

2024 State of the Game Industry

PRESENTED BY



This past year has been challenging for the game industry. Several studios have closed their doors and thousands of developers have been laid off, as increased studio conglomeration impacts the work landscape and prospective job market. Generative AI appears poised to increase productivity, though some fear the technology could lead to more upheaval.

But with challenges come opportunities. The rise in film and TV adaptations is bringing a new audience to games. Studios are exploring their options with game engines. Unionization continues to gain support, especially among younger developers, with some teams forming unions at their companies.

We asked over 3,000 game developers about their work and the industry. We found they're implementing more accessibility options into their games, they're growing frustrated with social media, and they're divided on mandatory return-to-office policies.

The 2024 State of the Game Industry survey is the twelfth in an ongoing series of annual reports that offer insight into the shape of the industry. This year, GDC worked with research partners at Omdia to dissect and analyze the survey data, providing more detailed insight than we've ever had before. This year's report continues our collaboration with Game Developer, with the two teams working together to provide more context and clarity for the survey results.

Thanks to all who participated for their thoughts and perspectives.

Editor's Note

To say it's been a tough year for game developers would be an understatement. Developers have faced adversity and uncertainty at every turn, as technology shakeups and workplace instability continue to shift the wider industry landscape. In precarious times like these, the perspectives and experiences captured within the *2024 State of the Game Industry* report become more valuable than ever.

This report remains one of my favorite projects for the Game Developer team to work on alongside GDC – largely because it is uniquely positioned to elevate the voices of the people within game development, just as much as it can highlight changing technology trends and industry demographics.

Within this year's survey, you'll find data and commentary on how developers are weathering the issues directly impacting their lives. Throughout these pages, developers weigh the pros, cons, and impact of key issues like: divisive return-to-office policies, ongoing waves of layoffs, the impact of sweeping studio acquisitions, shifts in the unionization landscape, ethical concerns about generative AI, and the ever-present issue of crunch.

Documenting and, more importantly, listening to these perspectives are vital to navigating difficult issues in a way that best serves game developers. Doing so empowers everyone involved, from GDC and Game Developer to game companies and developers themselves, to advocate for a better industry for all.

– *Alissa McAloon, Publisher at Game Developer*

Researcher's Note

GDC's State of the Game Industry 2024 is once again a treasure trove of data and insight. This year, researchers at Omdia were asked to collaborate on the project, using our exhaustive games industry data to provide further color to the trends revealed. Together, this provided GDC and Omdia the opportunity to help game developers better understand the industry they're an active part of.

The most striking observation derived from job losses in the industry – naturally a pressing concern for many. Among the insightful developer comments on the subject was the following: "Studios grew too quickly during the pandemic." This statement is borne out by games industry data, which shows a Covid-driven hump of extra revenue in 2020 and 2021, collectively totalling about \$50bn over expected figures. But 2022 and 2023 showed a reversion to the spend trendline seen prior to 2020, thus this reduction in headcount is partly caused by companies belatedly adjusting to the new, less positive market reality. However, with the forecast returning to steady growth to 2027, this ought to present a more stable picture for employment levels in future.

For a deeper dive on games industry trends, Omdia's Trends To Watch series is now available for subscribers.

– *Dom Tait, Research Director at Omdia*

Majority of developers have less than 10 years of experience, more likely to work at smaller studios

The number of respondents who have been involved with game development for 10 years or less remains in the majority (56%), keeping consistent with previous years.

How many years (if any) have you been involved in game development?

Under a year 3%

1-2 years 10%

3-5 years 21%

6-10 years 22%

11-15 years 15%

16-20 years 12%

21-25 years 7%

26-30 years 4%

More than 30 years 3%

N/A - Not involved in development 4%

This year, we wanted to take a closer look at the demographic makeup of who's been in the industry the longest—the decision-makers who have been part of the game industry for decades. Based on the survey, we found that men make up a large majority (87%) of game developers with 21 years or more experience in the game industry, and white men are the biggest demographic overall (92%).

When we looked at individual groups (by race and gender), we found a small percentage of Asian men (15%), Hispanic, Latino or Spanish-origin men (8%), Black men (6%), and white and Asian women (5% each) reported having 20 years or more experience in game development. There were zero Black women or Hispanic, Latino, or Spanish-origin women in the survey who reported the same.

What best describes your job role? (Choose all that apply)

Game Design 34%

Programming/Engineering 33%

Production & Team Management 31%

Business & Finance 20%

Visual Arts 19%

Narrative/Writing 14%

Community/Marketing/PR 13%

Quality Assurance 9%

Audio 9%

Not listed 10%

The top job roles for respondents were game design and programming/engineering, especially with younger developers. Almost half of 18–24-year-olds surveyed reported working in game design (45%) or programming (43%).

One-tenth of respondents noted additional job roles that weren't on the list. These included educators and students, technical artists, C-suite executives, and game researchers. Several respondents said they occupy roles that specialize in services like accessibility, localization, talent acquisition, and Generative AI.

What best describes your company?

Indie Studio 32%

AAA Studio 18%

AA Studio 11%

Independent Contractor/Freelance 7%

Education 5%

Creative Services/Consulting 5%

Co-Development Team 5%

Other 13%

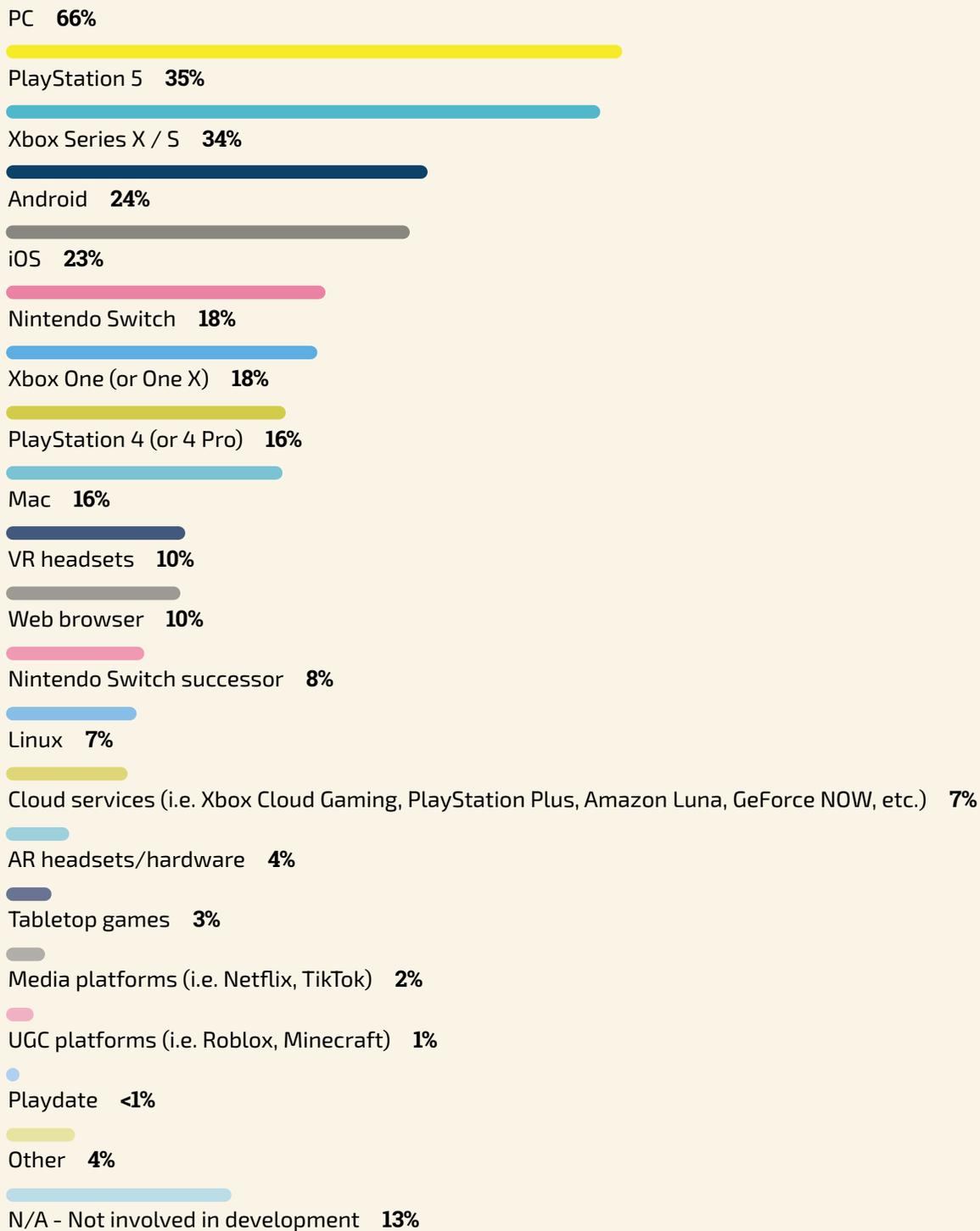
Prefer not to answer 3%

As far as company types, 32% of respondents reported working for indie studios, followed by AAA studios and AA studios. The majority of respondents (57%) work in studios with 50 or fewer employees. Much like previous years, the bigger-name studios tend to have larger staffs. Three-fourths of AAA developers (75%) work in studios with over 250 employees, while the same number of indie developers work in studios with 20 people or less.

PC remains the dominant platform as developers eye the Nintendo Switch successor

Every year, we ask developers to share what platforms they've been developing games for, and which ones they intend to support in the future. PC continues to be the main platform of choice for respondents for both current (66%) and upcoming (57%) projects.

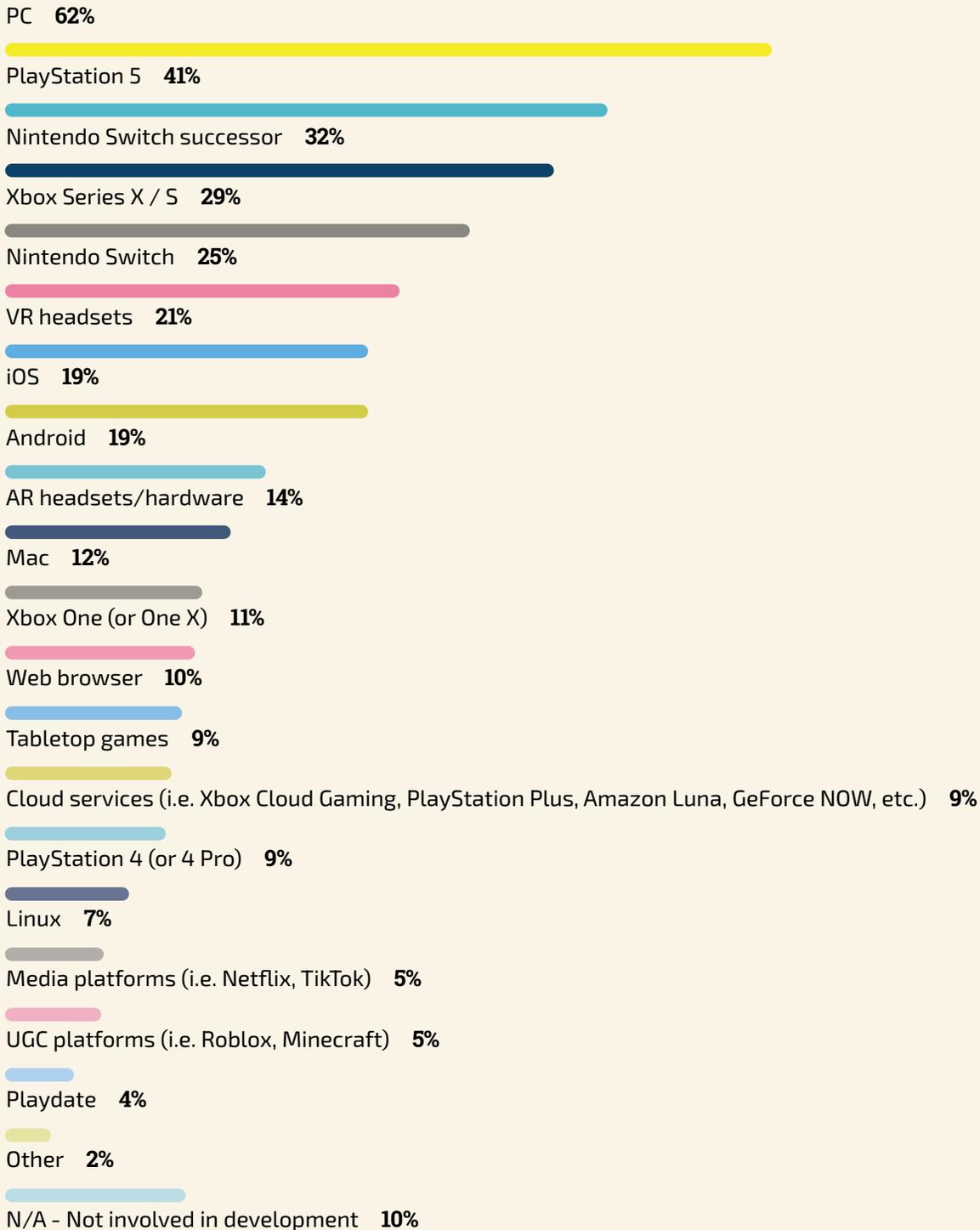
Which platform(s) are you developing your current project for? (Choose all that apply)



Where consoles are concerned, PlayStation 5 still has an edge over Xbox Series X | S—with 33% of respondents stating their next project will be available on PlayStation 5 hardware, compared to 30% for Xbox Series X | S. About 7% of developers said they're working on games specifically for cloud services like Xbox Cloud Gaming and PlayStation Plus.

Mobile platforms continue to decline in popularity. When asked what platforms their next games will support, one-fifth of respondents noted having Android or iOS in mind (16% less than 2023).

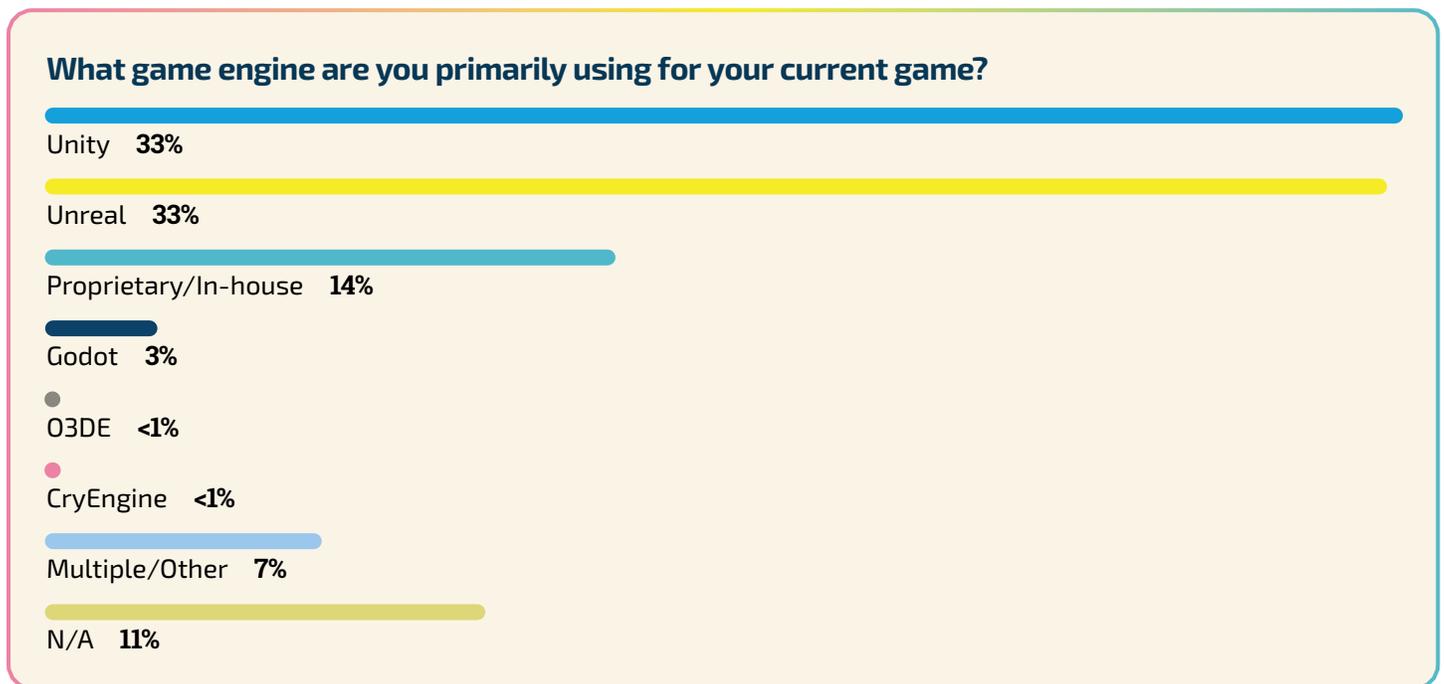
Which platform(s) most interest you as a developer right now? (Choose all that apply)



PC remains the preferred platform in terms of developer interest, with PlayStation 5 serving as the leading console. More respondents noted interest in creating games for the inevitable Nintendo Switch successor than for Xbox Series X | S .

One-third of developers have switched game engines in the past year or thought about doing so

In September 2023, Unity announced a policy (first reported by Game Developer) where it would begin collecting a “Runtime Fee” based on the number of game installs. This led to considerable backlash, and the runtime policy has since been amended. Following these developments, we wanted to know what game engines developers were using and whether they were considering switching to a different one.



According to the survey, Unreal Engine and Unity are the most used game engines, with 33% of developers each classifying them as their main toolset of choice. These were followed by proprietary/in-house engines and the open source game engine Godot.

In the last 12 months, have you or your company considered switching your game engine of choice?

Yes, we've already switched 7%

Yes, we've considered switching 28%

No 49%

Don't know / N/A 16%

However, it looks like some developers are thinking about changing things up. One-third of respondents said they've either considered switching game engines within the past year, or they've already done so, while almost half said they haven't considered switching.

When asked to explain their reasons for possibly switching game engines, many developers cited Unity's policies as their main motivator. According to an analysis of open responses conducted by our partners at Omdia, 51% said they were interested in switching specifically to Godot, either from Unity or Unreal Engine.

“We've thought about switching to Godot—or making our own—to not have to worry about shady business practices or the whims of shareholders.”

Meta Quest leads in VR/AR but Apple Vision Pro is piquing interest

Meta has been investing billions in a bid to grow their metaverse, while other companies like Apple, Valve, and Sony continue to develop virtual and augmented reality hardware. It doesn't appear that the increased investment has greatly impacted the game industry, at least not yet.

According to the survey, 36% of developers say they've been involved with VR/AR game development, down from previous years (38% in 2023, 42% in 2022).

Which VR/AR platform(s) do you anticipate your next game will be released on? (Choose all that apply)

Meta Quest Store 34%

Steam VR 26%

PlayStation VR/VR2 15%

Apple visionOS 13%

PICO Store 7%

Apple ARKit 7%

HTC Viveport 6%

Epic Games Store 6%

Google ARCore 5%

SideQuest 3%

Microsoft Store 3%

Magic Leap 2%

Other 47%

Those with experience working on VR/AR projects seem to favor Meta Quest for current (33%) and future (34%) games (this year's survey focused on software platforms instead of individual hardware). Meta Quest also led in developer interest, followed by Steam VR and Apple visionOS –the platform that will power the iPhone maker's new Apple Vision Pro mixed-reality headset.

Almost half of respondents marked "Other," with most of them noting that they weren't currently working on any VR/AR games.

Which VR/AR platform(s) most interest you as a developer right now? (Choose all that apply)

Meta Quest Store 40%

Steam VR 34%

Apple visionOS 30%

PlayStation VR/VR2 27%

Apple ARKit 16%

Epic Games Store 11%

HTC Viveport 11%

Google ARCore 9%

PICO Store 7%

Magic Leap 6%

Microsoft Store 6%

SideQuest 5%

Other 24%

Generative AI tools are entering the game development space

Generative AI technology has grown in popularity over the past year, with platforms like ChatGPT, GitHub Copilot, and Midjourney expanding usage and making the tools more accessible. As more companies invest time and resources into the Generative AI space, we asked developers what tools they're utilizing, as well as what concerns they may have about them.

Are Generative AI tools (i.e. ChatGPT, DALL-E, GitHub Copilot, Adobe Generative Fill) being used at your company or department?

Yes, I use them **31%**

I don't, but some of my colleagues do **18%**

No, but we're interested **15%**

No, we have no interest **23%**

Other **4%**

Don't know **9%**

Almost half (49%) of developers surveyed said that Generative AI tools are currently being used in their workplace, with 31% saying they personally use Generative AI tools and 18% saying they don't but some of their colleagues do. About one-fourth stated they have no interest in using them at all.

Are Generative AI tools being used at your company or department? Answered: Yes, I Use Them (by Job Type)

Business & Finance **44%**

Community/Marketing/PR **41%**

Production & Team Management **33%**

Programming/Engineering **25%**

Game Design **21%**

Narrative/Writing **13%**

Visual Arts **16%**

Audio **14%**

Quality Assurance **6%**

Developers at indie studios were most likely to use Generative AI tools, with 37% reporting that they are personally making use of the technology (compared to 21% of developers at AAA and AA studios). Business and marketing professionals were most likely to use them, while folks in quality assurance and narrative were the least likely.

What do game developers want to use these tools for? The bulk of respondents were interested in coding assistance and speeding up the content creation process. Developers were also intrigued by the idea of using AI to automate repetitive tasks. However, there were several developers who made it clear that they see no use case for AI technology.

In Your Words: What applications of Generative AI would you like to see in the future (if any)?

“Code development is one of the best places this will be helpful. Across engineering and content, developers will find ways to optimize their processes using AI. The best in the industry will do so to enhance their processes—not to fully replace anything.”

“I’d like to see AI tools that help with the current workflows and empower individual artists with their own work. What I don’t want to see is a conglomerate of artists being enveloped in an AI that just does 99% of the work a creative is supposed to do.”

“None. AI exploits the work of others without credit or payment and is a net loss to true creativity.”

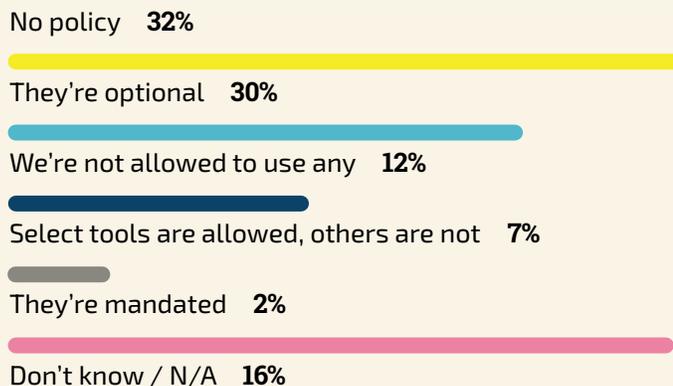
“Something that will do all my rigging because I hate that shit.”

“Focus on helping people do their jobs.”

Half of developers work at companies with Generative AI policies

Over half (51%) of developers said their companies have instituted some sort of policy regarding the use of Generative AI in the workplace, with many of them saying their companies have made use optional. Only 2% said Generative AI tools are mandated in their workplace, while 12% said they’re not allowed to use any of them.

What is your company's policy regarding the use of any Generative AI tools in the workplace?



AAA studios were more likely than indie studios to have company policies regarding the use of Generative AI tools, especially when it comes to restricting them. One-fifth (21%) of AAA developers said their companies have banned the use of such tools, compared to 9% of indie developers.

Four out of five developers are worried about the ethical use of AI

When it comes to how Generative AI will impact the game industry as a whole, developers appear to be uncertain. A majority of respondents said the impact would be mixed, while about one-fifth described the impact as either positive or negative.

Overall, what kind of impact do you think Generative AI will have for the game industry?



Developers working in business, marketing, and programming were more likely to say the technology would have a positive impact. Those in narrative, visual arts, and quality assurance were more likely to say the impact would be negative.

How concerned are you about the ethics of using Generative AI in the game industry?

Very concerned 42%

Somewhat concerned 42%

Not at all concerned 12%

No opinion 4%

Although developers seem to be uncertain about the industry impact of Generative AI, they are quite certain about the ethical impact. A large majority (84%) of developers indicated they were somewhat or very concerned about the ethics of using Generative AI, while 12% stated they had no concerns.

Developers shared a range of potential issues regarding the technology. Some were worried about whether Generative AI usage could lead to more layoffs at game companies. Others expressed concerns about how the tools could supercharge copyright infringement of intellectual property, and whether AI toolmakers would train their models using data obtained without the creator's consent.

In Your Words: What concerns do you have about Generative AI, and what can be done to address them?

"In a rush to develop new tech, we are ignoring many of the red flags and potential pitfalls of this exciting and potentially dangerous new frontier. Many of the developers behind AI seem blinded by the promise that AIs in Asimov, Greenburg, and even Roddenberry's worlds offer, whilst blindly ignoring the warnings and issues those same creators shared in their works."

It steals from artists. There needs to be legal regulations."

"Management will seriously think that they can replace artists or pay artists less for their work. They are already doing questionable things while the tech is still being developed. I expect artists to be laid off in full once the tech becomes proven."

"People need to adapt and it's hard for some. Some will be refusing the change."

"As an industry, we do a lousy job of crediting and acknowledging actual, human creators for their work and contributions to projects. This won't help."

"AI datasets are being created from creative professionals who didn't consent to their work being used to train AI. The people who make and maintain the tools make it difficult or impossible to remove your work, or to avoid having your work collected in the

first place. And contemporary artists who have recently died cannot personally fight this, so loved ones are either forced to pick up the fight in their place, or let go—knowing that, inevitably, someone will use their dead family member’s voice, face, or art style to say or do something heinous online. That’s horrifying as a living person to know someone could take what I’ve created and make something imitate me.”

“I think completely replacing someone’s job is a genuine concern. It should be used to enhance capabilities, not reduce the workforce.”

“I get nervous at times with big AAA companies trying to cut some corners by having AI do it, but at some point, AAA companies will quickly realize that right now you need human interaction with the tools to make games, not AI.”

“It’s theft, plain and simple, and since it’s ‘fancy and high tech’ no one seems to care about copyright or ethics. Public shaming hasn’t seemed to work, so we need actual regulation.”

Interest in blockchain technology continues to decline

Over the past year, studios continued to experiment with blockchain technology like cryptocurrency and non-fungible tokens (NFTs), but it seems like more companies are starting to wane on the practice.

What is your studio's level of interest in blockchain technology (i.e. cryptocurrency, NFTs, Web3)?



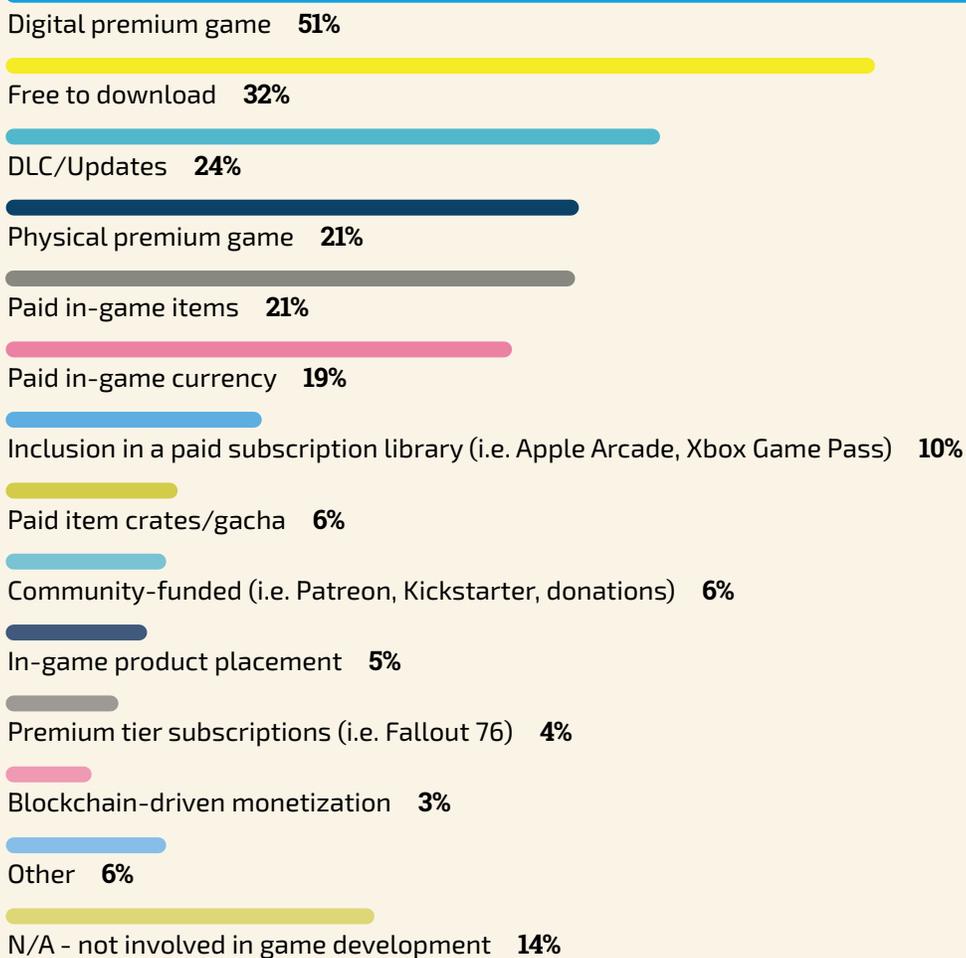
About 17% of developers said their studios were somewhat or very interested in blockchain technology, down from 27% in 2023. Over three-fourths of industry professionals said their companies were not interested in leveraging any form of blockchain technology, while 4% said their companies were previously using it but have since stopped.

Paid digital downloads are the preferred business model

We asked participants to share the business models for their current projects, so we could see how developers and companies are monetizing their games. Half of respondents said their current projects are digital premium games, followed by free to download, DLC content, and physical copies.

Like 2023, the least-used business models were premium-tier subscriptions and blockchain-driven monetization.

Which business model(s) are you using for the current game you're developing? (Choose all that apply)



Social media is the biggest marketing draw, but developers are frustrated with Twitter/X

Word of mouth and social media were the most used marketing tools for game developers, with 86% saying they employ each of those methods. These were followed by real-time communications like Discord or Slack (74%), Twitch or YouTube streamers (71%), and live events (71%). The least popular marketing method was in-game crossovers and promotions (29%), followed by influencers (57%) and paid advertising (58%).

Social media looks to be the lead tool for game marketing, as half of respondents (50%) said they frequently use social media in marketing (versus 46% for word of mouth). But social media hasn't been without its challenges. With the ever-changing social landscape, developers were asked to share what platforms they use to promote their games.

Twitter/X remains the most widely used platform overall, with 76% of developers saying they utilize the platform for game promotion. This was followed by YouTube/Shorts (64%), Facebook (63%), and LinkedIn (61%). Newer platforms like Threads, BlueSky, Mastodon, and Cohost have yet to break through, with about one-tenth of developers saying they've tried them.



The death of Twitter is really hard on indies.”

Those working in communications, marketing, and PR reported using TikTok 57% more than developers in all job roles, and they used Instagram 39% more. Developers based in African countries reported a higher use of WhatsApp (54%) over the global population (10%). Respondents in Asian countries were more likely to use regional-specific services like WeChat or Line (23% each), Sina Weibo (19%), and Tencent QQ (18%) than developers in the rest of the world (1-2%).

Even though Twitter/X remains the dominant social media platform for developers, it doesn't mean they're happy about it. When respondents explained how their use of social media marketing has changed in the past year, 97% of the ones who mentioned Twitter/X expressed negative views about the platform (according to an analysis from our partners at Omdia).

Responses included frustration about Twitter/X and its owner Elon Musk, the sheer number of apps and platforms companies must navigate, and a general lack of knowledge or interest in social media marketing. Some mentioned the need for companies to hire social media professionals.

One-fourth of AAA developers have games being adapted into films or TV shows

Movie and TV adaptations of games have been around for decades, but the past 12 months have brought things to a whole new level. Adaptations like *The Super Mario Bros. Movie*, *Five Nights at Freddy's*, *The Last of Us*, and *Dungeons & Dragons: Honor Among Thieves* have gained critical and commercial acclaim, and studios are eyeing dozens of games for future projects. This looks to be impacting the game industry itself.

Has your company adapted, or considered adapting, your game/IP as a film, episodic show, or other media type?

Yes, it's been/being adapted 10%

We've talked about it internally 20%

We've been approached 6%

We've pitched our game 2%

No 44%

Don't know 13%

N/A 4%

According to our survey, 10% of developers said their games are being (or have been) adapted into films, episodic shows, or other media—that number increases to 26% for developers working at AAA studios. One-fifth of all developers surveyed said their companies have discussed adaptations internally, 6% have been approached, and 2% have pitched their games. Altogether, 38% of developers said film and TV adaptations of their games have been on the table.

Do you think the rise in film and TV adaptations of games (i.e. The Super Mario Bros. Movie, The Last of Us, Dungeons & Dragons, Borderlands [2024]) is good for the game industry?

Yes 63%

Maybe 26%

No 4%

No opinion 7%

Do developers consider this a good thing? Many (63%) said yes. On the other hand, 4% said film and TV adaptations of games are bad for the game industry, while 26% were unsure. When asked to share their thoughts, many respondents expressed hope that this could lead to more exposure for their games, while others said the mediums are too different and they doubt most indies will benefit as much as larger studios.

In Your Words: What are your thoughts on the evolving relationship between film/TV and games, and how do you think this will impact the game industry?

"It's a natural progression. The people who grew up with games more in their childhood are now in positions of power within these companies and are able to pull the right strings and bring the franchises they love to more audiences. Cross-pollination of media where it works for the franchise can only be a good thing—especially now that a lot more care goes into these adaptations to be faithful while also leveraging the strengths of new media."

"Hopefully, it brings more audience to games and thus more money for better development. I also hope that developers learn from the unionization efforts in the film industry and adopts those practices to make the industry more lucrative for developers."

"I think it will both raise the caliber of narrative-driven content in the game industry, while at the same time flood the industry with bad games that are trying to become movies or shows."

"Games are not movies, and I think we should stop pretending that they are as such. So much is lost when you make a game into a movie or TV show because you lose the interactivity. I think it sells both mediums short."

"After years of being told that games are not cool I honestly feel like we're owed an apology now."

Half of developers say their companies implement accessibility measures in their games

There appears to be some promising growth in the adoption of accessibility features. Almost half (48%) of respondents said their companies have implemented accessibility measures into their current projects (up from 38% in 2023), while 27% said their companies have not implemented any of those features (down from 32%).

Have you implemented any accessibility measures (i.e. closed captioning, colorblind mode, content warnings) into your current game?

Yes **48%**

No **27%**

Don't know / N/A **25%**

This year, we asked participants what specific types of accessibility features were being added to better gauge what features companies currently consider essential for their games. The most-popular responses were industry standards like closed captioning, colorblind mode, and control remapping. Other notable features included content warnings, accessible hardware and controls, and phobia accommodations.

Some developers wrote in with additional features not included in the list, including settings for motion sickness, light sensitivity options, and vegan mode.

If yes, which accessibility measures have you adopted into your current game? (Choose all that apply)

Closed captioning 63%

Colorblind mode 57%

Control remapping 48%

Custom audio settings 46%

Adjustable difficulty levels 40%

Content warnings 33%

High contrast mode 33%

Audio narration 31%

Aim assist 28%

Text to speech 23%

Accessible hardware/controllers 19%

Dyslexia fonts 18%

Screen magnification 15%

Various game speeds 15%

Phobia accommodations 9%

Quicktime event toggles 9%

Other 7%

Confidence in company DEI efforts is decreasing

Over the past few years, many companies have announced commitments to diversity, equity, and inclusion (DEI) with varying degrees of success. We asked respondents to share their thoughts on their company DEI initiatives. According to the survey, confidence in company DEI initiatives appears to be going down.

In the last 12 months, how successful do you think your company's attempts at diversity, equity, and inclusion have been?

Very successful 27%

Somewhat successful 38%

Slightly successful 25%

Not at all successful 11%

About 90% of respondents reported their company's DEI efforts were at least slightly successful, down from 96% in 2023. Specifically, the number of developers who said those DEI efforts weren't successful at all increased to 11% (from 4% in 2023).

Developers were asked to elaborate on the successes or failures of their company DEI policies: Most discussed the shortcomings. According to an analysis of open responses conducted by our partners at Omdia, some of the most pressing concerns include the lack of resources and training, an increase in mandatory return-to-office policies, and an inability to attract qualified diverse candidates.

In Your Words: What do you think is or isn't working about your company's diversity, equity, and inclusion efforts?

"What's working: Seeing DEI efforts across multiple disciplines and in some areas of leadership. What's not working: No DEI efforts on the executive level."

"We have a very diverse company, but it's largely a passive effort. There are fewer instances than I would like to see of active advocacy for diversity in specific, localized circumstances, which is unfortunate. However, the overall company culture is so organically geared towards inclusion that we end up with a wonderful and diverse group of people, and my team and I are grateful every day for the positive impact that has on our project."

"Our company doesn't attempt anything, we just do, and are owned by Black folks making games. Most companies' 'attempts' are a failure."

"Like most AAA studios, our company talks a big game and touts their successes in this field while frequently working hard to cover up or ignore their myriad of failures."

**“Good intentions,
slow execution.”**

Developers are growing frustrated with the game industry's sustainability efforts

Continuing our efforts to track sustainability efforts in the industry, we asked respondents about their company's attempts at environmentalism, sustainability, or carbon offsetting.

In the last 12 months, how successful do you think your company's attempts at environmentalism, sustainability, or carbon offsetting have been?

Very successful 16%

Somewhat successful 27%

Slightly successful 29%

Not at all successful 27%

According to our survey, 72% of developers noted some kind of success in their company's sustainability efforts, down from 90%. The biggest change was in developers who said efforts were not at all successful (27%), up from 10% in 2023.

Developers were torn about the effectiveness of company efforts towards sustainability, as well as the game industry as a whole. Some noted the eco-friendliness of things like remote work policies and carbon credits. Others spoke to feelings of disillusionment, frustration, and helplessness when it comes to making a positive impact on the environment—especially related to the issue of personal versus collective responsibility.

In Your Words: What do you think is or isn't working about your company's environmentalism, sustainability, or carbon offsetting efforts?

"There is a sense that the topic is too big for small studios to tackle. The rising energy costs have been more of a driver for change than pure environmental concerns."

"They have been diligent but there is still the silent belief that 'first we make money, then we clean after ourselves,' without accepting that this is pretty much the mindset that brought the global society to this state. The environmental crisis seems a much larger problem that my current company believes to be able to tackle."

"Being a solo developer, I do believe that I've done a pretty successful job in terms of carbon offsetting. I work remotely from my home office. I barely drive at all. I recycle. I try to choose products that benefit the environment. I do my part."

“We do some carbon offsetting, but that feels like a Band-Aid on a bleeding wound. Not much is being done, or not that I know of, to address deeper issues like the energy consumption taken up with processor-intensive game development and maintaining our massive internal networks.”

“Indie studios aren’t the problem. Every indie could go carbon-negative and it wouldn’t change a thing. The real culprits are corporations like Amazon and Microsoft who run massively wasteful data centers.”

Majority of developers are working 40 hours or less per week

We asked developers to share how many hours they work per week on average. About two-thirds (64%) of respondents reported working 40 hours or less, on track with previous years, with 33% reporting a 36-40-hour workweek (up from 29% in 2023).

What is your average amount of hours worked per week in the last 12 months on games?

0-20 hours per week 13%

21-25 hours per week 6%

26-30 hours per week 5%

31-35 hours per week 7%

36-40 hours per week 33%

41-45 hours per week 18%

46-50 hours per week 10%

51-55 hours per week 3%

56-60 hours per week 2%

More than 60 hours per week 3%

When it comes to the maximum number of hours worked in a single week, 53% of respondents reported working between 41 and 60 hours. A similar number of developers said they’d worked a maximum of 40 hours or fewer as those who worked over 60 hours in a single week.

What are the maximum hours per week you worked during a single week in the last 12 months on games?

0-20 hours per week 7%

21-40 hours per week 16%

41-45 hours per week 15%

46-50 hours per week 16%

51-55 hours per week 9%

56-60 hours per week 13%

61-65 hours per week 6%

66-70 hours per week 5%

71-75 hours per week 3%

76-80 hours per week 4%

81-85 hours per week 2%

86-90 hours per week 2%

More than 90 hours per week 1%

About 71% of developers who worked more than 40 hours per week cited self-pressure as one of the main reasons. Other reasons included staff reductions and fear of repercussions, which were both new additions for the 2024 survey, as well as pressure from management. One-third said they didn't consider the time they worked to be excessive.

AAA developers are more likely to have mandatory RTO policies

Remote work has always been part of the game industry, but the pandemic and post-pandemic recovery made working from home a common practice. This looks to be reverting. More companies are instituting mandatory return-to-office (RTO) policies, and we wanted to know if this was impacting game developers—given how the industry has traditionally been more receptive to the practice of being remote. The short answer: It depends on where you work.

Has your company instituted a mandatory return-to-office (RTO) policy?

Yes, 5 days per week 5%

Yes, hybrid schedule 21%

No, we have an RTO policy but it's optional 16%

No, there is no policy 58%

One-fourth (26%) of developers said they have some form of mandatory return-to-office policy at their company, either working full-time in the office or a hybrid schedule, while the rest (74%) either don't have an RTO policy or say the ones they have make in-office work optional.

Has your company instituted a mandatory return-to-office (RTO) policy? Answered: Yes, 5 days per week or hybrid schedule (by Company Type)

Education 51%

AAA Studio 40%

AA Studio 28%

Co-Development Team 24%

Creative Services/Consulting 19%

Indie Studio 15%

Independent Contractor/Freelance 11%

AAA developers appear to be far more impacted; 40% of them said they currently have mandatory return-to-office policies (most of them being hybrid), compared to 15% of indie developers and 28% of AA developers. Respondents working in business and finance were most likely to say they work a hybrid or 5-day in-office schedule, while those working in narrative reported the most remote flexibility.

We asked developers how their company's RTO policies (or lack thereof) have impacted productivity, morale, or retention in the workplace. According to an analysis of open responses conducted by our partners at Omdia, developers with the option to work from home reported the most satisfaction with their arrangement, while those with mandatory RTO schedules (especially hybrid schedules) reported the most dissatisfaction.

Those in favor of mandatory RTO noted how in-office work is better for productivity and team collaboration, while those opposed said the practice has led to mass resentment and contributes to employee attrition.

In Your Words: How has this policy impacted morale, productivity, and/or retention in the workplace?

"It's pretty recent, but it's already had a hugely negative impact on morale. We were given the opportunity to give feedback, which then wasn't acted on, and the conversation revealed some really toxic attitudes on the team, both of which damaged trust. I can only speak to my productivity, but it has definitely been reduced. Both because I get less done in the office and because the continuity of my work is interrupted when I move from place to place. It's too soon to say much about retention, but I believe it's having a negative impact there as well. Three people have left so far in the past month or so, and I know of several others (including myself) who are planning to leave as a result of this policy."

"My workplace has seen 80 people quit specifically due to RTO. There's also growing unrest and contempt, as managers and executives retain their ability to work remotely. People are getting resentful of the policy and management."

"Everything is better now, when people are back at the office. A lot less toxicity between teams. Easier to handle conflicts. Easier to work with creative products. Of course, some people do not like having to be back at the office. If someone wants a different schedule, they can negotiate with their manager and team to WFH more days than the one day we have now."

"We are 100% remote and our productivity is 50% better than it was when we were in office. With today's tools it's very easy to work remote. We also save money on not having to have an office that has to support our number."

"People like working from home but they miss working with teams. It's a Catch-22 situation."

"Workers are happy to stay remote when allowed, but productivity is harder to verify. Remote workers are less visible and will find promotion more difficult."

"It sucks that there's a hybrid schedule and we aren't free to make our decisions regarding our workplace. Feels like a half-assed attempt at getting us to go back to the office, but it's better than forcing a full return, I guess."



**It's like your company
doesn't trust you anymore."**

"I get great access to awesome employees because I can pull from anywhere across the globe. People don't want to sit in traffic. People want to be with their friends and families."

"The vast majority were opposed to a mandated RTO for 3 days per week, but the company's leadership felt it knew best. Waves upon waves of resignations, loss of morale. This is because we had proven we're able to make a game from scratch, while working from home during the pandemic, and people don't understand why the proof isn't enough."

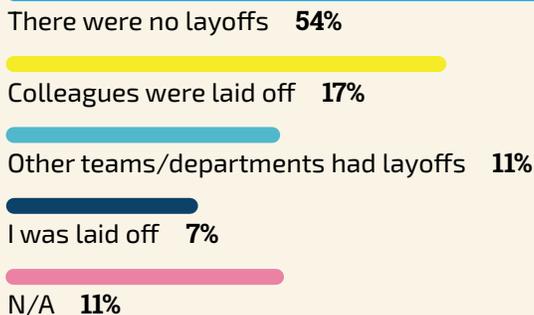
"People can't dodge you in person."

"It's like your company doesn't trust you anymore."

One-third of developers have been impacted by layoffs, and half are concerned there could be more

Over the past 12 months, layoffs have swept across the game industry. It seems that almost every week there's been news of another round of layoffs hitting a team or studio. We wanted to see how pervasive they've been in the industry, and how layoffs (or the fear of them) are impacting developers.

How have game industry layoffs impacted you or your company in the last 12 months?



One-third of developers (35%) said they've been impacted by layoffs—either by seeing some take place within their team or company or by being laid off themselves. Quality assurance developers appear to have been hit the hardest, with 22% of them saying they were laid off this year (compared to 7% of all developers). Business and finance professionals reported the least layoffs (2%).

How concerned are you that your company could see layoffs in the next 12 months?

Very concerned 14%

Somewhat concerned 16%

Slightly concerned 26%

Not at all concerned 35%

N/A 9%

Over half of respondents (56%) expressed some level of concern that their company could see layoffs in the next 12 months, while one-third said they weren't at all concerned. When asked to share their thoughts on the rise of layoffs in the game industry, many developers cited post-pandemic course correction, studio conglomeration, and economic uncertainty as possible explanations, and some expressed a desire for unionization to better protect workers.

In Your Words: What are your thoughts on the rise of layoffs in the game industry, and how will it impact developers moving forward?

"Studios grew too quickly during the pandemic and people are spending less money on games during a cost-of-living crisis. The bubble is sadly bursting. I hope it creates new start-ups that revolutionize how we develop games and sets a precedent for larger studios to follow by."

"The layoffs are concerning because they don't seem to be following the 'typical' cyclical trend of layoffs after a project ships. Not that that was great either, but it's hard to predict these days where and when layoffs might happen."



I hope it will not affect me."

"Layoffs are a reality of doing business. Markets change. Loss will lead to new opportunities and strategies. People need support to find them."

"It is worrying and concerning, it's impacting my ability to get a new job to get away from the company I am in. I feel forced to stay in a toxic environment."

"I hope that it will lead to more unionization. If no consequences happen for the employers, then layoffs en masse will keep happening and grow."

“I am extremely concerned about the rise of layoffs in the game industry because it makes it harder to find work as someone new to this industry. There are still many senior and lead animator positions open, however, if the studio isn’t hiring juniors or mid-level animators, how will they have any experience to become the same level as a senior? It impacts developers because teams will be smaller, crunch time will be more frequent, and the efforts of current artists will become more of a struggle.”

“Layoffs seem to indicate that the industry hired too many people as a result of the pandemic. I see it as a correction now that revenue is back to more normal levels post-pandemic. I don’t see any major issues moving forward.”

“We’re working in a deeply unfair industry, and the massive loss of talent and morale will be felt in the coming years.”

Developers grow more opposed to game industry acquisitions

Studio acquisitions and mergers have only increased since we first asked developers about them in our 2023 survey. This year, we saw developers express more negativity toward acquisitions and the impact they’re having on the industry.

According to our survey, 5% of developers believe the wave of major acquisitions will be good for the industry, down from 17% in 2023. Meanwhile, 43% think it will have a negative impact on the industry, keeping on track with 2023 (44%), and 2% think it will have no impact (down from 7%). This was the first year we added “mixed impact” as an option, and 42% of developers agreed with the sentiment.

Developers expressed a range of concerns about current and potential future acquisitions. Some spoke of the risks of anticompetitive practices, while others expressed concern over increased risks of layoffs and the challenge smaller companies might face finding success in the marketplace.

In Your Words: What are your thoughts on the ongoing wave of major acquisitions in the game industry?

“Obviously, there have been a great many layoffs, and the centralization of media under large umbrellas—as is happening with Disney as well—is not good for media because it creates a certain sameness. Many products, all competing with the same risk aversions and pillars of creative values. Less room for maverick upstarts and interesting one-offs.”

“It can be positive in the short term—payouts to smaller teams, stability—but increases risk and stifles creativity long term.”

“There’s a reason why antitrust laws were put in place. Consolidation of wealth and power inevitably breeds complacency and contempt for workers and consumers alike by executives and shareholders.”

“It’s not great from a competition standpoint. However, as a small company just trying to make ends meet, there is an allure in making oneself desirable for acquisition, since it can take pressure off management and make money issues a lower priority in the short term.”



**We need more new companies,
not a few big ones.”**

“Acquisitions are a vital part of the business ecosystem, and whilst there are inevitable casualties and losses with beloved studios and brands disappearing entirely, overall it has a positive impact on the business behind the IPs—often leading to new directions and innovations that were simply not possible before, even if that comes in the form of a new studio being formed by the execs who sold off the last studio.”

“I think it helps small studios to get a bigger audience and prevents franchises from disappearing.”

“It reflects just how big of a business the game industry has become. It’s both good and bad. When I was young, I never dreamed the game industry would be taken this seriously. It seemed like a bunch of people just having fun, telling stories, and being happy if they turned a profit. Now it is profit first, and I think that is having negative effects on the game industry as a whole.”

“I think the recent Embracer fumbles sums it up. Once a huge publicly traded company buys up large swaths of an industry, it will inevitably end up creating redundancies and placing innovative, more ‘exploratory’ studios in a position where they’ll never be seen as profitable enough for shareholders.”

“Too much control in one company’s hands is never a good thing.”

“AAA and corporate gaming will ossify and a new wave of ‘Triple-I’ indies will emerge soon. Long term this is good for gamers, a design renaissance will happen.”

Younger developers are more likely to support unionization than older developers

The topic of unionization within the game industry has continued to grow over the past 12 months. It's also having an impact, with 5% of developers saying they're currently part of a union.

Do you think that workers in the game industry should unionize?

Yes **57%**

Maybe **22%**

No **12%**

Don't know **9%**

According to our survey, 57% of developers are in favor of unionization (up from 53% in 2023) and 12% are opposed. Narrative designers were most likely to be in favor of unionization, while those working in business and finance were least likely to support it.

Have you or any of your colleagues discussed unionization at your company?

Yes **18%**

No **50%**

We are unionized **5%**

Don't know **17%**

N/A **10%**

Less than one-fifth said they've discussed unionization at their companies, while 60% said they haven't approached the topic or it's not applicable to them (for reasons like working independently or their country's labor laws). One-third (35%) of developers who've discussed unionization said their companies were supportive, 23% said they gave a "mixed" response, and 11% said they were opposed. About 18% said their companies didn't know, down from 23% in 2023.

Do you think that workers in the game industry should unionize?

Answered: Yes (by Age Group)

18-24 72%

25-34 66%

35-44 56%

45-54 43%

55-64 29%

65 or older 25%

Regarding overall union support, one of the most notable factors we found was the age of developers: 72% of 18-24-year-olds said they support unionization, compared to 28% of developers 55 years and older. The trend aligns consistently across all age groups: Starting from oldest to youngest, each group was more in favor of unionization than the last.

When asked to share their thoughts, many respondents cited the rise in layoffs, crunch, and large-scale media acquisitions as evidence that the game industry should unionize. Those who were opposed expressed frustration at the idea of forced participation, as well as how collective units could impact the individual employer/employee relationship.

In Your Words: What are your thoughts about ongoing unionization efforts in the game industry?

"They are great. I got a 1% raise during an 8% inflation period. My needs around WFH flexibility are getting ignored. Incoming AI automation is a risk to my job security. Inflation has been insane. Crunch is coming back. Leadership won't listen."



Without unions, our industry will not survive."

"The US work ethic is way more toxic than most Americans realize, and employers will continue to take advantage of it until unions stand up and normalize a sane work-life balance."

"Unionization is anti-professionalism. If you don't like your employer, unionizing won't solve anything."

“One of the departments at my company unionized and they were less impacted by layoffs than other departments.”

“Used to be extremely anti-union, as it felt it would adversely impact an industry reliant on flexibility and innovation to continue to thrive and grow. I still mostly feel this way, but the large-scale layoffs are making me re-think my otherwise confident stance.”

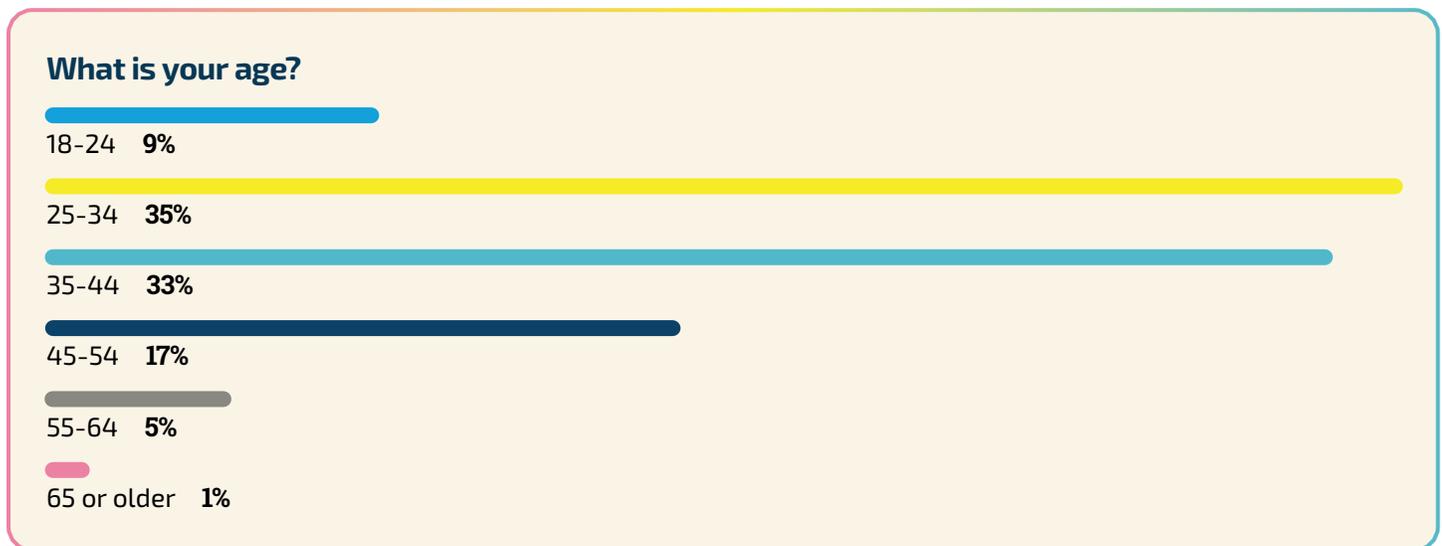
“I don’t like it. Would never join a union myself and would not want to hire anyone who is in a union.”

“As a CEO, I’m not hugely keen on it.”

“I am the CEO of my studio, and even I think it is a good thing for the workers, especially at large companies. It’s more administrative headaches for me, but it is ultimately good for them. In an ideal world we wouldn’t need that, but we don’t live in an ideal world, do we?”

“Unions are good for everybody and saying otherwise makes you a capitalist shill.”

Millennials make up a majority of game developers, industry remains primarily white and male



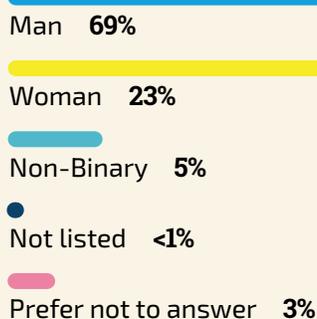
For the first time, we checked the age demographics of our respondents. The largest group is game developers who are 25-34 years old, followed by 35-44 years old and 45-54 years old. Millennials appear to make up the majority of the workforce, and there are currently more 18-24-year-old developers than there are developers 55 years and older.

What race, ethnicity, or origin best describes you?



We asked respondents to share what race, ethnicity, or origin best describes them. About two-thirds of respondents identified as White/Caucasian, followed by Hispanic, Latino or Spanish-origin and East Asian.

What is your gender?



When it comes to gender representation, men still make up over two-thirds of game developers—23% of developers surveyed are women and 5% are non-binary. Developers who are members of the LGBTQ+ community make up 21% of respondents, with 71% saying they are not and 7% opting not to identify.

Which continent/region do you reside in?

North America 62%

Europe 26%

Asia 6%

South America 3%

Australia/New Zealand 3%

Africa <1%

Not listed 1%

Countries of residence have stayed consistent with previous years, with 62% of respondents saying they live in North America. Keep in mind that GDC is based in the United States, so answers can be largely Western-centric.

In conclusion, the takeaways from this year's survey are sure to be useful to game professionals around the world, and they will greatly inform programming at the 2024 Game Developers Conference, stories published on Game Developer, and industry reports from Omdia. For more information, be sure to visit GDC's website.

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