# Developer Satisfaction Survey 2014

# Industry Trends and Future Outlook Report

20 January 2015

## Authors

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

**Maria Andrei-Gedja**
Masters Student, Library and Information Science
Faculty of Information and Media Studies
Western University, Ontario, Canada

## Acknowledgements

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

The data used for this report was collected through an industry and university partnership between the International Game Developers Association (IGDA), M2 Research, Western University, TÉLUQ, and the Georgia Institute of Technology. The authors gratefully acknowledge the contributions of Kate Edwards, Marie-Josée Legault, Wanda Meloni, and Celia Pearce in creating and administering the survey. The authors also acknowledge the research assistance of Sarah Medeiros in the preparation of the data for analysis and funding provided by a Social Sciences and Humanities Insight Research Grant held by Marie-Josée Legault and Johanna Weststar.

# Contents



## Introduction

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

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

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

To that end, we launched this new annual 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)

## Overview and Background

The IGDA's Developer Satisfaction Survey for 2014 was opened for responses on 17 March 2014 and closed on 28 April 2014. By the conclusion of the survey period, the survey accrued 2,202 responses. A preliminary summary report on this raw data was released on June 24, 2014.

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 Summary Report released as a first glimpse of the survey data.

What follows is a more detailed report on a sub-set of the survey that was geared to collect information about industry trends and the future outlook of the industry. As such, this report presents survey data on topics like the relative importance of game platforms, on perceptions of industry growth and on the image of the game industry to society.

When reading this report it is important to keep in mind that the inclusion criteria for completing this survey were quite broad. As a result, the responses reflected in the following pages represent the experiences and perceptions of those in core development roles as well as roles that are auxiliary to the making of games or part of the larger game industry community. Just under 40% of the respondents hold non-managerial roles in core development functions (including quality assurance and testing), 40% hold managerial roles (including producers and team leads), 18% hold roles in supportive functions to game making (such as administrative, human resources, legal, marketing, etc.) and a final 3% work in academia or journalism. Respondents were allowed to select multiple roles and approximately 11% identified as full- or part-time students.

While the respondents of this survey were predominantly male (76.4%), this survey did capture a fairly diverse population of individuals. There were just under a quarter who were female (22%), 0.6% who identified as being male-to-female transgender, 0.1% female-to-male transgender, 0.6% androgynous and 0.4% who selected "other." In terms of employment status, an overwhelming number reported being full-time employees, and 10% reported as being part-time. These individuals could be employed by a company, are self-employed or are freelance. Ten percent of respondents reported being currently unemployed, and 11% identified as full- or part-time students. It should 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%. Looking at the race and ethnicity of respondents, an overwhelming majority of respondents identify as being Caucasian (79%). The next highest group identified as being Hispanic/Latino (8.2%) and to round out the top three, 7.5% identified as being East/South-East Asian. While the age range of respondents was quite large (14-84 years of age), the majority of respondents are a fairly young group, in that 27% of respondents fall between 30-35 years of age. The second largest group of respondents is the 25-29 year olds (25%), and the third largest is the 35-39 year olds (17%).

## Quality of Life

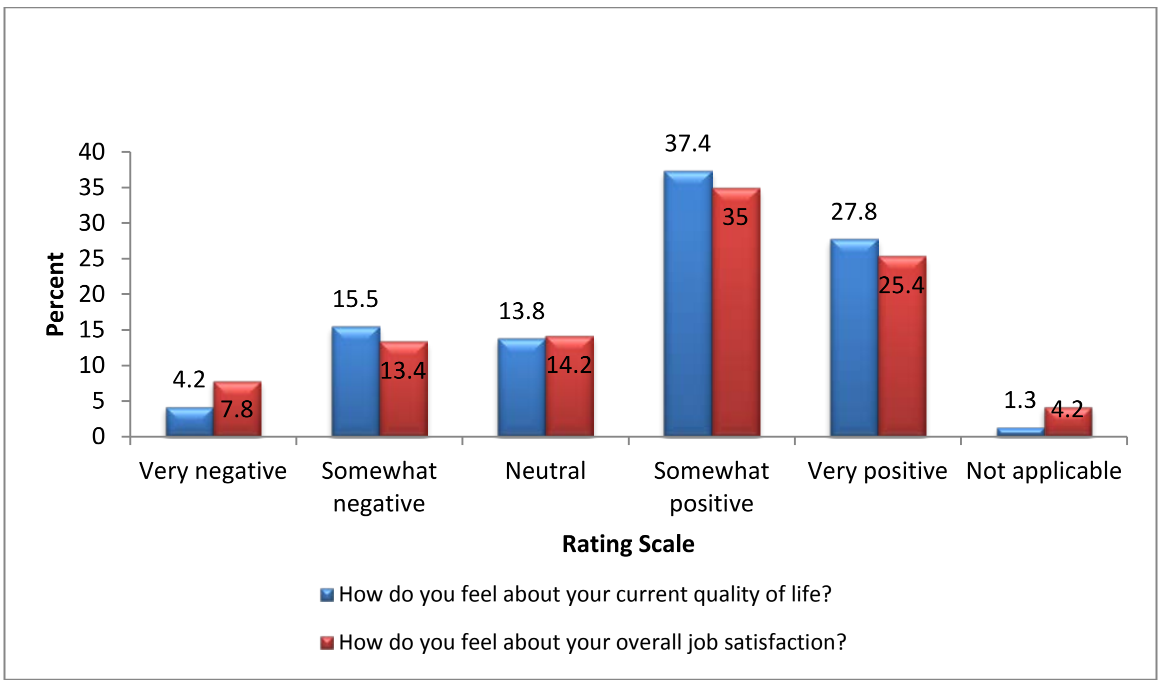
The 2014 DSS contained a number of detailed questions about quality of life and work-life balance. These were asked of a sub-set of the whole sample and will be presented in a subsequent Employment Report. The total sample was asked two additional omnibus questions.

From these questions in Figure 1 below, it seems that survey respondents are a relatively happy bunch. The majority (63%) self-reported that their quality of life was “somewhat positive” or “very positive.” That said, almost 20% of this sample expressed “somewhat” or “very negative” quality of life and this is a large minority.

In comparing the preceding perceptions on quality of life, there is a similar pattern in the self-reports regarding overall job satisfaction. A majority (60%) report their satisfaction as being “somewhat positive” or “very positive” and 21% consider it to be “somewhat negative” or “very negative.” Additional analysis reveals that these variables are strongly correlated in that those who indicate negative feelings about their quality of life are in turn more likely to also report negative feelings about their overall job satisfaction.

A negative feeling about job satisfaction was also found to be correlated with being a full-time employee, working at a larger company and with being a team lead. Positive feeling about job satisfaction was correlated with being a part-time employee, being a student, and being a studio founder or investor in the industry. There were no significant correlations found between job satisfaction and type of studio, with other job roles/disciplines or with factors such as gender, employment status (i.e. employee, freelance/contract, self-employed), age or tenure in the industry.

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

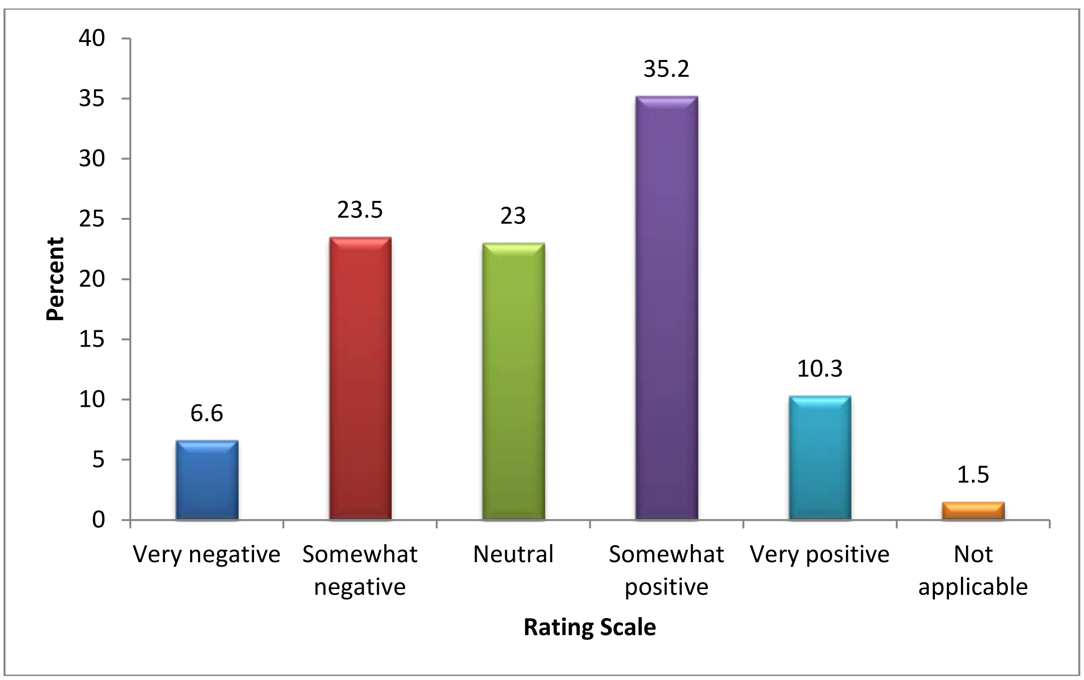


## Current State of the Games Industry

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

Following additional analysis, a negative view on the current state of the games industry was found to be correlated with a larger company size and a longer tenure in the industry. As might be expected since they are selecting this as their career path, full-time students were more likely to have a positive view of the current state of the industry. No significant correlations were found for other variables such as gender, full-time or part-time employment status, whether people were employees, contractors or self-employed, the type of game studio (i.e., first party developer/publisher, 2nd party, 3rd party, independent) or for job discipline/role/specialty. Those who reported positive feeling about their job satisfaction were more likely to feel favorably toward the state of the industry.

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

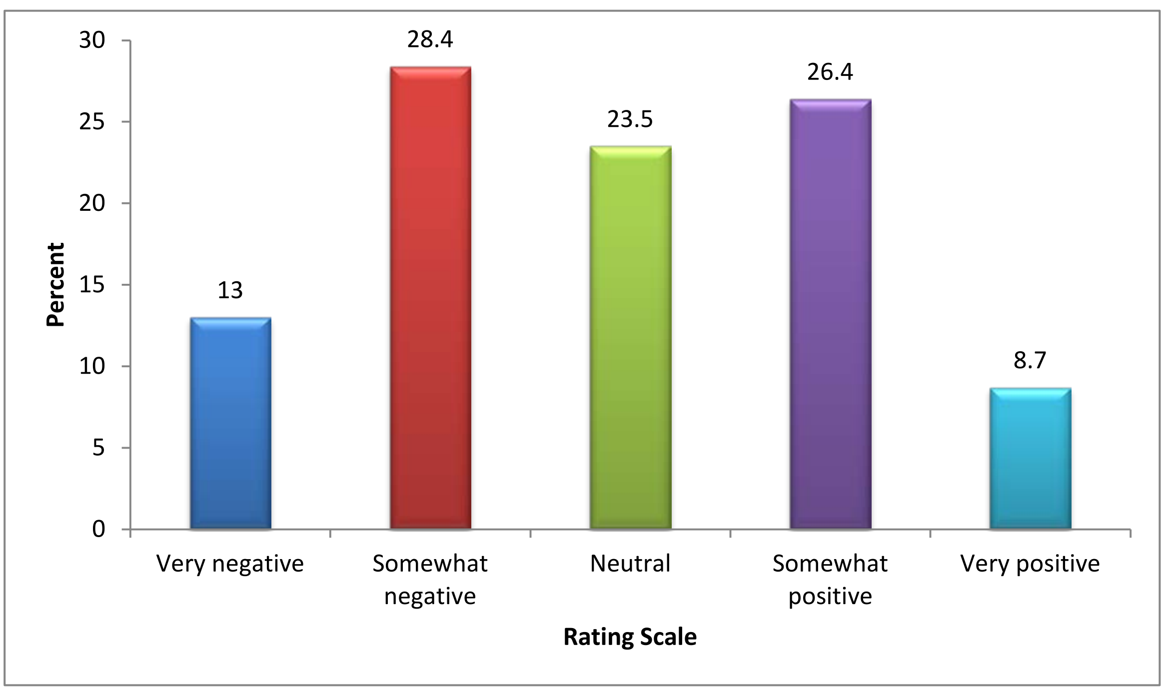



## Job Opportunities in the Games Industry

When respondents were asked to rate their perspective on job opportunities in the game industry there is a more negative outlook than for general quality of life and job satisfaction. As Figure 3 shows, while 24% reported a "neutral" opinion, 41% answered either "very negative" or "somewhat negative," and 35% answered either "very positive" or "somewhat positive." It is interesting to see this shift towards a more negative outlook here when considering that many reported being satisfied with their own job.

Additional analysis revealed that respondents who reported positive job satisfaction also tended to report a favorable outlook on job opportunities. Current outlook on the game industry is also positively correlated with views on job opportunities. This makes some sense as those who are happy in their jobs likely generalize that others are having the same experience or at least have access to such an experience. As well, a rosy perception about the state of the industry would likely include the sense that there are opportunities for growth through employment. However, some have a much less optimistic view. Not surprisingly, those who are currently unemployed were more likely to report a negative sense of job opportunities; both full- and part-time students were also more pessimistic despite their tendency to have a positive overall outlook on the state of the industry. Interestingly, since they are responsible for making jobs possible, respondents who identified as studio owners were more likely to report a positive view on job opportunities than other people in the industry. We also observed a small correlation between people who work at independent studios and positive views on job opportunities. As the 'indie scene' is rather hot right now, it may be that people in that environment feel a particular buzz and see more new opportunities.

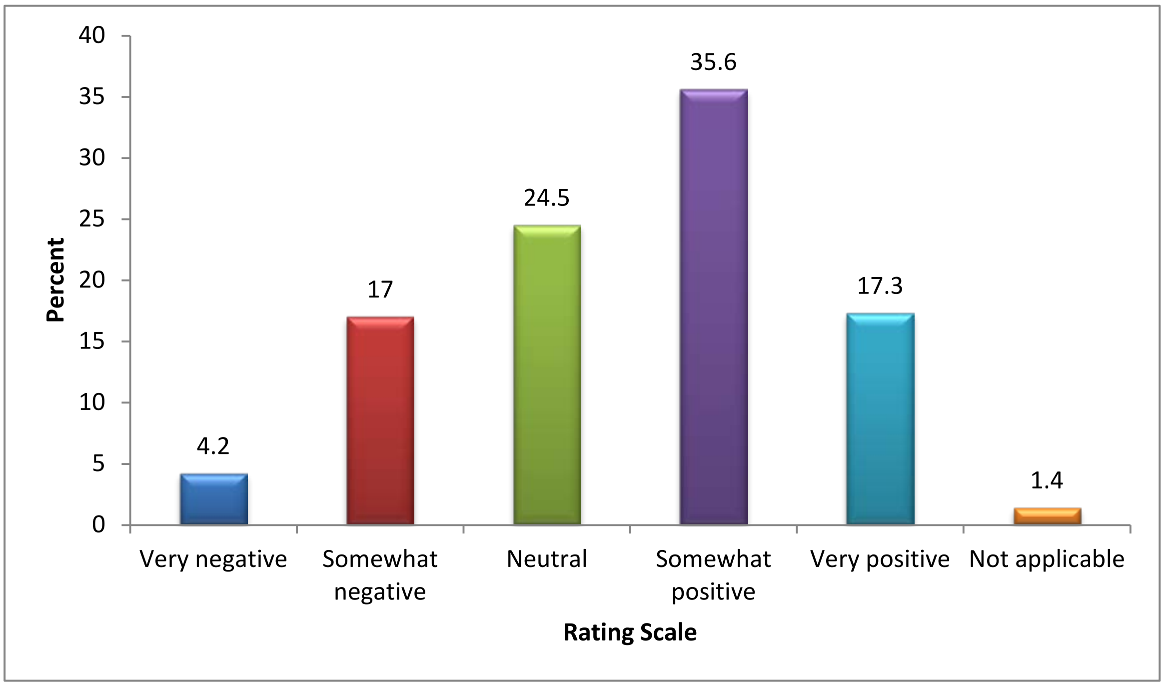
**Figure 3: Views on Job Opportunities in the Games Industry**



## The Outlook for the Industry – Looking 1 Year Ahead

When asked to rate their views on the outlook for the industry in one year, over half of the respondents (53%) reported a positive outlook (Figure 4). Only 21% held a negative outlook. This difference is made stark by examining the responses to the extreme poles. While 17% rated the future outlook as "very positive," only 4% considered the future outlook to be "very negative." This is a large difference and encouraging in the face of the general pessimism and agnosticism reflected in much of the data on other survey questions.

**Figure 4: The Outlook for the Industry in 1 Year**

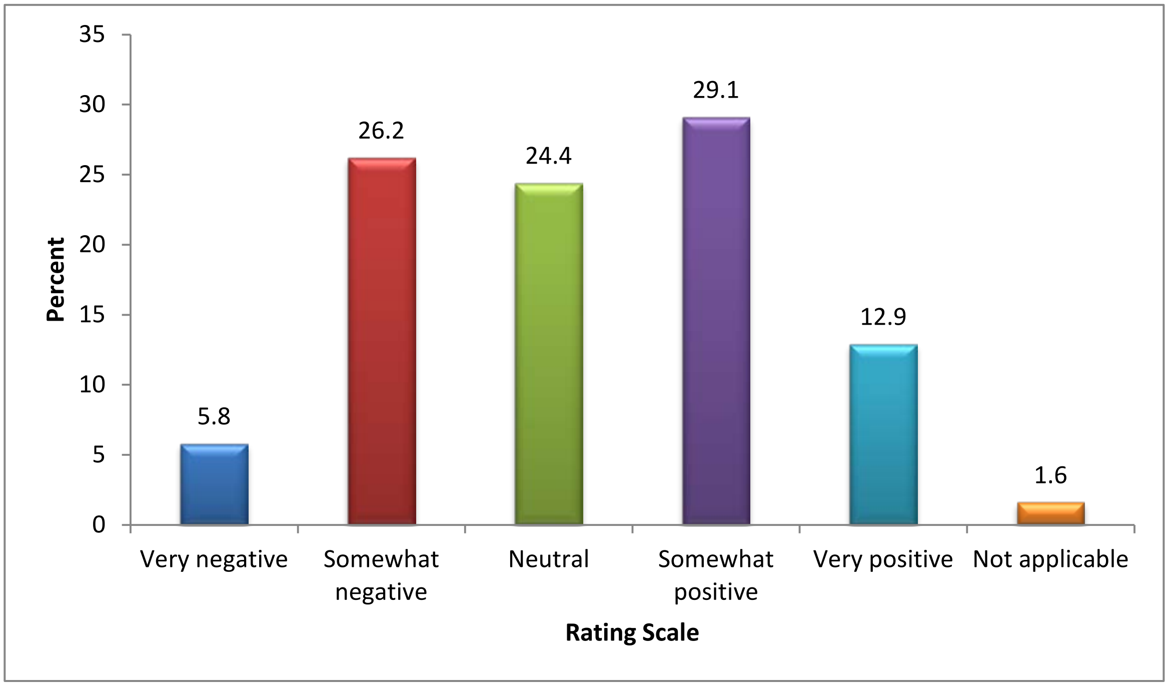



## The Social Perception of the Games Industry

In another omnibus question presented in Figure 5, respondents were asked about their views on the social perception of the game industry. As with the patterns in the questions above, the data are quite mixed and show a high degree of ambivalence through the use of the neutral option. On the whole, slightly more respondents (42%) have a positive view about the social perception of the game industry than a negative view (32%).

Though the industry has steadily grown and changed and games have become much more main stream for virtually all market segments, these data may indicate that developers and others close to the industry do not feel that the industry is wholly welcomed or perhaps understood. Despite advocacy efforts, aspects of the industry do create public controversy and in recent years the industry has received negative scrutiny, both warranted and not, over a number of issues. Negative views about the social perception of the games industry were correlated with negative views on job satisfaction, current state of the industry, and job opportunities in the industry. In cross-sectional, self-report datasets like this one, it is important to recognize that these correlations could reflect an impact of respondent mood across a set of closely situated questions rather than actual relationships.

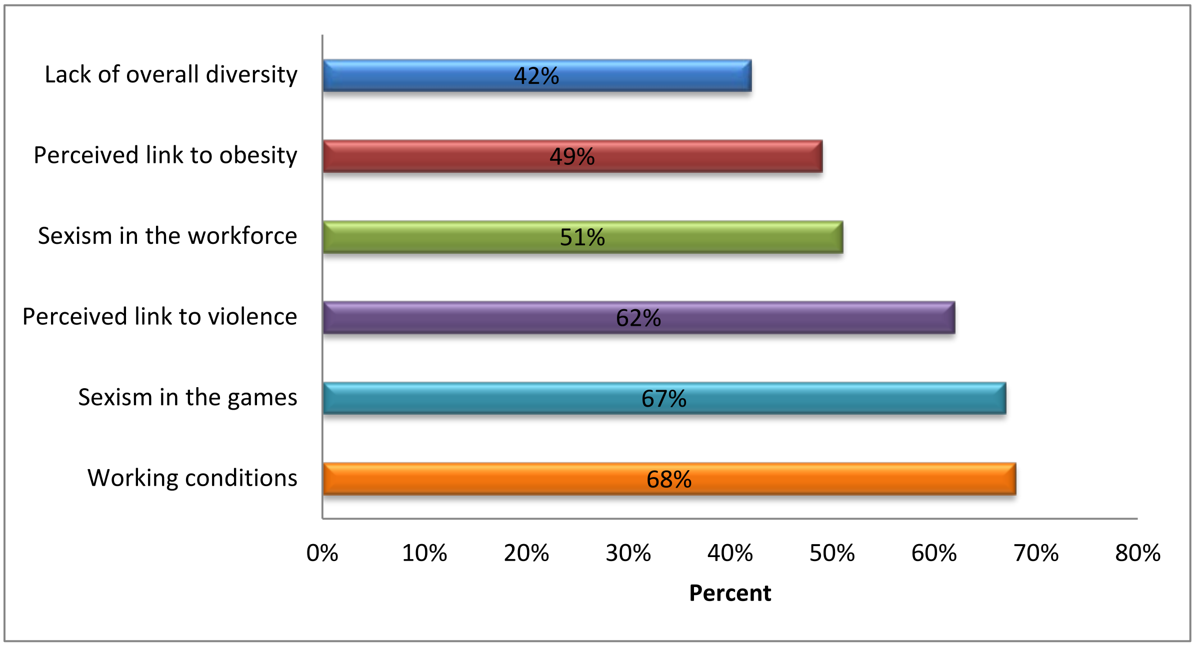
**Figure 5: Views on the Social Perception of the Games Industry**




Survey respondents were asked a subsequent question to better target the factors that might lead to a negative perception of the industry. This data is presented in Figure 6 below. It is interesting and somewhat surprising to note that "working conditions" was the top response (68%), followed closely by "sexism in the games" (67%) and "perceived link to violence" (62%). When only people working in non-managerial core development roles are considered as a sub-sample, the percentage who selected working conditions rises to 77% while their responses to the other categories reflect those of the total sample. Where societal discussions about violence and sexism in video games have been prevalent for decades, the topic of working conditions, particularly long, uncompensated hours has only been receiving greater public attention since 2004, and in fits and spurts at that. Clearly developers feel that this is a significant issue that reflects poorly on their industry.

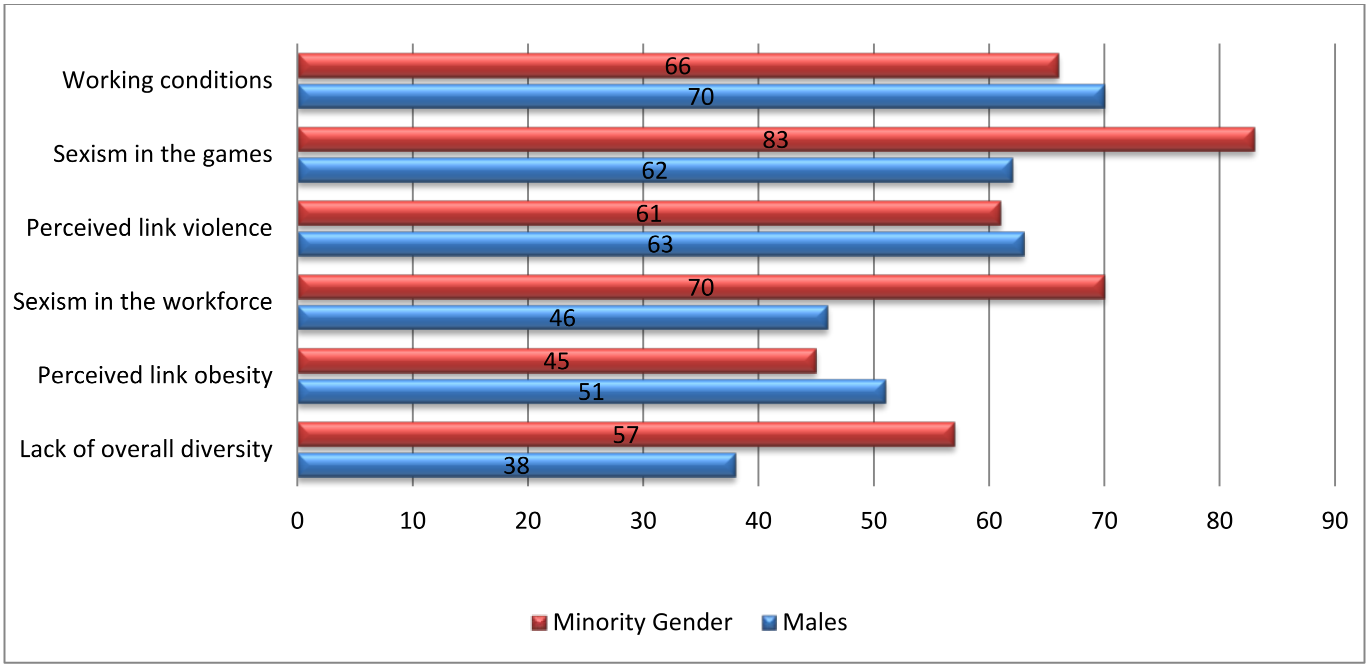
 

**Figure 6: Factors Influencing a Negative Perception of the Games Industry**




Unpacking this set of questions by gender revealed variation in the frequency pattern that is not entirely surprising (Figure 7). Respondents who self-identified as female, transgender, or androgynous were grouped together to collectively represent the minority gender in the industry and then compared to the responses from males. There were significant differences in response frequency for these two groups for every question except perceived link to violence and working conditions. Most notably, female, transgender and androgynous respondents were much more likely to report that sexism in games, sexism in the workforce and a lack of overall diversity were contributing to a negative perception of the industry than males. For this question overall, it is important to note that this survey took place prior to the Gamer Gate controversies.

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

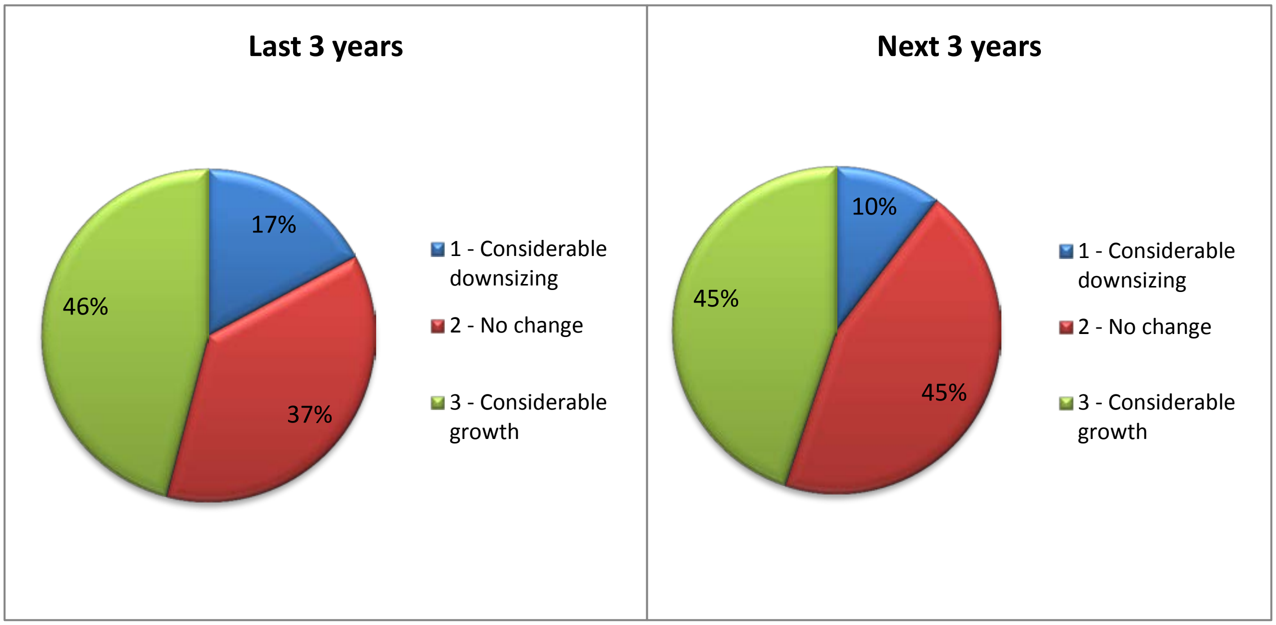



## Growth Rate: Company

Respondents were asked to characterize the growth rate of their company over the last three years. Current students were asked about their school or program. The data show the volatility of the industry, but tend to be positive overall. Almost half reported considerable growth at their company while a not insignificant minority (17%) said their company experienced considerable downsizing. A weak correlation was found between this question and company type which indicates that, according to survey respondents, publisher-owned developers saw more downsizing and independent studios saw more growth over the past three years.

When asked to think about the next three years, respondents were slightly more optimistic insofar as downsizing is concerned. Only 10% projected downsizing and a greater number anticipated no change. With 46% reporting considerable growth over the last three years, an approximately equal number foresaw considerable growth continuing over the next three years. Considering both “no change” and “considerable growth,” a vast majority of respondents (90%) had a positive outlook with respect to growth. The data for both of these questions are displayed in Figure 8.

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




## The Least and Most Important Platforms in the Next 5 Years

Respondents were asked what platforms they believed were "very important" for the future growth of the industry. They were also asked what platforms their company (or themselves if they were freelance or self-employed) currently develops for or supports. Table 1 below shows this data side by side for each platform option. Though admittedly not exactly a platform, Steam was listed by almost three-quarters of respondents as very important for the future growth of the industry. Interestingly, Steam also showed the greatest disparity between where respondents believe the future of the industry is, and what studios are currently developing for or supporting. This is in direct contrast to PC games distributed through packaged retail (PC boxed). Fewer than 10% of respondents felt that this was an important growth area for the industry, but 33% said it was the approach being taken by the studios where they worked. Another platform where respondents see potential is in proprietary platforms (25%), whereas few studios currently support or develop for these (6%).

**Table 1: Rankings for Platforms Important for Future Growth vs. Those Currently Supported**

| Platforms | Ranked as Very Important | Currently Supported | Difference: Importance minus Current Use |
|---|---|---|---|
| **Steam** | 72% | 33% | -39% |
| **PC Online** | 62% | 54% | -8% |
| **Android Phone** | 50% | 52% | +2% |
| **iPad** | 50% | 60% | +10% |
| **Android Tablet** | 50% | 51% | +1% |
| **Consoles** | 49% | 41% | -8% |
| **iPhone** | 48% | 57% | +9% |
| **Web-based application** | 31% | 40% | +9% |
| **Mobile: Other** | 30% | 28% | -2% |
| **Proprietary Platforms (Sifteo, Oculus, etc.)** | 25% | 7% | -18% |
| **Social Network Games** | 19% | 19% | — |
| **Dedicated Handhelds** | 18% | 14% | -4% |
| **Pervasive games/ARGs/Big Games** | 12% | 5% | -7% |
| **Interactive TV** | 11% | 6% | -5% |
| **PC Boxed** | 9% | 33% | +24% |
| **Custom Platform/Installation** | 6% | 6% | — |

In addition to the comparisons presented in Table 1, respondents were asked their opinion of the platforms that their employer would develop or support in the next 12 months. Table 2 shows the statistics for current development and future development as well as their difference for each platform option. This data is somewhat puzzling because the projections for the coming year are quite a bit lower across all listed options. The lack of selection for future development does not seem to be because respondents are just unaware of the direction of their company because they were given a "Don't Know" option. Only 22 respondents chose this option for current development and only a handful more (28 respondents) chose this for future development. Respondents were also given the option of selecting "Other" platforms; but only 59 individuals (3.5%) provided this response regarding what their employer currently supports, and only 28 respondents (1.7%) responded "Other" regarding platforms that would be supported in the next 12 months.

Perhaps it is an open question in studios about what platforms they should turn toward in the future. It is feasible that individual developers have a limited idea about the future direction for the company at which they work, even on a one year time horizon and so they left these selections blank, but did not select "Don't Know." Or perhaps respondents are protecting confidential studio decisions, despite the anonymity of the survey. Another feasible alternative explanation lies in survey design. The way this question was presented could have allowed for the 'in the next 12 months' check boxes to be overlooked by respondents. Therefore, though this data shows the accurate response patterns of the people who responded to this question and checked those boxes, this second column of data should be taken with a grain of salt.

**Table 2: Difference Between Platforms Currently Supported by Employer and Those to be Supported by Employer in the Next 12 Months**

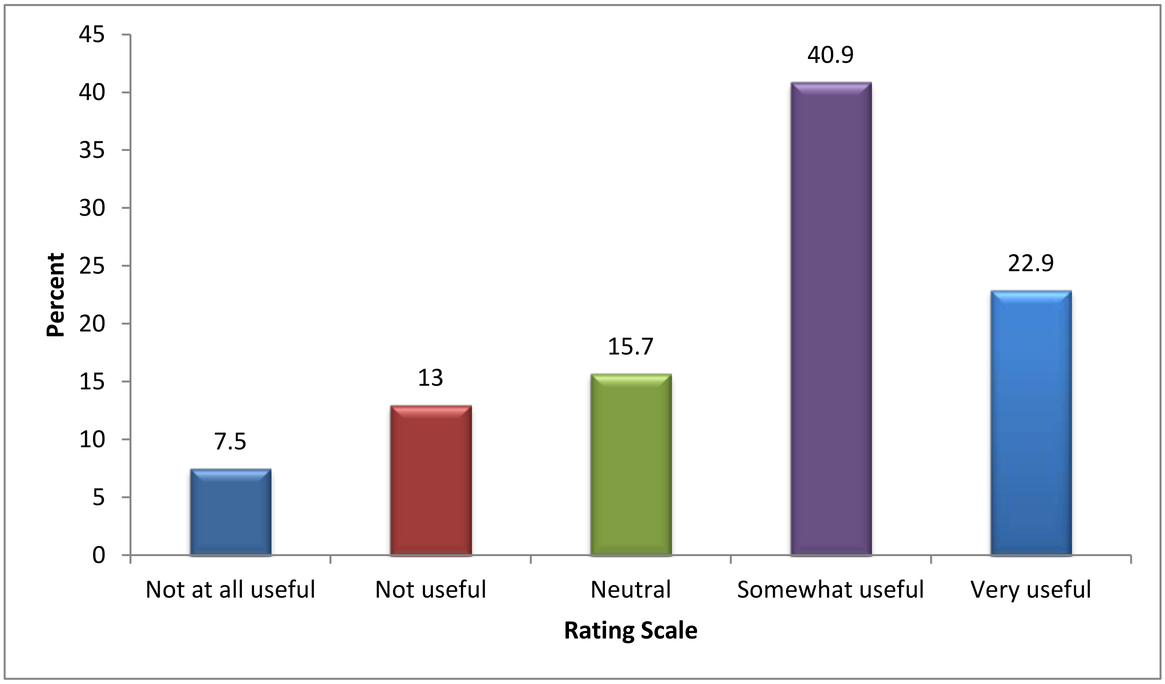
| Platforms | Currently Supports | Will Support in Next 12 Months | Difference |
|---|---|---|---|
| iPad | 60% | 15% | -45% |
| iPhone | 57% | 15% | -42% |
| PC Online | 54% | 12% | -42% |
| Android Phone | 52% | 15% | -37% |
| Android Tablet | 51% | 16% | -35% |
| Consoles | 41% | 14% | -27% |
| Web-based application | 40% | 8% | -32% |
| Steam | 33% | 14% | -19% |
| PC Boxed | 33% | 6% | -27% |
| Mobile: Other | 28% | 9% | -19% |
| Social Network Games | 19% | 5% | -14% |
| Dedicated Handhelds | 14% | 5% | -9% |
| Proprietary Platforms (Sifteo, Oculus, etc.) | 7% | 4% | -3% |
| Interactive TV | 6% | 3% | -3% |
| Custom Platform/Installation | 6% | 1% | -5% |
| Pervasive games/ARGs/Big Games | 5% | 2% | -3% |
| Other | 3.5% | 1.7% | -1.8% |
| I don't know | 1.3% | 1.7% | +0.4% |

## Age-ratings on Games

When asked about the importance of age-ratings on games, a majority of respondents (64%) felt that they were at least "somewhat useful" or else "very useful" (Figure 9). Only 21% felt that there was no importance to having an age-rating on the game. Unfortunately though, it cannot be determined from this high level question what 'useful' meant to respondents. As well, since age-ratings are likely here to stay and most respondents find them useful, this does not seem to be a major issue for the game community.

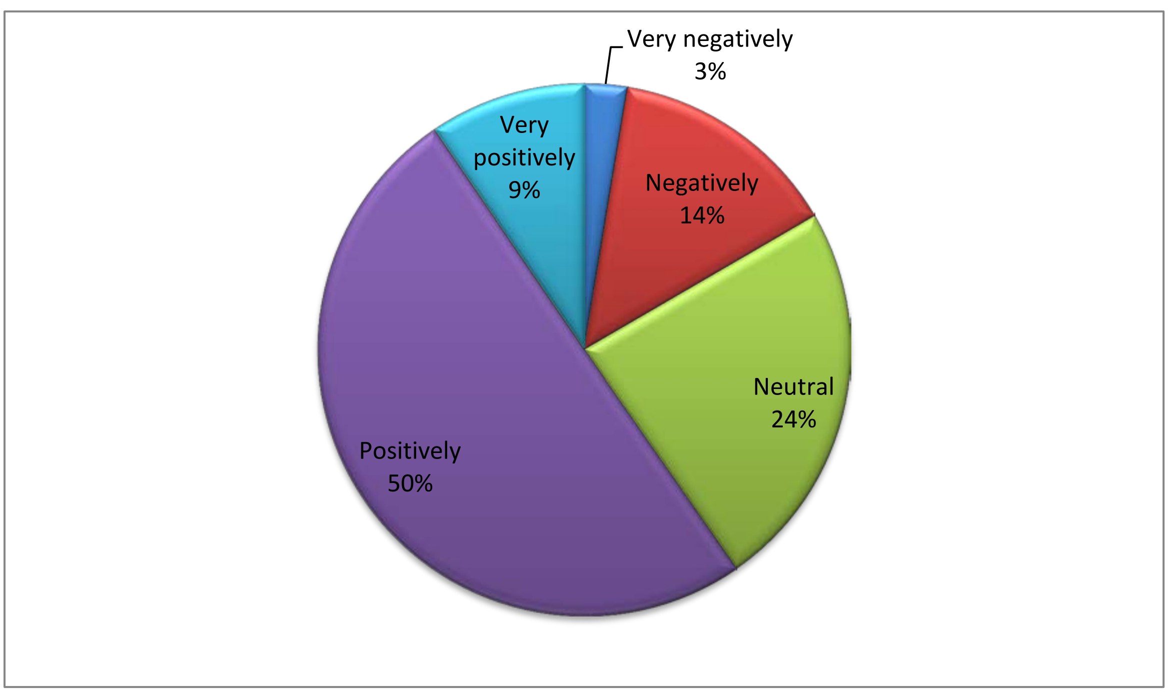
**Figure 9: How Useful are Age-ratings on Games?**




## The Overall Evolution of Game Mechanics in Games

As can be seen in Figure 10, respondents felt quite positively when asked to report their views on the evolution of game mechanics. Less than a quarter (24%) of respondents were "neutral" or had no strong opinion on the subject, and even fewer (17%) felt negatively about the evolution of game mechanics.

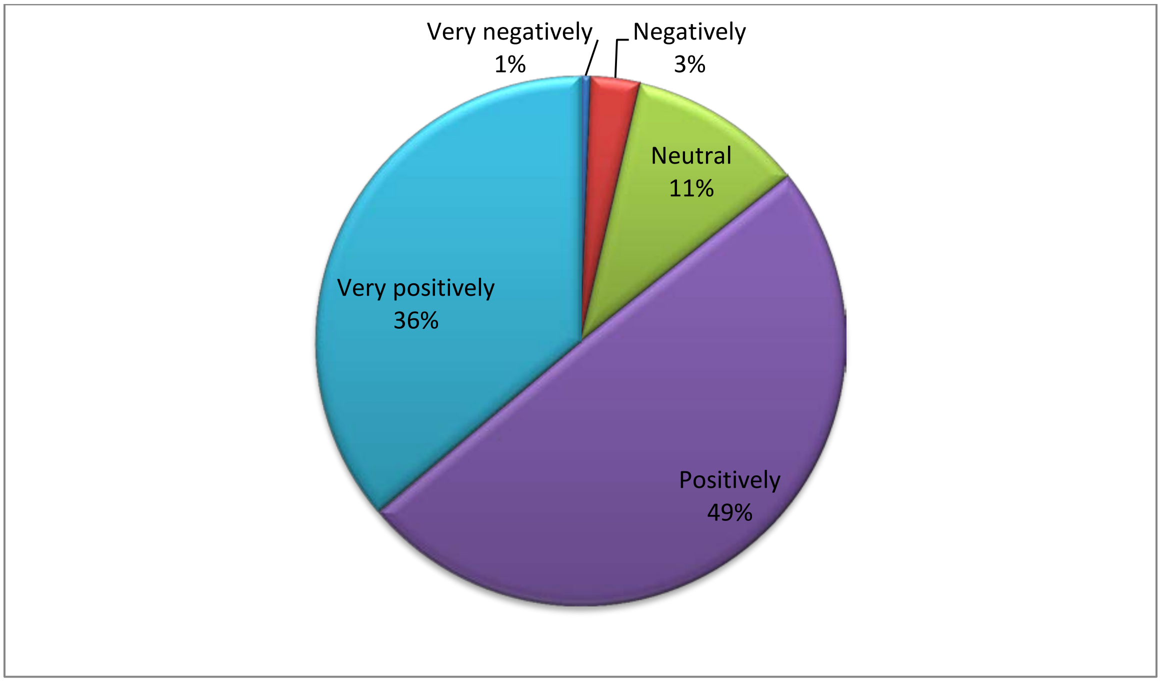
**Figure 10: The Overall Evolution of Game Mechanics in Games**



## The Overall Advancement of Game Development Technology/Tools

Similarly, the data presented in Figure 11 show that the feelings toward the overall advancement of game development technology/tools were overwhelmingly positive (86%). Only 11% of respondents were "neutral" on the topic, and only 4% felt negatively about the advancements being seen in game development technology/tools.

**Figure 11: The Overall Advancement of Game Development Technology/Tools**

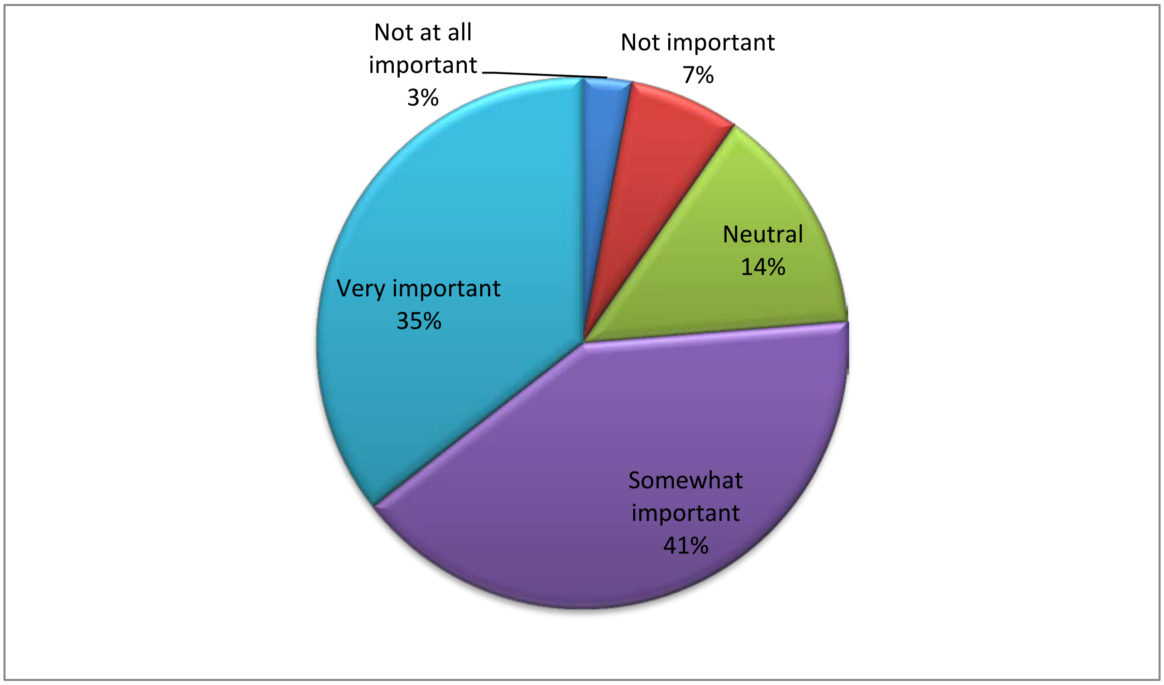



## Importance of Localized/Regional Versions of Games

Respondents reported that having a localized version of a game is imperative to its success (Figure 12). Overwhelmingly, respondents were in favour of having localized versions of games that are linguistically and culturally sensitive to specific audiences. Only 10% felt that this sensitivity and regionalization was not important for the success of a game.

**Figure 12: How Important are Localized/Regional Versions of Games?**




## Importance to the Growth of the Industry

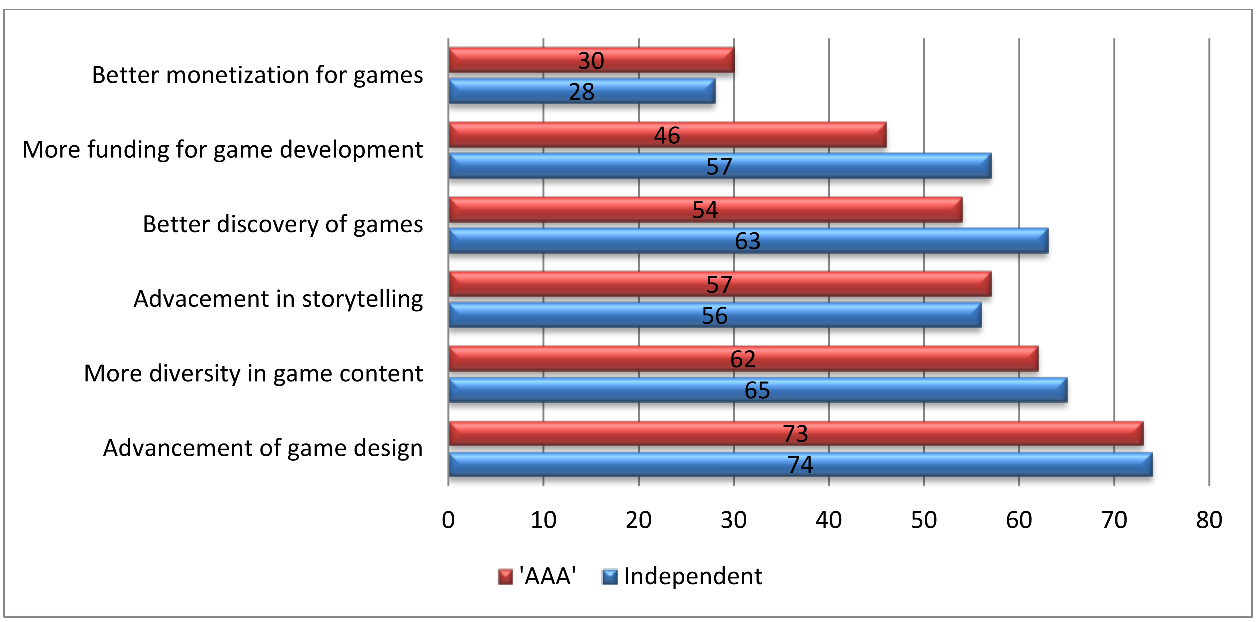
Respondents were asked to rate the importance of a number of interventions in terms of their importance to the growth of the industry. Table 3 presents them in rank order according to the number of respondents who said they were "very important" and with data isolated into three sub-samples. The second column represents the responses for only those respondents who identified as having managerial or team lead roles. The third column represents the responses for only those responses who identified as having non-managerial core development roles, including QA. The first column represents the responses from the whole sample which in addition to managers and developers includes people working in game studios in non-development roles, students, academics studying or making games, and game journalists. The numbers are not overwhelmingly different, yet there is some difference of opinion between managers and developers particularly around the financial factors. Though it came out as least important for both groups, managers felt that "better monetization of games" was more important than non-managerial developers. Members in the broader game community (i.e., academics, journalists and those in studio support roles) must have selected "diversity in game content" and "advancement in storytelling" more often than either developers or managers as the frequency counts for the whole sample rise for both of those factors relative to the sub-samples.

**Table 3 – How Important are the Following to the Future Growth of the Industry?**

| Future Growth of Industry | Very Important | | |
|---|---|---|---|
| | Whole Sample | Managers | Developers |
| **Advancement of Game Design** | 74% | 76% | 72% |
| **More Diversity in Game Content** | 65% | 63% | 64% |
| **Advancement of Storytelling** | 60% | 56% | 59% |
| **Better Discovery of Games** | 58% | 62% | 53% |
| **More Funding for Game Development** | 53% | 56% | 47% |
| **Better Monetization of Games** | 29% | 34% | 24% |

These questions were also analyzed with respect to studio or company type – particularly for the difference in views between those who self-identify as working at independent studios and those who report working in studios more traditionally associated with AAA games – first-party developers, publisher-owned developers and third party developers. There were no significant differences in the responses of these two groups for "better monetization of games", "advancement of game design", "advancement of storytelling" or "more diversity in game content". Respondents working at independent studios were significantly more likely to think that "better discovery of games" and more "funding for game development" were important for the future growth of the industry (see Figure 13). This fits with the challenges of small or start-up independents which require seed capital and compete for visibility in an increasingly crowded digital distribution marketplace.

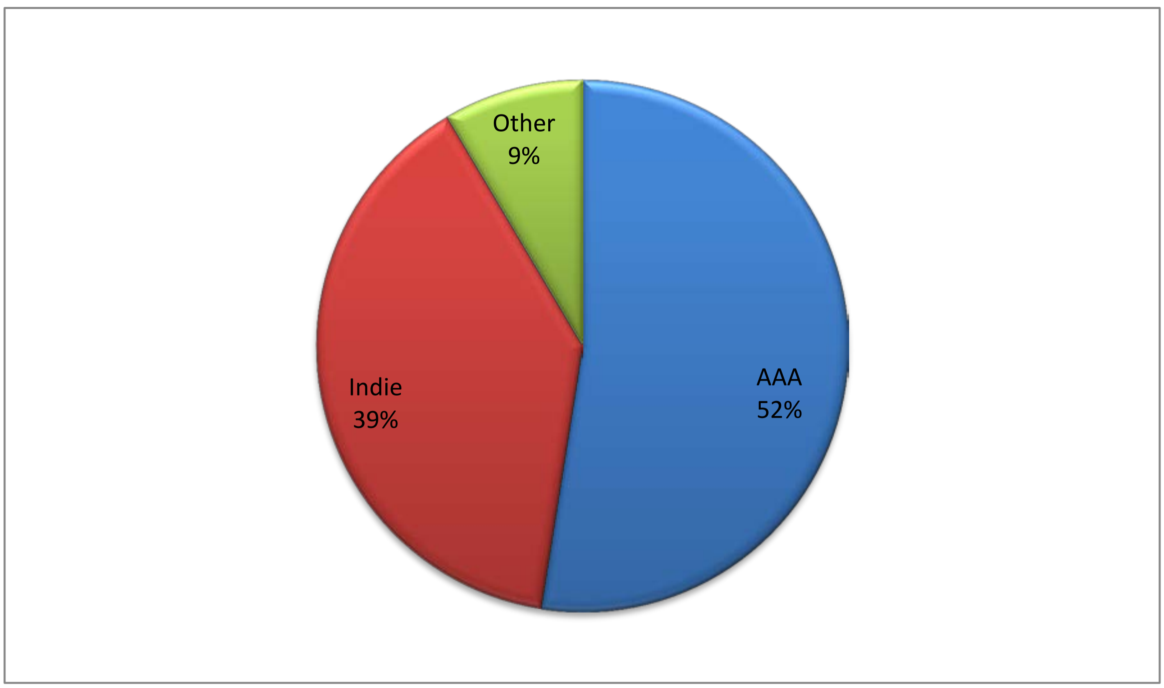
**Figure 13: Interventions Important to the Future Growth of the Industry by Broad Studio Type**



## Type of Company/Studio Respondents Would Like to Work For

When respondents were asked what kind of company they would most like to work for, over half (52%) reported that they would prefer to work with an "AAA" company, and 39% would like to work for an "Indie" company (Figure 14). No guiding definitions were provided to survey respondents when answering this question. The remaining 9% selected "Other." Rather than providing an alternative option, or in addition to it, a number of respondents in this group used the "Other" option to comment that this choice represents a false dichotomy given the complexity of the industry and the grey area that surrounds the definition of an independent studio. The wording of this question also did not reflect other types of companies such as for-hire or middleware studios. Nonetheless, this data is a useful benchmark for general sentiment. It is interesting because it does not completely match the data listing the type of company at which respondents currently work. Almost half of employed respondents (48%) reported that they work at an independent company. Independent company was defined in the survey only as one that develops its own intellectual property. Taken together 53% of employed respondents reported that they currently worked for a first-party developer/publisher, a publisher-owned developer (defined as second-party developers or subsidiaries), or a third-party developer where we would expect most 'AAA' games to be made.

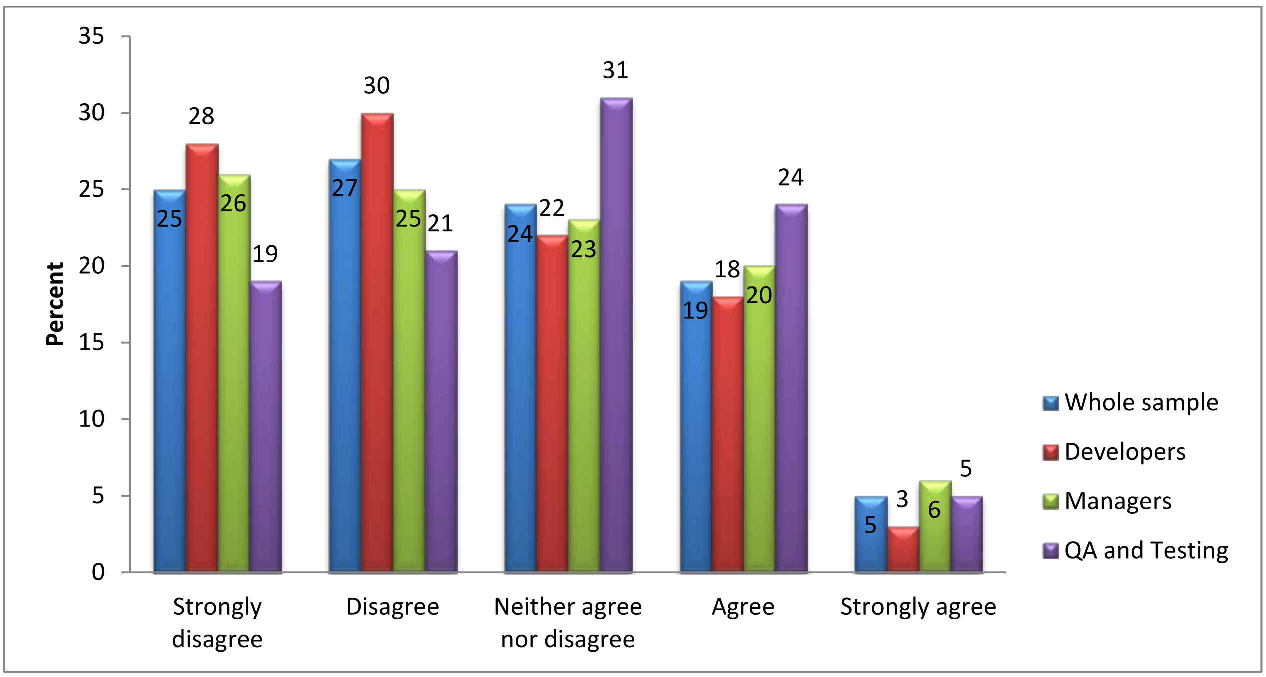
**Figure 14: At What Type of Company/Studio Would You Most Prefer to Work?**



## "Crunch Time is a Necessary Part of Game Development"

Though we will report on working hours for currently employed respondents in much more detail in a subsequent Employment Report, the DSS 2014 also asked the general question "Is crunch a necessary part of game development" of the whole sample. This data is presented in Figure 15 below. Over half (53%) of all respondents either "disagreed" or "strongly disagreed" with that statement. As noted above, the whole sample includes managers and owners and also people who do not directly make games. When the data is analyzed just for respondents who work in non-managerial core development roles, the rejection of this statement is even greater. Almost 60% of developers feel that crunch is not a necessary part of game development. We also analyzed the data for respondents in managerial roles and for those specifically in quality assurance and testing roles. Managers seem slightly more tolerant of crunch, though not overwhelmingly so; indeed, QA and testers seem most inclined to feel that crunch is necessary in game development, or at least are more likely to be ambivalent. Given the relationship that QA often has to other development functions and the later placement of QA in the development schedule, it may be that their lived experience more strongly reflects a 'we needed it yesterday' mindset and alternatives to this are harder to envision.

**Figure 15: "Crunch Time is a Necessary Part of Game Development"**




There are no significant correlations between this sentiment on crunch and either age, tenure in the industry, company size or team size. Nor are there significant differences in the responses to this question by gender. For the most part there are also no significant differences in the pattern of response depending on the type or nature of company, studio or business where respondents work. However, respondents who reported working at a company who focuses on business services such as marketing, legal, finance, accounting and public relations were much more ambivalent in their answer to this question than the rest of the respondents. This is likely because game development is not their core business and they would have less confidence in responding. On the contrary, those respondents who work in media, the press or game publication felt much more strongly; 42% agreed or strongly agreed that crunch was necessary as compared to 23% for the remainder of the sample. This finding is somewhat problematic if the game press is contributing to the perception that crunch is unavoidable or somehow important to the making of games. That said, it should be noted that the sample of game journalists, etc. in this survey who answered this question was very small (only 26 individuals).

## Conclusion

The IGDA administered the 2014 Developer Satisfaction Survey (DSS) in March and April of 2014 as a compilation survey of prior efforts in the area of demographics, diversity and quality of life. In addition to these topics, the IGDA was interested in taking the pulse of the game industry on a number of broader questions pertaining to industry trends and future outlook of the games industry. These questions were intended to give a snapshot of the general satisfaction level and confidence level that game developers, defined very broadly, hold toward their industry. The data presented in this report represent these questions.

The data indicate that overall, members of the broad game community seem satisfied with their industry in terms of industry growth and employment opportunities, advancement and innovation in game mechanics, development tools and storytelling, and individual perceptions of job satisfaction and quality of life. That said, respondents identify various challenges such as negative perceptions of society toward game content and game culture, the need for greater advancement in game design, more diversity of game content and better discovery mechanisms for emerging games (particularly with the growth in indie market, digital distribution and self-publishing). The game community also continues to wrestle with the issue of crunch, both in its real form and in the mythology of crunch that remains a part of the industry.

Given its position at the intersection of technology, art and entertainment, the game industry has always been a place of innovation, change and flux. This is borne out in this data when considering the plethora of game platforms available to developers and the significant shift that is occurring now from the traditional model of boxed games sold in retail outlets and played on stationary game consoles to a networked and mobile distribution and consumption model. With these changes come significant challenges, both positive and negative, to the long standing structure of the industry and the traditional publisher-developer relationships. Throughout this report significant minorities of respondents reported either a degree of ambivalence or direct negativity regarding various questions on the overall health and outlook of the industry. The concerns and experiences of these dissenting groups are important in building and maintaining a strong industry for the future.

As noted earlier in this report, keep watch for an additional report from the DSS 2014 data that will delve more deeply into the wealth of survey questions on employment issues such as hours of work, compensation and benefits, and employment and workplace profiles.

Also, keep watch for the launch of the IGDA 2015 Developer Satisfaction Survey. This will be a condensed and more tailored version of the 2014 survey and will allow the IGDA and other industry stakeholders to continue the important work of benchmarking and tracking the state of the games industry.

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