State of the Game Industry 2022

Presented by

GDC

The past year has seen some struggles and surprises. The ongoing pandemic has bolstered talks about permanent remote work options and unionization. Reports of toxicity and misconduct have forced the industry to take a hard look at behaviors that have run rampant for too long. It's a time of transition—but if there's one thing we know about game developers, it's that they're always up to the challenge.
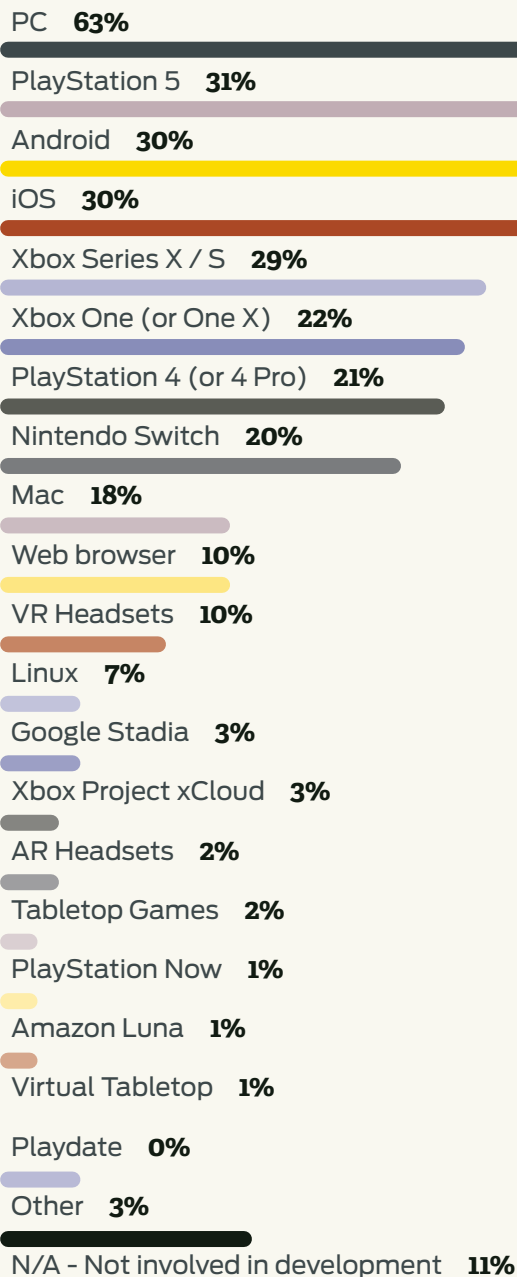
We asked over 2,700 game developers about their work, and their industry as a whole. We found developers are working to improve accessibility in games; they're mixed on the viability of Steam Deck; and they have strong feelings on bringing cryptocurrency or non-fungible tokens (NFTs) into the gaming sphere.

The 2022 State of the Game Industry survey is the tenth in an ongoing series of yearly reports that offer insight into the shape of the industry, marking a decade of growth and change. Thanks to all who participated for their thoughts and perspectives.

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PlayStation 5, Xbox Series X/S virtually neck and neck for current game development
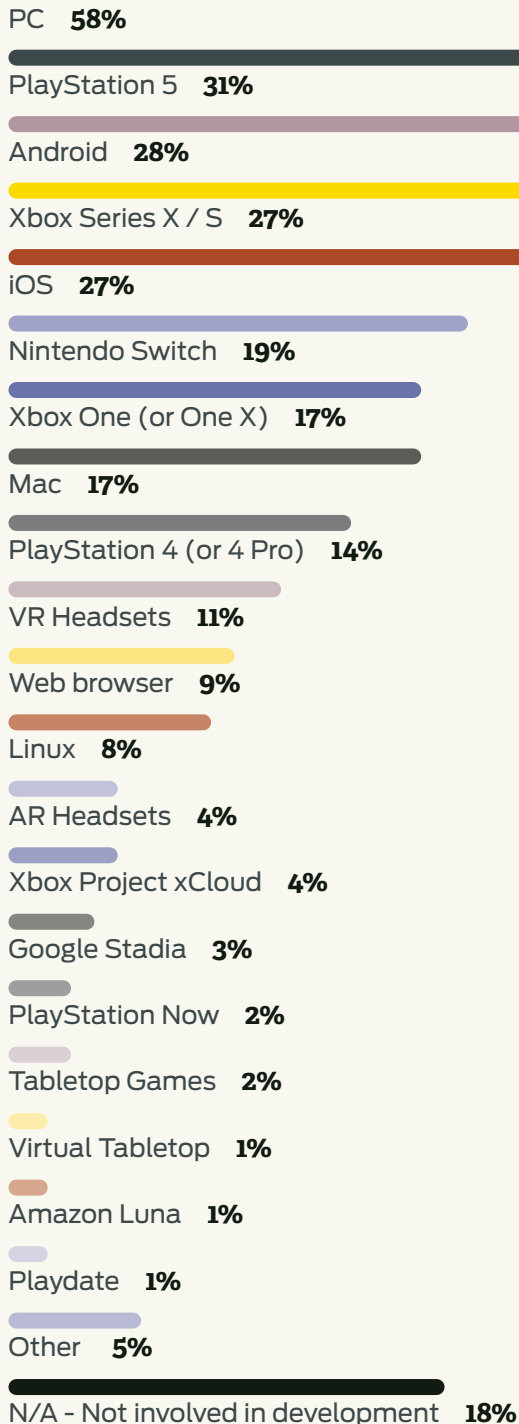
Each year, we ask game developers what platforms they're **currently developing games for**, and which platforms they'll be **developing their next games for**. Once again, PC has emerged as the most-popular platform for current games in development (63%) as well as next (58%) games. But when it comes to consoles, PlayStation 5 is the leading platform for current- and next-game development.

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

PC **63%**

PlayStation 5 **31%**

Android **30%**

iOS **30%**

Xbox Series X / S **29%**

Xbox One (or One X) **22%**

PlayStation 4 (or 4 Pro) **21%**

Nintendo Switch **20%**

Mac **18%**

Web browser **10%**

VR Headsets **10%**

Linux **7%**

Google Stadia **3%**

Xbox Project xCloud **3%**

AR Headsets **2%**

Tabletop Games **2%**

PlayStation Now **1%**

Amazon Luna **1%**

Virtual Tabletop **1%**

Playdate **0%**

Other **3%**
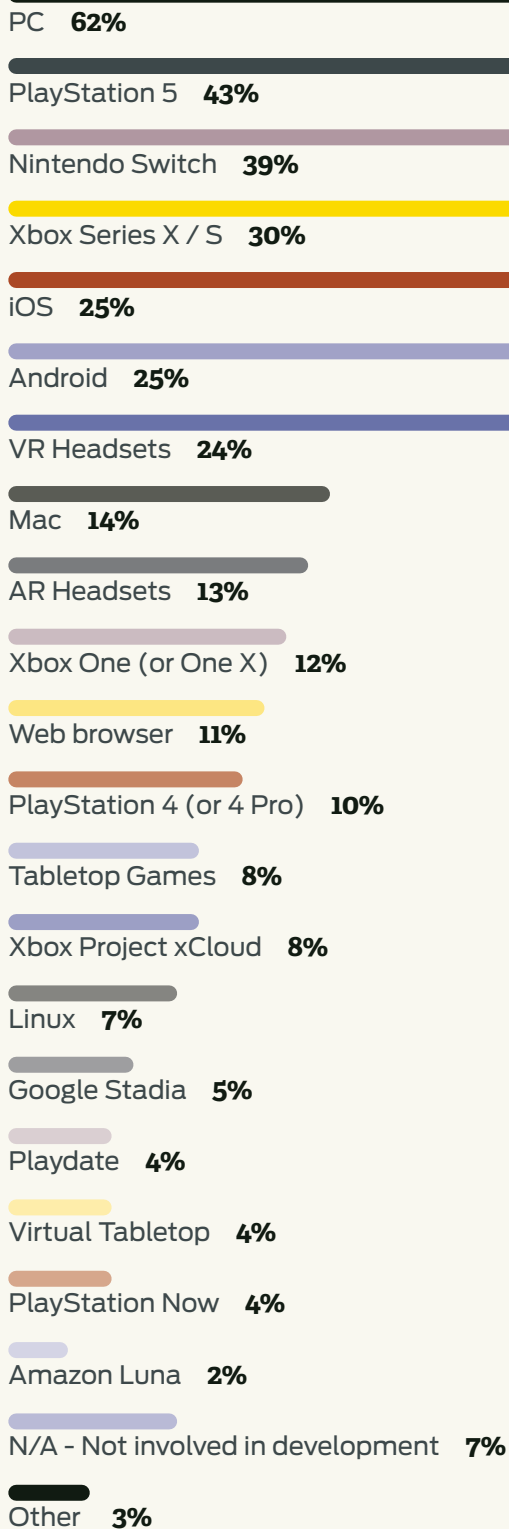
N/A - Not involved in development **11%**

The number of respondents currently making games for PlayStation 5 (31%) edged out Xbox Series X/S (29%), while on the mobile front, both iOS and Android garnered 30% each. For future games, the differences were more pronounced between PlayStation 5 (31%) and Android (28%) and iOS (27%), along with Xbox Series X/S (27%). Nintendo Switch slightly increased between 2021 and 2022, with 20% of respondents currently developing games for the platform.

Which platform(s) will you be developing your next project for? (Choose all that apply)

PC **58%**

PlayStation 5 **31%**

Android **28%**

Xbox Series X / S **27%**

iOS **27%**

Nintendo Switch **19%**

Xbox One (or One X) **17%**

Mac **17%**

PlayStation 4 (or 4 Pro) **14%**

VR Headsets **11%**

Web browser **9%**

Linux **8%**

AR Headsets **4%**

Xbox Project xCloud **4%**

Google Stadia **3%**

PlayStation Now **2%**

Tabletop Games **2%**

Virtual Tabletop **1%**

Amazon Luna **1%**

Playdate **1%**

Other **5%**

N/A - Not involved in development **18%**

PC leads overall interest as PS5 leads consoles

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

PC **62%**

PlayStation 5 **43%**

Nintendo Switch **39%**

Xbox Series X / S **30%**

iOS **25%**

Android **25%**

VR Headsets **24%**

Mac **14%**

AR Headsets **13%**

Xbox One (or One X) **12%**

Web browser **11%**

PlayStation 4 (or 4 Pro) **10%**

Tabletop Games **8%**

Xbox Project xCloud **8%**

Linux **7%**

Google Stadia **5%**

Playdate **4%**

Virtual Tabletop **4%**

PlayStation Now **4%**

Amazon Luna **2%**

N/A - Not involved in development **7%**

Other **3%**

The platforms that developers were **most interested in making games for** held steady this year. PC stayed on top, increasing from 58% to 62% this year. In the subsequent spots, we have PlayStation 5 (43%), Nintendo Switch (39%), Xbox Series X/S (30%), and iOS and Android (25% each). Interest in VR headsets decreased slightly (24%), along with augmented reality headsets (13%). A couple of the newest players—Playdate (4%), Amazon Luna (2%), and Virtual Tabletop platforms like Roll20 (4%)—don't seem to be catching on quite yet.

A Look Back at 10 Years of SOTI

This is the 10th iteration of GDC's State of the Game Industry (SOTI) report, so we decided to take a glance at game platforms over the years—to see what trends have surged, which platforms have fallen, and what has surprised us the most over the past decade. Here are a few highlights:

PC Is the House Favorite
Game developers have their star performer. PC has become the consistent top platform over the years, rising from 48% of current game development in 2013 to 63% in 2022.

Mobile Took the Plunge
Back in 2013, mobile was the hot trend in gaming, with 55% of developers making games for phones and other mobile devices. Now? It's down by almost half from its heyday, sitting at 30% in 2022.

PlayStation Beats Xbox
The war of the platforms has a winner: It's PlayStation. Over the past 10 years of SOTI surveys, the number of developers making PlayStation games has beaten the number for Xbox games in every year, except one—2014, the year after Xbox One and PlayStation 4 came out.

Has VR Hit Its Peak?
Virtual reality game development spiked in the mid 2010s, rising from 7% of games in 2015 to 24% just two years later. But that number has fallen almost all the way back, sitting at 10% for the past two years. Facebook's Meta and PlayStation VR2 could change things.

The Biggest Surprise
When GDC started the SOTI report in 2013, Nintendo was still a few years away from the stellar success of the Switch. The percentage of developers making games for 3DS or WiiU were in the low single digits. But then, rumors of Nintendo's next-gen console started to surface. The Nintendo Switch turned things around, with 20% of developers now making games for the platform in 2022.

Steam Deck met with both excitement and uncertainty

Following the failure of the Steam Machine (aka the Steam Box), Valve Software is taking a cue from Nintendo Switch with the Steam Deck—a portable, Linux-based handheld-dockable hybrid set for release in early 2022. We asked respondents whether they felt the Steam Deck would be a viable game platform in the long run. The results were mixed: 36% said yes, 17% said no, and 47% were unsure.

Do you think Valve Software's Steam Deck will be a viable game platform in the long term?

Yes **36%**

No **17%**

Unsure **47%**

Vox Pop: What are your thoughts on the Steam Deck and what do you think its impact will be?

"This is a product gamers have wanted for a long time. Now that the hardware is possible at a reasonable price—and it has Valve's support—it will be a success."

"The Steam Deck will be huge for smaller independent developers who struggle to get their games on Switch and other handheld devices."

"It's nifty, but not revolutionary."

"Having owned a Steam Link, I am familiar with Valve's issues in hardware development and service. While I think that the Steam Deck has potential, I don't think it will deliver anything revolutionary that isn't currently being delivered by the Switch. Controllers are incredibly difficult to design and produce, and I don't see Valve suddenly coming up with a compelling and accessible model that works for anyone beyond a niche market that is technology focused. It's a shame because I would love to see Steam become more accessible. And as someone who is looking to replace their gaming PC, the proposition was appealing until I started to dig into the details."

I'm skeptical of its ability to find an audience beyond devoted hardware early-adopters."

"I'm skeptical of its ability to find an audience beyond devoted hardware early-adopters."

"I'm pre-ordered and interested in seeing what the experience is like."
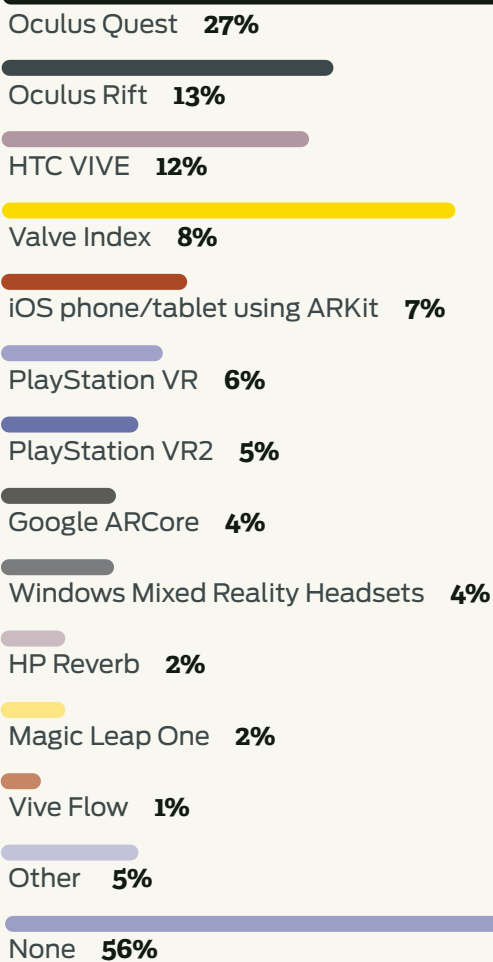
"I don't know what that is."

PlayStation VR2 captures interest, while Oculus Quest leads the way

The future of virtual and augmented reality gaming has been in flux for the past few years, and 2022 is no different. According to our survey, 42% of respondents said they were (or have been) involved in VR/AR game development. That's up from 38% last year.

However, that increase in developers doesn't appear to be impacting the number of games in development. We asked the 42% of folks who've worked on VR/AR games what platforms they were **currently developing** games for—56% of them said "None." That's an increase from 41% of developers last year. In addition, 52% likewise said "None" when asked about the VR/AR platforms they were releasing their next game on, up from 38% last year.

Which VR/AR platform(s) are you currently developing for? (Choose all that apply)

Oculus Quest   **27%**
Oculus Rift   **13%**
HTC VIVE   **12%**
Valve Index   **8%**
iOS phone/tablet using ARKit   **7%**
PlayStation VR   **6%**
PlayStation VR2   **5%**
Google ARCore   **4%**
Windows Mixed Reality Headsets   **4%**
HP Reverb   **2%**
Magic Leap One   **2%**
Vive Flow   **1%**
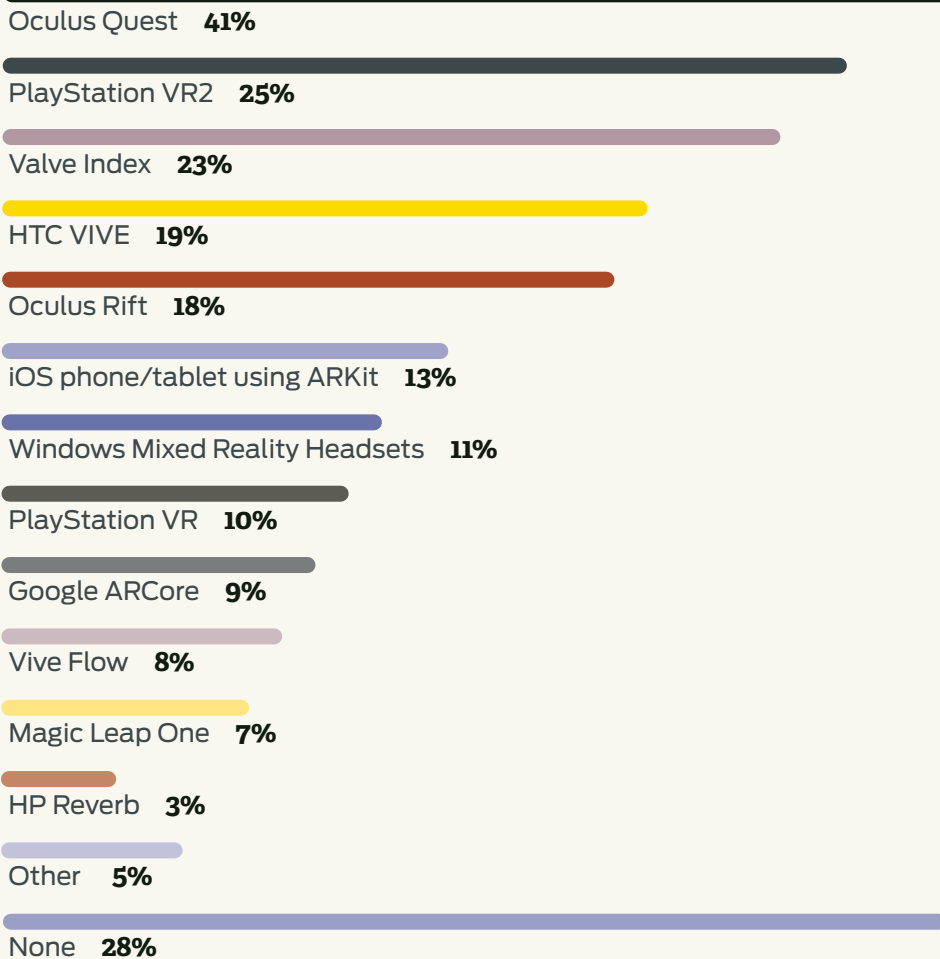Other   **5%**
None   **56%**

The Oculus Quest wireless headset remained the top VR/AR platform in 2022, with 27% of developers currently making games on that platform and 28% planning their next game for it. But enthusiasm for Oculus Quest might be waning, as 41% of developers said the platform is currently of interest to them—down from 52% in 2021. That said, Facebook's "Meta" rebranding and metaverse focus could change things for Oculus Quest in 2023
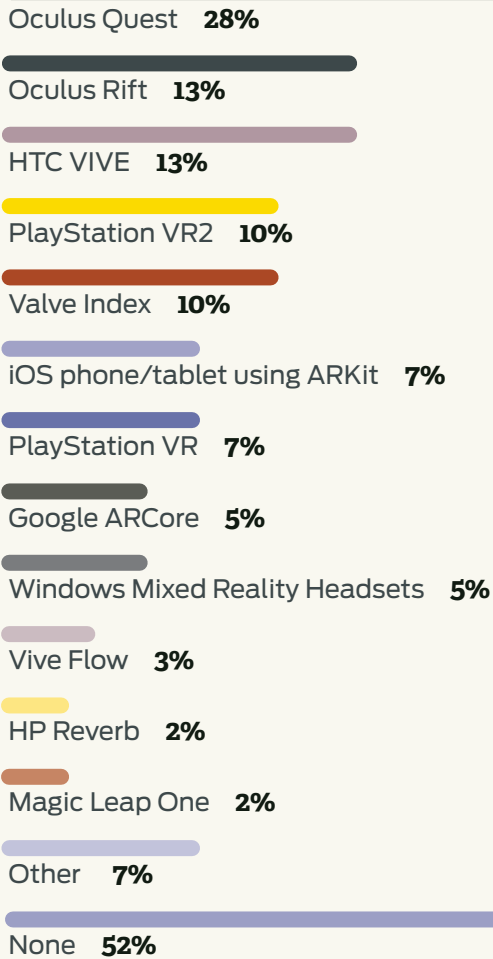
Note: *This survey was conducted prior to the Meta rebrand announcement.*

The newest arrival on the scene is the PlayStation VR2, PlayStation's next-gen VR console, set for release sometime in 2022. In our survey, 25% of developers said that was of **most interest** to them among VR platforms, and 10% said their next game would be released on PlayStation VR2. In comparison, 7% of developers were planning their next games for the original PlayStation VR.

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

Oculus Quest **41%**

PlayStation VR2 **25%**

Valve Index **23%**

HTC VIVE **19%**

Oculus Rift **18%**

iOS phone/tablet using ARKit **13%**

Windows Mixed Reality Headsets **11%**

PlayStation VR **10%**

Google ARCore **9%**

Vive Flow **8%**

Magic Leap One **7%**

HP Reverb **3%**

Other **5%**

None **28%**

Platforms that developers **expect to release their next game on** included Oculus Rift (13%) HTC Vive (13%), Valve Index (10%), and iOS phone/tablet using ARKit (7%). Every platform in the survey saw a decrease in development plans—except for PlayStation VR2, as it was the first year on the list.

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

Oculus Quest **28%**

Oculus Rift **13%**

HTC VIVE **13%**

PlayStation VR2 **10%**

Valve Index **10%**

iOS phone/tablet using ARKit **7%**

PlayStation VR **7%**

Google ARCore **5%**

Windows Mixed Reality Headsets **5%**

Vive Flow **3%**

HP Reverb **2%**

Magic Leap One **2%**

Other **7%**

None **52%**

Game development and the metaverse

The promise of the metaverse is growing in popularity in the game industry. One of its most-popular (and lucrative) components is user-generated content (UGC). But how many developers are actually participating in this field?

We asked respondents to tell us what UGC platforms they were developing or planning to develop content and/or experiences for. The vast majority (83%) said they were not involved at all. The remaining 17% of respondents were evenly split between Roblox (5%), Minecraft (4%), Fortnite (3%), Dreams (3%), and Core (2%). Among those who marked "Other" (6%), responses included: The Sandbox, VRChat, Unreal Engine, and "prefer not to answer due [to] confidentiality restrictions."

Even though a large majority of respondents were not involved in user-generated content, that doesn't necessarily reflect the potential of UGC and the larger metaverse concept. We asked respondents which companies/platforms were best placed to deliver on the promise of the metaverse. Of the companies listed, the most popular was Epic/Fortnite (17%), followed by Facebook (8%), Microsoft/Minecraft (8%), Roblox (6%), and Google (5%).

About one-third (33%) of respondents believe the metaverse concept will never deliver on its promise.

Note: This survey was conducted before Facebook's Meta rebrand was announced.

Interest in cryptocurrencies, NFTs grow, but game developers remain skeptical

One of the newest—and possibly divisive—additions to the industry are cryptocurrency and non-fungible tokens (NFTs). As more major studios announce their intention to add NFTs or crypto payment tools into their games, we wanted to know how widespread this practice was becoming and how game developers felt about it.

What is your studio's interest in cryptocurrency as a payment tool?

Very interested   **6%**

Somewhat interested   **21%**

Not interested   **72%**

Already using it   **1%**

What is your studio's interest in non-fungible tokens (NFTs)?

Very interested   **7%**

Somewhat interested   **21%**

Not interested   **70%**

Already developing them   **1%**

Over one-fourth (27%) of respondents said their studios were somewhat or very interested in cryptocurrency, and 28% said the same about NFTs. However, a majority of game industry professionals said their companies were not interested at all in cryptocurrency (72%) or NFTs (70%). The current implementation of both technologies is still very limited, with 1% of respondents saying that their studio already uses either.

When asked how they felt about the possibility of cryptocurrency or NFTs in games, a few called it "the future of gaming." However, a vast majority of respondents spoke out against both practices—noting their potential for scams, overall monetization concerns, and the environmental impact.

Vox Pop: What are your thoughts on the use of cryptocurrency or NFTs in video games and what do you think their impact will be?

"It's the wave of the future."

"How this hasn't been identified as a pyramid scheme is beyond me."

"I think it is a tech looking for a purpose. People will be interested in it as a gamble to make money, but there's not enough of a public demand for it to be an actual currency."

"Why do we need them? What benefit does it have putting these systems into our games? Who is using these things? It feels like a very small audience. And also, these technologies are still not using sustainable energy and are a target for money laundering. As a developer I feel deeply uncomfortable that there is a push for these. It feels entirely fueled by greed for more money because we read stories about crypto millionaires, when in reality all of it is extremely unstable and unethical."

> **I think it is a tech looking for a purpose."**

"We should collectively agree to ban the use of blockchain-based technologies in our industry because of their hugely negative environmental impact."

"Blockchain is a foundational technology that will transform organizations and accountability, but NFTs and cryptocurrencies in general are a scam."

"I think this is going to be a massive shift in the way we think about digital goods and ownership/monetization."

"NFTs and crypto are closely tied to the concept of the metaverse and I believe this to be intentional. The forces affecting interest (media, big companies) are betting on a new virtual life and to consume, we will need a safer and democratized virtual economy. This is where crypto will disrupt."

"I look forward to the gold rush turning into a dog pile and wish all involved maximum profit at any cost."

"I'd rather not endorse burning a rainforest down to confirm someone 'owns' a jpeg."

"Burn 'em to the ground. Ban everyone involved in them. I work at an NFT company currently and am quitting to get away from it."

"I personally am quite interested in NFTs and cryptocurrency, but many people in my studio and friend circle do not like them and won't develop for them. I think NFTs need to get a better reputation when it comes to [the] environment and art theft first, then it might be an interesting way to give digital content unique value."

"I'd be lying if I said that I don't think NFTs are, at best, stupid, and at worst, predatory and ecologically dangerous. Cryptocurrency, I think, can also be a sensitive thing to deal with. Both have had an immense amount of scams pop up in a very, very short while, and it makes me wonder if that trend will stay."

I think this is going to be a massive shift in the way we think about digital goods and ownership/monetization."

"They're going to drive a wedge right in the heart of this industry. It's going to become really clear what folks' motivations are, and it's not going to be pretty."

Social media leads discovery, marketing investments

In today's crowded marketplace, the right buzz can mean the difference between a hit and a bust. We asked our survey-takers what discovery methods they use to get the word out about their games, and how effective they thought each marketing strategy turned out to be.

Most respondents reported small investments in time or money across a variety of avenues—most notably pre-recorded YouTube videos, forums and email marketing (24% each), along with traditional press and bloggers (22%), real-time communications like Discord and Slack (21%) and Twitch streamers (20%).

There were also respondents that put moderate time or money investments into YouTube videos, media outlets, and real-time communications (20% each), but that time or money wasn't extended to email marketing (15%) or forums (13%). In fact, forums were seen as the least-effective marketing strategy based on weighted averages, with email marketing coming in a close second.

Social media was once again the most-popular form of marketing for game studios—25% reported moderate investment into platforms like Twitter or Facebook, and 15% made a large investment. A few noted how they're even getting into TikTok and Snapchat, with 19% saying they made a small investment in short-form video. However, 71% of respondents didn't report any investment into short-form video, making it the least-common discovery method this year.

Live events continued to take a hit, even as in-person activities have started to resume. About 58% of respondents didn't note any investments into live events, which was the same number as in 2021, up from 50% in 2020 and 42% in 2019 (prior to the COVID-19 pandemic).

On the other hand, simply "getting the word out" remained popular, with 14% having made a large investment into word-of-mouth campaigns. Just like in 2021, word of mouth was the second most-effective marketing strategy, based on weighted averages—the most-effective one was promoting on a platform's digital storefront, something 19% of respondents reported making a moderate investment into.

Accessibility in games on the rise

Accessibility has become an important topic among players of all levels, and the game development community is taking notice.

We asked respondents whether their current games are implementing any accessibility measures for those with sensory, motor, or other impairments. In previous years, more respondents have said "No" (48% in 2020, 42% in 2021) than "Yes" (28% in 2020, 31% in 2021)—but the reverse happened this time around.

Have you implemented any accessibility measures (for those with sensory impairment, motor impairment, or other impairments) into your current game?

Yes **39%**

No **36%**

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

In 2022, there was an increase in the number of developers who said their games were adding accessibility measures (39%) and a decrease in those who weren't (36%). It's the first time more respondents said "Yes" since the question was added to the survey in 2019. There's still a way to go, but accessibility options appear to be progressing.

When asked what game developers are doing to make their games more accessible, responses included: colorblind modes, re-bindable controls, closed captioning and descriptive text, dyslexia-friendly fonts, customizable difficulty options, motion sickness settings, and more. Here are further examples:

Vox Pop: Can you provide examples of how you changed your game to make it more accessible?

"We had employees get an accessibility certification, instilled [a] new process on design teams to include accessibility in design, appointed specific people on teams to lead those considerations and bring them up in meetings, and worked with our accessibility and disability ERG [employee resource group]."

"Haptic feedback in PS5 to assist with deaf/[hard-of-hearing] players. You no longer have to hear audio because you can feel it."

"Our standing VR experience has accommodations for users in wheelchairs."

"Because we have a day/night cycle, we implemented an 'always daytime' feature for those that only have time to play at night or find visibility in the darker environment detrimental to their ability to play the game."

"Added subtitles and made puzzles solvable via audio cues."

"All our camera shake animations are procedural, so we are able to disable them through the options menu. Did a rendering consistency pass to fix cases where bloom could flash due to rendering bugs and potentially cause an epileptic risk."

> **Unfortunately there is still a lot of pushback in implementing accessibility features"**

"Our last game was for children with special educational needs. Since many kids were on the autism spectrum, we tried to limit the activity on the screen and took measures to direct their attention to the task at hand."

"Unfortunately there is still a lot of pushback in implementing accessibility features, but anytime the team wants to introduce a feature where the only difference is color I always remind them that we need a different way to communicate to players instead of just color (adding icons, changing shapes)."

Still work to be done on diversity and inclusion

Accessibility is one of many topics under the umbrella of diversity and inclusion in the workplace. With a majority of Western game studios dominated by cishet non-disabled white men, more companies have been working toward creating a more equitable and diverse workplace.

How successful do you think your studio's attempts at inclusion and diversity have been?

Not at all successful **6%**

Slightly successful **23%**

Moderately successful **42%**

Very successful **20%**

Extremely successful **8%**

We asked our pool of game industry professionals to gauge to what extent their studio focused on staff inclusion and diversity initiatives. This year, 57% of respondents said their studio's initiative efforts ranged from "a moderate amount" to "a great deal," which is slightly down from 2021 (60%). However, more people said "a great deal" (29%) than did last year (21%). Almost one-quarter (24%) said their studios had not focused on diversity or inclusion.

When we followed with how successful they found those efforts, a vast majority (94%) said they were at least slightly successful, while 6% said they did not find it at all successful.

Vox Pop: What specifically is your company doing to expand diversity and inclusion efforts?

"We are focusing on our recruitment, specifically writing our job posts to highlight what we're able to offer which will attract candidates who have diverse backgrounds. We've gone fully remote since the pandemic. We're working with charities who will enable us to reach candidates of diverse ethnic heritages."

"Remote work is a game-changer."

"Reduced reliance on seniority and 'shipped title experience' in hiring. Returnship program for women looking to re-enter the workforce."

"They have set up a committee in the last six months to promote D&I but nothing has perceivably been achieved or changed. If anything, the company has become less diverse as 3 women have left/are leaving."

"We believe in the content of the flask, not the flask itself. When interviewing, we want the best results. If your work is good, you are a team player and you have a growth mindset, you're in."

"Not enough. We're trying to hire more diverse people, but the vast majority of applicants are white, male, or both. We're not doing the kind of effortful outreach that is needed to really diversify our group."

> *We're not doing the kind of effortful outreach that is needed to really diversify our group"*

"Changing the way we write our job ads, run our interviews and networks we get in touch with. We offer language courses in te reo Māori as well."

"Screening potential hires for bullying or bigoted online interactions."

"Wouldn't we all like to know, instead we're being sued for discriminatory employment practices while being constantly reassured by executives that they totally don't stand for that sort of thing."

"Stop talking about it and just do it."

Game studios engage in social activism

The rise in movements like Black Lives Matter, Stop Asian Hate, and the climate crisis conversation has resulted in an expectation that companies do more to engage in the community.

In the past year, to what degree has your studio taken part in any activism or social justice movements?

A great deal **8%**

A moderate amount **20%**

A little **24%**

None at all **49%**

This year, we asked game industry professionals if their studios have participated in any activism or social justice movements within the past year. Over half of respondents (51%) said their studios had done some form of activism—with many citing Black Lives Matter public statements or climate change awareness—while the remainder (49%) said no.

We also asked which studios had focused on environmentalism, sustainability, or carbon offsetting within their companies in the past year. In this case, a majority (55%) said their studios had done "none at all." Among those who have, 23% said "a little" and 14% replied "a moderate amount," while only 8% of respondents said their studios had done "a great deal" to address climate change.

In the past year, to what degree has your studio focused on environmentalism, sustainability, or carbon offsetting?

A great deal **8%**

A moderate amount **14%**

A little **23%**

None at all **55%**

Vox Pop: What activism or social justice movements has your studio taken part in, and what (if any) changes came as a result?

"Sponsored Game Devs of Color expo. Raised money for Comer Children's hospital. Promoted employees' stories for LGBTQ pride month, Hispanic Heritage month, AAPI Heritage month and the Stop Asian Hate movement, and more."

"Had some internal support for BLM, time off after the insurrection, time off to go vote. Really established the culture and the idea that no art is apolitical."

"Local social unrest. The changes were a new constitution for my country."

"Allowing two days leave a year specifically for 'action days'—voting, engagement with issues, and causes."

"The only thing we took part in was a comment about the mass graves created by the Residential School System in Canada. I'm not sure much came of it in the studio itself."

"Our game is about dementia, so we worked with Alzheimers UK charity on events. We were also part of the itch.io Indie Games for Palestine bundle."

"BLM and supporting Climate Change initiatives. Climate change and finding ways to curb it right now is figuring prominently in our next game."

"We participate in food bank supplies and funding for a local homeless shelter."

"The studio paid minor lip service to the BLM movement due to employees insisting and staking a claim. The end result is that the company is now unlikely to ever promote any social justice movements in the future due entirely to the discomfort the studio head had with doing even the most minimal, effortless work."

"George Floyd, Palestine. No forward progress. Death threats."

Vox Pop: What sustainability measures has your studio taken part in, and what (if any) changes came as a result?

"We gave up our office. Our next major project is a response to climate change."

"We do have blackout Thursdays. At 3pm everything non-critical gets turned off, we gather and talk shop until home time. There is a strict recycle, upcycle and reuse policy. Some of the desks are hand built from pallets and other desks. We have indoor hydroponics and vertical towers growing a few things. This [is] the way to go. People are happier, most of us grow and upcycle things in our personal lives. Try it."

"We're now carbon neutral, we've planted trees after a Green Global Game Jam, and fostered sea turtle releases."

"We organized the E-Africa Challenge to educate creatives on sustainability issues so they can tackle them with their creative skill sets."

"We have applied to join the Playing for the Planet initiative at the UN and are looking at ways to reduce our carbon footprint, both from our internal development and company as well as from our players."

> *"We're now carbon neutral, we've planted trees after a Green Global Game Jam, and fostered sea turtle releases."*

"Recycled Plastics in hardware production. No plastic in packaging. Carbon Neutral data centers. Infrastructure to support electric vehicles. Flexible work hours and work weeks to reduce commuting."

"Solar-powered transportation and solar-powered video production, including cameras and video production equipment on our travel show."

"All-electric studio with water and consumables that come from the local area and city tap."

"We purchase carbon offsets on our air travel and are attempting to make our HQ carbon negative by 2023."

"Green spaces in the studio, vegetarian meals, non-plane travel options for company trips."

"This hurts to say but our involvement with NFTs is counter to our beliefs on saving the environment. That said, we are all aware that any mining that takes place should be offset by the causes we are supporting. One of the biggest sustainability measures we've undertaken is to have everyone work remotely since the spring of 2020. We now all work from home which has eliminated a massive amount of miles on our vehicles. Add to that, we haven't been to a physical gaming event since PAX East in 2020, which has cut down on our collective airline miles. As a result, our team is much happier with being able to work in their pajamas."

Studios stave off closures amid pandemic

Despite the ongoing pandemic, the game industry has stayed resilient. Half of respondents (50%) said their companies expanded in terms of staff over the past year; 13% said it contracted, 33% said it stayed the same.

These figures are similar to the previous year, signifying that the pandemic and shift to remote work did not have a lasting impact on the workforce—with one exception, as 2% of respondents said their studios closed entirely (it was 1% last year).

Most game devs are working 40 hours or less per week, self-pressure drives longer hours

Work-life balance and crunch continue to be important topics in the game industry—especially with rising talks about permanent remote options or a four-day workweek. It looks like those conversations may be starting to have an impact.

We asked respondents how many hours per week (on average) they'd worked on video games over the past 12 months. For the first time since we started asking this question in 2019, 60% of respondents reported working 40 hours or less. The number remained stagnant at around 55% in previous years.

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

Hours	Percentage
0-20 hours per week	17%
21-25 hours per week	5%
26-30 hours per week	5%
31-35 hours per week	6%
36-40 hours per week	26%
41-45 hours per week	18%
46–50 hours per week	12%
51-55 hours per week	4%
56-60 hours per week	3%
More than 60 hours per week	3%

The 36-40 hour workweek once again proved to be the most-popular answer (26%) among respondents, with the biggest dip being among folks saying they work 41-45 hours per week on average (18%, down from 21%).

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

0-20 hours per week   **17%**

21-25 hours per week   **5%**

26-30 hours per week   **5%**

31-35 hours per week   **6%**

36-40 hours per week   **26%**

41-45 hours per week   **18%**

46–50 hours per week   **12%**

51-55 hours per week   **4%**

56-60 hours per week   **3%**
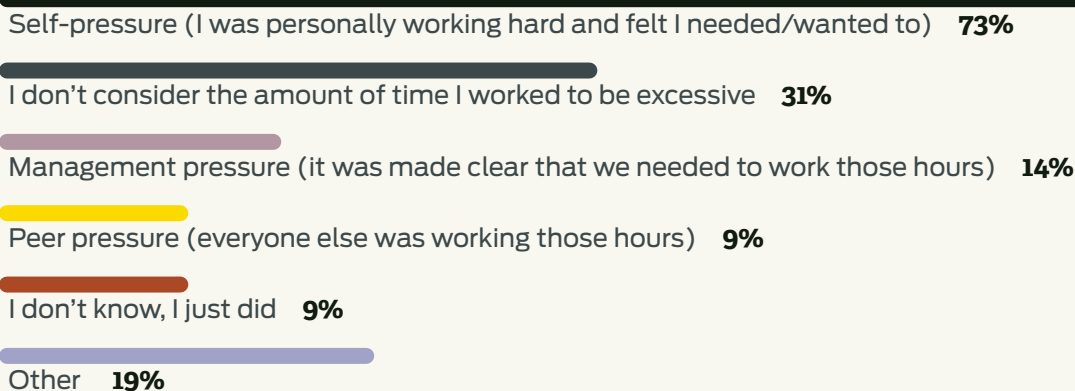
More than 60 hours per week   **3%**

In order to gauge the ongoing impact of crunch and overwork in the industry, we asked game industry professionals to tell us the maximum number of hours they'd worked on games in a single week over the past 12 months. Here is where we saw another surprising change.

For the first time since we started asking this question in 2019, the most-popular answer (15%) was 21-40 hours—no more than a standard workweek.

This was followed by folks working 46-50 hours (14%) and 41-45 hours (12%). However, the number of people working 86-90 hours per week (4%) or more (2%) during the height of overtime has remained unchanged.

Self-pressure continued to be the driving factor behind people working more than 40 hours per week—with 73% of respondents, which was the same as 2021. Interestingly, last year saw a huge increase in "self-pressure" as a reason (73% vs. 59% in 2020), which stayed consistent this year, meaning we could be seeing a shift from external to internal pressure. It may not be coincidental that it comes alongside the rise of work from home.

What were the major factors that caused you to work more than 40 hours per week? (Choose all that apply)
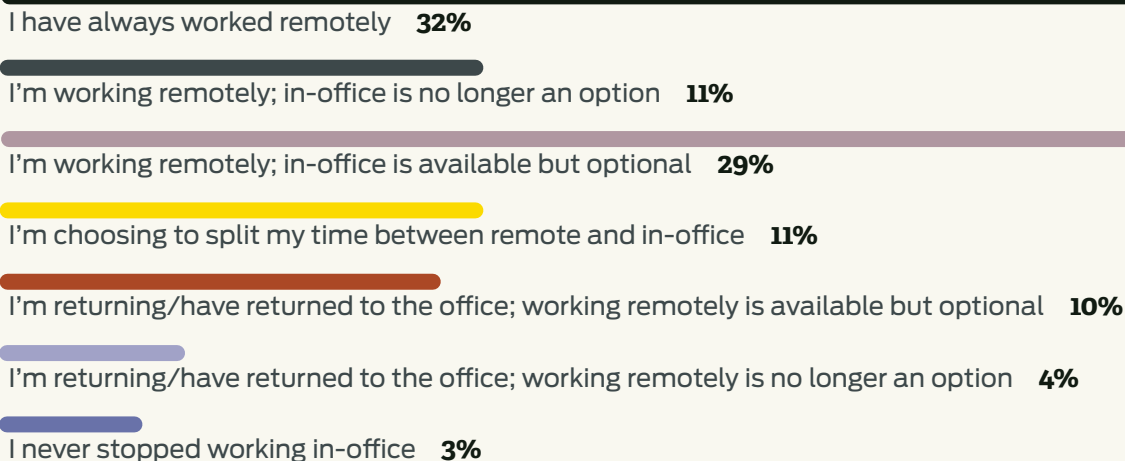
Self-pressure (I was personally working hard and felt I needed/wanted to) **73%**

I don't consider the amount of time I worked to be excessive **31%**

Management pressure (it was made clear that we needed to work those hours) **14%**

Peer pressure (everyone else was working those hours) **9%**

I don't know, I just did **9%**

Other **19%**

Remote working and the return to offices amid a pandemic

Last year, many respondents (66%) told us working from home during the pandemic was positive for their creativity or productivity, so this time we asked about their companies' attitudes toward an ongoing remote work option. Are they being given the choice to stay home, or are they pressured to return to the office?

Apart from respondents who said they've always worked remotely (32%), the most-popular answer was people working remotely with an option to go to the office (29%). This was followed by people splitting their time between office and home (11%), as well as those who say their companies no longer have offices and have become entirely remote (11%). A few developers (4%) said they're being forced to return to the office, despite the pandemic, while 3% never stopped going.

Note: This survey was conducted before the first known cases of the omicron variant were reported in South Africa.

What is your studio's policy/your status regarding working remotely vs. in-person at the office?

I have always worked remotely **32%**

I'm working remotely; in-office is no longer an option **11%**

I'm working remotely; in-office is available but optional **29%**

I'm choosing to split my time between remote and in-office **11%**

I'm returning/have returned to the office; working remotely is available but optional **10%**

I'm returning/have returned to the office; working remotely is no longer an option **4%**

I never stopped working in-office **3%**

Vox Pop: What was your studio's approach to workplace safety and efficiency during the pandemic, and has it been successful?

"I think my workplace has been very effective with this. Employees worked remotely during the height of the pandemic. Within the last year, offices have reopened but there is a vaccine mandate in place to go in. Employees continue to have the option of working from wherever they want."

"Our studio went fully remote during the pandemic, and it does not seem like we will ever return to our office. People without home work environments were given options for workspaces near them, and our meetings are 100% remote (even for co-located individuals). It has been quite successful."

> *Our studio went fully remote during the pandemic, and it does not seem like we will ever return to our office."*

"Everyone immediately switched to remote work, we sold our offices in San Francisco, and we stopped travel. The net result is a rise in revenue, a successful merger, and $350M in new funding from VCs. Remote work works."

"We switched from office to remote work and it's been great. So much so that many are requesting, and have been granted, permanent remote status."

"We quit one studio when they said they would require all employees to return to the studio physically. Our new studio has been much more accommodating."

"I was hired working remotely and the company keeps claiming they are going to force us back into the office. I have no interest in this and expect to quit when they attempt to force this."

"Yes it has been successful because all were infected with COVID."

"It had a plan to start having people come in waves, but then delta happened, which made some people return to working remote and I also think some people left because the messaging was very strange. At one point HR made it sound like it would fire people who don't want to return without saying that. So overall, I don't think it was successful but it has enforced masking in the office at all times."

"They picked an arbitrary date for us to come back in. Some got covid after that, so now we all have to wear masks."

"The majority of employees worked remote but some people have worked from the office during the past year anyway. The studio is now bringing everyone back to the office and has started organizing after-work events, unfortunately there are no mask or vaccine mandates and not everyone feels safe."

"It has been OK, but they should let people plan to work from home permanently, and let people move without cutting salary."

"We make games. This is easy to do remotely."

In Epic Games v. Apple, more devs side with Epic

Last year, the mobile game development community witnessed a major rift between Epic Games and Apple, over what respondents called Apple's "walled garden." Epic tried to get around Apple's App Store fees by making changes to the mobile version of Fortnite, directing users to purchase directly from Epic at a cheaper rate, instead of the App Store.

In response, Apple (and later Google Play) pulled the game from their storefront, so Epic Games sued Apple. The judge ultimately ruled that it was questionable for Apple to charge 30% revenue share and ordered them to let companies link to alternate payment options—but also fined Epic $12 million for breach of contract.

In the case of "Epic Games v. Apple," who was in the right?

Apple **8%**

Epic Games **34%**

Both **10%**

Neither **23%**

Not sure **25%**

We asked respondents who they felt was "in the right" in the case of Epic Games v. Apple. Over one-third of respondents (34%) sided with Epic Games, making it the most-popular response—while the least popular was Apple (8%). Nearly a quarter (23%) said neither side was right, 10% said both made good points, and one-fourth (25%) said they weren't sure.

Vox Pop: What impact do you think the Epic Games v. Apple case will have on the industry?

"Great question... If I knew I'd be rich!"

"At best it will make Apple a more open platform. At worst it could just make microtransactions more prevalent."

"Hopefully the trial will result in Apple's ecosystem being more open to developers, but also for Epic Games to realize that they need to be more honest in the way they present their arguments if they want to gain developer and public trust."

"It's going to make people question whether or not paying 30% is really worth the amount of discoverability that Apple is really providing."

"Hopefully a lot. I work in mobile games, and having the option of our own store to save 30% of royalty fees is huge. At the same time, Apple can easily just not support us on home screen or other featuring, which is a huge driver in new installs and could be the death of a game."

"I hope none. On one hand I agree that a 30% cut is a bit too much—but on the other hand, if you create a full ecosystem including hardware, software, OS, economy, and marketplaces, it is somehow expected that you deserve the cut."

"Apple is not the big shark, Apple is the sea. Epic is the big shark, and the outcome will only increase the gap between big and small game devs."

"When two multi-billion-dollar companies fight does anyone really win?"

The response—or non-response—to toxicity in the wider game industry

The ongoing issue of diversity and inclusion in the Western games industry faced a specific obstacle last year. In July 2021, California's Department of Fair Employment and Housing filed a lawsuit against Activision Blizzard citing "numerous complaints about unlawful harassment, discrimination, and retaliation."

Since then, various reports of systemic sexism, harassment, and other misconduct have surfaced about Activision Blizzard and other game companies—resulting in a larger conversation about toxicity and misconduct in the industry.

Has your studio reached out to address the recent events regarding misconduct and toxicity within the gaming industry?

Yes **38%**

No **62%**

At the time the survey was conducted, 38% of respondents said their companies reached out to them to start a conversation about how misconduct and toxicity are handled in the industry; 62% said their companies did nothing. This shows a growing number of workplaces in the industry have taken at least some initiative to root out toxicity, while also pointing out the industry has a way to go.

Note: This survey was conducted prior to the Wall Street Journal's investigative report about Activision Blizzard CEO Bobby Kotick, Riot's settlement, and Microsoft's acquisition of Activision Blizzard.

When asked about the response, some respondents said their companies held group discussions on misconduct or reminded employees how to report improper behavior. Other companies ignored the issue. However, many respondents said their companies "don't have those problems"—some because their studios were too small, they weren't based in the US, their company had a "zero tolerance" policy, or it wasn't something they've witnessed.

Vox Pop: How do you feel about your company's response to recent events of misconduct and toxicity within the gaming industry?

"The studio did great. All levels of management addressed the situation. This behavior is not tolerated at the company."

"Their initial response was poor but I think they have learned from that and are genuinely taking the issue seriously. I think we are seeing real change."

"It was great, our leadership spoke up, made it very clear that we are always encouraged to reach out to anyone on the team about any concerns, and they also set extremely clear expectations that misconduct will not be tolerated. I feel safe at my current workplace, but I was sexually harassed at a previous workplace, so I know the industry has a whole has a lot of work to do."

> *Our leadership spoke up, made it very clear that we are always encouraged to reach out to anyone on the team about any concerns."*

"No one is surprised by the misconduct. We've all seen it or experienced it in some form in our career. Our company spoke to working harder to do better. They've started creating classes and inviting speakers to help inform and educate people."

"Pretty good but as a member of a privileged class I am not comfortable saying the work is done—just because I haven't experienced it doesn't mean it isn't happening. That said, I think the company is making good faith efforts to continually address the matter."

"This is a very North American focus right now. Studios in Thailand are not focused on these issues. At our company we take care to avoid these toxic conditions by creating an environment where people feel free to express their concerns. Employees are encouraged to speak to each other, their managers, and the co-founders if they have any issues. We have channels where people can easily discuss things in private. There have been a few cases where the actions of some of our employees towards other employees were out of line and we were able to resolve it internally. We also had a case where one of our employees was being sexually harassed by an employee from another business that we share an office space with. We reached out to that business and made sure they understood the actions of their employee were not acceptable and things were resolved."

"Is tepid lipservice a thing?"

"Abhorrent responses, claiming it never happened or that the victims were exaggerating. Disgusted at my executive leadership."

"It has been miserable; pathetic, recalcitrant lip-service to change. My volunteer work as part of a DEI group has been promoted by corporate executives—who have no idea what that work has been about—as evidence that harassment and discrimination do not happen at our massive company. I helped found a DEI group because harassment and discrimination happen not just at our company but in our industry. Our company's response to events of misconduct and toxicity has shown me that our corporate leaders are unaware and incompetent or, at the very worst, protective of making sure the malice should continue to occur because they think it's fine."

"It's been woefully inadequate. My studio has had a lot of issues addressing this in the past, and they continue to be totally silent on it now."

"They bury it and pretend it isn't a problem and act like they are different. There continue to be people harassed and silenced. They are quietly forced to leave while the harassers are promoted and protected."

> **Our company's response to events of misconduct and toxicity has shown me that our corporate leaders are unaware and incompetent."**

"Sorta half-baked. The official line is, 'This doesn't usually happen here, and our HR department really is fair about giving people justice.' But I know several people in the studio who have tolerated more than they probably should have. I don't have confidence in our studio leadership."

"It has been entirely performative from what I have witnessed. I have personally been on the receiving end of misconduct, toxicity, and retaliation for speaking out against such things at my company, and I know several current and former coworkers who have experienced similar things. My repeated efforts to enact positive change at my company through the official channels have not resulted in anything tangible or noticeable at large."

"I've had to force them to make internal statements. We were affected directly by the Blizzard misconduct and still we opted to say nothing. My faith in big companies to do the 'right' thing is non-existent."

"I think that it is inappropriate for studio leaders to take a public stance on other studio's situations and even more inappropriate to make public statements about any politicized or socioeconomic trends. Those are personal beliefs that should not be shared as representatives of companies."

"They could have at least said something, even if they thought it didn't apply to them. I don't even know how I would raise a complaint if I needed to."

Union hopes grow; almost one-fourth talked about unionizing

Rising focus on toxicity in the industry, employee equity, and a healthy work-life balance has likewise meant a bigger conversation about unionization. As the game industry continues to grapple with long-standing worker issues, it looks like more game developers are seeing the advantages of organization, but fewer think it will

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

Yes **55%**

Maybe **22%**

No **14%**

Don't Know **9%**

Do you think that workers in the video game industry will unionize?

Yes **18%**

Maybe **46%**

No **24%**

Don't Know **12%**

happen for their industry.

In our survey, 55% of respondents said workers in the game industry should unionize (up from 51% in 2021 and 54% in 2020). However, fewer respondents believe workers in the industry will unionize, with just 18% saying yes (down from 20%) and 24% saying no (up from 23%).

It's one thing to theorize the future of unionizing the game industry, it's another to put it into practice. This year, we asked respondents if they or any of their colleagues have discussed unionization at their companies. Almost one-fourth of respondents (23%) said union talks have happened in their workplace. A wide majority (62%) said no, while 15% said they didn't know.

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

Yes **23%**

No **62%**

Don't Know **15%**

And how are those companies responding to union talks amongst their workers? The results seem varied. The most-common reaction reported by respondents was positive, with 36% saying their companies were supportive—and the least-common was companies opposing unionization talks, at just 8%. More than one-fifth (21%) of respondents said their companies didn't know that some of their employees were talking about unionizing.

Vox Pop: What are your thoughts about unionization in the gaming industry?

"It's desperately needed, the last year of headlines should prove that."

"Corporations have had multiple opportunities to solve the problems within the gaming industry and have consistently failed. We wouldn't need unions if we were treated properly, and as a result we should unionize."

> *We wouldn't need unions if we were treated properly, and as a result we should unionize.*

"It needs to happen to standardize hiring practices, compensation packages and work/life balance. Large companies treating developers as a disposable resource needs to end."

"It's not a silver bullet that will fix all of the problems in the industry but it provides a baseline for workers to challenge exploitation."

"I think unions have a place in the workforce, but video games is not one of them. We are individual artists and engineers who are worth unique values and should be free to negotiate those terms ourselves."

"This makes sense for the big companies which have a tendency to exploit workers. It would be a huge and unnecessary burden on smaller employers and employees of small companies, limiting their freedom and costing them time and money. So yes they should unionize, but only in some cases."

"Even as a studio owner, I'm for unionization of the industry. However I'd like to see something similar to a structure that the movie industry uses. There also definitely needs to be some mechanism included that accounts for the indie scene. If not done correctly unionization will kill the independent game dev scene."

"It absolutely needs to happen, the first companies that do it will be able to attract the best talent, and be able to retain them much better than our current standard."

"It will destroy games. Making games is intrinsically hard. I've never seen it be easy. I'm not saying that it needs to be cruel, but if you aren't paying with blood, sweat, and tears, you probably aren't hitting your real ambitions. True genius has a price."

> **I think unions have a place in the workforce, but video games is not one of them."**

"I work in Sweden, where we already have a union. The USA really needs to unionize, but it's an uphill struggle there. But unless they do, the wild hours they work will continue. I'd never work there until they unionize and I think it could lead to a talent drain, as people look for better working conditions outside AAA and in more-affordable cities."

"I would join a union right now if it were available. I have been actively seeking opportunities."

"I do not feel comfortable writing an answer to this question."

Most game developers are less than a decade into their career

When asked how many years they've been involved in game development, the number of people who said 6-10 years (23%) increased slightly, while the number who said 3-5 years (20%) went down two percentage points. Overall, a majority of developers (55%) have been in the industry for a decade or less—which is similar to previous years.

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

Under a year **3%**

1-2 years **9%**

3-5 years **20%**

6-10 years **23%**

11-15 years **16%**

16-20 years **10%**

21-25 years **8%**

26-30 years **4%**

More than 30 years **4%**

N/A - Not involved in development **4%**

Game industry still dominated by men

There was little change over the past year, with the number of women in the industry (20%) losing a percentage point and the number of men (73%) staying the same. There was a slight increase in the number of respondents who self-identified as non-binary (4%).

What is your gender?

Man **73%**

Woman **20%**

Non-Binary **4%**

Prefer not to answer **3%**

Not listed (please specify) **1%**

Game developers by location

There was not much movement in this area between 2021 and 2022, even with the ongoing shift in attitude toward remote work options. But keep in mind that GDC is based in the United States, so answers will be largely Western-centric—but it's still a snapshot worth sharing.

Which continent/region do you reside in?

United States **54%**

Western Europe **16%**

Central/Eastern Europe **8%**

Asia **6%**

Canada **6%**

Central/South America **5%**

Australia/New Zealand **3%**

Middle East **1%**

Africa **1%**

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