[GDC] Festival of Gaming
by informa

STATE OF THE GAME INDUSTRY

NOVEMBER 2026



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FOREWORD

For over a decade, GDC's State of the Game Industry has been a space for game industry professionals to have their voices heard. It's traditionally come out at the beginning of the year—but our report is more of a look at where things are, not where they're going. To better reflect its intent, we've adjusted our release date moving forward.

This year, we surveyed over 2,600 game industry professionals (with a +-3 MoE) from 69 countries on layoffs, generative AI, labor, co-development, and more. Internal AI tools were used selectively during the research and editing phases.

Under the guidance of our new State of the Game Industry Committee, we're continuing to expand and diversify our reach—our goal being to give the full game ecosystem a space to express their views, with international representation being a focus moving forward.

The industry has faced hardships over the past few years, and the people within it are understandably concerned about what comes next. This survey is designed to amplify the needs of game professionals, but that's just part of our mission. We're also here to uplift the community; finding unity in its strength, passion, and resilience.

The GDC Festival of Gaming is a space for thousands of game industry professionals, from all walks of life, to be seen, heard, and valued. We want to thank all of you for trusting us to tell your stories.



1 * DEMOGRAPHICS

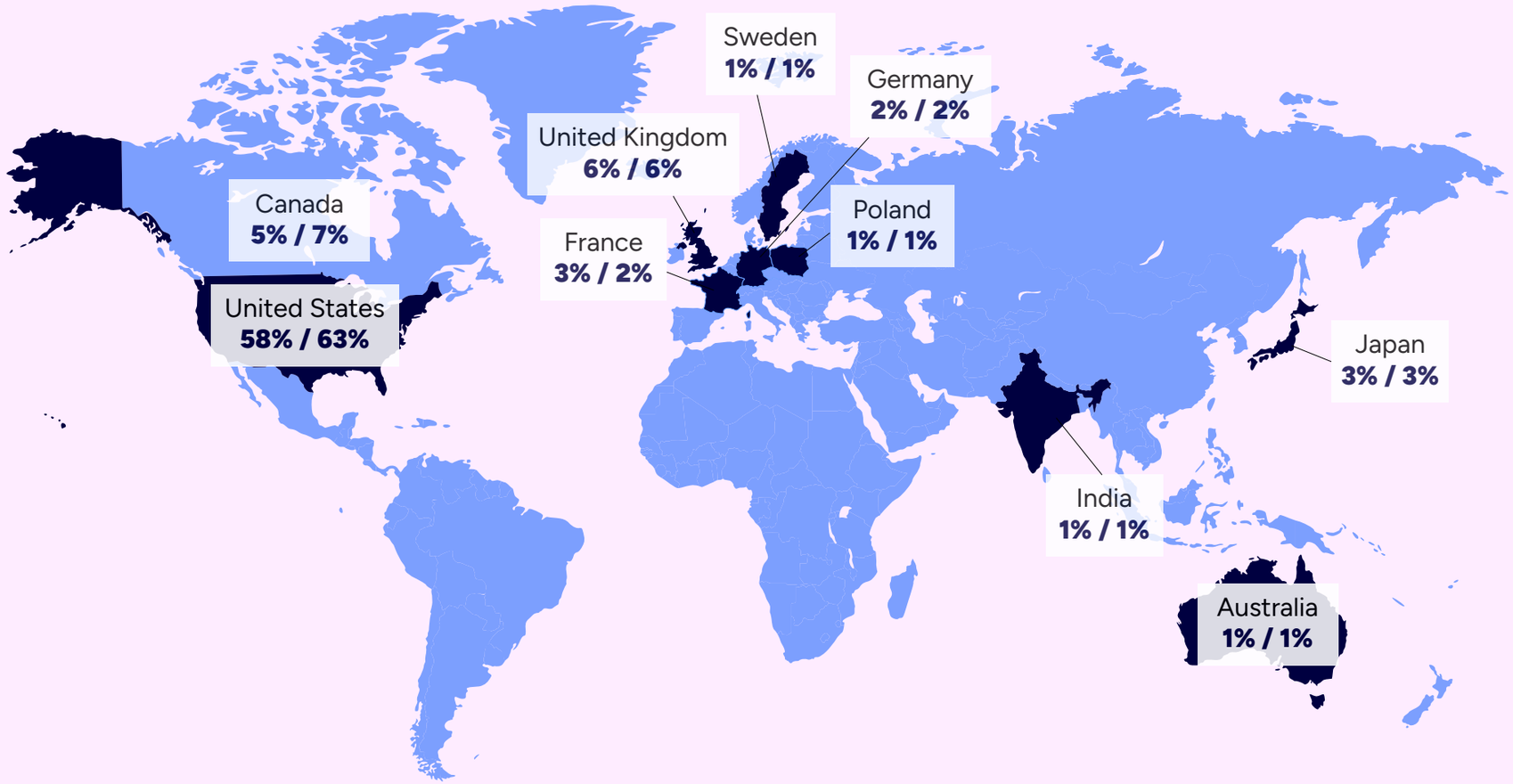
WHERE THEY'RE FROM AND WHERE THEY LIVE

This year's survey reflects the North American game industry more heavily: 63% of this year's respondents live in the United States, up from 54% last year, and 8% are based in Canada and Mexico (n=12). Overall, we've seen a 32% increase in US-based respondents and a 9% decrease in non-US representation—much of it concentrated in Europe.

When we look at individual regions, there's been a 45% increase in representation from East, South, and Southeast Asia (mostly in Japan), and the region is currently 6% of total respondents. There's also been a 37% increase from Central & South America, totaling 3% of this year's respondents. Western Europe has stayed consistent. The largest decrease was among non-Western European countries. This year, 18% of respondents are from Europe, compared to 25% last year.

Notable countries
(by respondents)

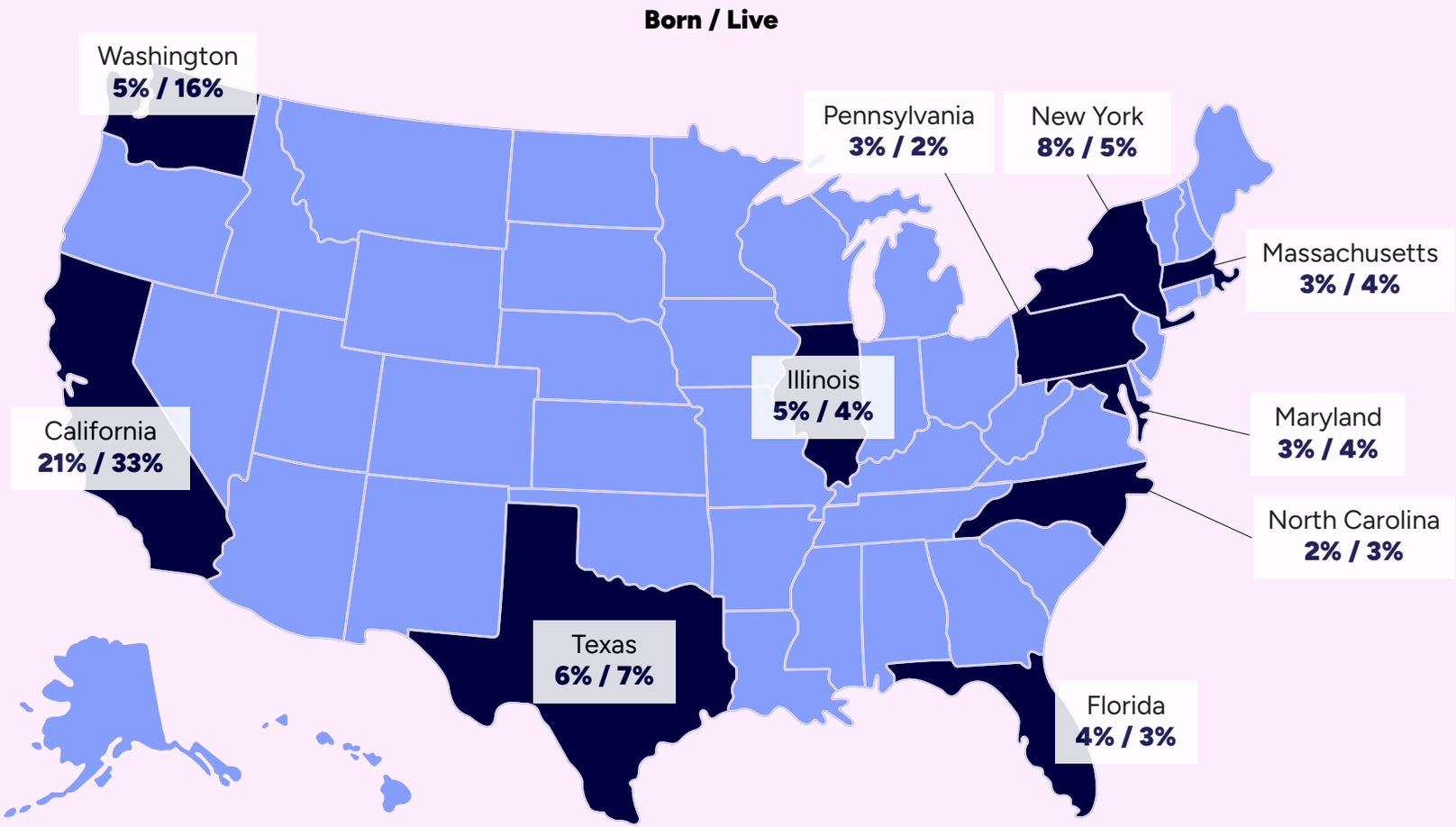
Born / Live



Global representation matters, especially when it comes to critical issues like the impact of layoffs and generative AI usage. This year's report will present North American and total respondent data side-by-side whenever we spot significant regional differences. In the instances that respondents in the United States are not aligned with their North American counterparts, we will focus on the US data.

For state-by-state migration, one-fifth (21%) were born in California and 33% currently live there. Washington saw an increase in respondents, going up to 16% this year (from 12%). Texas and Maryland have seen some growth, though within the margin of error, and North Carolina made its debut in the Top 10 states for respondents to live in.

Notable states
(by US respondents)



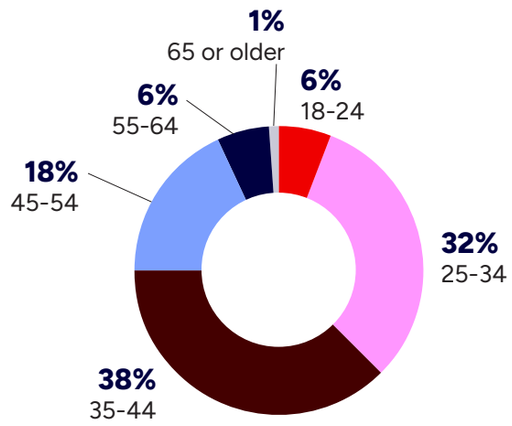
WHO THEY ARE

Seventy-six percent of respondents are younger than 45 years old, with a higher concentration of younger people outside of North America: 45% of them are younger than 35 years old, compared to 35% in the United States, Canada, and Mexico.

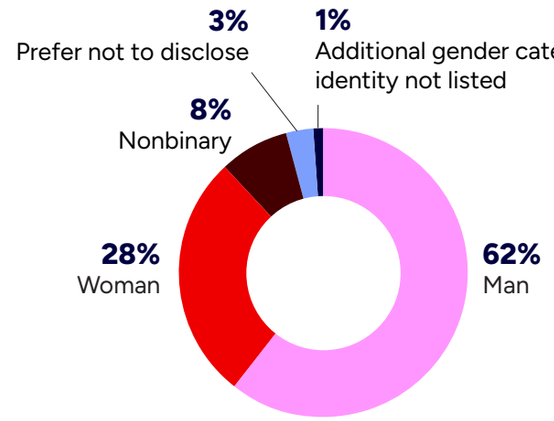
The number of male participants has not changed significantly (62%), but this year has seen an increase in women taking part (28%): This shift took place globally, with 4-point increases for women in the North American region (29%) and outside of it (26%). Currently, women and non-binary (8%) game industry professionals make up 36% of respondents, up from 32% in the previous two surveys.

We're seeing consistency with LGBTQ+ representation. About 29% of respondents identify as LGBTQ+. These percentages increase for those living in North America (32%), especially for the younger generations: Almost half (48%) of North Americans between 18 and 34 identify as LGBTQ+, compared to 28% of those who live outside of the region.

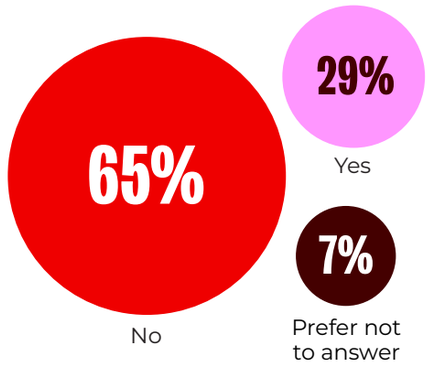
Age



Gender



LGBTQ+



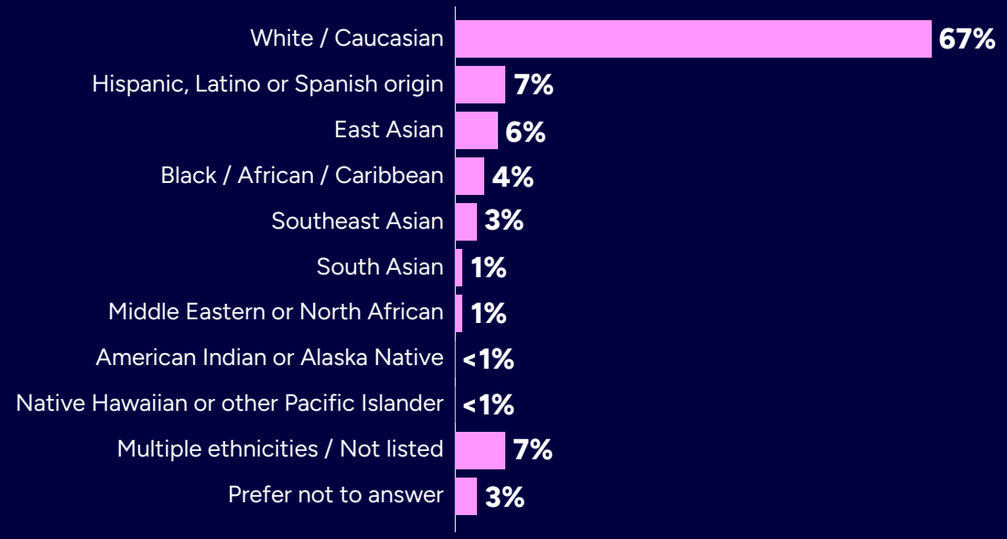


Regarding GDC Festival of Gaming attendance, over half (56%) have been to GDC at least once; 5% have gone to adjacent events during the week of GDC; and 39% have never been. But these numbers change significantly when looking regionally: 64% of North American respondents said they've been to GDC and 31% have never attended.

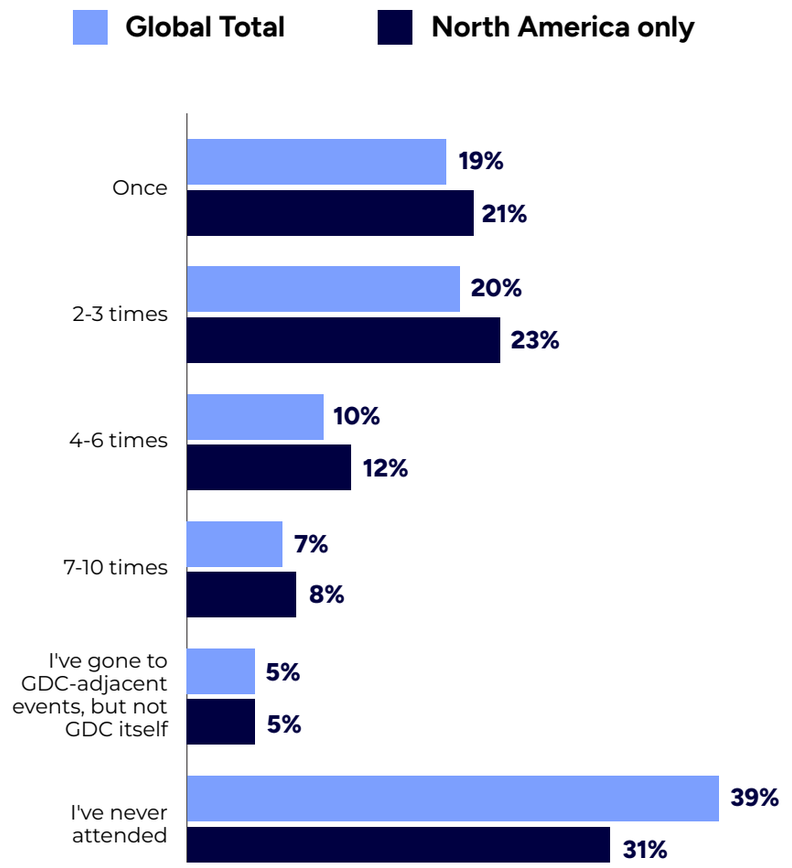
We again limited the race and ethnicity question to respondents living in the United States. The results are relatively unchanged, though we have seen an increase in Asian representation. Our survey found that two-thirds (67%) identify as White or Caucasian; 12% are East, South, or Southeast Asian (up from 8%); 7% are Hispanic, Latino, or of Spanish origin; and 4% are Black, African, or Caribbean.

About 7% described themselves as having a multi-ethnic background—of those individuals, 80% are part-White or Caucasian; 44% are part-East, South, or Southeast Asian (up from 36%), 28% are part-Hispanic, Latino, or Spanish origin; and 19% are part-Black, African, or Caribbean.

What race, ethnicity, or origin best describes you?
(US ONLY)



How many times have you attended the GDC Festival of Gaming (prev. Game Developers Conference) in the past 10 years?

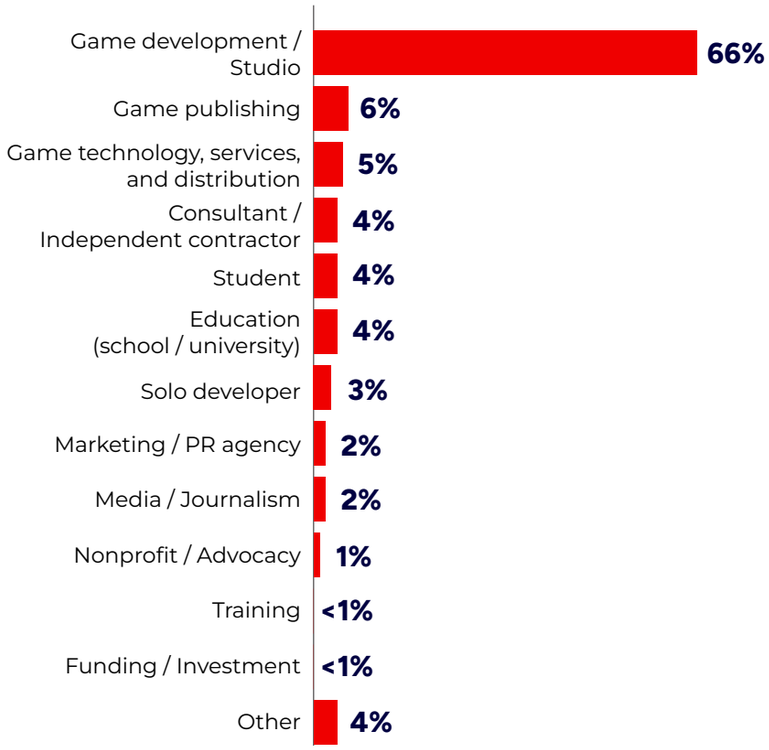


WHERE THEY WORK AND WHAT THEY DO

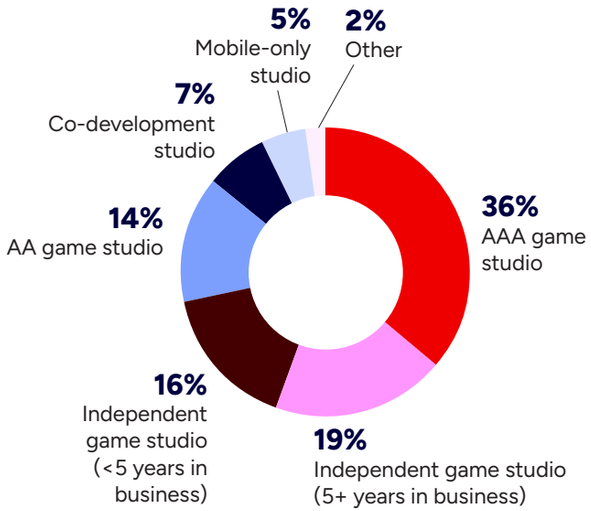
Two-thirds (66%) of employed respondents work at game companies or studios in a variety of roles, followed by publishing (6%), game technology, services, and distribution (5%), and consultants/independent contractors (4%). For the 5% who work in game services, the top specializations are game engine technology (19%), art and animation (14%), and QA testing (8%). Three percent of respondents classified themselves as solo developers, down from 6% last year.

Representation from AAA studios increased to 36% (from 31%) and AA studio respondents decreased to 14% (from 18%). One-fifth (19%) work at older indie studios (at least five years old) and 16% work at younger indie studios (less than five years old). This marks the first year that AAA representation is on par with indie representation.

Company Type



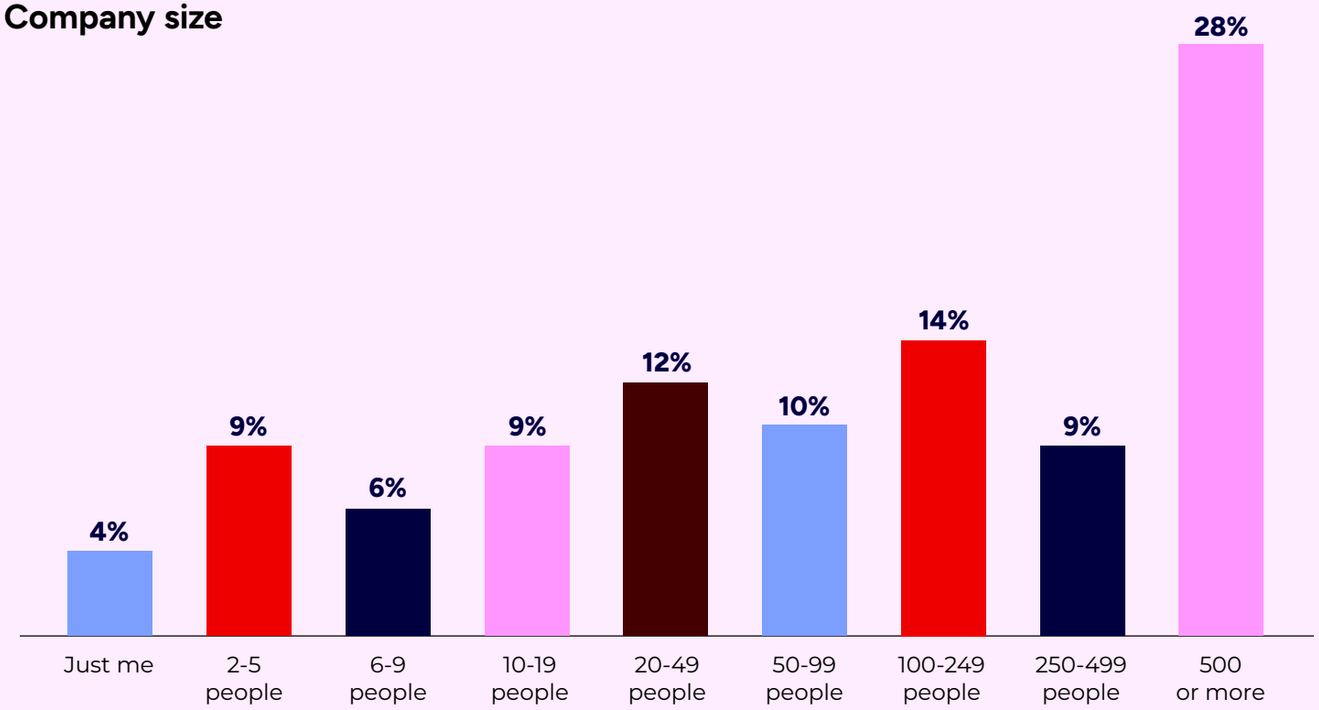
Studio Type



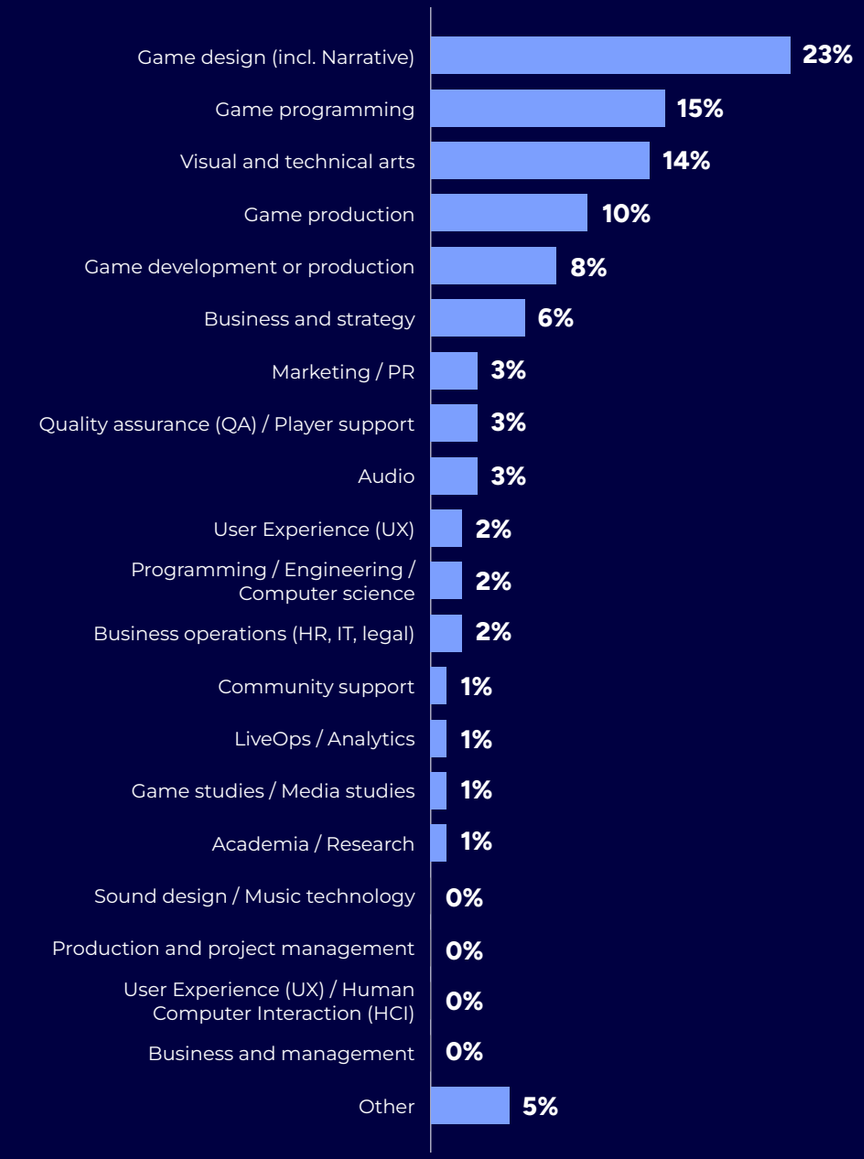
The top job roles for respondents were game design (23%), programming (15%), visual and technical arts (14%), and production (10%). This was relatively consistent for people both inside and outside North America, although there was a higher concentration of game designers in Canada (32%).

Sixty-four percent work at companies based in the United States, followed by Canada (6%), the United Kingdom (6%), and Japan (3%). Among US employees, 43% work for companies based in California (while 33% live there), 15% in Washington, and 7% in Texas. For company size, 96% of AAA respondents work at companies with at least 100 employees (52% have 500 or more), and 91% of indie workers are at studios with fewer than 100 people. Twenty-two percent of indie workers are at studios with 2 to 5 people, and 7% work by themselves.

Company size



Job discipline



> “I just want to make great games and have some sense of stability in my life.”
>
> - FORMER SENIOR EMPLOYEE (PRODUCTION), MARYLAND / LAID OFF <3 MONTHS AGO

2* INDUSTRY LAYOFFS

THE [HUMAN COST] OF GAME INDUSTRY LAYOFFS

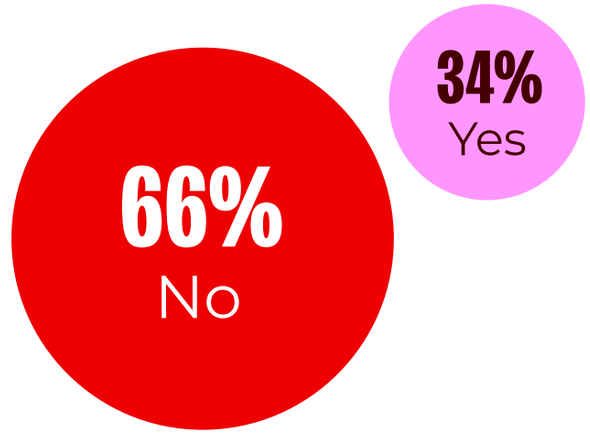
One in three (34%) respondents have been laid off sometime in the past two years, increasing to 39% for those living in the United States. These people (and their stories) give us a meaningful look at how layoffs are impacting the game community.

We have been documenting game industry layoffs through our survey for the past three years. The rates have gone up every time, lining up with overall industry trends. However, our survey shows a higher rate of increase than other models. For example, Always Supporting the Games Community (ASGC) estimates that 14% of US-based game industry professionals have been laid off in the past 24 months. (This is based on publicly reported, employer-disclosed, and non-public ASGC community-shared data, which may not account for all layoffs.)

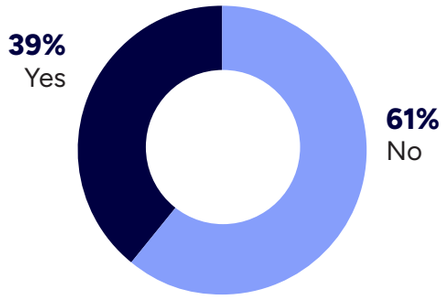
We can see this shift in our employment numbers too. This year, half (50%) of US-based respondents are employed full-time, down from 59%. One-fifth (21%) are currently unemployed, an 8-point increase from last year (13%).

These numbers suggest that the survey reflects higher participation from people most affected by layoffs, especially in the United States (the region we'll be focusing on in this section). While more weighted than aggregate employment data, this pool of approximately 900 laid-off game workers lets us dive deeper into their lived experiences.

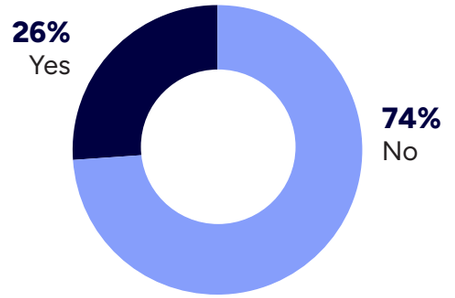
Have you been laid off in the past 24 months?



US only



Outside US



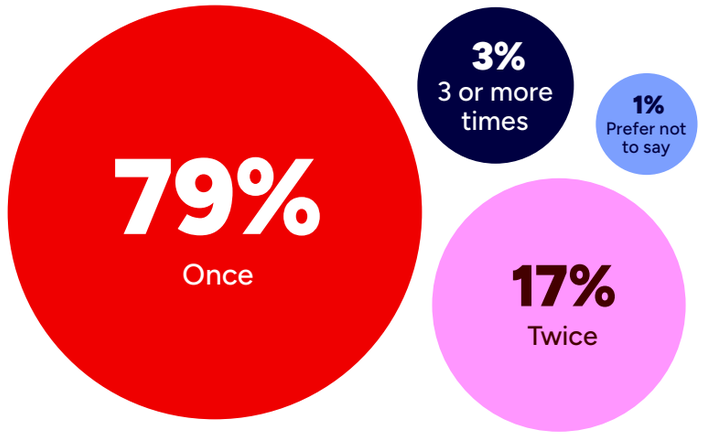
“I’VE BEEN LAID OFF [FOUR TIMES] IN A ROW. THE GAME INDUSTRY LEFT ME.”

We asked laid-off game workers to share their employment journeys, to get a better understanding of what it’s like to navigate the job market today.

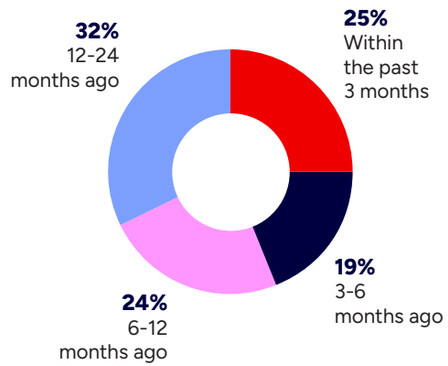
Game workers were twice as likely to have been laid off in the past 12 months (68%) rather than the year prior (32%). In addition, 79% said they were laid off once, as opposed to twice (17%) or more (3%). Those in quality assurance, marketing/PR, and visual and technical arts were the most likely to have been laid off, while those working in business operations and services were the least likely.

Overall, 49% of respondents (55% for US-only) said their companies have implemented some form of layoffs over the past 12 months. That number increased to 68% for those working at AAA studios and decreased for workers at older (35%) and younger (14%) indie studios. The top reasons cited: company restructuring, financial difficulties, and cancelled projects.

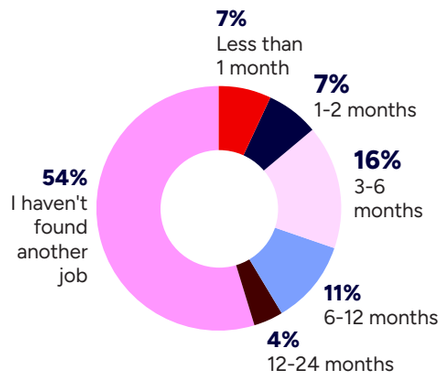
How many times have you been laid off in the past 24 months?



When were you most recently laid off?



How long did you take you to find a new job?

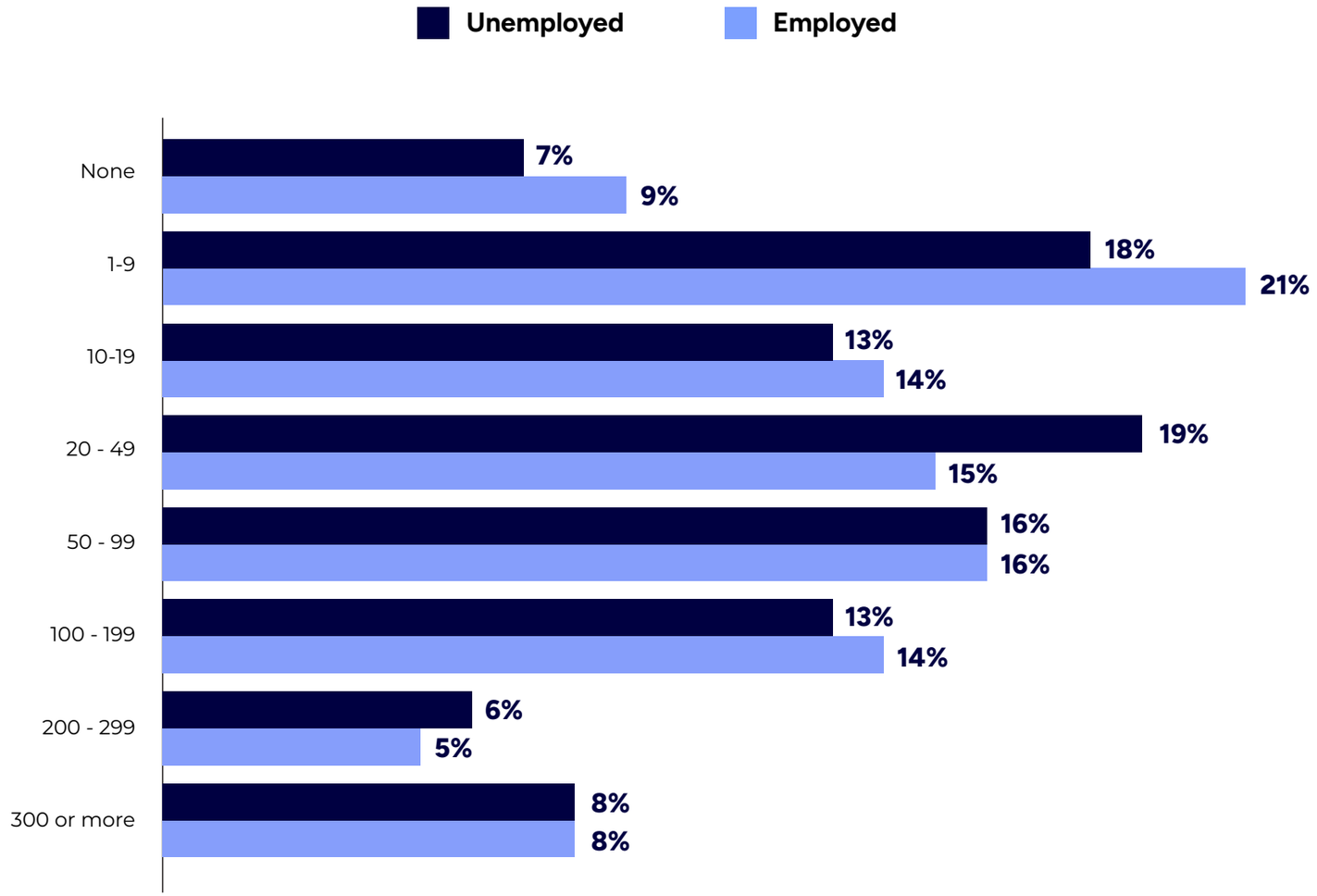


ONE-FOURTH HAVE SENT [100+] JOB APPLICATIONS

The ongoing situation has made the environment more difficult for job seekers: Over half (54%) of laid-off workers said they are still unemployed, increasing to 59% for those living in the United States. Twenty-seven percent of respondents have sent in at least 100 job applications, whether they have since found a job or not. Generative AI tools have been used by 41% of respondents during the process of applying for work, increasing to 47% for those still unemployed.

For those who have found a job, 68% of them are in a similar field; 28% said their new job is similar to their previous one; 23% said it's better; and 17% said it's worse. Another 9% got a job outside the game industry, and 4% started their own companies or studios.

How many jobs have you applied for?



[THOUGHTS] FROM AN INDEPENDENT STUDIO CO-FOUNDER



> I'm insulated because I am a co-founder so I'm not concerned; my concern is becoming the kind of place where layoffs aren't normal business practice anymore. It's an embarrassment."

"To be honest, the next five years are going to be a fight over whether games stay a creative profession or become a financial asset-management business.

Also, a thing I think is really, really funny:

The game industry spent years refusing to train junior devs because they 'needed experienced talent,' then spent the last few years laying off experienced devs because of the cost. You can't simultaneously refuse to let people become experienced and then fire them when they are.

What did y'all think was going to happen?

You don't get to eat the seed corn and then whine when nothing grows.

Another unintended consequence:

Studios like mine get to exist.

If nobody's going to give us a healthy, functional employment pipeline when they've had the time and resources to make one, then we're just going to do it ourselves. It'll take longer, but the result will be better by far than whatever the industry is currently doing. If the established generation keeps refusing to create the next generation of devs, then we're just going to build outside it. That's how this works."

- CO-FOUNDER (INDEPENDENT STUDIO), NEVADA

CONFIDENCE IS [SHAKY], EVEN FOR THOSE WITH A JOB

According to our survey, 45% of employed game industry professionals feel at least slightly secure that they'll have the same job in 12 months, while 55% did not. Business services and operations professionals (63%) were most likely to have job security, and workers at older indie studios (54%) tended to feel more secure than those at AA (48%), AAA (43%), and newer indie studios (36%).

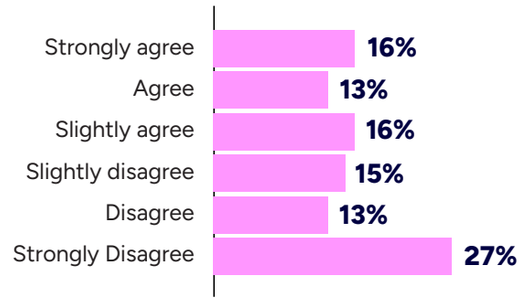
For those who are not working, confidence is lower. Nearly three-fourths (72%) of unemployed respondents said they're not confident they'll find a job within the next year; one-third (31%) said they "strongly" feel that way.

This is also impacting the next generation. Half (50%) of surveyed students said they do not have suitable access to internship or work placement programs—a structural barrier that could help explain why 87% are worried about their future careers. Educators have confirmed the issue: 92% said the current economic and industry climate is affecting student placement into jobs.

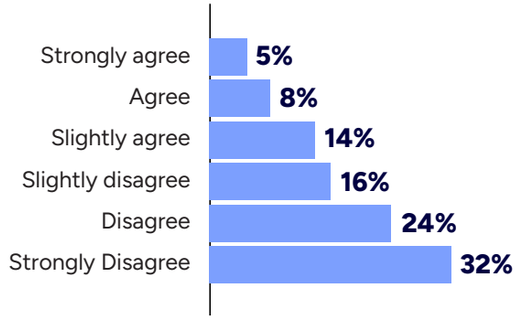
> "I do not know how much longer I will be able to work in games."
>
> - CONTRIBUTOR (GAME DESIGN), CALIFORNIA

To what degree do you agree with the following statement:

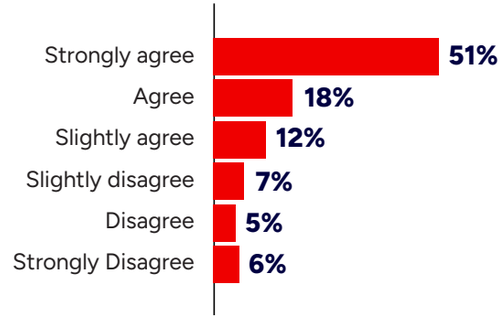
"My job is secure for the next 12 months."



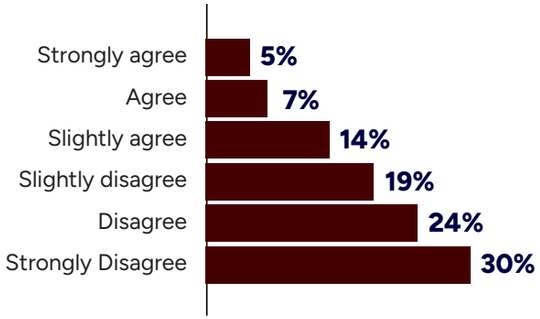
"I am confident I will find a game industry job in the next 12 months."



"I am concerned about my future in the game industry."



"I am hopeful about where the game industry is headed."



This lack of confidence is echoed in respondents' views on the overall game industry, more so for those in the United States. Over three-fourths (77%) of US respondents said they're not hopeful about where the industry is headed, compared to two-thirds (66%) of those outside the US. When asked if they're considering leaving the game industry, 30% of US-based and 23% of non-US respondents said yes.

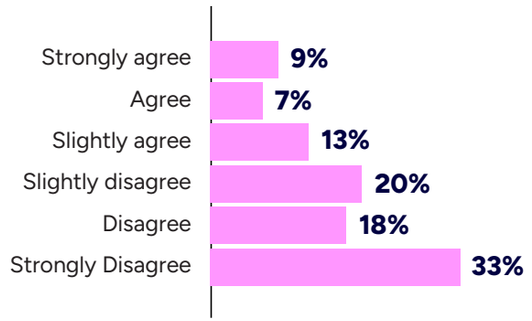
When asked why they might leave, respondents said there simply aren't enough jobs out there—especially those just entering the workforce, who are competing with people who have years of experience. They also cited lack of stability, fear of future layoffs, and leadership's focus on profits over projects.

Some see this as an opportunity to reshape the industry. Several respondents proposed a shift away from AAA production to instead focus on building smaller, agile teams that can work with more limited budgets. There are people looking to do just that: One student said several of their classmates are "looking to band together to create their own studio."

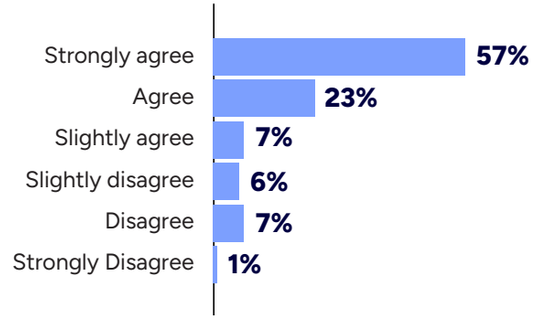
> "Who's going to make games when everyone leaves?"
>
> - FORMER SENIOR EMPLOYEE (VISUAL & TECHNICAL ARTS), CALIFORNIA / LAID OFF <3 MONTHS AGO

To what degree do you agree with the following statement:

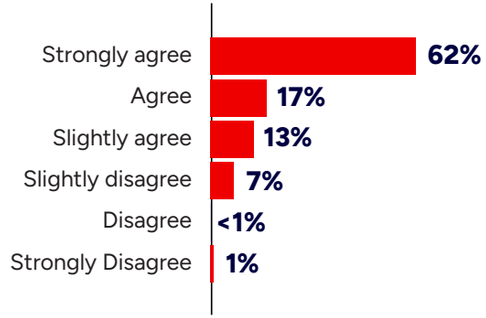
"I see myself leaving the game industry within the next 12 months."



"I am concerned about my future job prospects in the game industry."



"The current economic and industry climate is having an impact on the placement rate of my students into the game industry."



IN [YOUR] WORDS

From your perspective, what impact will the ongoing layoffs have on your career—and the game industry overall—over the next five years?

"I think it will make the industry more cautious, but also less stable. For me, it means staying adaptable and constantly learning. But if we keep treating people as disposable, we'll lose a lot of experienced talent from the industry. I just hope the next five years push studios towards building sustainable careers, not just sustainable projects."

- SENIOR EMPLOYEE (QUALITY ASSURANCE / PLAYER SUPPORT), BRAZIL

"It makes me scared to search for a better job. I'll just hunker down where I am."

- SUPERVISOR (PROGRAMMING), CALIFORNIA

"It's going into a vicious loop where the more people are laid off, the worse quality the games will be; and the less money will be made, the more people will be laid off."

- CONTRACTOR (VISUAL AND TECHNICAL ARTS), CHINA

"We're losing tons of institutional knowledge ... [and] we're betting against our own future by not fostering juniors."

- SENIOR EMPLOYEE (PROGRAMMING), FRANCE

"I think we're going to see another massive indie boom. These industry crashes tend to happen in cycles and, at least to me, are more predictable than we might realize."

- FORMER DIRECTOR (AUDIO), UNITED STATES / LAID OFF 12-24 MONTHS AGO

"I'm competing with people twice my age for the same jobs with the same pay. It sucks for me, but it must suck for them more."

- STUDENT (PROGRAMMING), OHIO

> “AI can never replace expertise. But it can streamline the work of experts who know what good looks like and have a clear vision for what they need.”
>
> - OWNER/FOUNDER (GAME PUBLISHING), CALIFORNIA

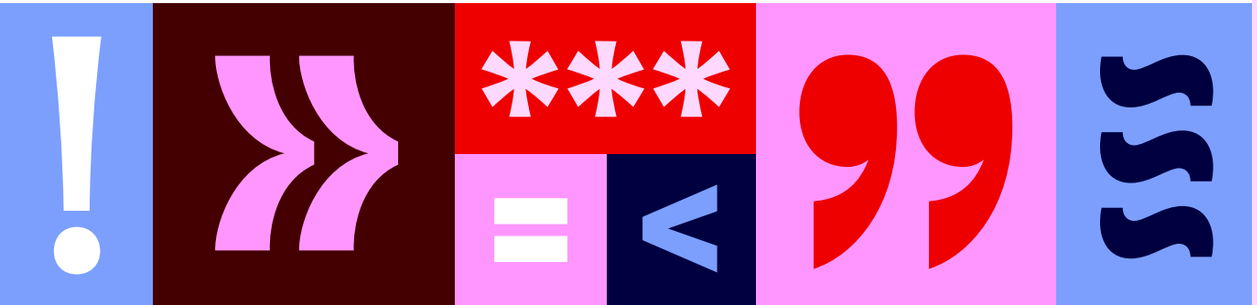
3* GENERATIVE AI

GENERATIVE AI USAGE [INCREASES], THOUGH NOT AS MUCH IN THE US

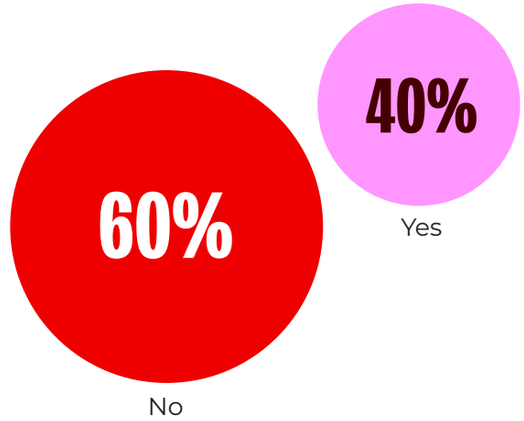
After years of speculation about how large language models, diffusion models, and other generative AI tools would impact the game industry, a clearer picture is coming into focus. It's on devices and in search engines; it's a common feature for most productivity software. However, usage has not changed significantly—at least for those based in the United States.

Forty-percent of surveyed game industry professionals said they use generative AI tools as part of their job, up from 36% last year. Results did not change much for those based in the US, moving from 36% last year to 38% this year, which is within the margin of error. The increase was more prevalent for those outside of the United States, going from 37% to 44%, a 7-point increase.

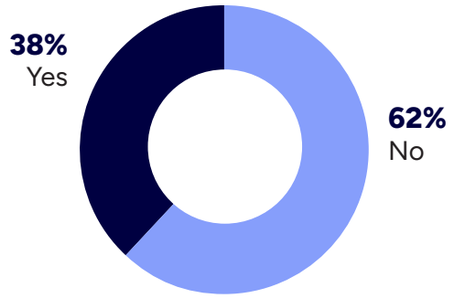
Age remains a determining factor: Over half (54%) of people 45 years or older reported using the tools, an 8-point increase from last year's survey. There is also more usage among men (45%) than women (33%)—with the number of men using the tools increasing by 4-points—as well as those in business operations or services (63%), marketing and PR (51%), and programming (48%).



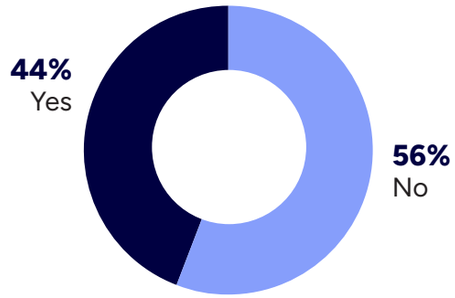
Do you use generative AI tools as part of your job?



US only



Outside US



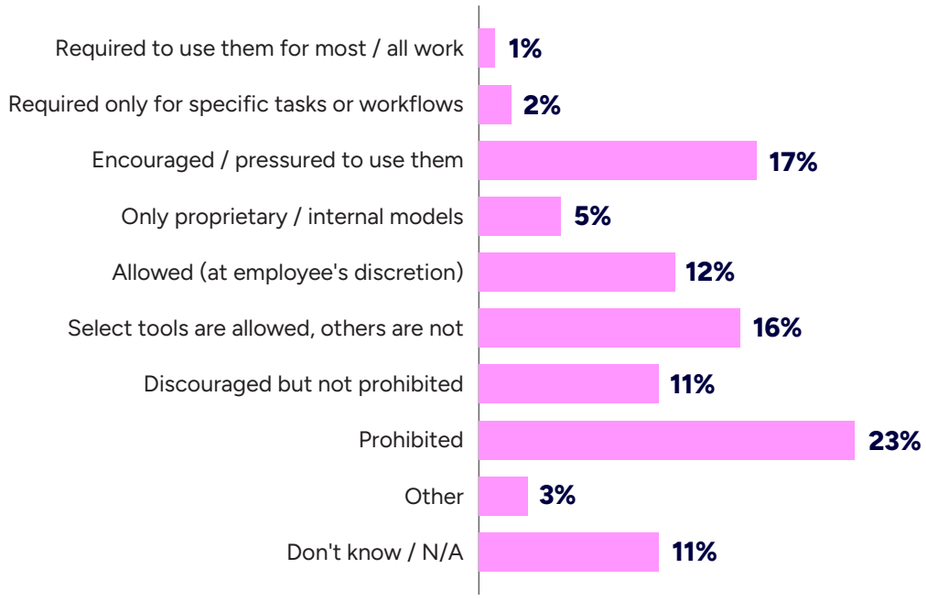
Workers at older indie studios (29%) were less likely to use them than the average respondent, as well as those working on premium games (32%). We saw much higher usage among those working on free-to-play games (58%) and mobile-only studio workers especially (70%).

Combined, these statistics support the idea that outside-US game companies specializing in free-to-play games (especially mobile) are more likely to bring generative AI tools into their workflows. This aligns with broader industry research but is limited by our sample size. Expanding our international representation in future surveys will enable us to examine these findings in more detail.

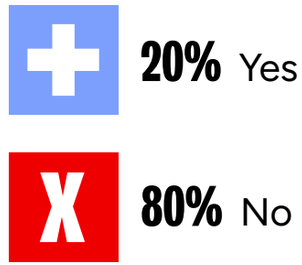
When it comes to company policy, 27% of AAA workers said they're encouraged or pressured to use them, and 3% are required in some capacity. This is nearly three times higher than indie studio workers (9%), none of whom said they're required to use them for most or all tasks.

Generative AI is also impacting the next generation of game industry professionals and their educational experiences: 62% of educators said they allow, encourage, or require their students to use generative AI tools in their game development coursework. However, just 20% of students said they're currently using them for those assignments.

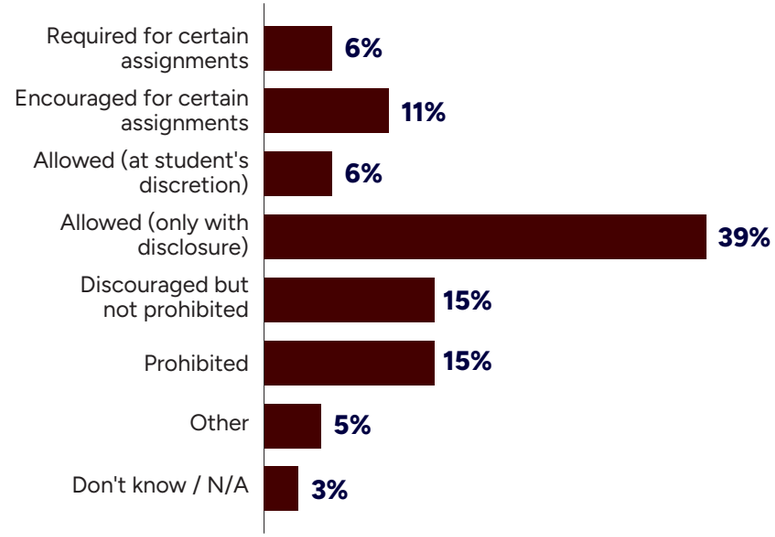
What are company guidelines regarding the use of generative AI tools for your job?



Do you use generative AI tools as part of your game development coursework?



To what extent do you allow students to use AI tools in game development coursework?



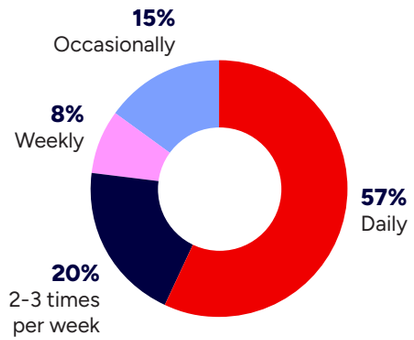
DAILY USE IS [MORE COMMON] AMONG AI ADOPTERS

Given how AI is more widespread, we wanted to get a better picture of how (and how often) it's being used. According to our survey, 57% of AI adopters said they use the technology daily, more so among men (63%) and those in business operations and services (71%).

The number of available tools has risen significantly over the past year, so we chose to focus on categories rather than specific products. The most popular tools are for text generation (72%), followed by code generation (62%) and productivity software AI (35%). Twenty-two percent of AI adopters said they use it for image generation—increasing to 29% for indie studio workers and 30% for those at mobile studios—and 7% use it for creating video content.

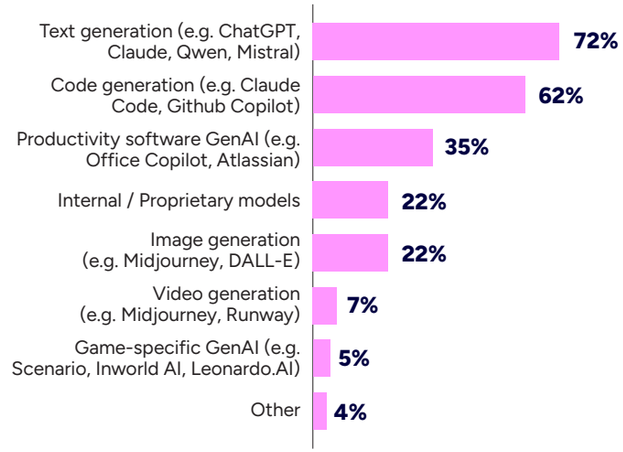
When they were asked about how they use these tools, 73% said research and brainstorming, 62% data analysis and summarization, 56% code generation and debugging, 42% proofreading and editing, and 39% for generating slide decks or presentations. Twenty-two percent use it for concept art or visual ideation, 11% use it to create promotional images or video, and 8% for production art or final game assets.

On average, how often are you using generative AI tools for your job?



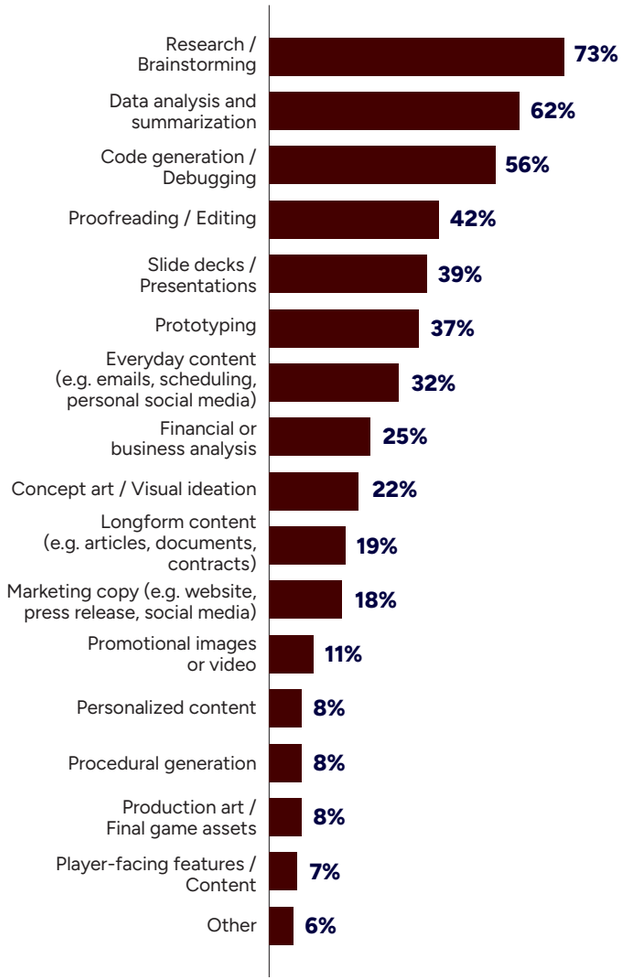
Which tools do you use for your job?

(CHOOSE ALL THAT APPLY)



How do you use generative AI tools for your job?

(CHOOSE ALL THAT APPLY)



GENERATIVE AI SENTIMENT HOLDS [STEADY]; MORE SUPPORT FOR NON-CREATIVE USE

This is the fourth time we've asked game industry professionals to share their views on the impact generative AI is having on their profession. In previous years, the shifts have been substantial and stark. This time around, things are more complex.

According to our survey, 55% of game industry professionals think generative AI is having a negative impact on the game industry, unchanged from last year's 54%[1]. Workers in quality assurance and community support (76%) held the most unfavorable views, followed by game design (65%), visual and technical arts (65%), and audio (57%). Thirty-five percent said generative AI is having a mixed impact on the game industry, while 8% said it's having a positive impact.

When asked what considerations or values guide their decisions on whether to use generative AI tools, over 2,000 game industry professionals weighed in—and this is where we're seeing some changes taking place.

Sentiment analysis (using our internal AI tools) suggests game industry professionals are forming more nuanced views on generative AI, rather than taking an all-or-nothing stance. Many said they see value in using gen AI tools for things like repetitive tasks, research, brainstorming, and early prototyping—even several people who said generative AI is having an overall negative impact on the industry.

But they still have concerns. Many noted the importance of weighing the benefits against the costs; including the environmental impact, legal issues, and job losses. New for this year, several respondents said they're worried about generative AI usage leading to skill atrophy and a loss in professional and personal development. And there was wider condemnation of using generative AI for player-facing features.

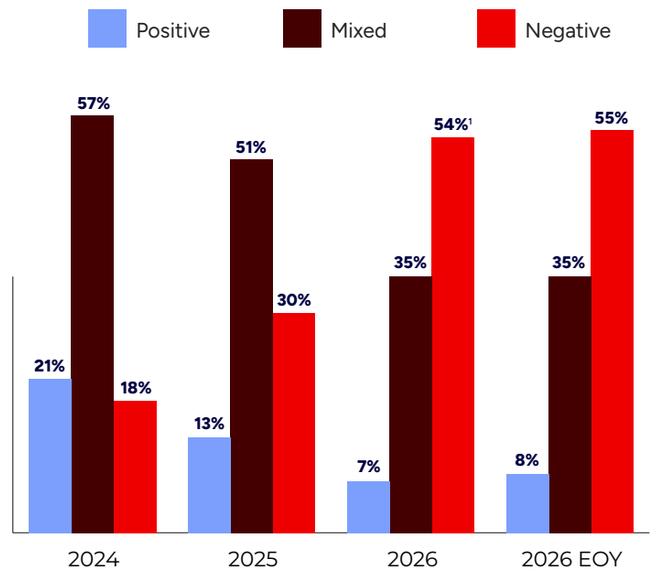
One-tenth of respondents expressed opposition to any use of generative AI, and a small group said they don't want to use gen AI tools at work, but they have to.

[1] *Figure has been updated from previous report to reflect corrected data.*

> "Gen AI is a tool; and like any tool, it should be applied to the right job. I try to think of it like a screwdriver: Great for tightening a screw, not great for painting a wall."
>
> - SENIOR EMPLOYEE (PROGRAMMING), MICHIGAN

What impact do you think Generative AI is having on the game industry?

(CHOOSE ALL THAT APPLY)



IN [YOUR] WORDS

What considerations or values guide your decisions about if, when, or how to use generative AI tools in your work?

(categorized by responses to generative AI's impact on the game industry)

POSITIVE IMPACT

"I am fine with it in every aspect of my work, I maintain my own standards of quality, and I'll take responsibility for everything my AI produces."

- SENIOR EMPLOYEE (PROGRAMMING), WASHINGTON STATE

"I can build much faster and cheaper as a solo developer with no external funding."

- SOLO DEVELOPER, CHILE

"I use generative AI extensively, because I see it as a new layer of intellectual infrastructure rather than simply an automation tool. The question for me is not whether I should use it, but what kinds of decisions I should not delegate to it."

- EDUCATOR (GAME DESIGN), SOUTH KOREA

"AI is great to go from 2 to 8, but you need someone with actual experience to go from 0-1 and from 8 -10."

- DIRECTOR (GAME TECHNOLOGY, SERVICES, DISTRIBUTION). TENNESSEE

"I prefer to create and solve problems than to code, so AI is the way."

- SENIOR EMPLOYEE (PROGRAMMING), URUGUAY

IN [YOUR] WORDS

What considerations or values guide your decisions about if, when, or how to use generative AI tools in your work?

(categorized by responses to generative AI's impact on the game industry)

POSITIVE IMPACT

“As a disabled founder without the financial or institutional support that larger studios take for granted... without generative AI, I would not have a company.

I would spend so much of my available capacity navigating systems, researching unfamiliar processes, and trying to acquire decades of institutional knowledge that there would be very little left for actually making games.

When that barrier is removed, something interesting happens: I can make games.

I can design systems. I can learn Godot. I can write extensive documentation. I can build the game. I can perform the functions of a developer when you take away the artificial constraint of, ‘You must already know how to do this.’

We use generative AI as an accessibility and knowledge-amplification tool, not as a substitute for humanity and authorship. It does not and cannot build the game for us. It cannot operate Godot for us. It cannot establish creative direction for us.

Expertise is not at all the same thing as access to expertise. A senior dev sitting next to me can help me solve a problem, but I haven't got one of those sitting next to me. If an AI system can break the concept down and explain it well enough that I can implement it myself, then my game gets made and nothing has replaced my creative labor. It is giving me access to a resource I otherwise couldn't afford.

People are concerned about their jobs and about AI using established creative work, and I get that. I really do. But I also think we should take just as seriously the idea that AI can be a powerful equalizer for people who were already excluded by cost of expertise, admin overhead, geography, or lack of access to professional networks.

My goal is not and was never to make fewer people necessary. My goal is for people like me to participate at all.”

- OWNER/FOUNDER (INDEPENDENT STUDIO), NEVADA

IN [YOUR] WORDS

MIXED IMPACT

"It helps with code generation; productivity is higher. But I am afraid it will soon be used to replace people. It is already stopping us from hiring juniors."

- SENIOR EMPLOYEE (PROGRAMMING), UNITED KINGDOM

"It's very good at making things faster, but it's also very good at making people not pay attention to all details. I fear at some point all products will feel the same."

- SENIOR EMPLOYEE (PROGRAMMING), COLOMBIA

"If it helps with making tedious tasks automated or faster, without me losing my creative controls, I'm okay with it."

- CONTRACTOR (VISUAL AND TECHNICAL ARTS), INDIA

"If the tool enhances my own skills or allows me to learn a new one, I'm all for it. If it eases hardware requirements or simplifies workflows for my teams, I'm all for it. If it wholesale replaces a human member of the team, then I reject it."

- DIRECTOR (GAME DESIGN), CALIFORNIA

"At the end of the day, generative AI tools are just like Lua, Python, Unity, Unreal, etc. Myriads of game development tools that have come and gone throughout our industry. It's not about considerations or values: It's a tool, make use of it to get your job done."

- MANAGER (GAME DESIGN), WASHINGTON

IN [YOUR] WORDS

NEGATIVE IMPACT

"I try to avoid AI unless I am explicitly told to use it. I strongly prefer collaborating with individuals or doing work on my own when possible. I got into this industry to collaborate with creative people, not to have an advanced chatbot riff on the ideas of someone who was laid off."

- CONTRIBUTOR (GAME PUBLISHING), CALIFORNIA

"I refuse to burn the one planet we have for some chatbot to give me an answer I could've found myself."

- SENIOR EMPLOYEE (GAME DESIGN), FINLAND

"I'll never use gen-AI tools for the parts of my job that require creativity (which is most). I will happily use gen-AI for the mundane parts of my job that don't require creative thought, thus freeing up more time for the creative parts that I enjoy."

- DIRECTOR (GAME DESIGN), UNITED KINGDOM

"I did not get into a creative industry to hand over the creativity to an algorithm."

- SUPERVISOR (VISUAL AND TECHNICAL ARTS), UNITED KINGDOM

"I think the boundary to making games is much lower due to AI. I do not think that AI should be used to create, but it should help bring ideas to life. It should not remove the most important part, which is human creativity."

- STUDENT (VISUAL AND TECHNICAL ARTS), ALABAMA

"I believe that no one should have to read what no human has written and shouldn't have to see what no human has created. I believe we are human beings worthy of paychecks and respect."

- MANAGER (PRODUCTION), MINNESOTA

"I don't want something that a person didn't care enough to actually make."

- SOLO DEVELOPER, OHIO

4 * ENGINES, PLATFORMS, & FEATURES



MORE WORKERS ARE AT STUDIOS WITH THEIR OWN [ENGINES]

Following last year's change, we've limited the game engine and platform questions to those whose job titles best correlate with the physical creation of games, including game designers, programmers, and visual and technical artists. We will refer to this group of approximately 1,200 respondents as "developers" throughout the rest of this report. This in no way diminishes the essential contributions those in adjacent fields bring to their projects, including business operations and services, marketing, and support teams.

According to our survey, 35% of developers are currently using Unreal Engine (down from 42%) and 28% are using Unity (down from 30%). While both Unreal Engine and Unity were down, proprietary engines were up, increasing from 19% to 23%.

What game engine do you primarily use for game development?

Unreal Engine	Unity	Proprietary / In-house	Godot	GameMaker	Other / N/A
35%	28%	23%	6%	1%	6%

Since we had more AAA studio survey takers this year, we wanted to check if these changes were a result of demographics or overall trends—so, we compared engine usage by studio type in the past two surveys, to see if we could spot any consistent trends.

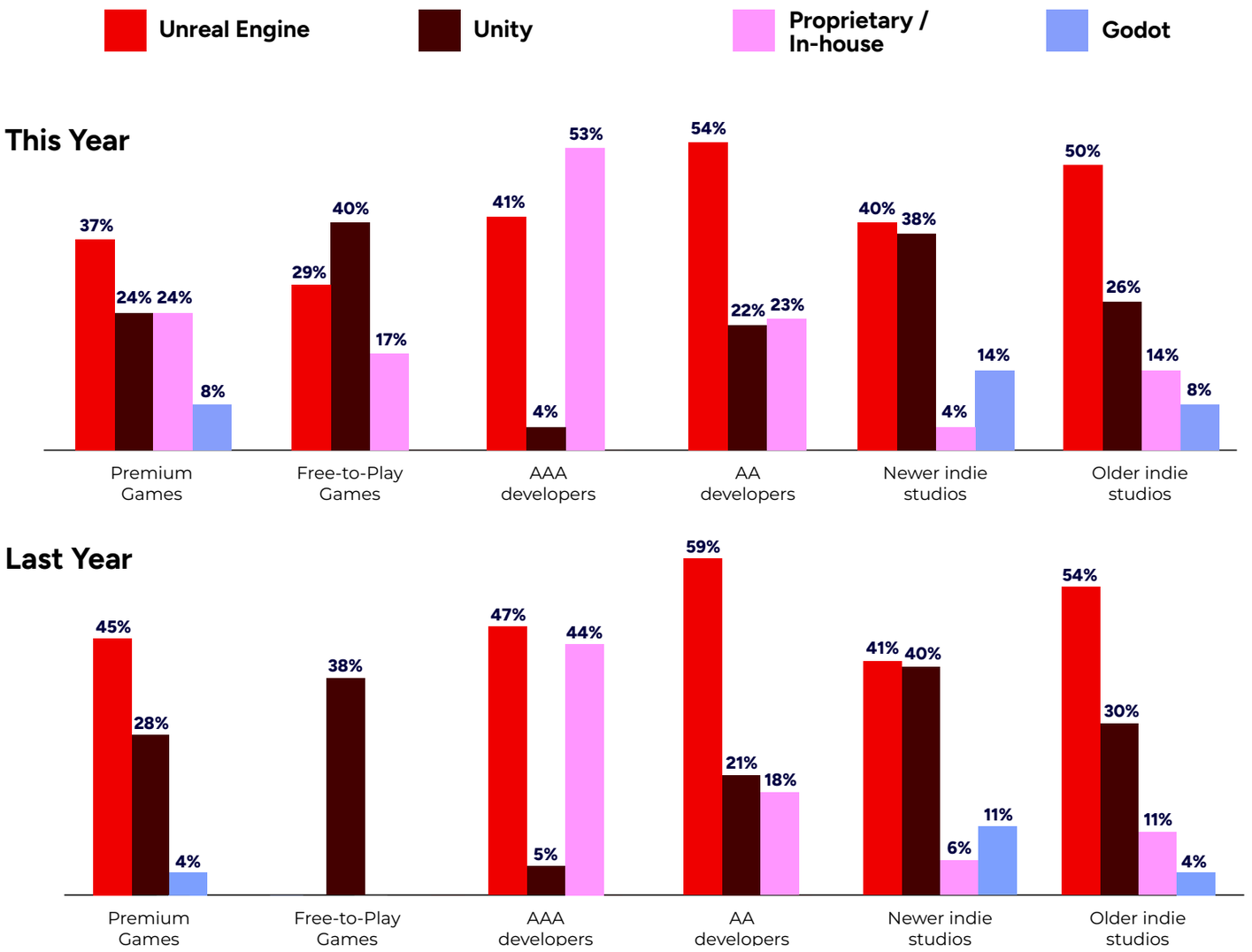
We found that the number of respondents using Unreal Engine or Unity did go down for studios across the board, though some of them were within the margin of error. We also saw an increase in respondents from AAA, AA, and older indies using proprietary/internal tools, which indicates broader growth across game studios.

Godot is also seeing some growth among indies: One-tenth (11%) of respondents currently work at indie studios using the open-source engine (up from 7%).



What game engine do you primarily use for game development?

(BY BUSINESS MODEL AND STUDIO TYPE)



DEVS GEAR UP FOR [NEXT-GEN CONSOLES] VR CONTINUES TO DECLINE

The next generation of console gaming approaches. Xbox and PlayStation are preparing their newest consoles for release in the next 1-4 years, which means the timing of a game's release—and what specs developers will be working with—can impact which platforms are prioritized.

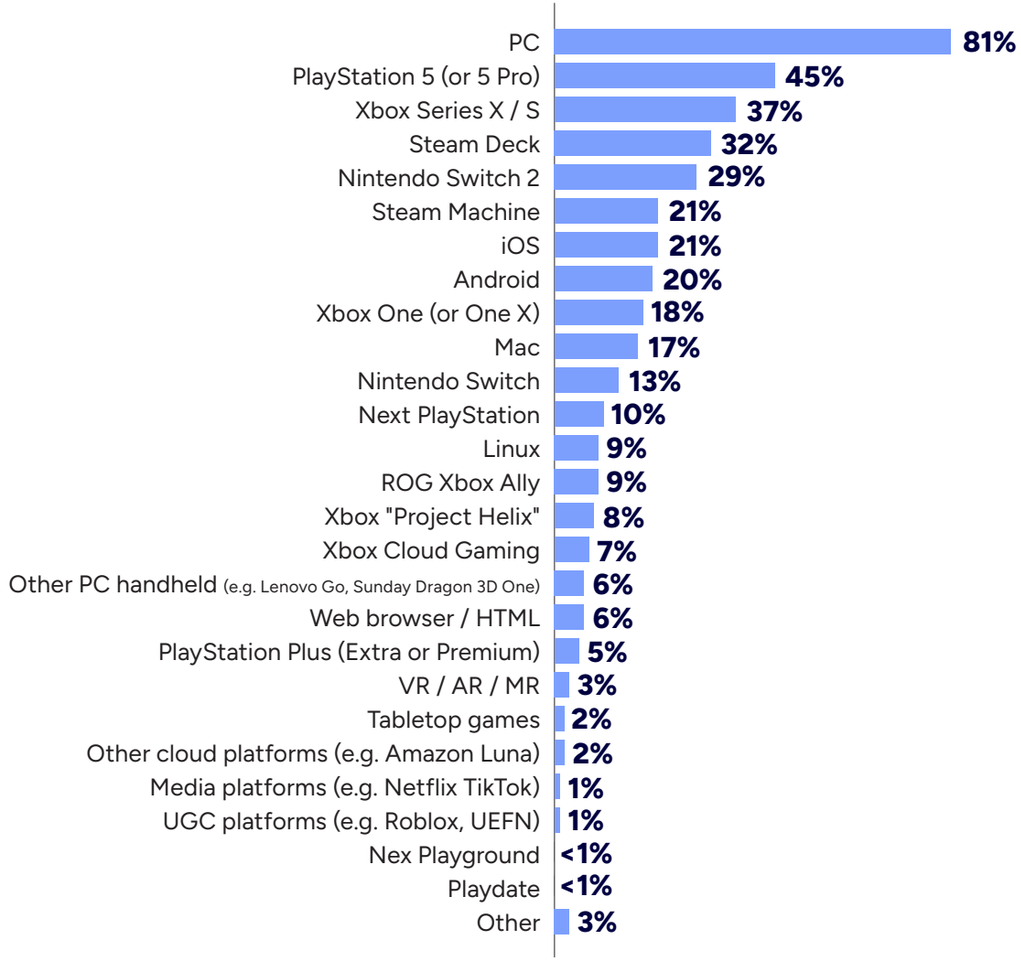
At the time of the survey, about 88% of respondents were working at studios currently developing a game, or they were making one themselves. We asked them what platforms their upcoming games would be on. For those who'd released a game in the past 12 months and were not working on something new, we asked them about their most recent projects.

For upcoming releases, PC remains the top platform for respondents, with 81% developing their upcoming game for the platform. This was followed by PlayStation 5 (45%), Xbox Series X/S (37%), Steam Deck (32%), and Nintendo Switch 2 (29%). Twenty-one percent are making games for the new Steam Machine, 10% are planning theirs for the next PlayStation, and 8% said theirs will be released on Xbox's next console, nicknamed "Project Helix."



Which platform(s) will your upcoming game or project be shipped on?

(CHOOSE ALL THAT APPLY)



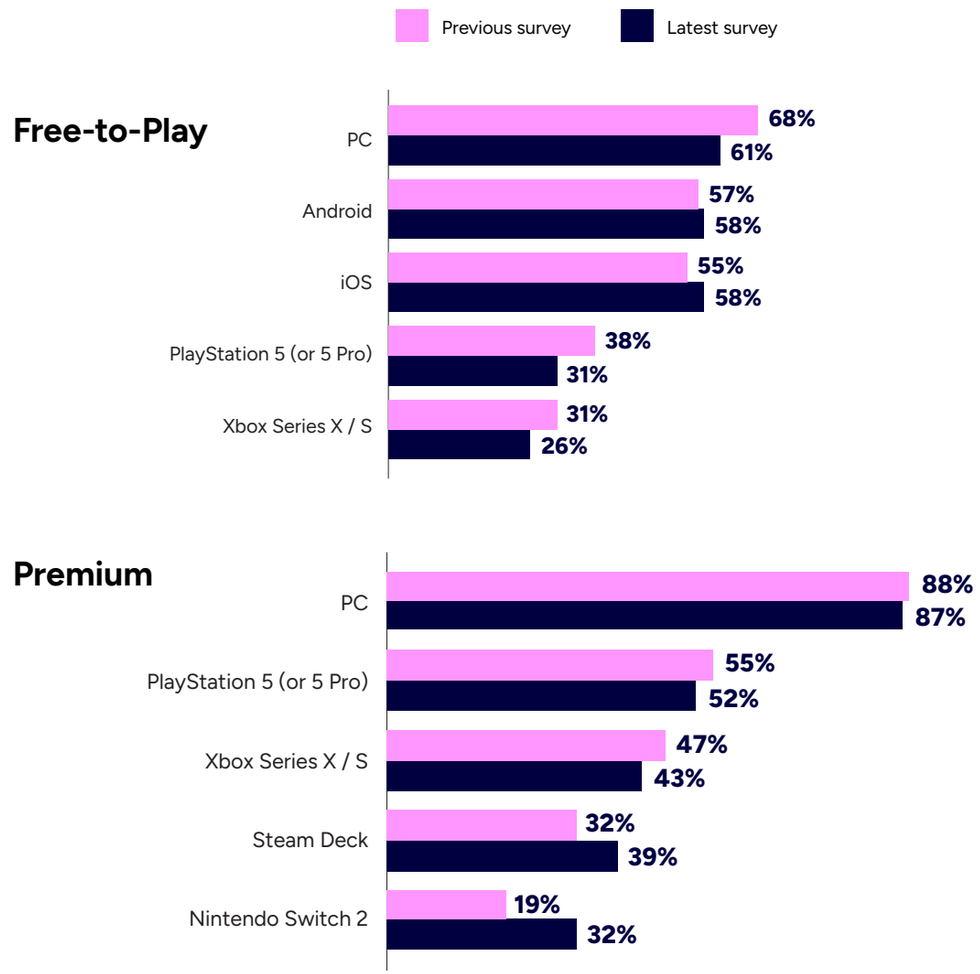
For the 258 respondents who weren't making a game but had published one in the past 12 months, 78% released them on PC, 57% on PlayStation 5, 50% on Xbox Series X/S, 36% on Steam Deck, and 32% on Nintendo Switch 2. Six percent said their latest games were shipped on either Xbox's "Project Helix" or the next-gen PlayStation, which may indicate their games are optimized for those upcoming consoles.

We asked respondents what platforms they would be interested in developing games for, or having their company develop games for. PC (81%) was again the most cited option, followed by Nintendo Switch 2 (47%), PlayStation 5 (42%), Steam Deck (39%), and the Steam Machine (29%). The current Xbox Series X/S (26%) ranked similar to the next-gen PlayStation (27%), while 17% said they were interested in developing games for Xbox's "Project Helix."

The virtual world looks to be losing steam: 3% of developers said they are either working on VR/AR/MR projects or have released one in the past 12 months, down from 8% last year. We have also seen a decrease in developer interest, going from 12% last year to 8% this year. Traditionally, we've shared what individual platforms VR/AR/MR developers are releasing their games on, but the sample size was too small this year to be statistically significant.



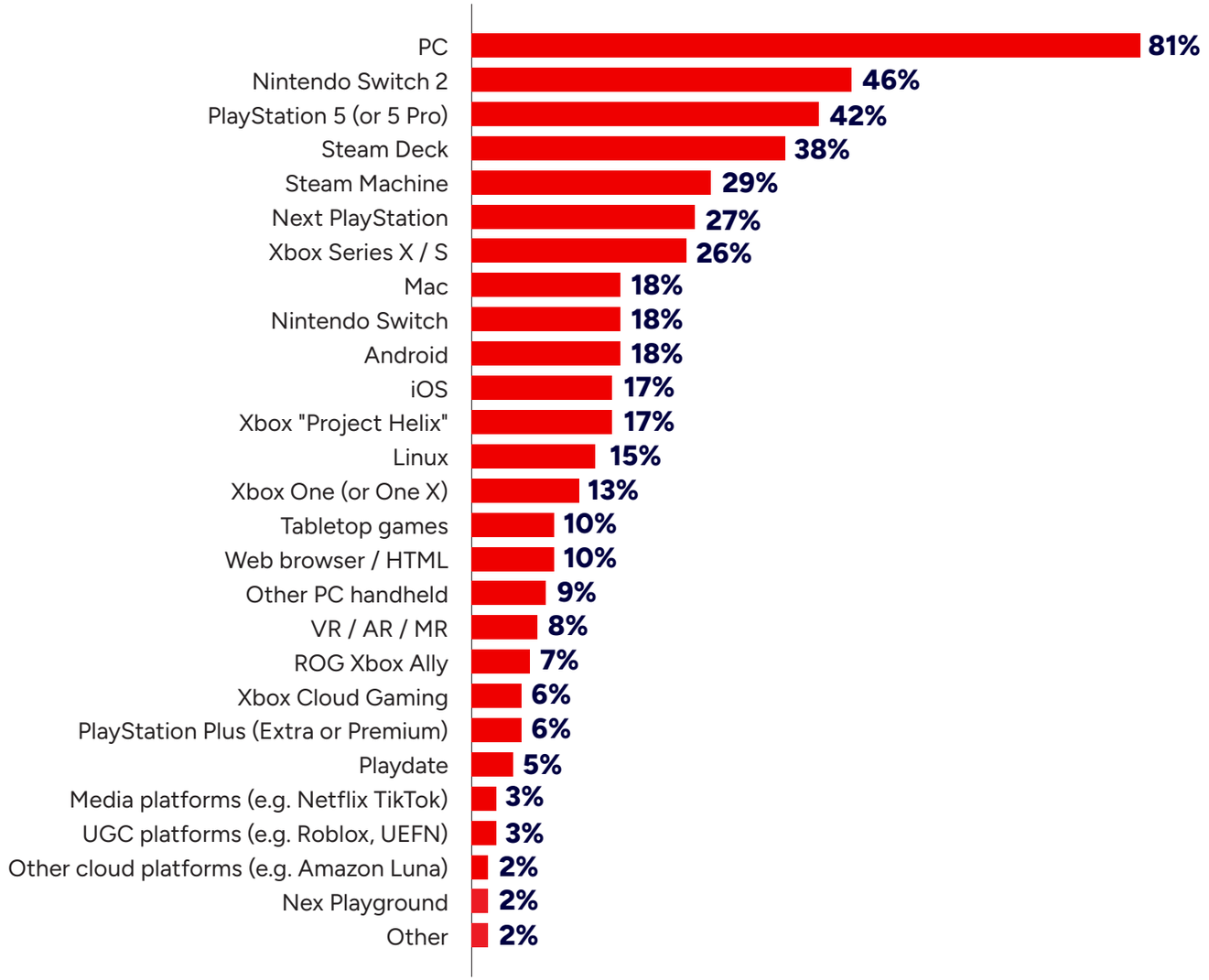
Top 5 Platforms





Which platform(s) are you most interested in developing games for, or having your company develop games for?

(CHOOSE ALL THAT APPLY)



5 * THE BUSINESS OF GAMES

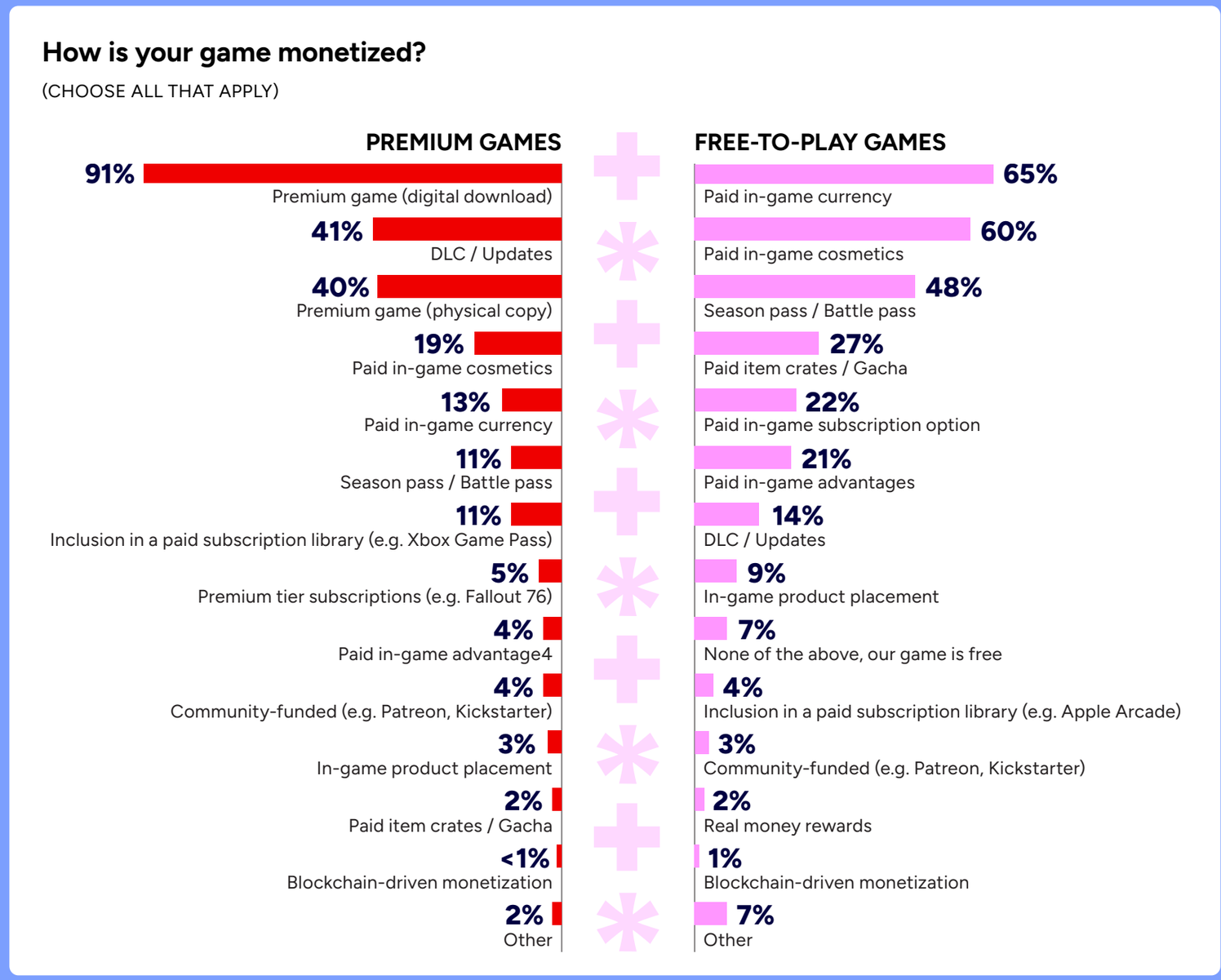
PREMIUM GAMES RELY ON DIGITAL [DOWNLOADS]

Three-fourths (75%) of studio workers said their companies produce premium games, while one-fourth (25%) make free-to-play games.

These results reflect the survey's North American weighting. For broader context: Sensor Tower's State of Gaming 2026 report showed that, of the 225,000 video games released in 2025, 91% were released on mobile platforms, and 96% of those were free-to-play. This demonstrates how free-to-play games dominate the global market.

Eighty-five percent of mobile-only respondents are in free-to-play games, and we saw a higher percentage from respondents based in South or Southeast Asia (33%).

Looking at monetization, free-to-play games rely more on paid in-game currency (65%), paid in-game cosmetics (60%), season or battle passes (48%), and paid item crates like gacha (27%). Seven percent said they don't charge anything. Some premium games rely on DLC/updates (41%), paid in-game cosmetics (19%), and paid in-game currency (13%). However, digital downloads (91%) and physical copies (40%) remain the biggest forms of monetization.



But how much are they charging? Our survey showed a clear correlation between price and studio type—with 70% of AAA workers having games that cost $50 or more, 60% of AAs in the $30 to $60 range, 70% of older indies between $10 and $40, and 61% of younger indies with games under $20.

Pricing also correlates with studio size: 63% of companies with fewer than 20 employees charge less than $20, while 72% of companies with 100 or more workers charge at least $40.

What price point is your current (or most recent) game originally launching at (in $USD)?

(BASE PRICE ONLY, NO ADD-ONS)

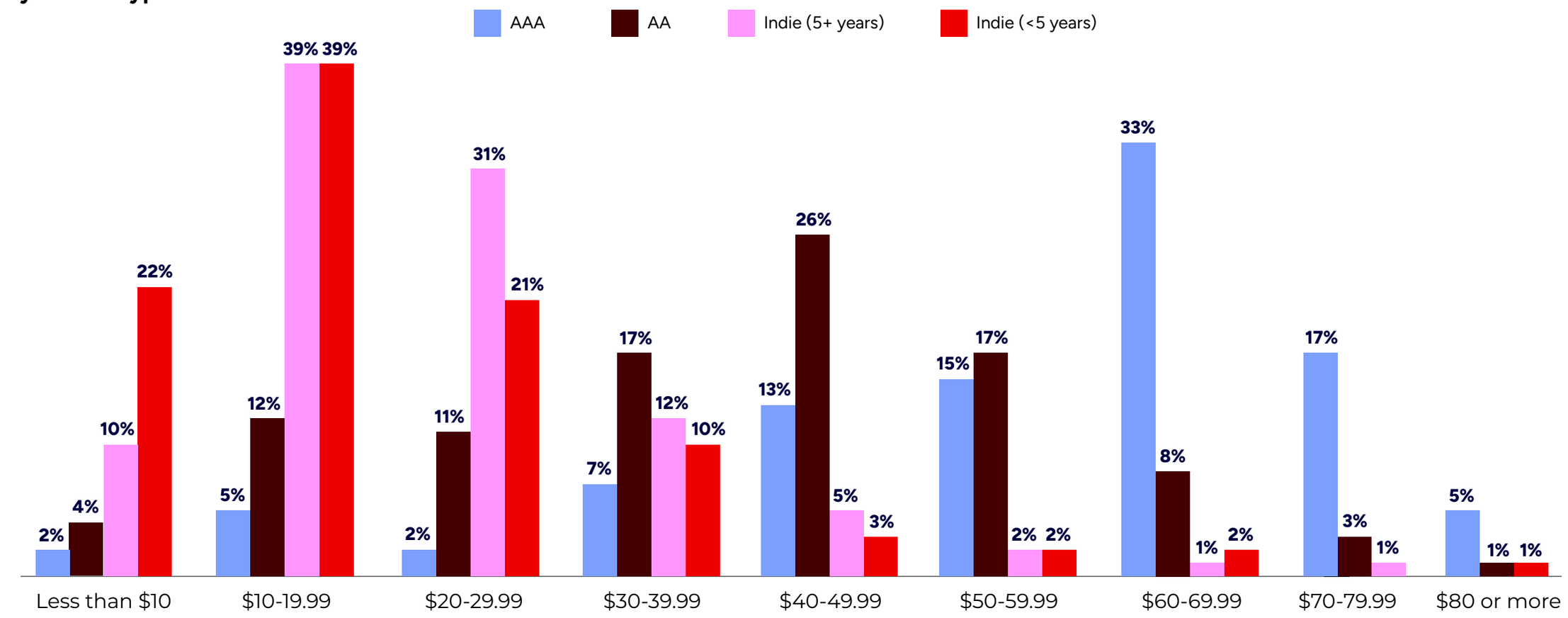




What price point is your current (or most recent) game originally launching at (in $USD)?

(BASE PRICE ONLY, NO ADD-ONS)

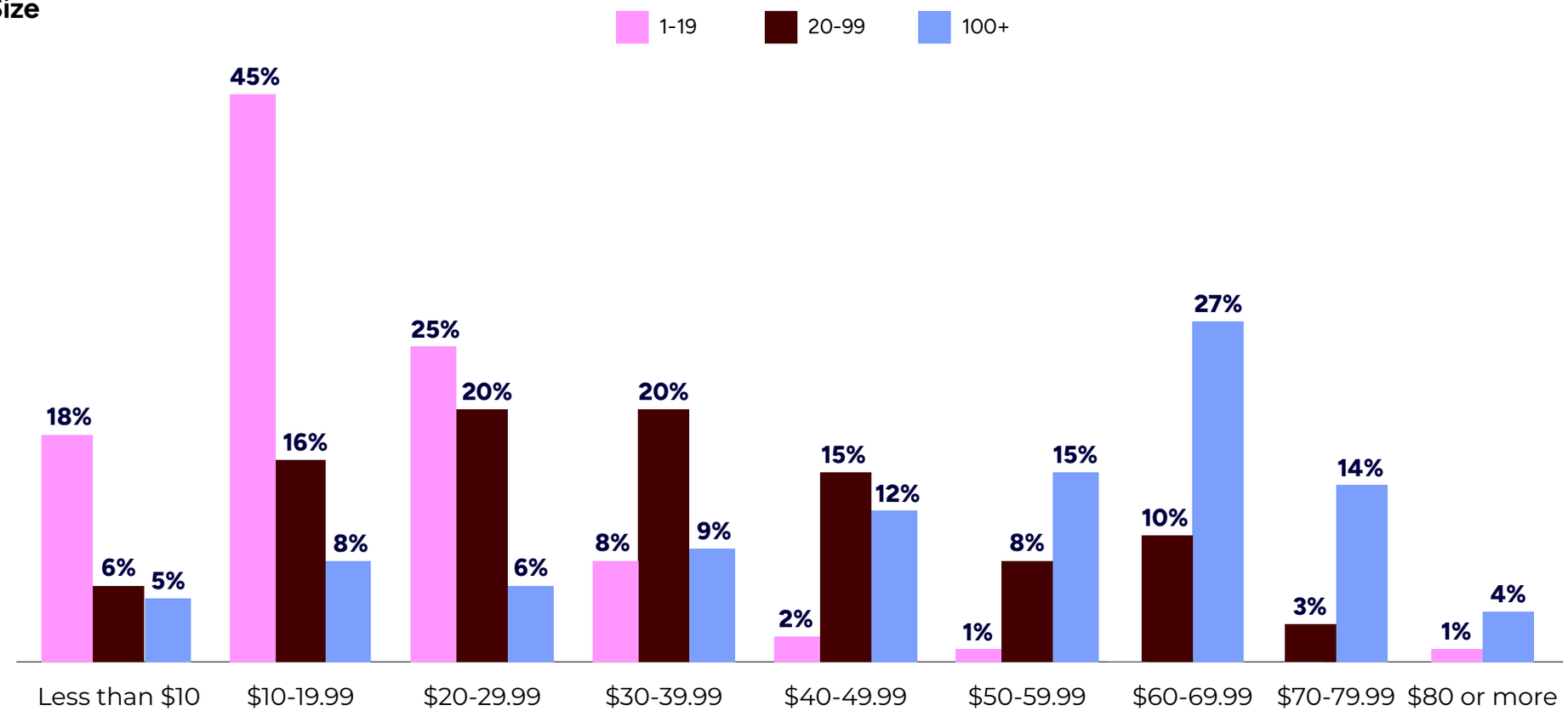
By Studio Type



What price point is your current (or most recent) game originally launching at (in $USD)?

(BASE PRICE ONLY, NO ADD-ONS)

By Studio Size

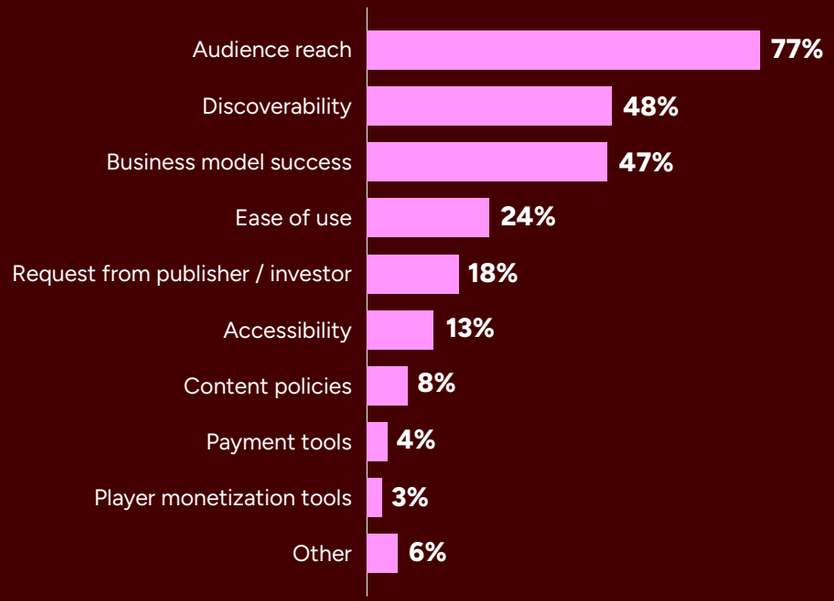


We asked studio workers in business decision-making positions what factors they prioritize when choosing platforms for their games. The most popular considerations were audience reach (77%), discoverability (48%), business model success (47%), and ease of use (24%).

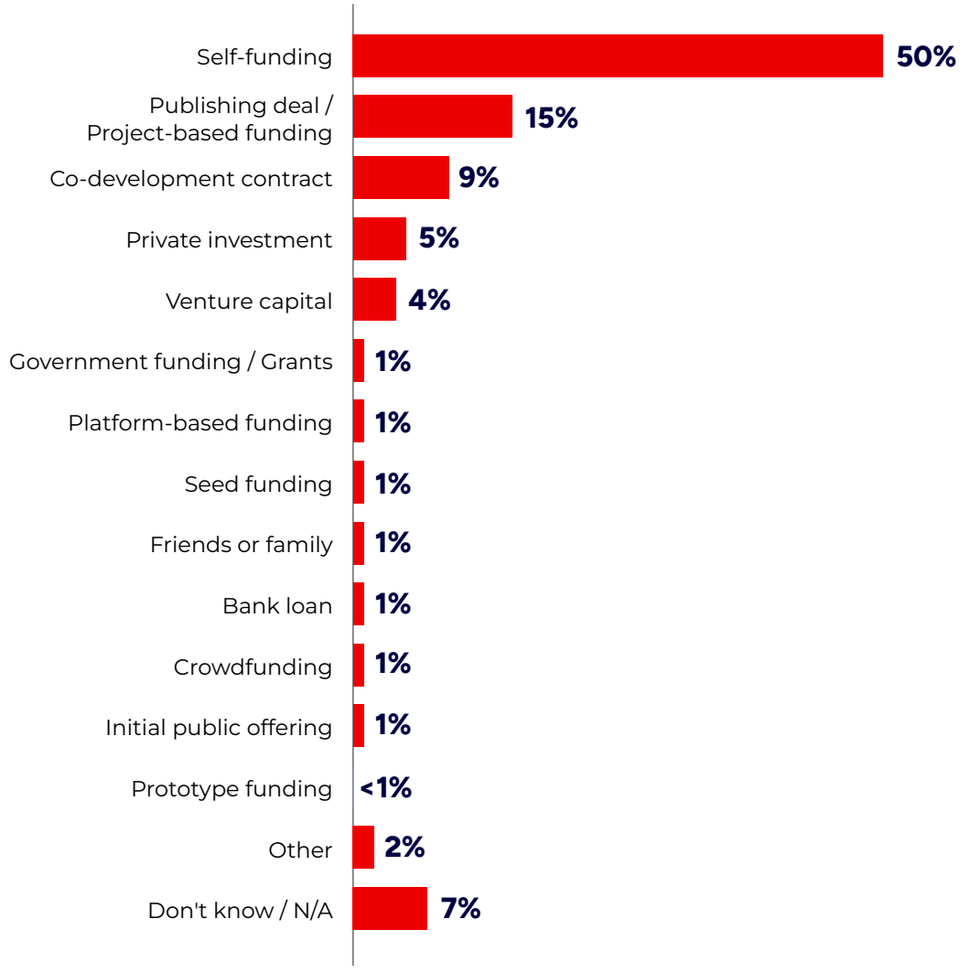
We also asked them what the predominant sources of funding are for their projects. Fifty percent said the primary source is self-funding, including 35% of AAA workers. This was followed by publishing deals or project-based funding (15%), co-development contracts (9%), and private investment (5%).

What are you or your company's top factors for choosing a platform to release a game?

(CHOOSE UP TO 3)



What is the predominant source of funding for your game or company?



IN [YOUR] WORDS

What are the biggest obstacles you or your company have faced in securing funding, and how has it impacted projects you have worked on?

"Our Kickstarter was successful, but the price of everything has gone up since then and investors seem more reluctant than ever when we have spoken to them."

- OWNER/FOUNDER (INDEPENDENT STUDIO), CALIFORNIA

"New games failed to become popular, and old popular games lost sales. This made stock prices drop and funding dry up."

- DIRECTOR (CO-DEVELOPMENT STUDIO), JAPAN

"We are a small studio without a shipped game and despite being made up of a team of seasoned AAA professionals we've struggled to find publishing deals. We are forced to do service work for other companies to raise funding for our own IP development."

- OWNER/FOUNDER (INDEPENDENT STUDIO), CANADA

"We love making niche games. They sell well to the audience, but struggle to connect with publishers/investors. We might also just be really bad at pitching games."

- OWNER/FOUNDER (INDEPENDENT STUDIO), FLORIDA

"Publishers want a finished game to fund, not to fund a game to finish."

- OWNER/FOUNDER (INDEPENDENT STUDIO), CANADA

"We haven't had trouble, we found an excellent publisher a few years ago who have supported us for years, plus we receive rebates and support from the NZ government."

- OWNER/FOUNDER (INDEPENDENT STUDIO), NEW ZEALAND

NEARLY [HALF] OF STUDIO WORKERS HAVE USED CO-DEVELOPMENT

As funding becomes more challenging, some studios are pursuing co-development—both as a way of saving costs and as a method of increasing revenue. Forty-five percent of studio workers said their companies have hired co-development services for their most recent projects. Workers at AAA studios (64%) are more likely to utilize co-dev services and those at newer indie studios (23%) are the least likely.

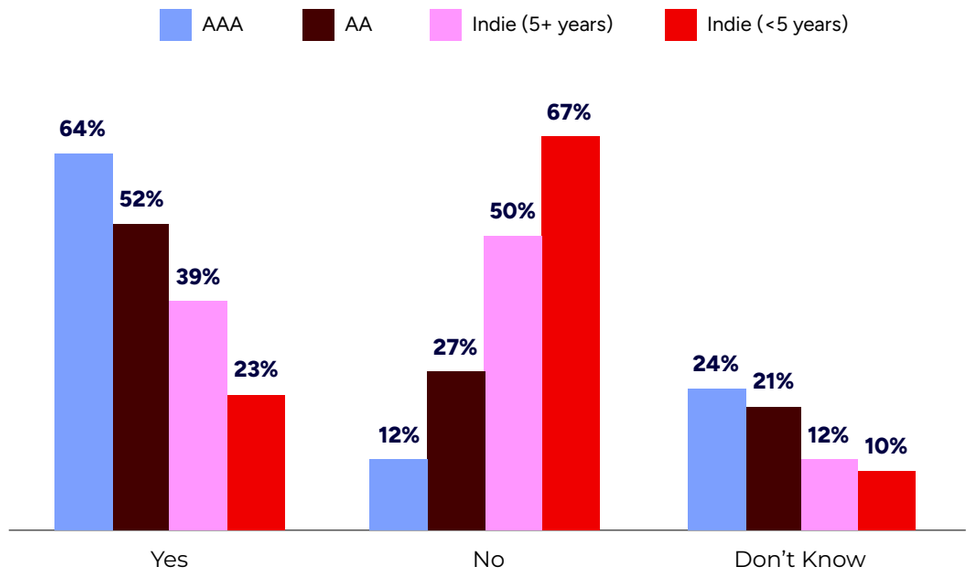
Several respondents commented that art, animation, and engineering are some of the more utilized co-dev services; and that hiring these outside companies helps their studios successfully produce games. As one studio worker put it: “Co-dev studios are helping us meet our ship date and reducing pressure on our internal developers, so that we don't have to reduce scope or delay.”



Has your company hired any co-development services for your most recent project?

45%	37%	18%
Yes	No	Don't know

By Studio Type



Seven percent of studio workers are primarily in co-development—with 48% of them saying their studios also make their own games—but they're not the only ones engaging in the co-dev market. According to our survey, 16% of studio workers (who aren't co-dev) said their companies have offered or provided co-development services sometime in the past 12 months. The number increases to 23% for workers at older studios.

When asked why their studios are offering co-development services, responses ranged from needing additional income streams to liking the challenge of working within someone else's constraints.

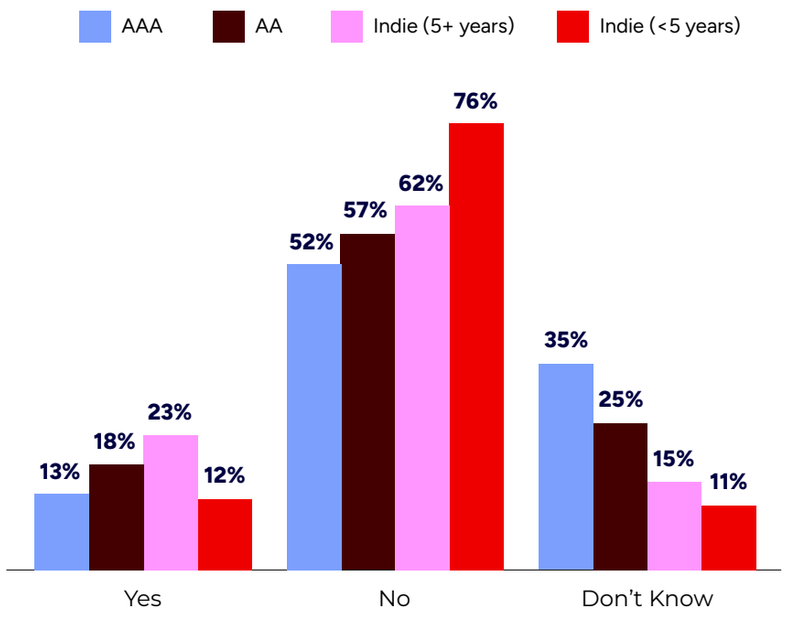
Has your company offered or provided any co-development services in the past 12 months?

16% Yes

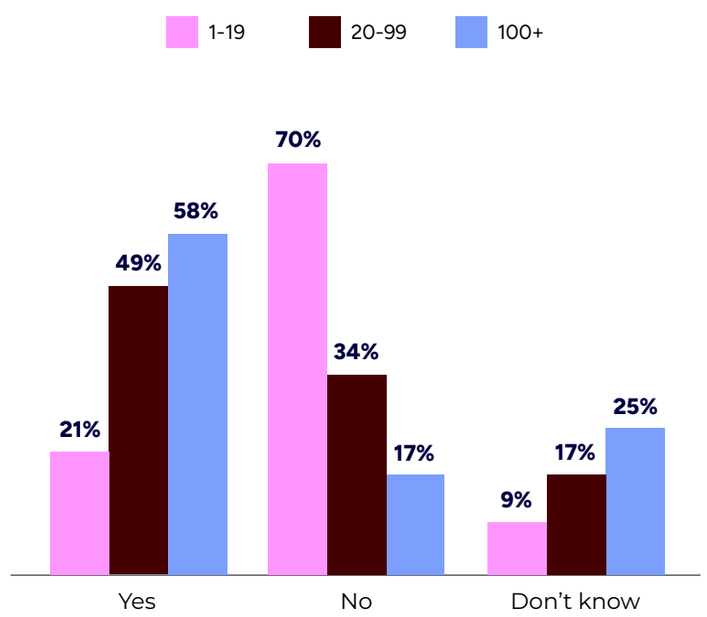
60% No

24% Don't know

By Studio Type



By Studio Size



Does your co-development studio make its own games?

48% Yes

23% No

20% Not yet, but we plan to

7% No, but we'd like to

2% Don't know

6 * LABOR

GAME WORKERS REPORT [LONGER HOURS] THAN DEVELOPERS

The Labor section (previously Advocacy) explores what it means to be a game industry professional today; covering the wider effects of overtime and crunch, new accessibility and DEI initiatives, and the game community's mental health and overall well-being.

We've expanded the hourly labor section to cover all studio workers, not just the people physically making the games. What we found is that overtime is not restricted to developers: It may be more common for everyone else in the game ecosystem.

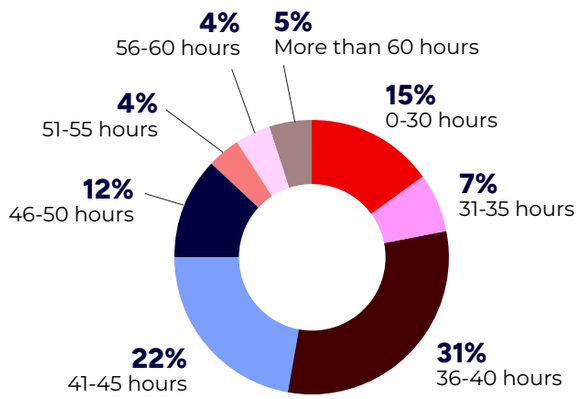
This year's survey separately tracked the working habits of developers and other game industry workers—meaning those in marketing, business, training, research, and other related fields. They will be referred to as game workers for the remainder of this section.

We also returned the working hours choices to their previous versions, following audience feedback. This will mean we have one more year without year-on-year comparisons, but the data will be more accurate and consistent going forward.

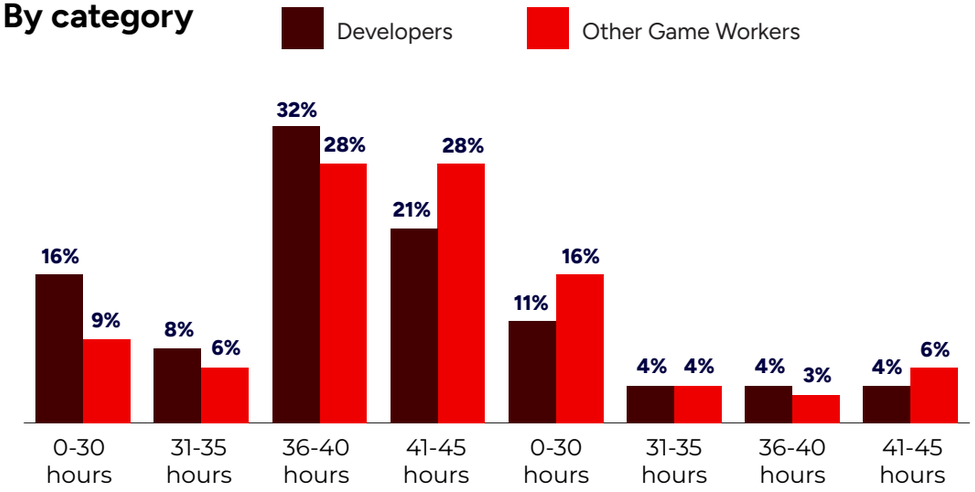
Fifty-six percent of developers reported working 40 hours or fewer every week on average. Fifty-seven percent of game workers said they've worked more than 40 hours per week on average, with 28% working an average of 41-45 hours per week, compared to 21% of developers. If you look specifically at game workers, two-thirds (65%) reported 41+ hour workweeks.

On average, how many hours per week have you worked over the past 12 months?

Overall



By category



When looking at all respondents, longer average working hours were more common for men, 45+ year olds, and those working in marketing, business services and operations, and game production. Fewer respondents who live in the United States (52%) or work for a company based in the United States (51%) are capping at 40 hours per week, compared to those who work or live outside the US (56%). However, they're all still in the majority.

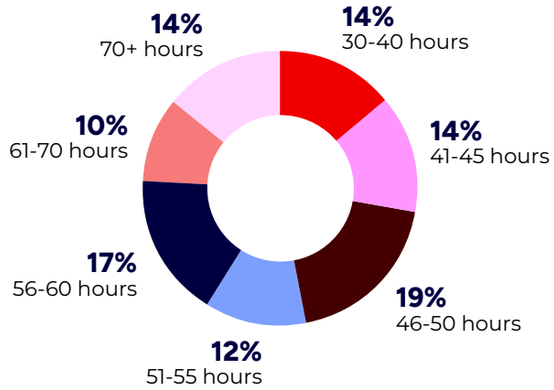
When it comes to the maximum number of hours, 86% of developers and 87% of game workers said they have, at least once, worked over 40 hours in a single week. Studio workers were more likely to work over 60 hours (30%) or 70 hours (18%), compared to 23% or 13% for developers.

For those who've worked over 40 hours at least once in the past year, we asked them to identify the main reason for their extra hours. Forty-six percent of respondents said they wanted or needed to work longer; 16% were encouraged or pressured to; 11% have more than one job or multiple contracts; and 9% are working on their own side projects in addition to their regular jobs. These numbers were relatively consistent for developers and other game workers.

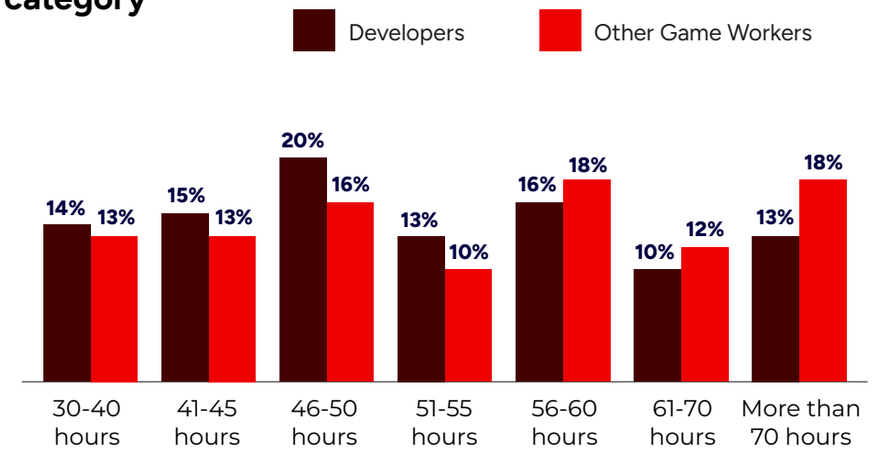


What is the maximum number of hours you have worked in a single week in the past 12 months?

Overall



By category



[TWO-THIRDS] SAY THEIR JOBS HAVE IMPACTED THEIR MENTAL HEALTH

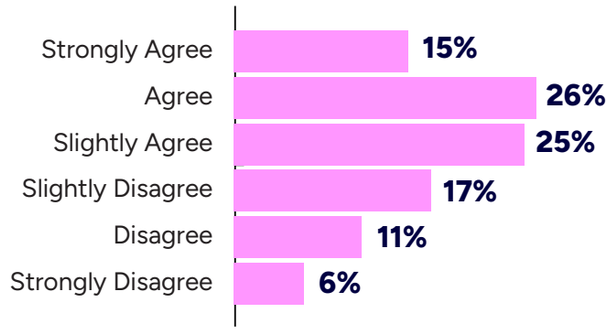
Extensive overtime and crunch are not the only indicators of a potentially negative work environment. There are many factors that go into someone's health and well-being on the job—including their work-life balance, mental health, and overall satisfaction in the work they do.

Sixty-six percent of respondents said they maintain a healthy work-life balance, and 70% said their workloads are manageable within their work hours. The numbers were relatively consistent between different job and company types, as well as where they currently live and work.

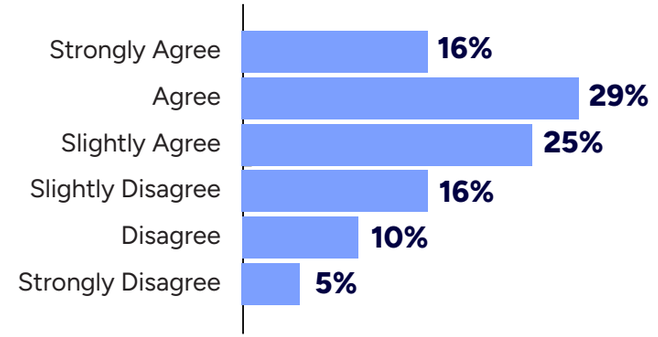
But two-thirds (65%) said their mental health has suffered because of their job over the past 12 months, with one-third (32%) saying they "strongly agree" with the statement. This is especially impacting people who are unemployed (81% agree overall, 52% strongly agree); as well as currently employed respondents who'd been laid off sometime in the past two years (73% agree overall, 39% strongly agree). The numbers were also lower for respondents outside of North America (58%).

To what extent do you agree with the following statements:

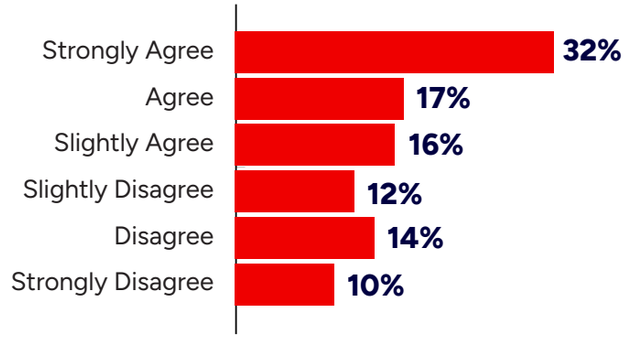
"I maintain a healthy work-life balance."



"My workload is manageable within my scheduled work hours."



"My mental health has suffered due to my job over the past 12 months."



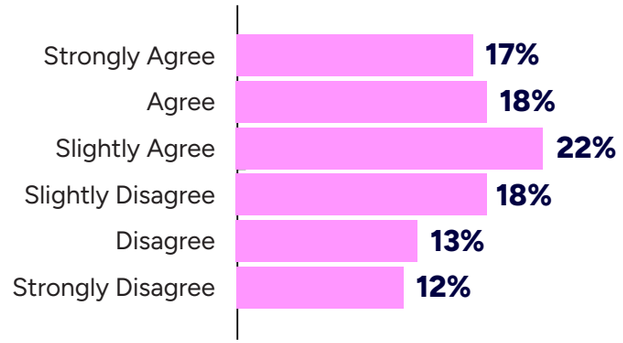
Still, their love for what they do runs deep. Two-thirds of respondents (66%) said their identity and self-worth are tied to their work in games, with higher concentrations among 25- to 34-year-olds (74%), people who identify as LGBTQ+ (73%), and those based outside of North America (73%).

Eighty-six percent reported getting more fulfillment working in games than they would in another industry, with 44% saying they strongly agree; increasing to 90% overall (and 50% strongly agree) for unemployed respondents.

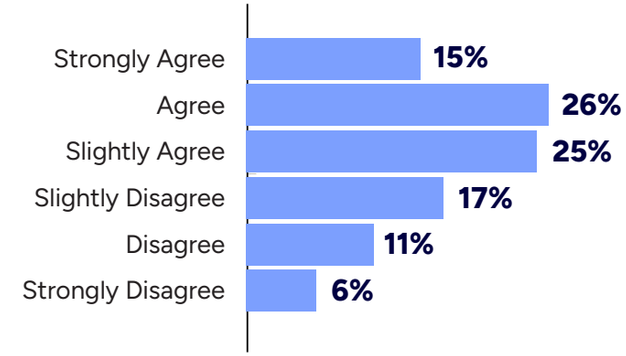


To what extent do you agree with the following statements:

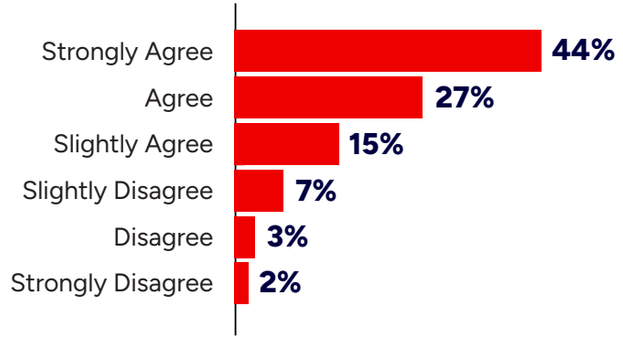
"My employer actively supports my mental health and well-being."



"My identity and sense of self-worth are tied to my work in games."



"I get more fulfillment working in games than I would in another industry."



UNION SUPPORT STAYS CONSISTENT; INTEREST IN JOINING ONE [DECLINES]

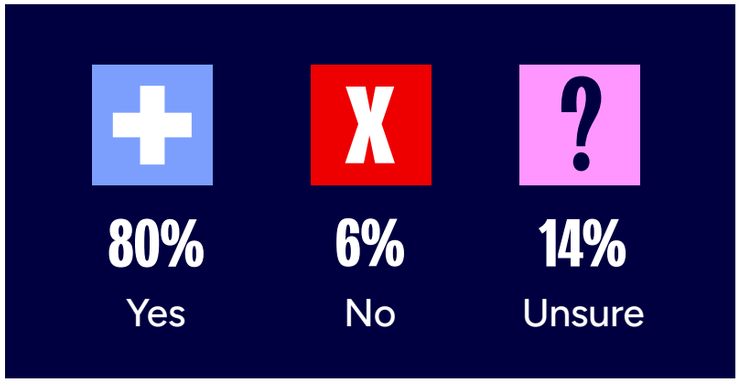
American workers are still largely in favor of unionization, but we could be seeing early signs of a drop in interest.

According to our survey, 80% of US-based respondents are in favor of unionization, down slightly from last year (82%), though still within the margin of error. Six percent were opposed, and 14% were unsure. Much like last year, union support was higher among workers making under $200,000 per year, people who'd been laid off sometime in the past two years, and those younger than 45 years old.

Though support hasn't changed much, engagement has: Fewer respondents said they're interested in joining a union, going from 62% last year to 55% this year (58% for studio workers). Part of this can be attributed to the fact that more respondents are current union members: 13% of AAA studio respondents reported being part of a company-wide union, which brought the total for all respondents to 5% (up from 2% last year). However, we're also seeing that 20% of survey takers are not in a union and aren't looking to join one, up from 16% last year.



Do you support the unionization of game industry workers?



Are you part of a union?

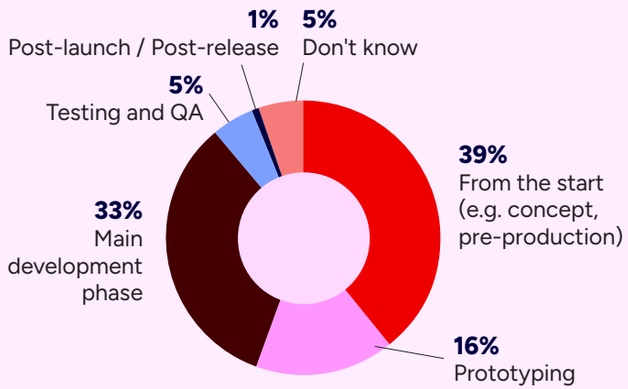
55%	No, but I'm interested
20%	No, not interested
10%	Yes, an industry-wide union (e.g. United Videogame Workers-CWA)
5%	Yes, a company union (e.g. Activision Quality Assurance United-CWA)
10%	N/A

ACCESSIBILITY FEATURES FACTOR IN [EARLY ON]

Twenty-eight percent of surveyed developers said they directly work on accessibility features in games, down from 33% last year. Using the most recently available ESA Accessible Games Initiative list as a guide, we found the top accessibility features being implemented are basic input remapping (64%), color alternatives (57%), difficulty levels (51%), and clear text and multiple volume controls (48% each).

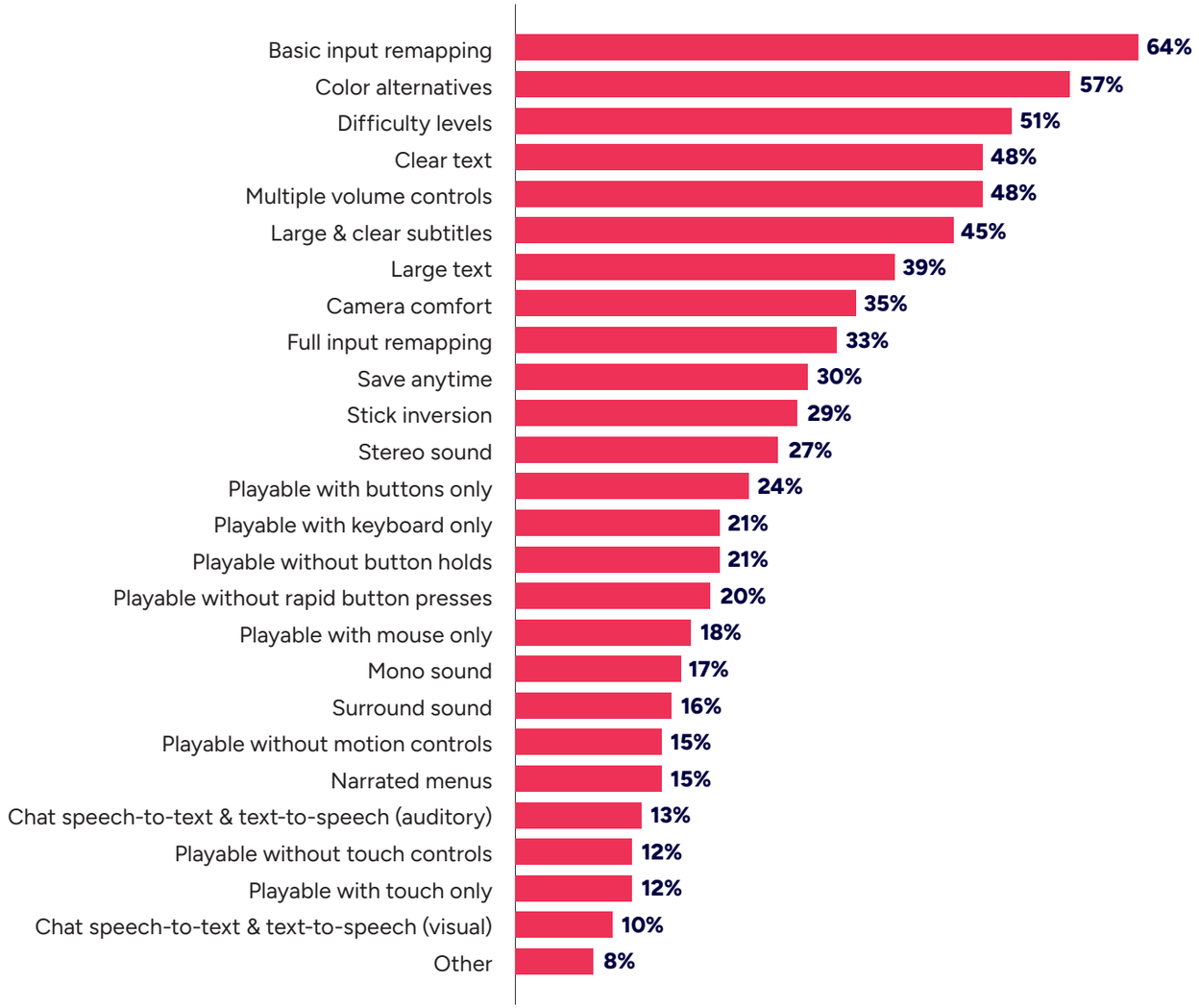
We also asked these developers when accessibility features are being discussed or implemented in the development process. Most respondents said it's either during the pre-production (39%) or production (33%) phases, followed by prototyping (16%), testing/QA (5%), and post-launch (2%).

At which stage is the team considering accessibility in design?



What features are you working on, or know are being implemented, for your next game?

(CHOOSE ALL THAT APPLY)



MAJORITY SAY THEIR GAMES PROMOTE DIVERSITY; MOST SEE [GAPS] IN THE INDUSTRY

The game industry has both acclaims and shortcomings when it comes to diversity, equity, and inclusion (DEI). It is a space where people from marginalized communities can bring their stories, their cultures, and their worldviews to life. However, our demographics data has consistently shown that the industry remains largely white and male. This dichotomy was made clear in this year's survey.

Sixty-one percent of US-based respondents said their most recent games promote the inclusion, representation, or perspectives of marginalized communities. Although they were twice as likely to say their games somewhat (40%) promote diversity instead of a lot (21%), it shows at least some commitment to diverse storytelling. But things look different behind the scenes.

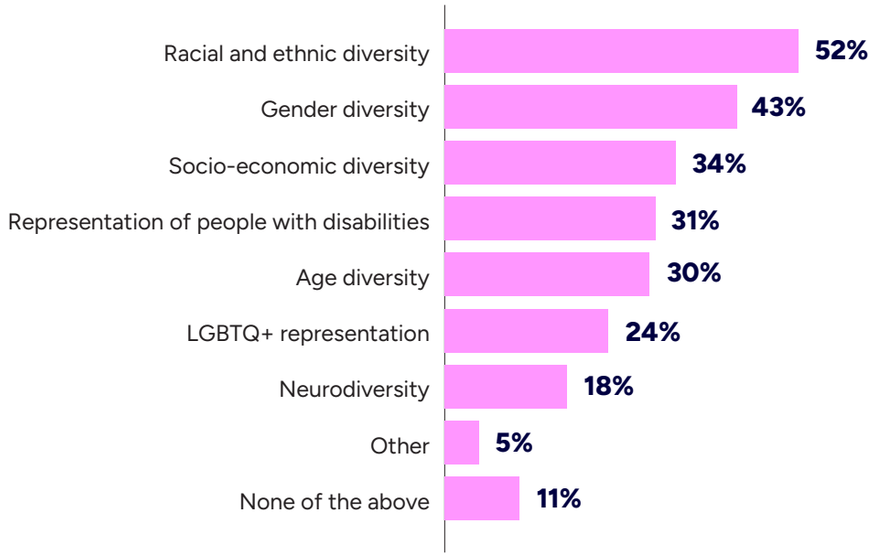
When asked to select which areas of inclusion they think need improvement, 11% said "none of the above," compared to the 89% who made at least one selection. A majority (52%) said racial and ethnic diversity was the biggest issue, followed by gender diversity (43%), socio-economic diversity (34%), representation of people with disabilities (31%), and age diversity (30%). Some of the additional suggestions in the open comments were representation for working parents and body size diversity, and a few said they wanted to choose "all of the above."

To what extent does the narrative/design of your most recent game promote the inclusion, representation, or perspective of marginalized communities?



In the game industry, which areas of inclusion are most in need of improvement?

(CHOOSE UP TO 3)



CLOSING THOUGHTS

Beth Elderkin

This year, I wanted to close our report a little differently. We asked respondents if they would be comfortable telling us what they love about working in games, despite the industry's challenges. Almost 2,000 of them took part. Every response I read was a journey into that person's heart and mind. And what I found was love.

Love for gaming's creativity and artistic freedom; working with amazing, talented, and like-minded people; seeing players find joy in stories they helped create; and so much more. For many people in the industry, it's not just a job; it's a calling. They're fulfilling a lifelong dream.

But there are those for whom the dream is dying. Several respondents shared how they've fallen out of love with games, largely thanks to the challenges previously discussed in this report. Others noted how their passion can sometimes be taken advantage of. It's a reminder that love, while important, isn't enough on its own.

I've shared some of their thoughts below, and I would like to close with mine:

> When I'm playing games, I'm in a world that is not my own. Everything I see, hear, discover, and learn is built by years of hard work, artistic and technical prowess, and the power of the human spirit. There are games that are silly and fun; and then there are those that change me as a person. If I can help the people whose games have helped me, I consider that a life well lived."
>
> - BETH ELDERKIN



IN [YOUR] WORDS

What do you love about working in games?

"Games are the only media where you get to be part of the process instead of an observer. They are made by the best and the brightest. Every game is a miracle."

- SENIOR EMPLOYEE (GAME DESIGN), ILLINOIS

"I want to entertain people. It's the main way I know how to make the world a better place."

- ENTRY-LEVEL (GAME DESIGN) NEW ZEALAND

"Nothing is better than watching someone's face light up in joy because they are playing something that changes their life. I will chase that high the rest of my days, if I can. I will be old and gray and senile rubbing two dice together and spouting nonsense in the nursing home about playtesting a frog dentures game about capitalism."

- SENIOR EMPLOYEE (GAME DESIGN), WASHINGTON STATE

"It's good to make things that are beautiful."

- OWNER/FOUNDER (INDEPENDENT STUDIO), FINLAND

"Being able to create the same sense of excitement and wonder that I experienced as a child."

- CONTRIBUTOR (AUDIO), JAPAN

"It's where my heart lives."

- CONTRIBUTOR (MARKETING / PR), VIRGINIA

"It's what I've always wanted to do, and I like knowing 10-year-old me would be proud of what I'm doing."

- CONTRIBUTOR (PROGRAMMING), MASSACHUSETTS

IN [YOUR] WORDS

What do you love about working in games?

"The people. Almost everyone I have met or worked with in the games industry have been amazing. The people are the ones who truly make the game industry what it is. People are so friendly and extremely inclined to help each other out no matter what."

- ENTRY-LEVEL (PRODUCTION), SWEDEN

"When I was little, my motivation was the idea of making people happy. Since then, it's remained the same! I'm so glad I can make something that is not only close to my heart, but allows me to give someone a good time. I just really love this art—no matter what it takes, I will continue fighting for it."

- STUDENT (PROGRAMMING), GUATEMALA

"I love to make games. I love the process, the collaboration, the rich interplay of disciplines. I love to tell stories that can only be told through interactive media. There's nothing else I'd rather do with my life, and I will fight every day to make it not just survivable, but livable."

- CONTRIBUTOR (GAME DESIGN), WASHINGTON STATE

"I love making worlds that people can lose themselves in – and, more often, find themselves in."

- SENIOR EMPLOYEE (GAME DESIGN), CANADA

"I was made to do this. This is where I belong. If they won't hire me, I'll do it myself."

- SOLO DEVELOPER, NORTH CAROLINA

"Games have always been a big part of my life and I love being able to be a part of their creation."

- ENTRY-LEVEL (PRODUCTION), CZECHIA

IN [YOUR] WORDS

What do you love about working in games?

"Game development has been, until recently, a creative industry where you could actually make money. Now, profitability is very challenging and I'm worried about the future. I've always wanted to be involved in a creative industry and hope game development can survive for smaller players."

- OWNER/FOUNDER (INDEPENDENT STUDIO), CANADA

"I heavily disagree with this question even being included. I know exactly how such answers will be used. So pass."

- FORMER SENIOR EMPLOYEE (GAME DESIGN), CALIFORNIA / LAID OFF TWICE IN PAST 2 YEARS

"Well, I guess that question is worded perfectly. I think most of us don't enjoy working in games these days. We love making games, yes, but working in games has now become somewhat toxic. Not like social media toxic, more like we've lost control over our own medium."

- SUPERVISOR (GAME DESIGN), NEW ZEALAND

"I used to love the the idea that in our industry anything could happen and anyone could be part of it. Sadly, I don't feel like that anymore."

- MANAGER (GAME PUBLISHING), BRAZIL

"It was my passion and I took a lot of pride in what I did. It was really difficult to leave the industry and switch to teaching. I just felt like I had to for my family and my own stability."

- EDUCATOR (VISUAL AND TECHNICAL ARTS), TEXAS

"I'm sorry to say that I don't love working in games anymore. My experience in the industry has been largely negative, and the future of the industry for myself as a worker looks pretty bleak. I regret ever pursuing this career path in the first place."

- ENTRY-LEVEL (QUALITY ASSURANCE), VIRGINIA

STATE OF THE GAME INDUSTRY: NOVEMBER 2026 {COMMITTEE}



MORGAN BRODSKIY

SENIOR LEAD PRODUCER,
BLIZZARD ENTERTAINMENT

Morgan Brodskiy has worked across games in a variety of areas - from indie to AAA, from event planning and management to deep in development. She's currently Senior Lead Producer on Diablo IV at Blizzard, and the Event Chair for Boston GameLoop.



BOB DE SCHUTTER, PHD

PROFESSOR OF GAME DESIGN,
NORTHEASTERN UNIVERSITY

Bob De Schutter (MFA, PhD) is an award-winning game designer, researcher, educator, author, and advocate for meaningful play in later life. He leads initiatives on games for age-friendly game design, intergenerational play, and health, and directs Northeastern's graduate program in Game Science and Design.



AMARI DOSHI

PHD RESEARCHER,
UNIVERSITY OF ST. ANDREWS

Amara Eden Doshi is a PhD researcher at the University of St Andrews, investigating the development, adoption, and implications of generative AI in the games industry.



DAVID JAGNEAUX

HEAD OF 80 LEVEL

David Jagneaux is the Head of 80 Level, where he oversees editorial strategy, audience growth, content development, and the publication's broader direction.



ELIZABETH KILMER, PHD

CLINICAL PSYCHOLOGIST; SENIOR RESEARCH, **TAKE THIS, INC.**

Elizabeth Kilmer, PhD is a licensed clinical psychologist and researcher focused on the broad intersection of games and well-being. As Senior Researcher at Take This, she leads research and workshops helping game industry professionals build healthier, sustainable practices.



LAINE NOONEY

ASSOCIATE PROFESSOR OF MEDIA INDUSTRIES, **NEW YORK UNIVERSITY**

Laine Nooney is an Associate Professor at New York University and a historian of computing and video games. They are the author of The Apple II Age: How the Computer Became Personal, co-host of the games industry podcast UNBOXING, and co-editor of ROMchip: A Journal of Game Histories.



VERONICA PESHTERIANU

COO, **SYSTEM ERA SOFTWORKS**

Veronica Peshterianu is the COO and Executive Producer at System Era, where she helps lead the studio behind Astroneer. She has worked on dozens of games and media projects across beloved franchises like Plants vs. Zombies, Halo, and The Sims, building teams and creative processes rooted in thoughtful collaboration.



AMIR SATVAT

GENERAL PARTNER, **1UP VENTURES**

Amir Satvat is a General Partner at 1Up Ventures and founder of ASGC, Always Supporting the Games Community, a volunteer initiative providing free career resources, coaching, and support to games professionals worldwide.

AUTHOR



Beth Elderkin serves as content marketing manager for GDC Festival of Gaming, part of Informa Festivals, helping to tell the stories of the people and ideas shaping the game industry. She's also the primary author and researcher for the annual GDC Trends Report and GDC Insights.

DATA SUPPORT



Cheryl Ball is a senior research analyst for Omdia, part of Informa TechTarget, that frequently collaborates with GDC Festival of Gaming. As part of Omdia's research team, she works on survey creation and ensuring data quality and integrity through survey tools and data creation.

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