STATE OF THE GAME INDUSTRY 2020: WORK FROM HOME EDITION

Presented by:

GDC

The Game Developers Conference has polled nearly 2,500 game developers as part of a special State of the Industry: Work from Home Edition Survey, which provides a snapshot of how the COVID-19 pandemic has impacted the game industry ahead of the all-digital GDC Summer this August.
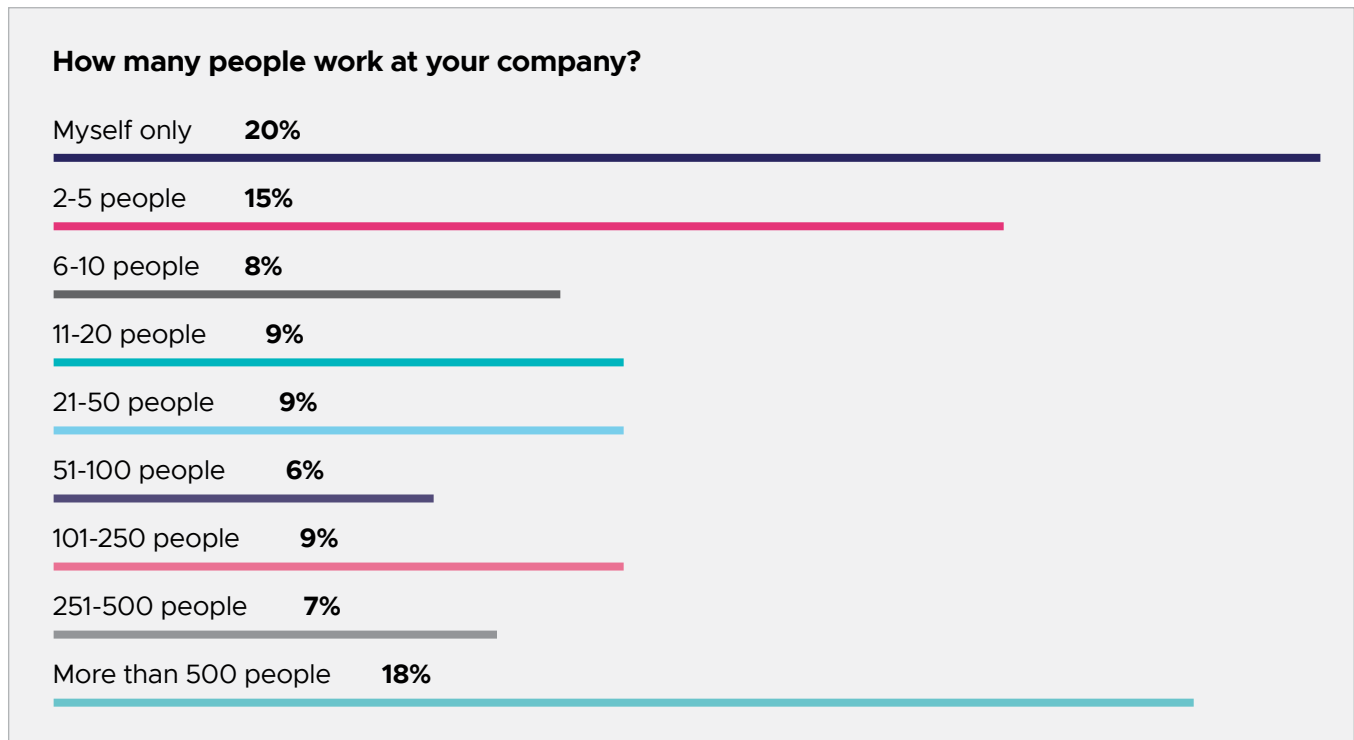
Some of the most notable trends highlighted in this survey include a shift to work-from-home setups for a majority of game developers, with nearly half reporting longer working hours and less productivity than before the pandemic.

In the full report you'll find more detailed insights into how the spread of COVID-19 has impacted incomes, personal lives, and release schedules in the game industry, as well as a selection of relevant comments from our survey respondents.

The State of the Industry: Work from Home Edition Survey is the latest in an ongoing series of regular reports that offer insight into the shape of the industry as a prelude to GDC. Organized by Informa Tech, GDC Summer will take place this August 4th through 6th in a special online format.

To get a sense of where our survey respondents work, we asked them to tell us up front how many people work at their company.

How many people work at your company?

Myself only	**20%**
2-5 people	**15%**
6-10 people	**8%**
11-20 people	**9%**
21-50 people	**9%**
51-100 people	**6%**
101-250 people	**9%**
251-500 people	**7%**
More than 500 people	**18%**

Most work at either very small or very large organizations; the largest share of respondents, 20 percent, said they work alone, and the second largest share (18 percent) said they work at companies that employ over 500 people. 15 percent said their company employs 2-5 people, while the rest of our survey respondents reported (in roughly equal measure) working at companies with headcounts between 6 and 500.

Less than 10 percent of devs have been laid off or furloughed due to COVID-19

With so many people in the world out of work as the threat of COVID-19 forces economic change, we asked our respondents to let us know if they'd been laid off or furloughed due to the pandemic. 8 percent said they had lost their job due to the pandemic, while 92 percent had not.
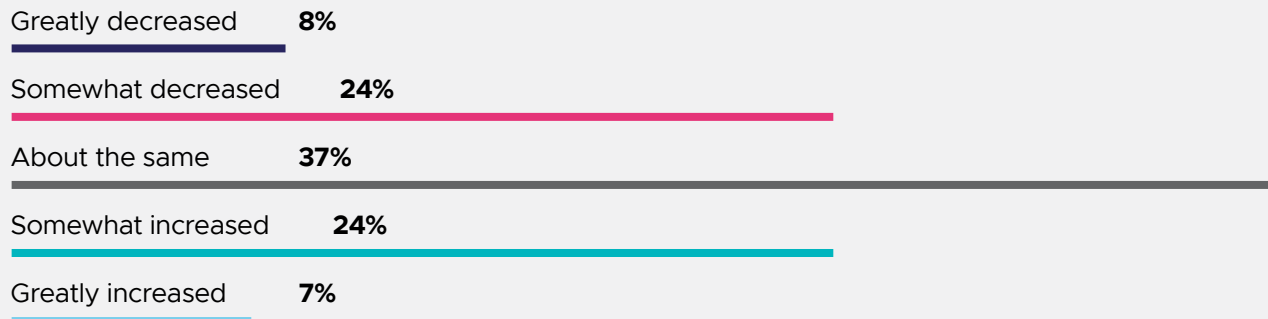
Since our pool of respondents includes a broad swathe of the game industry with varying levels of experience, it's important to consider that many respondents may be freelance contractors, independent developers, or students who may be working outside of a traditional studio environment.

Roughly a third of devs have seen their business decline due to the pandemic, but nearly as many saw it increase

Another key concern this year was understanding how the various shelter-in-place and quarantine measures enacted around the world in response to the COVID-19 pandemic have impacted the business of game development.

To that end we asked our survey respondents to tell us whether they felt their business had diminished, stayed the same, or grown during the pandemic; the answers we received form a striking bell curve.

How do you feel the pandemic has affected your overall business?

Greatly decreased **8%**

Somewhat decreased **24%**

About the same **37%**

Somewhat increased **24%**

Greatly increased **7%**

The largest share, 37 percent, said they felt their business had stayed about the same so far. We saw the rest of respondents fall pretty evenly to either side of that, with 24 percent saying their business had somewhat decreased and another 24 percent saying it had somewhat increased. 7 percent said it had greatly increased, and 8 percent said their business had greatly decreased during the pandemic.

Given these results, we hypothesize that the ongoing COVID-19 pandemic has meaningfully affected the business of a majority of game developers, with some seeing upticks even as others suffer significant business downturns.

1 in 4 devs say their household income has fallen due to the pandemic

When we asked our survey-takers to tell us how their household income has changed due to the pandemic, the majority (62 percent) said it's remained about the same so far. 18 percent said their income had decreased somewhat, and 8 percent said it had decreased greatly.

How has your household income changed due to the pandemic?

Greatly decreased **8%**

Somewhat decreased **18%**

About the same **62%**

Somewhat increased **10%**

Greatly increased **2%**

That suggests roughly a quarter of game makers have seen a drop in household income due to the pandemic, which continues to affect the world's economies.

On the flip side, 10 percent of our respondents said their income increased somewhat, and 2 percent said it had greatly increased due to the pandemic.

"Clients aren't willing to spend money. Projects have evaporated," one respondent explained in the (optional) write-in portion of the question.

"I am now unable to afford rent and may very well have to move back home with my parents in order to survive," wrote another. "I can't even afford groceries, but have been helped by friends just to get basic needs met."

"No one has lost a job, I got a raise, and we're spending a lot less on restaurants," one survey-taker wrote in.

"A month before the pandemic we had released some really great mechanisms on our game which greatly boosted our revenue," wrote another. "So everyone in the studio including us (the owners) had a salary increase."

"We have not lost business, but have lost prospects and need business soon," added one respondent.

1 in 3 devs have had a game delayed due to the COVID-19 pandemic

"Has your game suffered any delays due to the pandemic" was one of the core questions of this edition of the survey, and roughly a third (33 percent) of our respondents said yes. 46 percent said no, and 21 percent said the question wasn't applicable (because, for example, they weren't working on a game at the time).

Has your game suffered any delays due to the pandemic?

Yes   **33%**

No   **46%**

N/A - not currently working on a game   **21%**
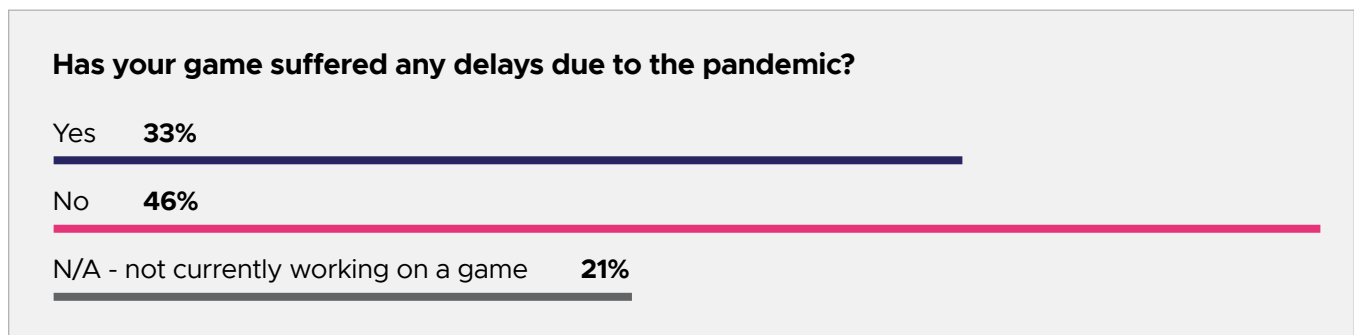
We gave survey-takers the option of writing in with more details about why, and their responses shed some light on how studios around the world are adapting to life in the time of COVID-19.

"The company was quite effective in switching everyone to remote work," wrote one respondent. "I work on a central team supporting external development. None of our games have been delayed due to COVID," wrote another.

"Our entire team has stepped away in order to focus on desperately trying to manage their lives, living situations, and find bread and butter work to make ends meet," said one

respondent. "We were hoping to show our new projects but some major events were cancelled, working from home slowed us down, and some work-for-hire projects were delayed or cancelled," another wrote.

"We transitioned to WFH okay, but it did cause us about a couple of weeks of disruption," stated one respondent from New Zealand. "As NZ has got COVID under control we're already back at the office and functioning 100 percent."

Some respondents said they'd suffered delays and other losses due to the pandemic affecting their partners, even if they themselves were able to continue on schedule. "Most of our delays are because of other companies/studios not being ready for a work-from-home model. Internally, we were already set up pretty good and the transition has not been very difficult to make," wrote one respondent. Another stated that "Certifications through Nintendo have been backed up due to their processes being adversely affected by the pandemic."

Poor communication, isolation, and lack of access to critical tools are some of the common challenges devs are dealing with right now

We also gave our survey-takers the option of telling us about the biggest challenges they and their team had yet faced due to the pandemic, and what solutions they'd implemented so far.

"The most important challenge was the subject of communication," a respondent wrote.. "We were starting the design of a game when the pandemic started; at the beginning it cost us to migrate everything to Discord servers for our communication, but we were able to do it and finish the design from our homes."

"We have an office in downtown Rio de Janeiro, but since March we have all been working from home," explained one survey-taker. "It took a while to get used to being available online, using Discord as the main means of communicating, lessening the distractions at home, knowing when to shut down, etc., but I believe we have managed to maintain our efficiency."

> *"The biggest overall team challenge has been managing ambient stress. Everyone has been affected by the pandemic in some way, even if not directly, and the general atmosphere of anxiety is impossible to ignore completely."*

"Recording voice actors from their homes," was a big challenge for another respondent. "We created remote kits of recording gear and acoustic treatment to send to actors."

"The voiceover recordings," were the biggest challenge for another, "because the Italian laws forced us to close the studio, so our audio engineer had to change some processes (and add a few more hours for post-production)."

"Due to funding falling through, we attempted to cut costs as much as possible by moving to different cloud service providers, cut development and try to go with bare-minimum maintenance," said one respondent. "We furloughed all but two employees initially."

"The biggest functional challenge has been testing console features and/or platform certification requirements, which has not necessarily been easy from home due to hardware limitations and networking constraints," wrote one respondent. "The biggest overall team challenge has been managing ambient stress. Everyone has been affected by the pandemic in some way, even if not directly, and the general atmosphere of anxiety is impossible to ignore completely. We've tried to address this by encouraging people to ask for time off if they need it, take breaks, and by organizing social activities via video conference to keep people from feeling too isolated."

70 percent of game makers have had to switch to working from home

We also asked survey-takers whether they'd had to switch to a work-from-home setup due to the pandemic.

Of those who answered, 70 percent said yes; 3 percent said no, and 27 percent said they were already working from home.

Did you have to switch to working from home from a physical office at any point due to the pandemic?

Yes, I had switch to working from home   **70%**

No, I never had to switch to working from home   **3%**

No, I was already working from home   **27%**

Nearly half of game makers feel working from home has lowered their productivity

When we followed up with our respondents to suss out how they feel working from home during the pandemic has impacted their productivity, just over a quarter (27 percent) said they felt about the same.

The largest share, 32 percent, felt their productivity had somewhat decreased while working from home, while 9 percent felt productivity had greatly decreased. 24 percent of respondents said they felt they'd somewhat increased their productivity, and 8 percent said their productivity had greatly increased while working from home.

"Good days are really good, bad days are really bad. If there were fewer outside stressors, such as family healthcare, it would be significantly more productive."

Those who opted to write in with more details commonly cited their home environment, their lack of access to outside stimuli, and lack of in-office communications as key reasons their

productivity had shifted.

"Lots of distractions at home with 4 little children also at home," wrote one respondent. "But the ability to work late and still be home has been beneficial and helped me be productive."

"There is more 'busy time' due to the increased need for good and more communication," wrote another, clarifying that "good: emails need to be very well-written; more: more calls and longer introductions even for small tasks."

"I'm coming up to speed on the tools slower than I would if I were sitting next to those currently using the tools and who are trying to teach me the tools," said another respondent.

"I find the pressure of 'butt in seat' to be completely non-existent and so I'm able to better tailor my day around my natural rhythms," one survey-taker wrote in.

"Good days are really good, bad days are really bad," explained another. "If there were fewer outside stressors, such as family healthcare, it would be significantly more productive."

A third of devs feel they have experienced a decrease in creativity while working from home during the pandemic

We also checked in to see how our survey-takers felt their creativity had been affected (if at all) by working from home during the pandemic.

The largest share of those who answered (40 percent) said their creativity had remained about the same while they worked from home. 28 percent said it had somewhat decreased, and 7 percent said it had greatly decreased.

On the flip side, 19 percent of respondents said they felt their creativity had increased while working from home, and 6 percent said it had greatly increased. When given the option to explain further, many wrote in to say that working remotely made it either much easier to focus, or much harder -- especially for those with family at home.

> *"The increase in time to focus has been offset by not getting the change of venue and perspective that comes from the commute, as well as being in the office and around others."*

"Working from home with little kids is not easy," one survey-taker explained. "Too many distractions with kids running around and they don't understand," another wrote.

"Fewer distractions means more space to think and act on ideas," said one respondent.

"The increase in time to focus has been offset by not getting the change of venue and perspective that comes from the commute, as well as being in the office and around others," wrote another.

"The overall situation (financial troubles at company level, additional meetings and overhead, anxiety going to the grocery store) is probably more to blame than staying at my home is," concluded one respondent.

Most devs surveyed don't have children at home; those who do are predominantly handling childcare duties themselves during the pandemic

Since the responsibilities of parenthood factor so greatly into how workers are adapting to working from home during this pandemic, we made sure to survey our respondents and find out how many have children at home.

The majority (73 percent) do not; when we asked the 27 percent who do have kids how they're handling childcare responsibilities during the pandemic, most said they're dividing them with others in the home.

73 percent of respondents who have kids said they don't have hired childcare and are splitting that responsibility with others in the home, while 18 percent said they're handling childcare responsibilities all by themselves. Another 5 percent said they had hired childcare outside of the home, and 4 percent were paying for in-home childcare.

A majority of devs are making permanent changes to the way they work in response to COVID-19

As the game industry adapts and continues to work under the threat of COVID-19, we asked our respondents whether there were any new processes or practices they had adopted during the pandemic that they planned to continue even after things improved.

The majority (64 percent) said that yes, they would be permanently modifying the way they work in response to the changes made during the COVID-19 pandemic. Many took the time to write in with some specifics about what practices or processes they'd be permanently adopting; one of the most common responses was the adoption of permanent work-from-home options for staff members.

Are there any new processes or practices you and/or your team has adopted during lockdown that will carry over post-lockdown?

Yes   **64%**

No   **36%**

"Our company will now allow artists to work from home, and use flex scheduling," wrote one respondent.

"We had to make some changes on our daily tasks to compensate not being at our office working physically together, but those have proven to increase our efficiency and productivity," wrote another. "Lately we have even talked about embracing the home office configuration even after the pandemic."

"We gather up end of day reports from everyone (publicly) - this has been super helpful in improving communication and visibility, so we will likely stick to it," one respondent wrote. "We've also started hiring employees who will remain fully remote."

"We worked with our developers to create an online game that could be used for charitable purposes using Zoom," another respondent stated. "We've been able to generate around $30k through these events which we'll continue to host even after the lockdown lifts."

"I believe more of our work will be done remotely. The collaboration tools that proved useful will stay with us," wrote another. "Apart from that -- we were a source of support for each other. This friendship will definitely stay."

The COVID-19 pandemic has meant longer working hours for nearly half of devs

Separate from the income question, we also wanted to survey our audience of game makers to see if they were working more or less hours during the ongoing pandemic. The largest share, 41 percent, said they were working about the same hours during the pandemic as they had prior. Nearly as many said they were working longer hours than before; 28 percent said they were working somewhat more hours due to the pandemic, and 11 percent said they were working much more than before.

On the opposite side, 14 percent of respondents said they were working somewhat less due to the pandemic, and 6 percent said they were working much less.

Those who chose to write in with more details gave us some insight into why these changes are taking place. We saw many comments that suggested working from home regularly was opening up more time to work that had been devoted to tasks like commuting; many more said they had trouble stopping work for the day, or contributing as much as normal while dealing with the needs of children stuck at home.

"It's a little harder to leave work at work, since I have to use the same machine for work and home use," wrote in one survey-taker. "I get sucked into a Teams conversation at night sometimes."

"It's harder to establish limits when working from home," another wrote. "You feel you're at home so it's okay to do 2, 3, 4+ extra hours. The company also encourages (unpaid) crunch."

> *"I believe more of our work will be done remotely. The collaboration tools that proved useful will stay with us. Apart from that — we were a source of support for each other. This friendship will definitely stay."*

"All company employees were furloughed," wrote one respondent who saw their hours decrease. "Too stressed and sad to work as much as I would like or as efficiently as I would normally," wrote another.

"My wife and I both have full-time jobs, but we also have two kids. So we have to split time working with childcare and schooling," one respondent wrote. "Ultimately, it means we have less time to do work. Fortunately, as a designer, I can spend a lot of the childcare time thinking on design problems."

Game makers say isolation, lack of communication, deteriorating work/life balance, and childcare demands are some of the most difficult parts of working from home

While surveying our audience of game industry professionals we also gave them the option to write in with their perspective on the most difficult challenges of working from home during the pandemic.

These responses help illuminate the wide-ranging impact of COVID-19 on game development, as survey-takers describe grappling with everything from social isolation and lack of regular team communications to an overload of work or distractionsfrom others in the home.

"My whole family is living with me and sometimes it's hard to focus on my tasks," one survey-taker wrote.

"Aside from the pressures of home life, not seeing people that work on the game in person has been tough," stated another. "The lack of a human connection and a physical tangible place to call work just makes you feel like an outsider."

"Any semblance of work-life balance I had pre-WFH has dissolved," one respondent wrote. "The fact that I can always be working is a huge issue for me. I usually forced myself to go other places (gym, shows, etc.) to not be overworked. Since those aren't options for me anymore, I find it increasingly difficult to pull myself away from work."

"I thrive in a creative studio and being able to collaborate to solve problems. It's nearly impossible from home. "
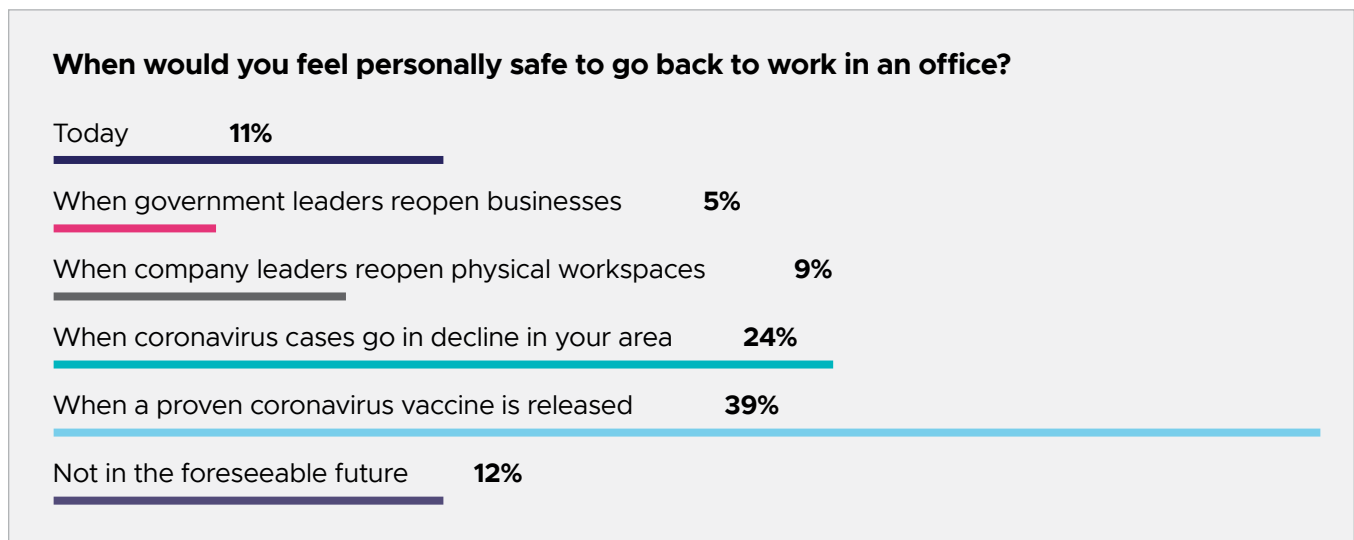
"The most difficult part is problem-solving," one game maker explained. "Not everyone can sit on Zoom all day. We typically would have brainstorming sessions in the office together that would help when we were stuck on an issue."

"I thrive in a creative studio and being able to collaborate to solve problems. It's nearly impossible from home," another said. "With children at home it's very hard to stay focused. I am grateful to still have a job, but it's also very tiring and I don't feel like I'm making progress."

Only 1 in 10 devs feel safe going back to work in an office right now

With so many game industry professionals working remotely (or not working at all) due to the ongoing pandemic, we polled our survey respondents on what would make them feel personally safe to go back to work in an office.

When would you feel personally safe to go back to work in an office?

Today	11%
When government leaders reopen businesses	5%
When company leaders reopen physical workspaces	9%
When coronavirus cases go in decline in your area	24%
When a proven coronavirus vaccine is released	39%
Not in the foreseeable future	12%

Over a third of respondents (39 percent) said they wouldn't feel comfortable going back until a proven coronavirus vaccine is released. 24 percent said they'd be ready when coronavirus cases went into decline in their area, and 12 percent said they simply wouldn't feel safe in the foreseeable future. Roughly 11 percent said they felt safe returning to office work today.

Two thirds of devs say their company has a plan to reopen

When we asked our pool of respondents to tell us whether their company has a plan for reopening, two thirds (66 percent) said yes and the rest (34 percent) said no.

GIven the option to explain their answers, our survey-takers shed some light on their unique situations. Some said their companies had no plans to reopen because they had never closed; others said there was a plan in place but that didn't mean they expected things to reopen anytime soon.

Does your company have a plan for reopening?

Yes   **66%**

No   **34%**

"There has been talk of reopening the office for some individuals, with extra cleanliness required," wrote in one respondent. "I want no part in it."

"Company is doing a very slow staged rollout--only people who REALLY WANT to work at the office are considered, and must take precautions," explained another. "We are looking at October as a possible time to have people return in larger numbers."

> *"There has been talk of reopening the office for some individuals, with extra cleanliness required. I want no part in it."*

"They are following government reopening plans," wrote another respondent. "However, that is likely to cause issues as most people don't feel the government is doing enough or waiting long enough to reopen. Our state has surging infection rates."

"We are reopening in July with safety precautions in place," one respondent explained. Another wrote "probably the end of August", while a third stated "after Christmas for now, but will evaluate later."

"It's vague. We'll be working from home for the foreseeable future," one game maker wrote. "It's possible we won't have a workspace until 2021."