)
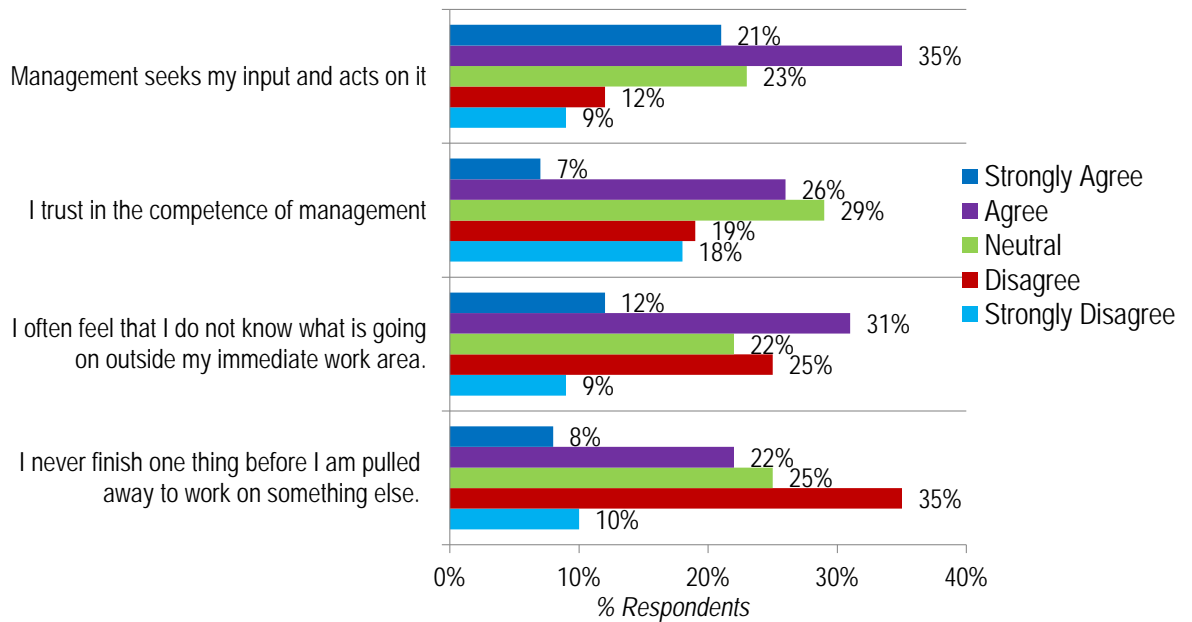
JOB SATISFACTION IS HIGH

More than 65% of respondents indicated that they have fun doing their work and another 74% felt proud of the games they produce (Figure 40). However, when respondents were asked whether they felt that any sacrifice they had to make for their jobs was worth it to work in the industry or at that particular company, 46% disagreed or strongly disagreed. This data closely reflects the sentiments collected in 2009 and is actually slightly more positive with respect to fun work and pride in games.

Though not shown, slightly fewer respondents in the core developer sample reported pride in the games they made (66%) than the whole sample reported above, and even more developers disagreed that any sacrifice was worth it to work in the industry (52%).

Figure 40

Perceptions of job satisfaction (Whole sample, 2014)
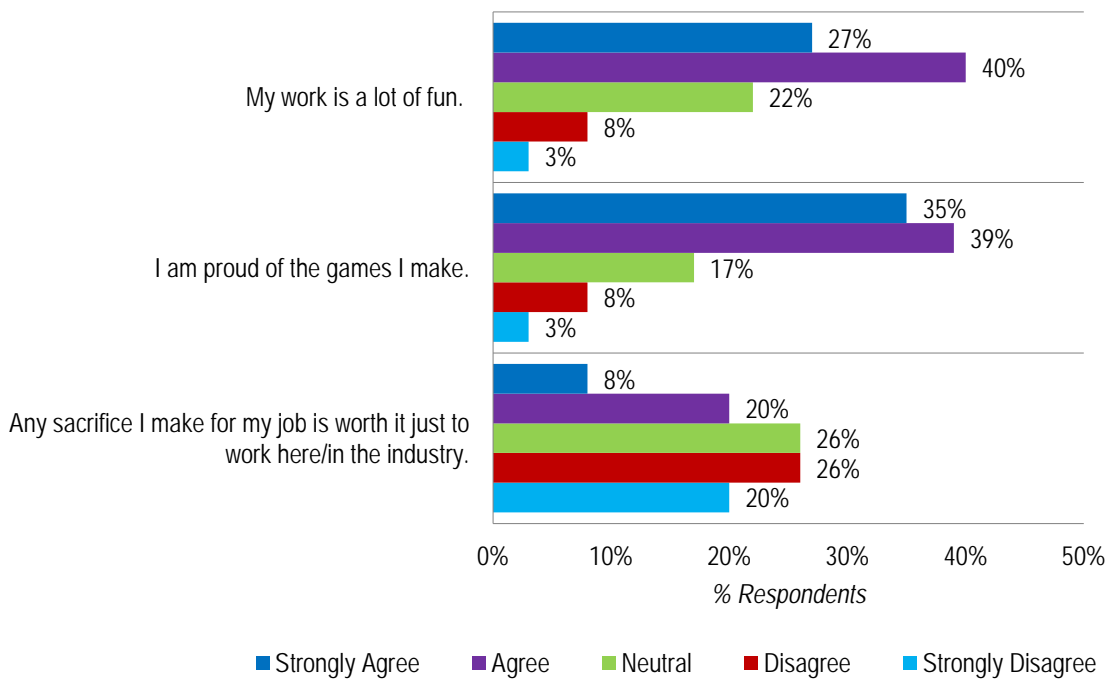
AUTONOMY AND APPRECIATION OF WORK

A majority (66%) of respondents felt that they have creative freedom in their work (Figure 41). As well, half of the sample felt that their work is appreciated; 56% either disagreed or strongly disagreed with the statement: "My work is under-appreciated and mostly goes unrecognized." These responses are the same for the developer sub-sample and reflect slight increases from the 2009 data. In 2009, 58% of respondents agreed or strongly agreed that they had creative freedom in their jobs and 50% felt their work was appreciated.

Figure 41

Perceptions of autonomy and appreciation (Whole sample, 2014)
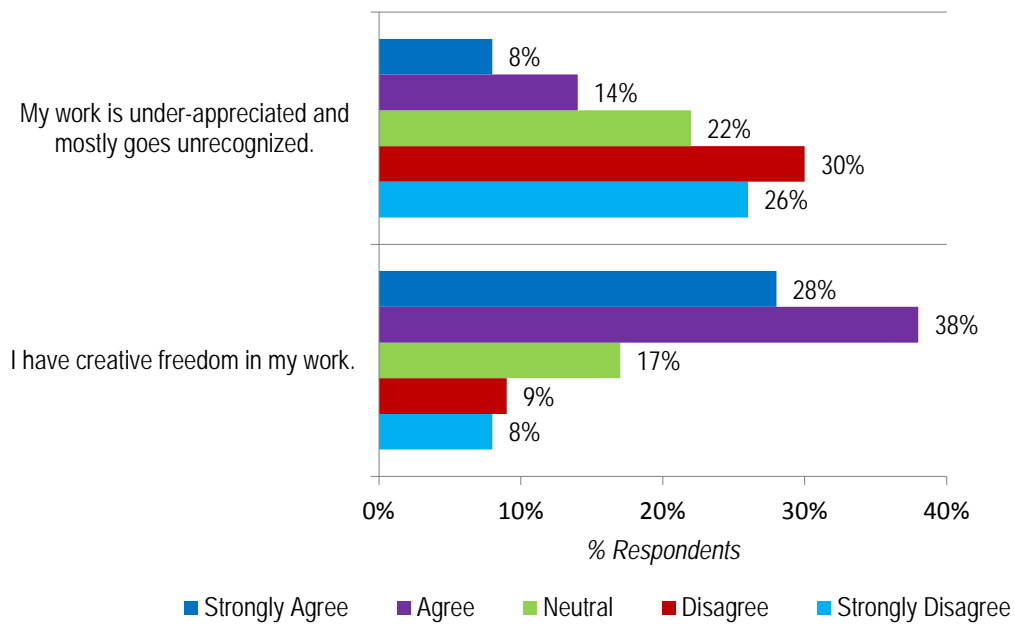
WORK-LIFE BALANCE

Time management: A difficult but somewhat successful balancing act

Survey respondents were asked a series of questions to identify their experiences with work-life balance. As Figure 42 below shows, there are a range of experiences with some respondents doing well and others struggling.

Figure 42

Perceptions of work-life balance (Whole sample, 2014)
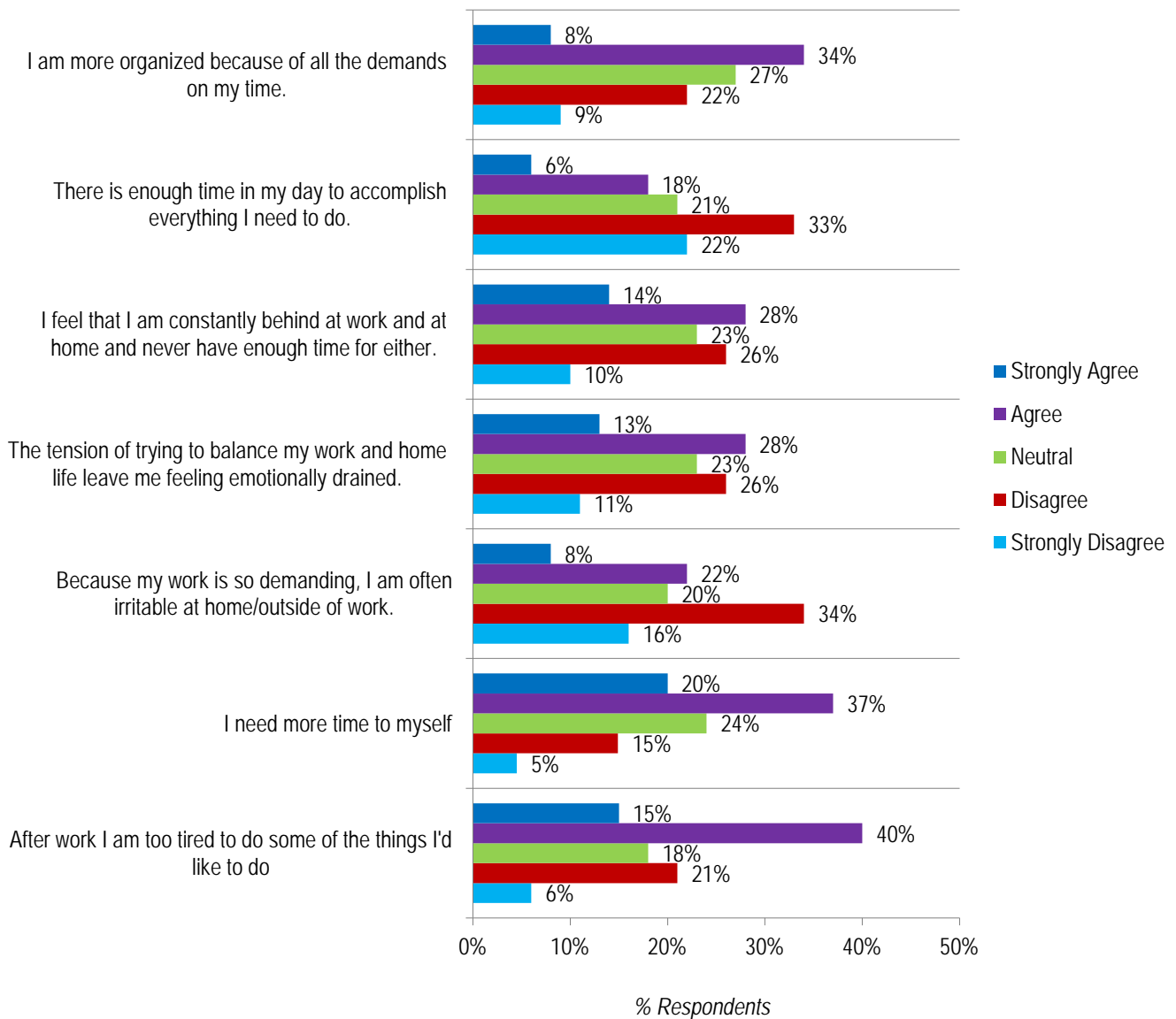
To provide a more distilled view, Table 6 provides a summary of each question featured in Figure 42 (above) with only the 'strongly agree' or 'agree' responses grouped and displayed. This data is shown for the 2009 and 2014 whole samples. The data for the developer sub-sample for 2014 is virtually identical and is not shown.

Of immediate note is the lack of improvement on any of these measures over the five year period. Over half of the sample needed more time for themselves and were too tired after work to do some of the things they would like to do. Almost half of the sample felt constantly behind at home and at work and emotionally drained by the effort to keep up.

This data suggests a problematic work-life balance that is not improving.

Table 6

Perceptions of work-life balance, part 1 (Whole sample 2009, 2014)

|	% in Agreement	
	2009	**2014**
I am more organized because of all the demands on my time.	43	42
There is enough time in my day to accomplish everything I need to do.	21	24
I feel that I am constantly behind at work and at home and never have enough time for either.	42	42
The tension of trying to balance my work and home life leave me feeling emotionally drained.	37	41
Because my work is so demanding, I am often irritable at home/outside of work.	30	30
I need more time to myself.	61	57
After work I am too tired to do some of the things I'd like to do.	52	55

Still a struggle to maintain family and other social relationships

The data presented in Figure 43 (below) continue to show a range of work-life balance experiences. As above, Table 7 (below) provides a more distilled view that compares the 2009 and 2014 data. However, unlike the above, we see some differences in this suite of questions.

In 2014 more respondents reported that work interferes with their ability to spend time with

their family, more felt that people close to them complain about their preoccupation with work, and more worry that time spent away from work diminishes their chance of promotion or advancement. Though the percentage increases are small, this could be the beginning of a worrying trend.

To counter that, double the respondents in 2014 felt perfectly comfortable taking time away from work to be with family and friends compared to 2009. As well, the seeming commitment of families to support the game workers' career remains high. Taken together these data points could indicate that game workers are choosing to reclaim some work-life balance and are publically confident in that choice; but the known reality of the advancement hierarchy remains and produces niggling doubts.

Slightly fewer respondents felt that they need more time to be with their friends in 2014 as compared to 2009, but as the majority of game workers socialize with people from work in a blurring of the work/play boundary, this pressure is likely eased.

Table 7

Perceptions of work-life balance, part 2 (Whole sample, 2009, 2014)

	% in Agreement	
	2009	**2014**
My family fully supports my career and accepts how much time it takes.	66	69
I feel perfectly comfortable taking time away from work to be with my family and friends.	26	52
My work interferes with my ability to spend time with my family.	36	41
People close to me complain that I am preoccupied with work whenever I am at home/not at work.	25	35
I tend to socialize with the people I work with.	57	63
I need more time to be with my friends.	54	49
I worry that the time I spend with my family diminishes my chances of promotion/advancement.	21	29

Figure 43

Perceptions of work and family balance (Whole sample, 2014)
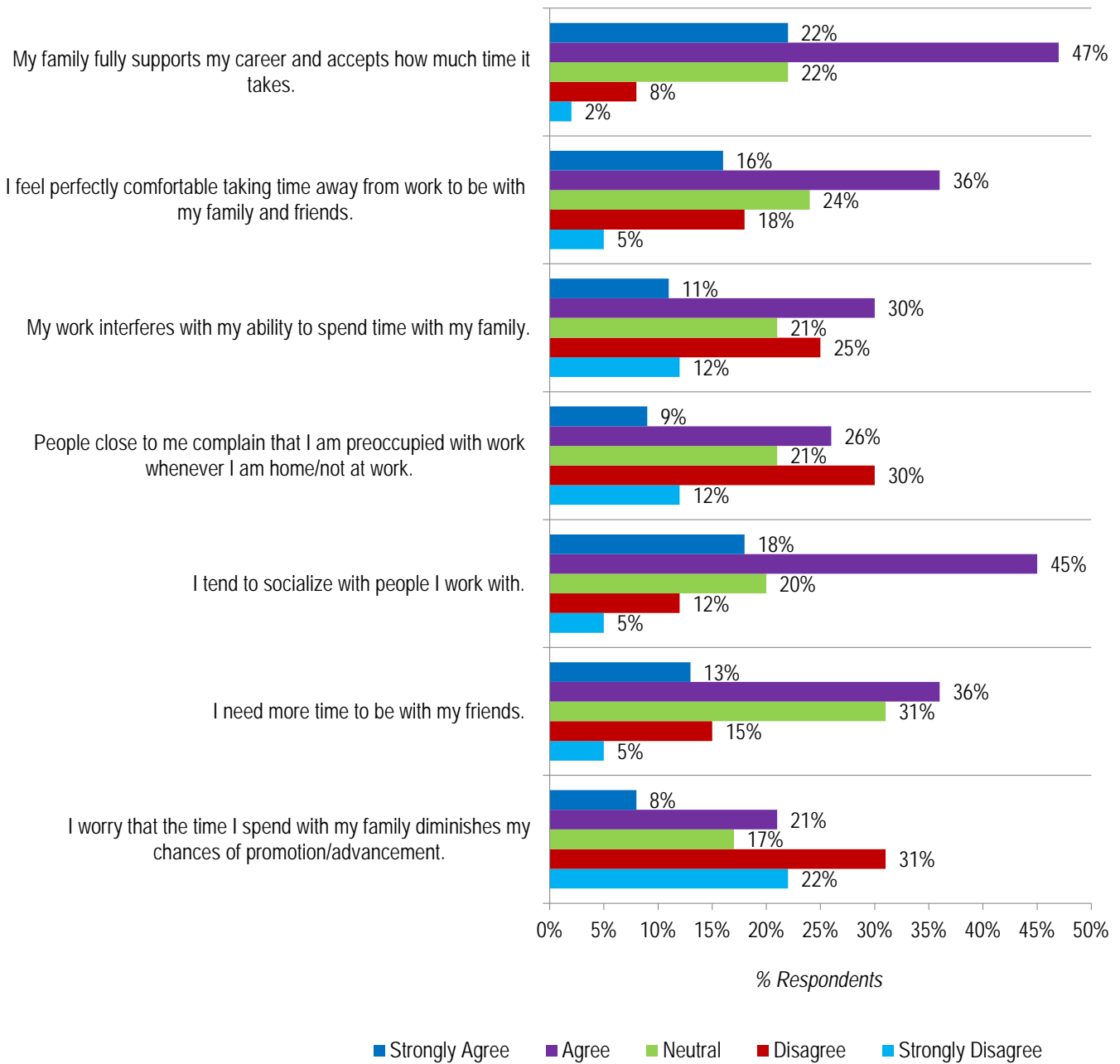
Are they workaholics?

Figure 44 represents a last set of questions about work-life balance. This data is presented for the 2014 whole sample only. In line with the consistent finding that people in the game industry socialize together, the data continue to show that, for most, hobbies and interests

are work-related. In fact, more people reported enjoying work more than leisure time than in 2009 (20% versus 13% with 34% undecided in both years). This may not be sufficient evidence, though, for the oft-cited 'passion' of game developers because among the developer sub-sample, only 15% report enjoying work more than leisure time.

However, additional questions make the line between intrinsic positive regard for the work and organizational pressures and norms a little less clear. In the 2014 data, only 37% could definitively say that they did not experience pressure to stay at work. Among the developer sub-sample, 41% agreed or strongly agreed that they felt pressure to stay at work. This question was not asked in 2009. As well, in the 2014 data, 35% of the whole sample and 31% of the developer sub-sample said that they had a hard time dragging themselves away from their work to go home. This is an increase of 11% from 2009.

Figure 44

Statements on importance of work in life (Whole sample, 2014)
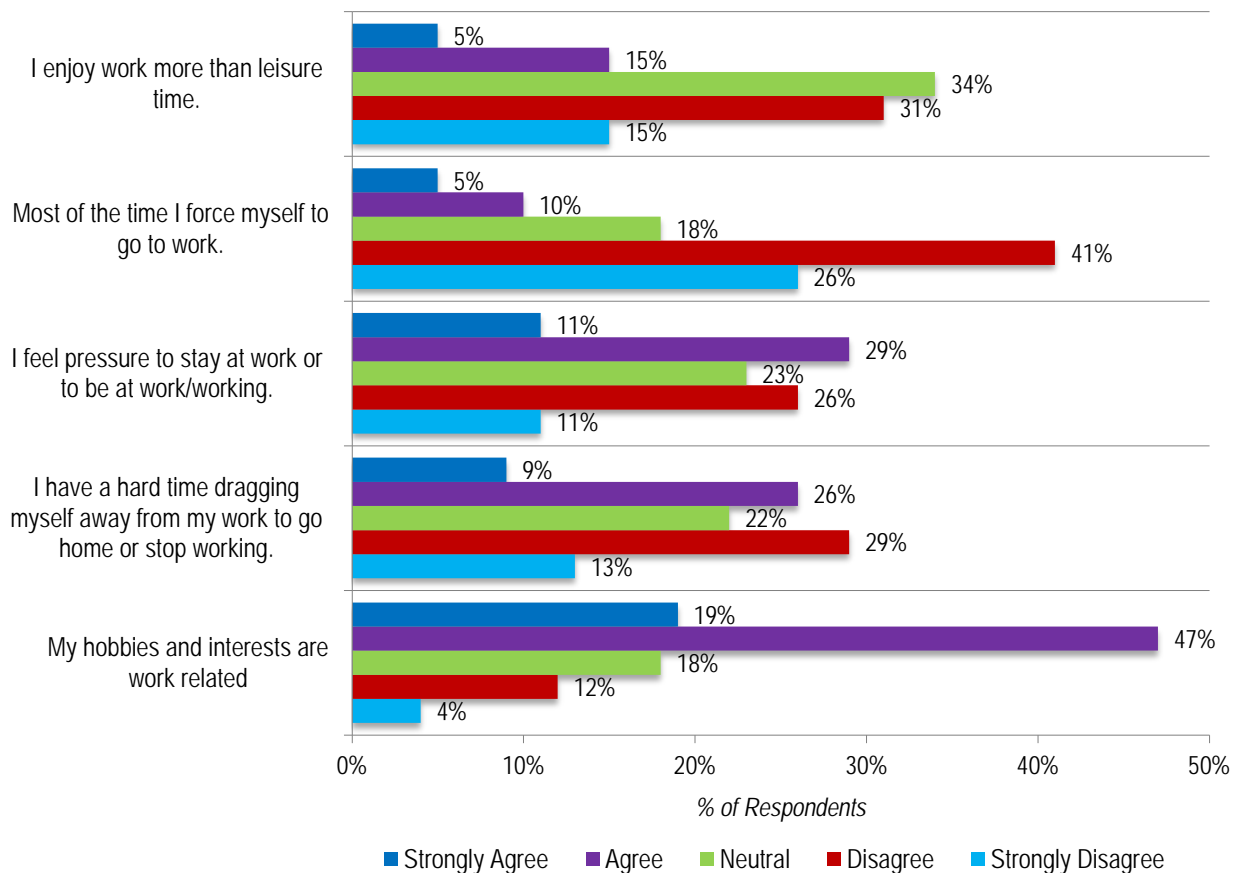
Regardless of the root causes, the impacts of working long hours are quite clear in the 2014

data. As displayed in Figure 45, when asked about the negative impacts of crunch, respondents reported physical, emotional, social and even financial impacts, though the latter was the least common.

Figure 45

Has crunch time at your job negatively affected your life outside of work/school?

(Whole sample, 2014)
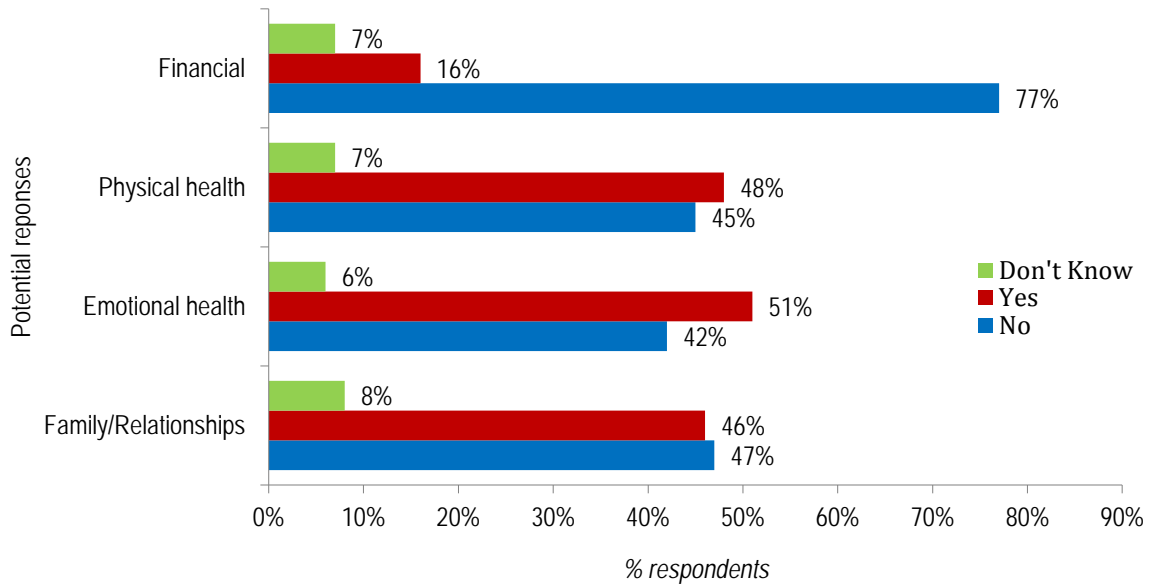
% respondents

WORKPLACE PROFILE

In line with and building on the 2009 IGDA QoL survey, the 2014 DSS asked a number of questions about the workplaces of respondents in addition to the questions already reviewed in this report about individual working conditions.

What's new? More indies on the scene!

A direct comparison of the data on company type to the 2009 IGDA QoL Survey is difficult because a much greater range of options was provided to respondents in 2014. The 2014 survey was also pitched at a much larger population that included academics who do development work, members of the game press, etc. However, the data for the categories that were present on both the 2009 and 2014 survey is still useful as it represents the core game development employers. As shown in Figure 46 below, there is a notable increase in the number of respondents who report working at independent studios.

There are a number of potential explanations for this that are beyond the scope of this survey to verify; we can only speculate on different hypotheses that could be acting in conjunction:

- There could have been a real rise in independent studios over this five year period. This would seem to be borne out at least anecdotally in the press and in the general rising attention being given to 'indies' and 'indie games.'
- The definition of the term 'independent' may have broadened and more studios /individuals could be using that moniker in 2014.
- Studios could have become more diverse in the products that they make and in the distribution streams that they use such that there is a blurring of the lines within studios of whether they are 'AAA' or 'indie' or something in between. This was borne out in a number of the comments made in this survey to the question about whether respondents would rather work for a 'AAA' studio or an 'indie.' Many respondents felt that this question presented an artificial and increasingly non-existent dichotomy in the current game development environment.
- A less satisfying answer, at least from an industry trends perspective, is that simply more people from independent studios answered the survey this time around and this data represents nothing more than survey response bias.
- Similarly, it must be noted that the wording on the 2014 survey listed 'first-party game developer/publisher' while in the 2009 survey the option was only listed as 'publisher.' Some of the rise and fall in these categories may also be due to this change in label/category.

Figure 46

Comparison of Studio Type (Whole sample, 2009 – 2014)
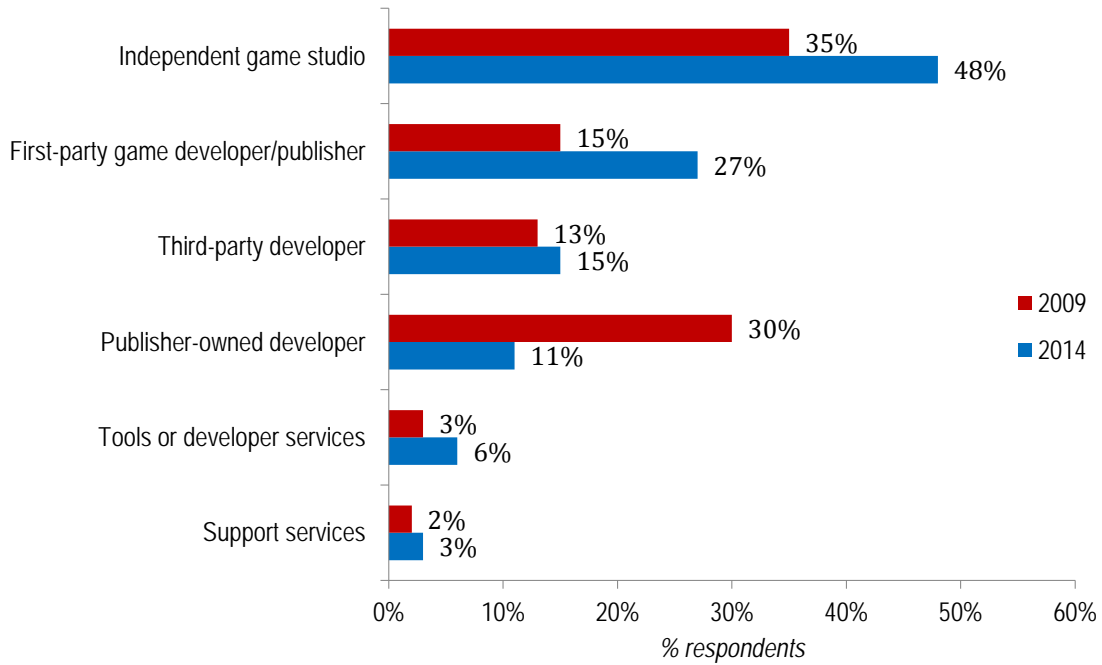
Stability and expansion in studios

According to survey respondents, one-third of the companies represented in this sample have been in the game industry for 15 years or more and almost another third have been in the industry for three years or less. These are promising figures as they reflect both stability and expansion or growth through new entry. What is even more interesting is to compare years in business with company type and company size (Table 8).

Table 8

Years in the game industry by company size (Whole sample, 2014)

Years in Business	Number of Employees						
	1	**2-5**	**6-10**	**11-50**	**51-100**	**101-500**	**500+**
Less than 1	36	38	14	10	2	0	0
1-3	25	31	17	22	4	2	1
4-6	11	22	9	31	9	15	3
7-9	8	11	7	32	12	20	10
10-14	6	8	6	18	23	31	9
15+	3	5	3	11	6	32	41

The older the bigger...

Figure 47 below plots a simplified version of the data presented in Table 8 above. It plots three employee size categories (1-5, 11-50 and 101+ employees) against years in business to reveal a number of key patterns:

- First, there is a positive correlation overall between years in business and company size such that small companies are more likely to be new companies and large companies are more likely to be established companies. This is exemplified for small companies by the steady decline in response rate across the year categories and for large companies by the steady increase in response rate across the year categories.
- Mid-sized companies of between 11-50 people demonstrate a quadratic pattern. There are very few mid-sized companies in the start-up phase of less than a year. Their presence grows across the years to about the 10 year mark and then their presence declines.

Figure 47

Years in the game industry by company size (Whole sample, 2014)
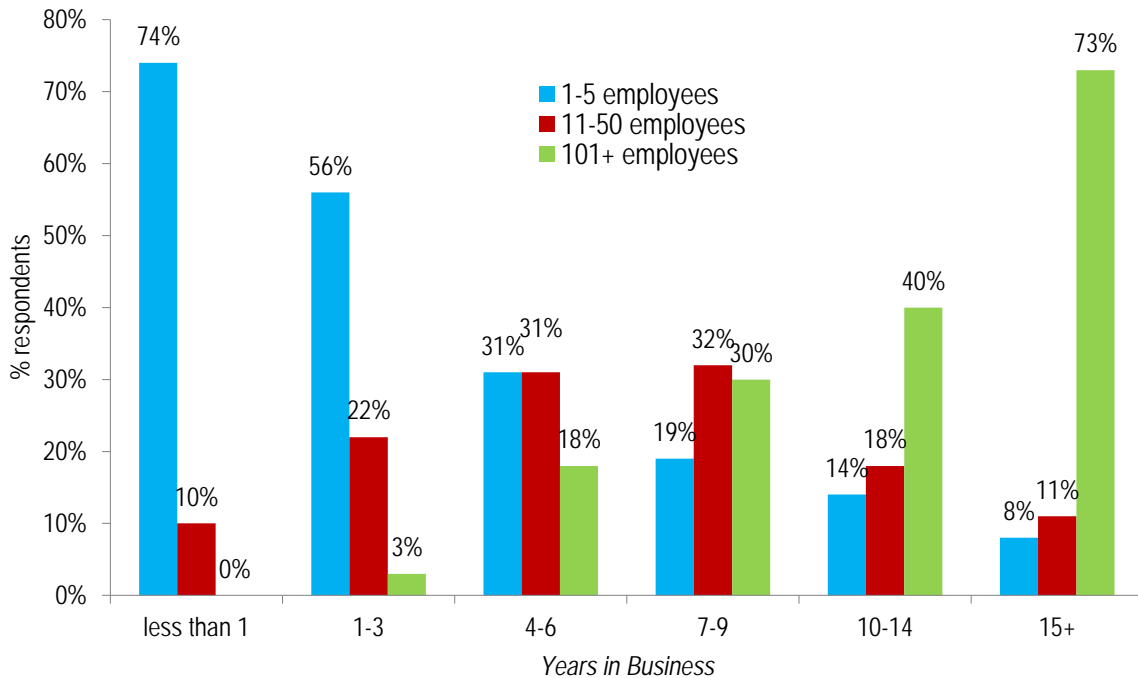
The data for years in business and number of employees can also be mapped to company type. For Figures 48 and 49 below we grouped the responses for "first-party game developer/publisher", "publisher-owned developer" and "third-party developer" into a category that we labeled 'AAA'. The 'Indie' category includes the respondents who indicated that their studios are "independent developers."

This data shows that independent studios tend to be smaller and more nascent; over 90% of indies are one-person shops that have been started within the last year. In a completely opposite pattern, 'AAA'-type studios are larger and tend to be established studios. There are few new 'AAA' studios emerging each year.

Figure 48

Years in business by company type (Whole sample, 2014)
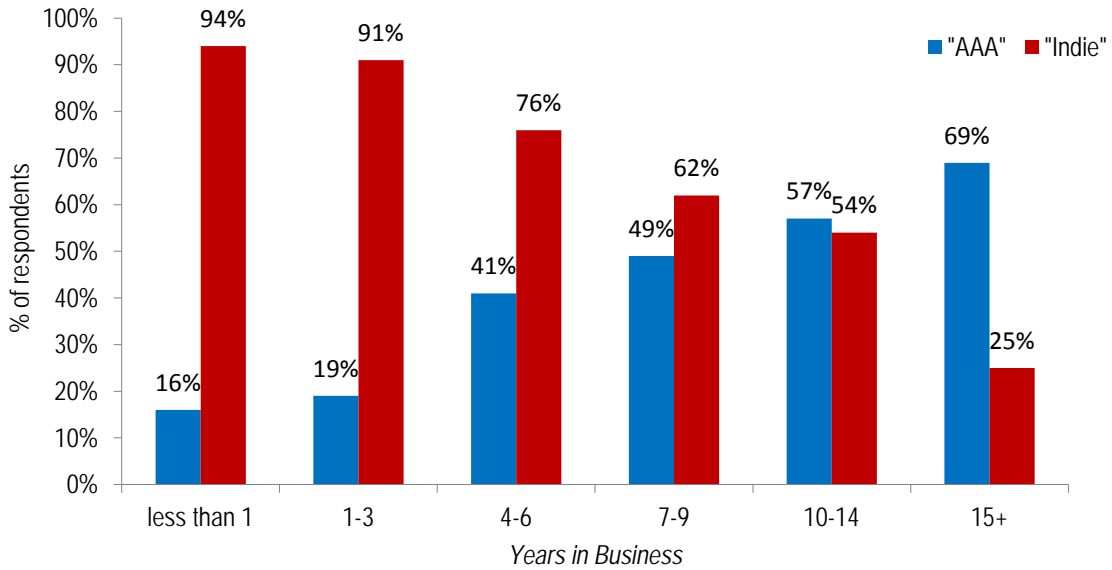
Bigger AAA studios are also the ones that employ larger staffs, while indie studios operate in small teams. They can, of course, be part of bigger networks in subcontracting relationships, but they are still small employers.

Figure 49

Number of employees by company type (Whole sample, 2014)
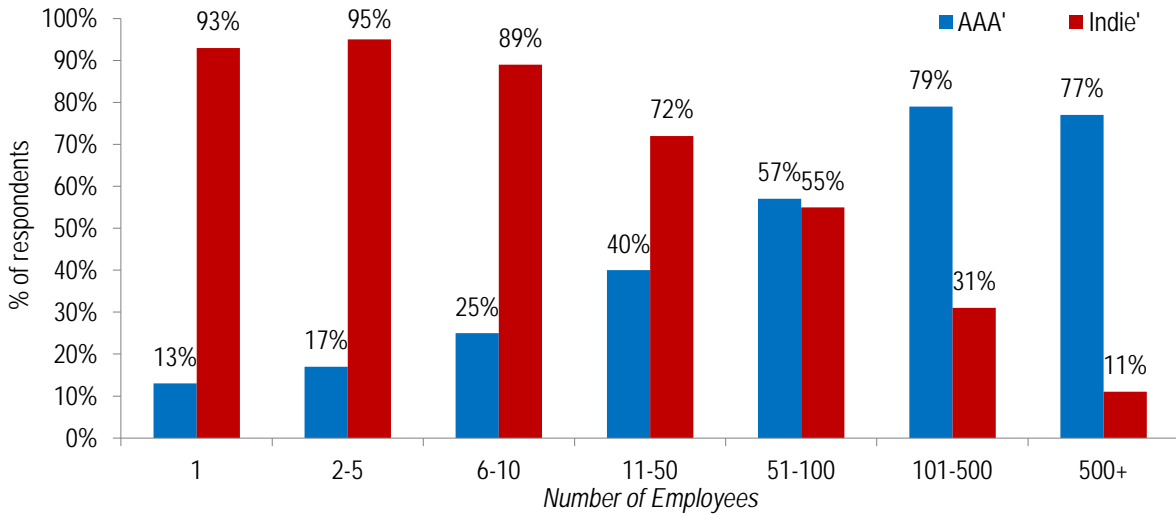
More studios with fewer staff...

Comparing the data on studio/company size from 2009 to 2014 seems to corroborate the discussion above about the rise of independent studios (or the greater response of people from independents in the sample) if we adhere to the common assumption that independent studios are smaller shops. In 2014, around 35% of the companies had 1-10 employees on their payroll compared to only 7% in 2009 (Figure 50).

To mirror this, there is a notable decrease in the percentage of medium to large companies when comparing the 2014 data to the responses collected in 2009. The percentage of respondents working at companies that employ 51-100 people is down by 7% in 2014 and the percentage working at companies that employ 101-500 people is down by 13%.

Figure 50
Number of employees working in the studio (Whole sample, 2009-2014)

... but bigger development teams on projects

The data suggest an upward trend in the size of development teams with particular movement in the categories of small and very large teams. In 2014 just over half of the respondents indicated that they were working on a team with fewer than 10 people while almost 70% selected this option in 2009. At the other end of the spectrum, in 2014 more than 10% reported working on a development team of 100 or more people while only 2% selected this option in 2009 (Figure 51).

Here again we can only speculate about the explanations:

- This could reflect the unique composition of the survey sample in each of the data collection years.
- It could also reflect the growing complexity of game development and the requirement for larger teams.
- In some instances these data seem at odds with the numbers that suggest a rise in smaller studios. This trend could be tapping into an increased level of collaboration across multiple studios to produce a larger project team.
- It could also reflect the use of contractors or freelancers on projects who might not have been included in the company size assessments made by respondents.

The data for the developer sub-sample are included in Figure 51. To recall the caveat presented earlier, many people in smaller studios have multiple roles that span traditional manager-employee boundaries. Anyone holding a managerial role as a primary capacity was excluded from the developer only sub-sample; this restriction would impact the response rates more for the categories of smaller companies and smaller teams. That said, core developers do seem to make up a greater proportion of the ranks of large companies as compared to the whole sample of respondents.

Figure 51

Size of the development team (Whole & developer sample, 2009-2014)
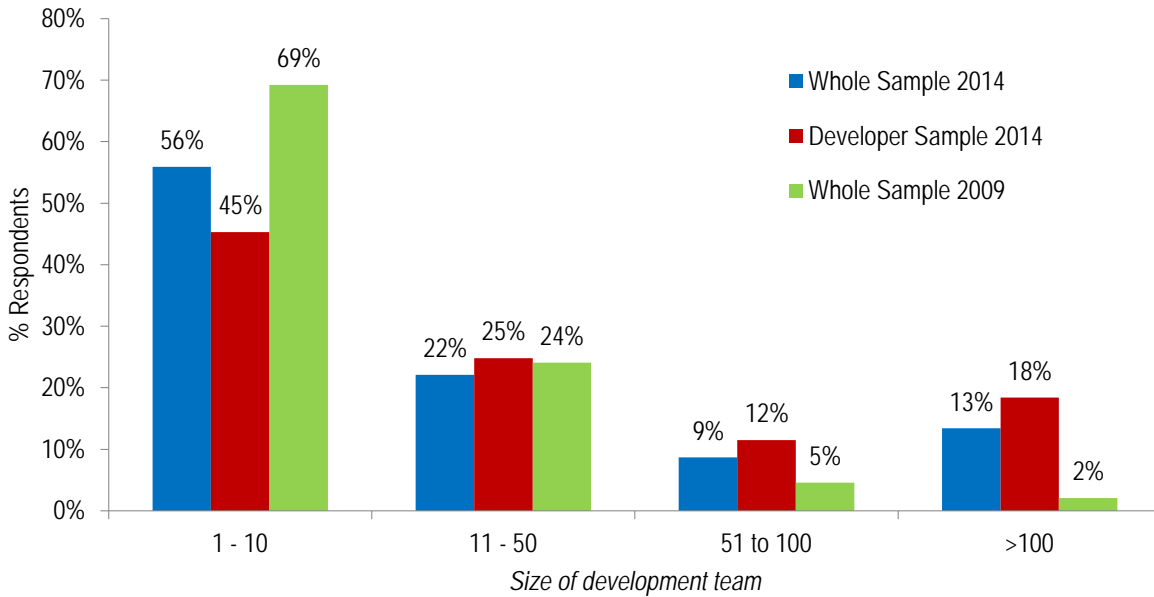
Leaving bedrooms and garages

Most survey respondents do their work at their employer's studio or company. This is magnified for those engaged in core development work. That said, the 2014 survey also shows that a large number of respondents do game-related work at home either in a planned dedicated space (38%) or in various ad hoc spaces around the home (14%). The numbers for college/university lab reflect the presence of academics in this survey who make games, students who are concurrently making games for commercialization, and perhaps the growing trend toward game incubators that are sponsored on university or college campuses (Figure 52).

The survey questions divide the home office into two parts – dedicated space and temporary space. It is interesting to note that despite the seeming growth of coworking spaces – either dedicated to game-related work, or more generic spaces – they are used by only 3% of core developers and about 7% of the whole sample. The pros and cons of these spaces for game development particularly as compared to home-working would be a useful area for additional research particularly in the context of the rising indie scene.

Figure 52

Place of Work (Whole & developer sample, 2014)
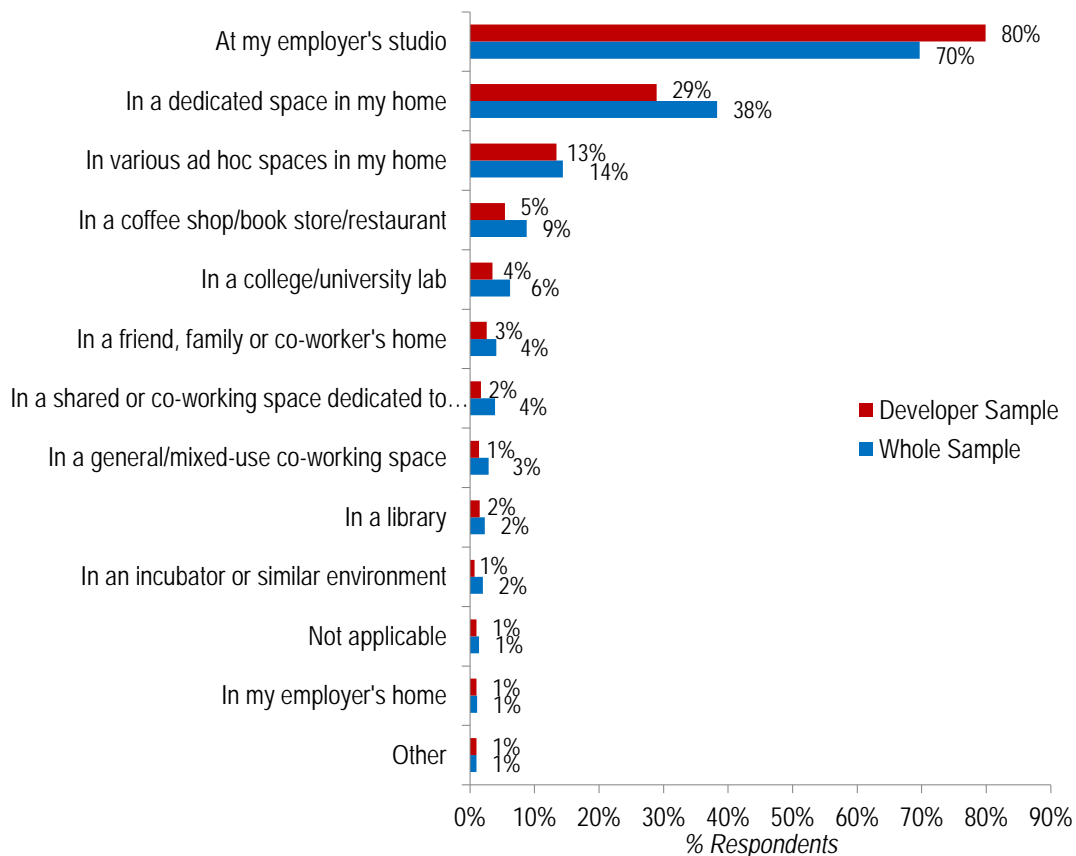
Project Management Process

It is not surprising that the 2014 data show Agile project management methods and its derivatives to be the most popular development process used by game studios. This matches the data collected in 2009. Over this same period, the use of Waterfall methods seems to have decreased.

Again though, this could simply reflect a bias in the sample. What is promising from a project management standpoint is that fewer respondents did not know their development process in 2014 compared to 2009, and fewer reported that their studio had no process or an ad hoc process. That said, one-third of the respondents still fall into those groups. The data were similar for the whole sample and the developer sub-sample and so only the whole sample is included in Figure 53 below.

Figure 53

Development Process followed by a Company (Whole sample, 2009-2014)
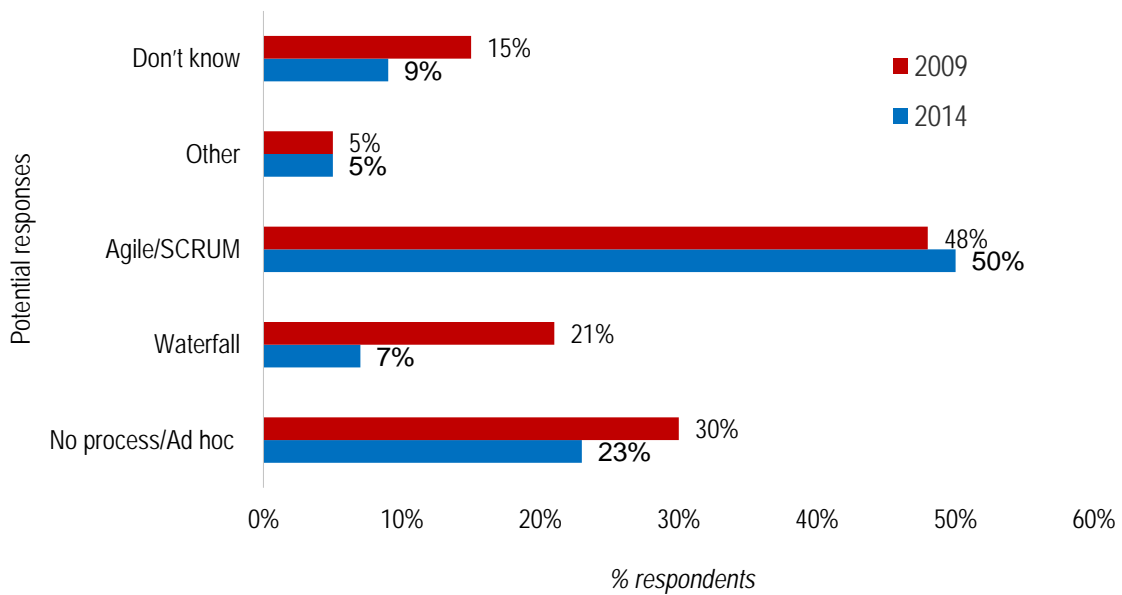
EMPLOYMENT PROFILE

Preference for permanent status or the freedom of freelancing?

Freelancers, independent contractors and self-employed developers seem to be on the rise in the game development scene since 2004. When compared to similar data from the IGDA Quality of Life surveys in 2004 and 2009, the data shows that the percentage of respondents in freelance, independent contractor and/or self-employment arrangements has increased from 12% in 2004 to 30% in 2014.

Note that in Figure 54 below, the numbers do not total 100% across each year category because in each of 2004 and 2009 the questions were configured differently and included other options that are extraneous to this comparison. Note in particular that in 2004 and 2009, the self-employed group was lumped in with the freelance group, so we have to sum up these two groups for 2014 to achieve a cross-year comparison. Taken separately in 2014, the 'temporary employee / independent contractor / freelance' group made up 15% of the sample and the 'self-employed' group made up 15% of the sample.

Figure 54
Trends in preferred status (Whole sample, 2004-2014)
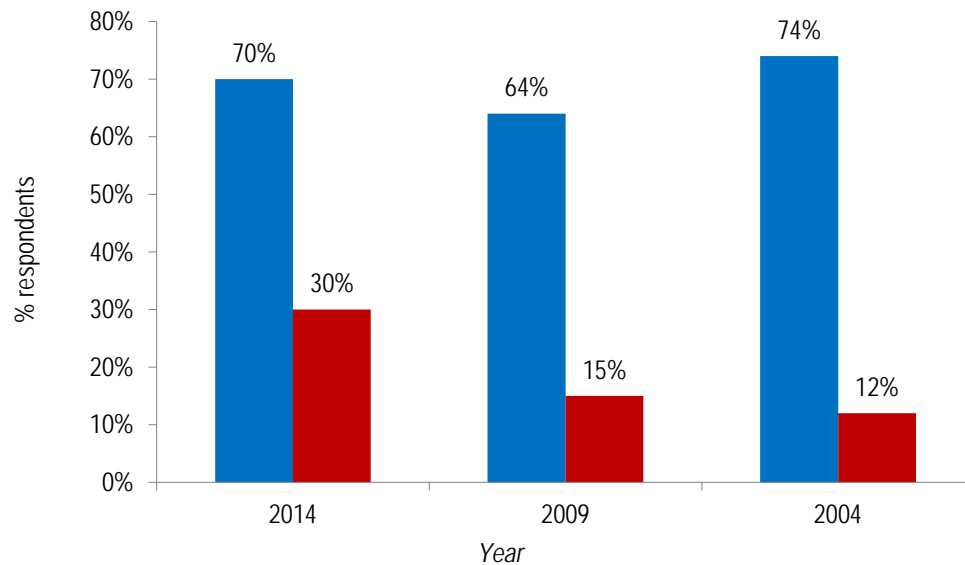
In 2014, all respondents who were working full-time or part-time either as an employee of a studio, a freelancer or in self-employment were asked which would be their preferred or ideal type of employment. Self-employed employment status was a separate option, which allows us to examine finer distinctions. A considerable majority (72%) reported that they would prefer permanent (full-time or part-time) employment and 23% said that self-employment

would be their ideal. Significantly fewer respondents said that they would prefer working as a temporary employee, independent contractor or freelancer (5%).

Table 9 below shows an aggregate comparison of the current employment status of respondents to the employment status that they would prefer. We can observe that many temporary employees, independent contractors or freelancers don't appreciate their status (15% current versus 5% preferred). As well, more respondents prefer self-employment than currently report being self-employed. The percent of respondents who are currently permanent employees is similar to the percent which prefer to be permanent, at least for the sample as a whole.

Table 9

Comparison of current and preferred employment status

(Whole & developer sample, 2014)

	Current Employment Status		Preferred Employment Status
	Whole Sample (%)	Developer Sample (%)	Whole Sample (%)
Permanent full-time (or part time)	70	80	68 (4)
Temporary employee/Independent contractor/Freelancer	15	15	5
Self-employed	15	4	23

Although jobs granting permanent employee status (either full-time or part-time) have increased slightly from 64% in 2009 to 70% in 2014, they still represent less of the sample than in 2004 (74%). This data could suggest a growth in the casualization of jobs such that people are being hired more often as contractors rather than permanent employees, and also may reflect a rise in the self-employment category.

That said, in 2009 while 60% of the freelancers/self-employed group said they would prefer to work as a full-time permanent employee, 51% of the permanent employees said they would consider working freelance. Taken together this data may instead just paint a picture of perpetual mobility and churn through a variety of employment relationships and statuses and a 'grass is greener' perception.

Comparing the preferences of the whole sample to the developer sub-sample (Figure 55), we can see that developers have a slightly greater preference for permanent full-time employment and a slightly lesser preference for self-employment than the whole sample.

Figure 55

Employment status preferred (Whole & developer sample, 2014)
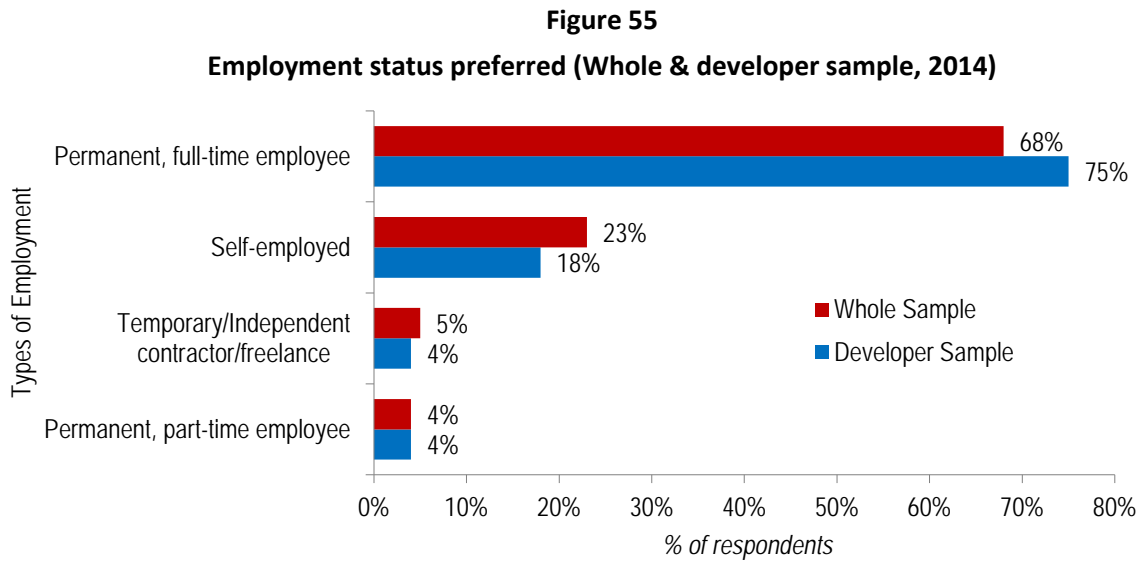
Self-employed or freelance for more control

It appears that control is a popular reason for choosing to be self-employed or work freelance (Figure 56). When respondents were asked why they were in these employment arrangements, the most popular answers were control over the content of work (58%), control over the conditions of work (56%) and control over the management of projects they worked on (55%). Other popular responses included: "To work on more varied projects/games" (43%), and "to have more control over my employment stability/risks" (32%).

One-third of respondents indicated that they were working freelance or were self-employed because they could not find a permanent job in an established studio. This seems particularly true of the temporary employee / independent contractor / freelance group as Table 9 above showed that only a small percentage would actually prefer that type of work arrangement.

We note that far more than wishing to guarantee their working activity, developers who choose to be self-employed or freelance wish to have more control over important issues in their activity: working conditions, content of their work, games they make.

Figure 56

Reasons respondents choose to be self-employed or contract/freelance

(Whole sample, 2014)
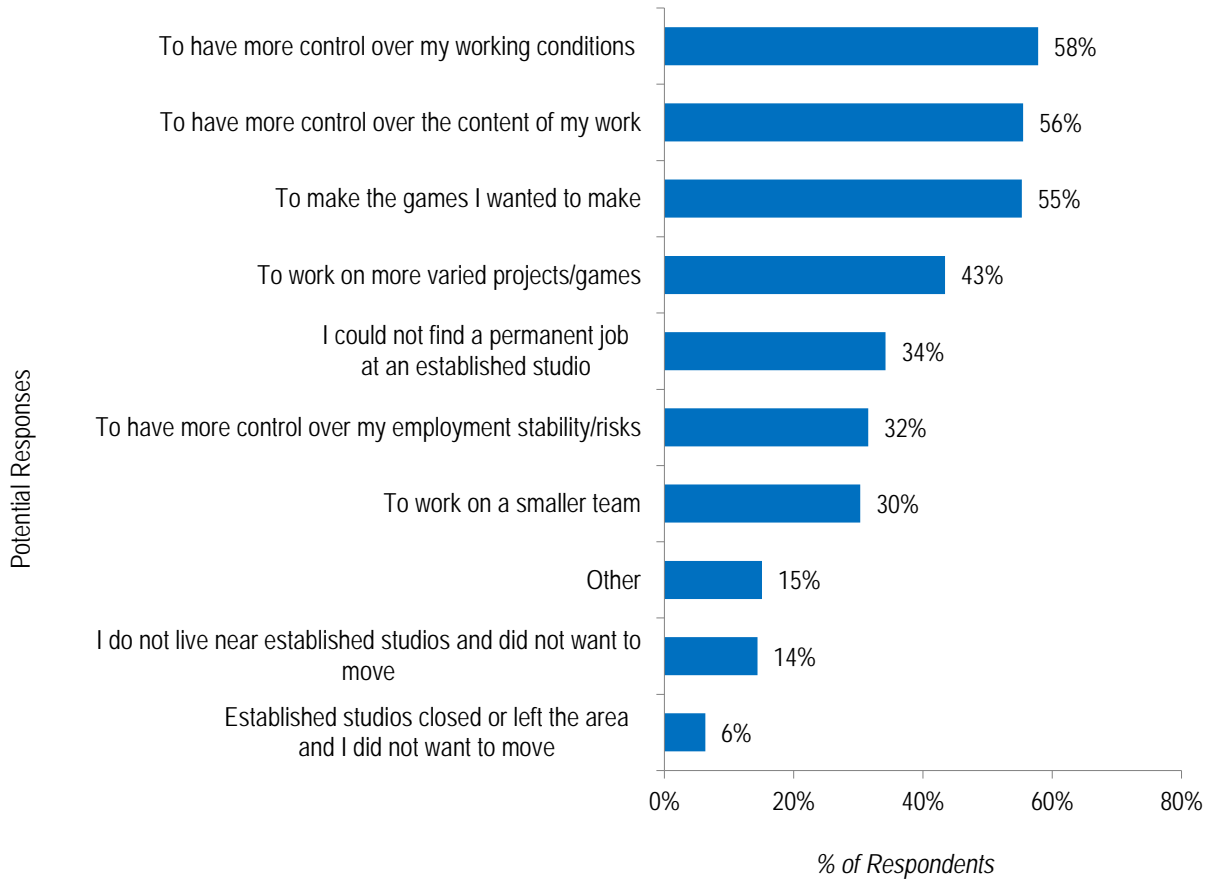
Developers are in to stay

The 2004 IGDA Quality of Life survey report presented the lack of intention to stay in the game industry as a serious concern; 52% indicated that they intended to leave the industry within the next 10 years. This question was not included in the 2009 QoL survey, but appeared again in the 2014 DSS. This current data from 2014 paints quite a different picture; only about 13% of the survey sample reported an intention to leave within the next ten years (Figure 57).

This could be interpreted positively for the industry in terms of reduced turnover and greater maturation through retained knowledge, skills and abilities of experienced developers.

Employed survey respondents, including the self-employed and freelancers, were also

asked how long they expected to remain with their current employer (or remain self-employed, as applicable). This was an open ended question where respondents could enter as many years as they wished. The average was 7.5 years.

Figure 57

Intention to stay in the industry (Whole sample, 2014)
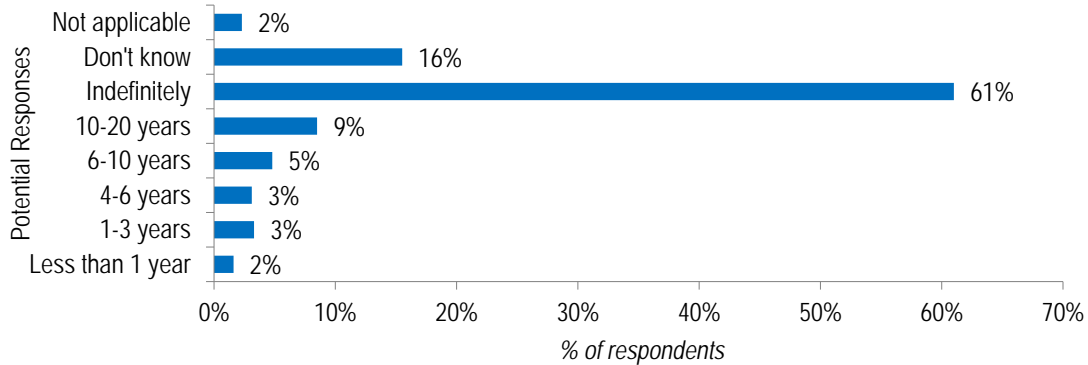
Long periods of unemployment

While the majority of the sample reported being employed, 10% of the whole sample and 8% of the developer sub-sample indicated that they were currently unemployed in the industry.

Within this unemployed sub-group of the whole sample, 55% reported that they had been unemployed for more than a year. The situation for the unemployed developer sample was slightly better; only 38% had reported being unemployed for more than a year. That said, 17% of developers reported being unemployed for the past 7-12 months (Figure 58).

Figure 58

Elapsed time since most recent game-related job (Whole & developer sample, 2014)
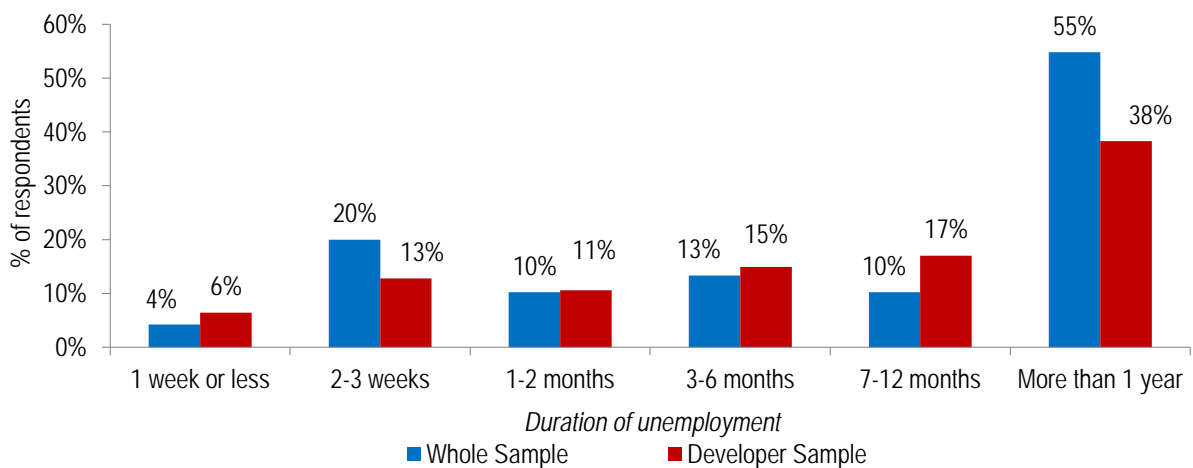
Reasons for Unemployment

Among all the currently unemployed respondents in the whole sample, almost half (46%) were unemployed because they were looking for their first job in the industry at the time of the survey. Among the others, 25% reported being laid off and a further 15% reported that their contract had ended. Less than 1% of respondents reported being fired and about 11% voluntarily quit their last job (Table 10).

When the developers' sub-sample is considered, the response distribution across the reasons for unemployment changes significantly. The most common reasons for unemployment among developers were "my contract ended" (43%) and "I was laid off" (36%). Less than 2% of respondents reported being fired and 19% quit voluntarily.

The risk of lay-off in particular seems to have remained consistent at about 34-36% over the intervening years between the 2004 QoL survey and the 2014 DSS. The 2004 survey was primarily targeted at core developers and so is best compared with the developer sub-sample data from 2014. This question was not asked in 2009.

Table 10

Reasons for current unemployment (Whole & developer sample, 2014)

	Unemployed from the Whole Sample (%)	Unemployed Developers Only (%)
Seeking my first job	46	0
I was laid off	25	36
My contract ended	15	43
I quit	11	19
I retired	2	0
I was fired	1	2

In the 2014 DSS, employed respondents were also asked whether they had experienced a lay-off (Figure 59). The percentages are slightly fewer than among the currently unemployed group discussed above; 21% of employed respondents in the whole sample reported that they had been laid off either permanently or temporarily in the past two years.

Figure 59

Have you been laid off in the past two years? (Whole sample, 2014)
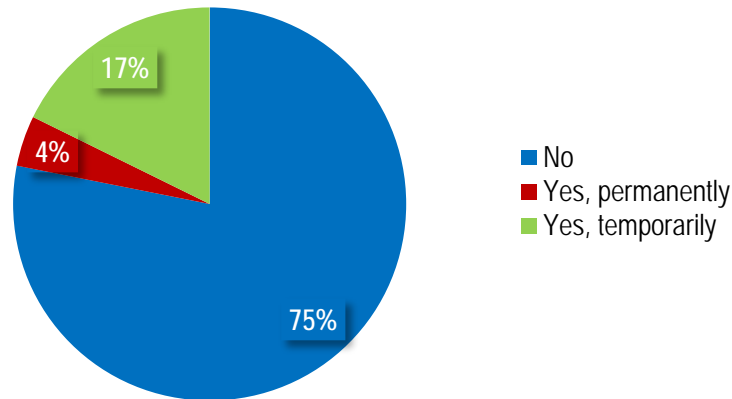
Confident mobile workers

Employment instability is also reflected in the responses from employed and currently unemployed respondents about how many game-related employers they had had in the past five years. This question also included the self-employed and freelancers.

The data shows that there is notable variation in the number of job changes between the whole survey sample and the developer sub-sample. On average, those in core development roles reported having 5 employers in the past 5 years compared to the average of 3 produced by the whole sample. The median value in the data set suggests that half of the core developers have had at least 5 employers over the past 5 years compared to only 2 employers as calculated for the whole sample. The most common response for the whole sample was one employer in the past 5 years while it was 5 employers for the developer sub-sample.

This data suggests that the work of core development is far more volatile and precarious than work in fields related to or supportive of game-making. This makes sense even within game studios because game development is project-based and staffing is determined by the needs of the projects on the go at any one time; support roles are staffed on a more constant operational level.

Among the employed respondents, 56% said that they had not had to relocate for work in the past two years, while the remaining 44% had to locate one or more times (Figure 60).

Figure 60

How often have you had to relocate for work? (Whole sample, 2014)
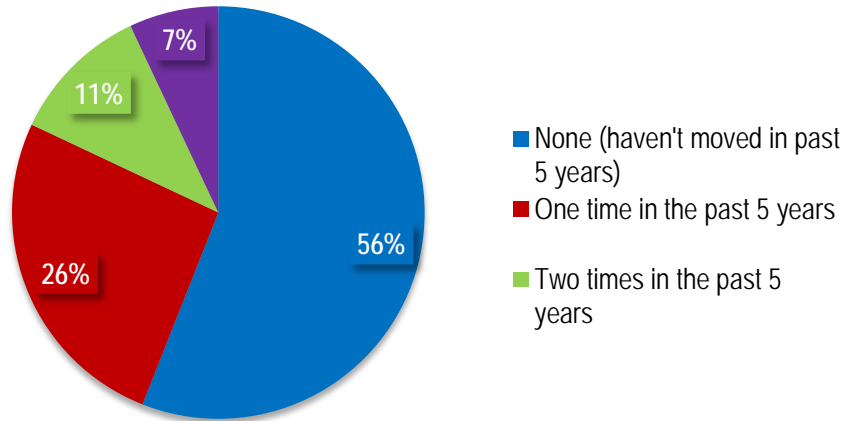
In the face of these figures, on a subjective level, many respondents do not seem that worried about their job security. Perhaps this is because they expect and anticipate project end dates and contract end dates. But, as indicated in Figure 61 below, over half indicated that they disagreed or strongly disagreed to the statement "I worry my job won't be here next month." Just over 25% do worry.

Figure 61

I worry my job won't be here next month (Whole sample, 2014)
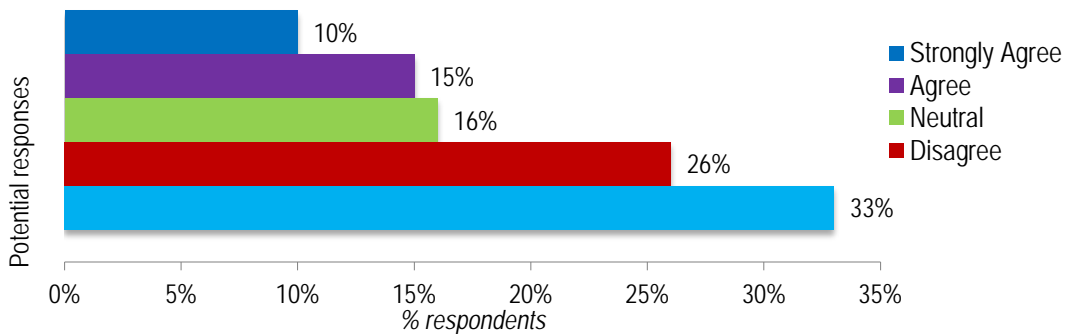
As well, almost 60% of respondents indicated that they were either "somewhat confident" or "very confident" that they would quickly get another job at the same pay rate without having to move. However, there is still a sizeable 25% who have much less confidence (Figure 62).

Figure 62

Confidence in finding a new job (Whole sample, 2014)

- Not confident at all
- Not too confident

Passionate workers

Students were excluded from the majority of questions presented in this report as they were not currently working for pay in the game industry. However, students and those curr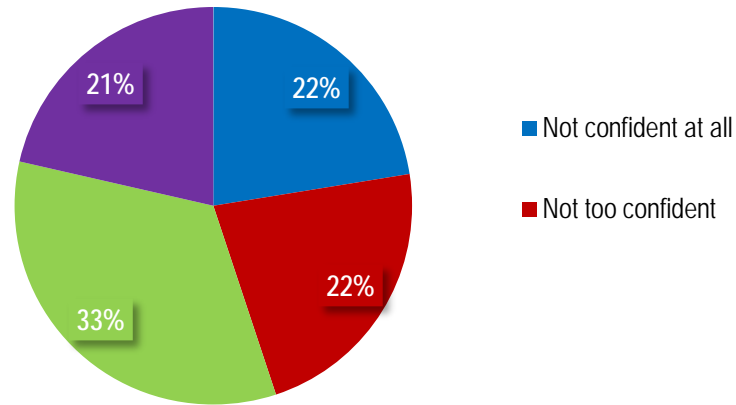ently unemployed, but seeking their first job were asked why they wanted to join the game industry (Table 11). As has often been reported, passion for games and game-making were the main reason for the vast majority of respondents (81%). These results are similar to the responses to the 2009 QoL survey; although, in 2014 slightly fewer respondents said that making games was a hobby that they wanted to make into a career.

Table 11

Reasons for wanting to join the industry (2009-2014)

	2014 (%)	2009 (%)
I want to earn a living by doing what I enjoy	41	43
I'm passionate about games and I want to share that passion by being in the industry	40	35
Making games is a hobby and I want to turn my hobby into a career	8	12
Playing games is a hobby and I want to turn my hobby into a career	7	8
I have to do something	2	1
I want to get paid to play games	1	1

In 2014, respondents who were currently working in the games industry were asked a similarly themed question (Figure 63). Of this group, 50% of respondents indicated that their career is a large part of their lives. Few respondents indicated that their job was not a very important part of their lives - 11% responded that they had other ambitions and 2% responded that it is "just a job."

Figure 63

Importance of game-related work in life (Whole sample, 2014)
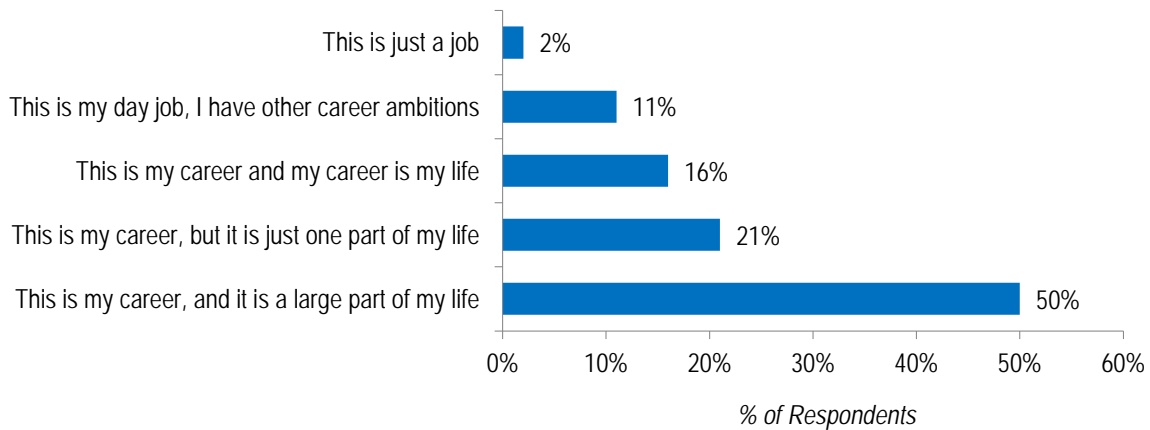
No tourists in the games industry

When game development was still a fledgling industry, entry to the industry was rather fluid; the industry attracted workers from many other corollary industries. As the industry has matured, and perhaps reflective of the growing number of formal educational options related to game development and design, a career in the industry is the result of intentional decisions. This seems particularly true for those in core development roles where 78% reported that joining the game industry was an intentional career choice. For the sample as a whole this number was less at 69% (Figure 64).

This makes sense, given that this larger population includes people in jobs that are tangential to or supportive of the game development process. For instance, those trained in accounting, human resources, law, or journalism may have embarked on that career path not knowing that they would end up practicing their field in relation to game development.

Figure 64

Reasons to join the industry (Whole & developer sample, 2014)
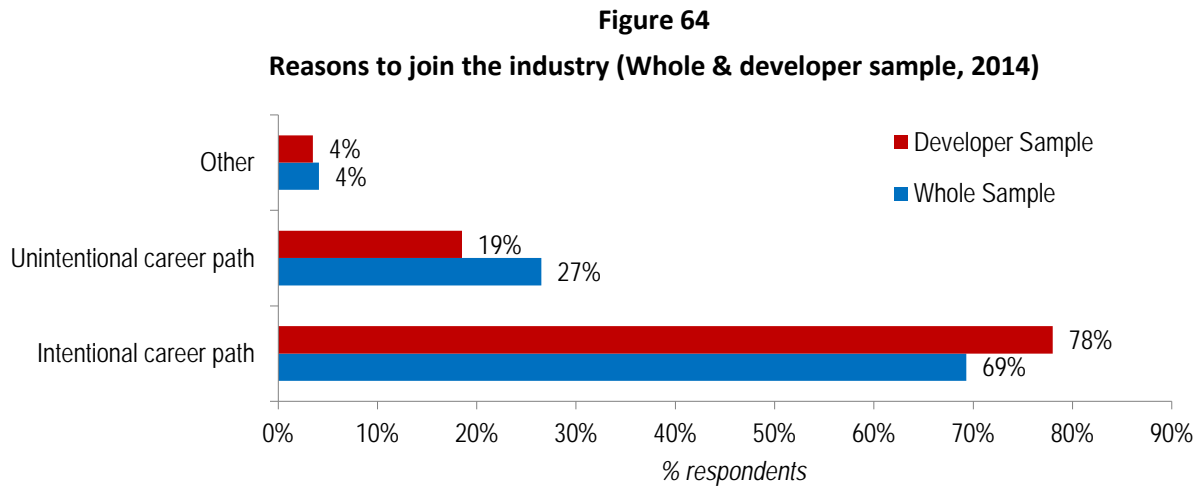
Passion is not enough ... Reasons for leaving the industry

Many express great love for the game industry, but for a small number of survey respondents, passion is not enough. Among the respondents in the whole sample who said they were currently unemployed, 15% of individuals said that they did not want to get another job in the industry.

When asked for their reasons, 39% said they left for a better quality of life and a further 15% said that they burned out. When considering just the developer sub-sample, these numbers decrease somewhat. Just fewer than 30% said they left for a better quality of life and 14% said they burned out. More developers said that they left to become a stay at home parent than in the sample as a whole (Figure 65 and Table 12, below).

We note that in all cases, quality of life remains the most important concern among people who leave the industry.

Figure 65

Reasons for leaving the industry (Whole & developer sample, unemployed, 2014)
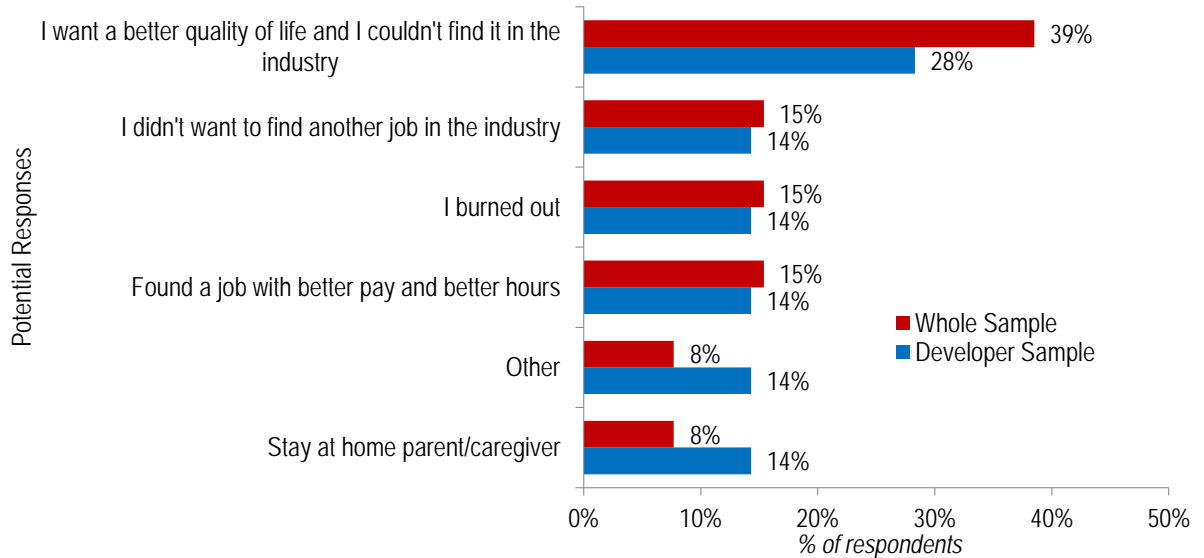
Table 12

Reasons for leaving the industry (Whole & developer sample, 2009-2014)

	2014 Whole Sample	2014 Dev. Sample	2009 Whole Sample
I want a better quality of life couldn't find it in the industry	38	28	0
I found a better paying job	0	0	11
I found a job with better hours	0	0	8
Found a job with better pay and better hours	15	14	18
I burned out	15	14	15
I was fired and didn't want to stay in the industry/I didn't want to find another job in the industry*	15	14	39
I was fired and haven't found another job in the industry/I haven't been able to find another job in the industry*	0	0	9
I left to become a caregiver/stay at home parent	8	14	--
I became disabled	0	0	--
Other	8	14	--

Note: *For comparative purposes, this is presented as 2009 wording/2014 wording.

ABOUT THE RELIEF TROOPS... WHAT DO STUDENTS WANT?

Students' preferred company

In 2014, 38% of the student respondents said that they would like to work for large game companies engaged in first-party development and/or publishing. Comparatively, only 11% of students selected this option in 2009. Independent studios were the second most popular choice in 2014, at 34%. This is similar to the percentage received by indies in 2009 (Table 13).

Table 13

Students' preferred company (Student sample, 2009-2014)

	2014 (%)	2009 (%)
First-party game developer/publisher	38	12
Publisher-owned developer	4	22
Third-party developer	6	16
Independent game studio	34	38
Tools or developer services	2	2
For-hire game studio	1	--
Serious game studio	4	--
Game related position at a non-game company	2	--
Non-profit sector	1	--
Business services	1	--
Academic/research	7	--
Other	2	--

The job students are looking for

The data in Table 14 below suggests that the majority of the job seekers want to work in the core gaming areas like software coding and content development. In 2014, students responded that their most preferred job in the game industry is programming (30%) followed by design (20%) and art (13%). The same preferences were recorded in the 2009 student sample. The percentages in each category are slightly lower in the 2014 data and likely reflect the larger set of options presented to students in that survey.

Table 14

Student's preferred position (Student sample, 2009-2014)

Preferred Position	2014 (%)	2009 (%)
Programming	30	33
Design	20	27
Art	13	18
Other	7	--
Starting own company	6	--
Writing	6	7
Production	6	6
Teaching	3	--
Quality assurance	2	3
Game related position at a non-game company	2	--
Audio	2	4
Business management	1	2
Game journalism	1	--
Community management	1	0
Support (legal, HR, accounting, clerical)	1	1

CONCLUSION

This report presented a comprehensive summary of the 2014 IGDA Developer Satisfaction Survey (DSS). Specifically this report focused on questions related to employment practices: hours of work, compensation and benefits, quality of work, and work-life balance. In addition the report summarized questions that build an employment and workplace profile of the game industry: employment status, primary discipline, studio type and size, etc. Where applicable the report presented data from the whole sample of respondents (which included those working in roles that are supportive or more tangential to the core work of game making) as well as a sub-sample of respondents who work in non-managerial developer roles related directly to game making. Also, where applicable this report compared data from the 2014 DSS to the earlier IGDA Quality of Life surveys of 2004 and 2009.

We can draw a number of conclusions from the analysis of this data. Long working hours have become a seemingly inescapable feature of the industry, but on this front, the data shows an improvement. There is a general decrease in regular hours of work, both in the respondents' perceptions of managers' expectations and actual hours worked in the field. There is a decreasing practice of crunch time, though the phenomenon is still part and parcel of the trade and important in quantitative terms. There seems to be a downward trend in the duration of crunch (weeks in a row), the frequency of crunch (weeks per year) and the intensity of crunch (hours per week).

Developers are more and more critical about long hours, and there is a demand for change. Though studios seem to be making stronger conscious efforts to proactively manage crunch, the project-management issues of poor scheduling, scope creep and inadequate resourcing prevail. These issues are blamed on poor management and workers in the game industry maintain skepticism about their managers' abilities. Those who leave the industry say they do so in a quest for quality of life that cannot be found in this industry.

In direct connection to working time we note that a majority of developers are salaried and earn 50,000 to 100,000 USD yearly. Salaried developers are happy in certain respects, but a fair share is critical of the crunch time compensation and the processes to allocate bonuses and pay raises. Overall, half of respondents do not feel they share in the profitability of their studio. They are also critical of the management of studios and the quest for independent production is very lively.

Once an industry where fringe benefits were scarce, we now note the emergence of some initiatives: flexible time-off policies, vacation, sickness or other personal days off, health coverage, life insurance, pension plans. Almost 30% of respondents indicated that they do not receive any paid vacation time, but they may be independent contractors, freelancers or self-employed. Parental leave and daycare are still neglected. On the other hand, less

substantial perks are common: espresso coffee, free water and drinks, game lounge, ordered meals during crunch time…

Developers continue to enjoy their work and job satisfaction is high. As a whole, they are still the passionate workers they used to be, they are proud of their work, and they are ready to give much because they have creative freedom, but… Although satisfaction with the available career options is slightly more likely than dissatisfaction, many developers feel that career paths and potential for advancement are still unclear. Lay-offs are common and although developers are used to mobility, sometimes job changes take their toll. But all in all, there is confidence in the industry's health.

Most developers prefer to have permanent, full-time status instead of being part-time, freelancers, independent contractors or self-employed. Among those who prefer to have one of these latter statuses, we find a quest for control over working conditions, the content of work and type of games, variety, location, employment and risks.

Most of all, time management and work-life balance are daily challenges. As developers grow older they struggle to maintain family and other social relationships. But, they seem to face these struggles in a very different way than in 2004. Then, survey respondents seemed set on leaving the industry, but now there are clear intentions to stay in the industry for good.

Lastly, we can see an evolution of the industry. Respondents are more numerous on the indie scene than they used to be; we find many employees in independent studios. As the industry is prosperous, existing studios outlive their growth crisis and there is expansion among many of them. The biggest studios are often the oldest and the new ones are smaller than their forebears. Employment is distributed among many small or mid-sized studios. Many of these small or intermediate studios seem to be linked across collaboration and subcontracting networks, as development teams are still considerable. Projects are mostly managed under AGILE / SCRUM school of project management.

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