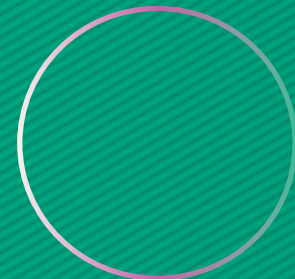# GDC

2025 GDC TRENDS REPORT

Connecting the World Through Games

Informa

Every year, I have the privilege of helping the game industry come together to network, learn, and solve problems. I've seen developers land their dream jobs, studios find publishers, and games of all sizes and budgets receive acclaim. It's part of what makes the Game Developers Conference an engaged, enthusiastic, and enduring community.

Our team, along with the fantastic GDC advisory board, strive to curate cutting-edge content and industry expertise at every GDC so our community can make informed decisions and stay connected. In a year that has been difficult for the industry, it's more important than ever for us to provide opportunities for developers to grow and thrive.

That's why I am excited to share the first-ever Trends Report for GDC 2025, covering everything from the latest generative AI tools to game accessibility. It's our way of cataloging some of the biggest findings and takeaways from the Game Developers Conference, ensuring that our attendees can stay informed throughout the year.

I am grateful to all our speakers, attendees, and exhibitors who make this annual event such a special experience. I hope that, by reading this report, you gain a new understanding about where the game industry is going and what you can do to help get it there.
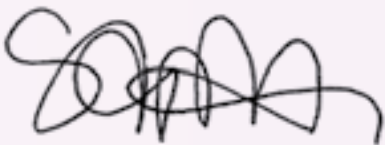
Stephenie Hawkins
Event Director

Contents

Executive Summary

6 Key Takeaways from the 2025 GDC Trends Report

1. Generative AI tools are becoming faster, cheaper, and more efficient for tasks ranging from prototyping to NPC creation—but concerns about copyright and job security persist.

2. The introduction of more affordable VR headsets has diversified the audience, increasing the demand for multiplayer, free-to-play, and mixed reality games.

3. AAA live service games are on the decline as more publishers cancel projects, but there's a growing space for smaller, cheaper live service titles that serve niche audiences.

4. Players are moving from hyper-casual to hybrid-casual mobile games, which combine simpler gameplay mechanics with more narrative, worldbuilding, and metagame elements.

5. The lack of universal guidelines has made it challenging to implement accessibility features, especially for smaller studios, and the new Accessible Games Initiative hopes to address this.

6. Publishers and investors are becoming more selective, demanding games with suitable hype, leading more game developers to turn to self-publishing and alternate funding methods.
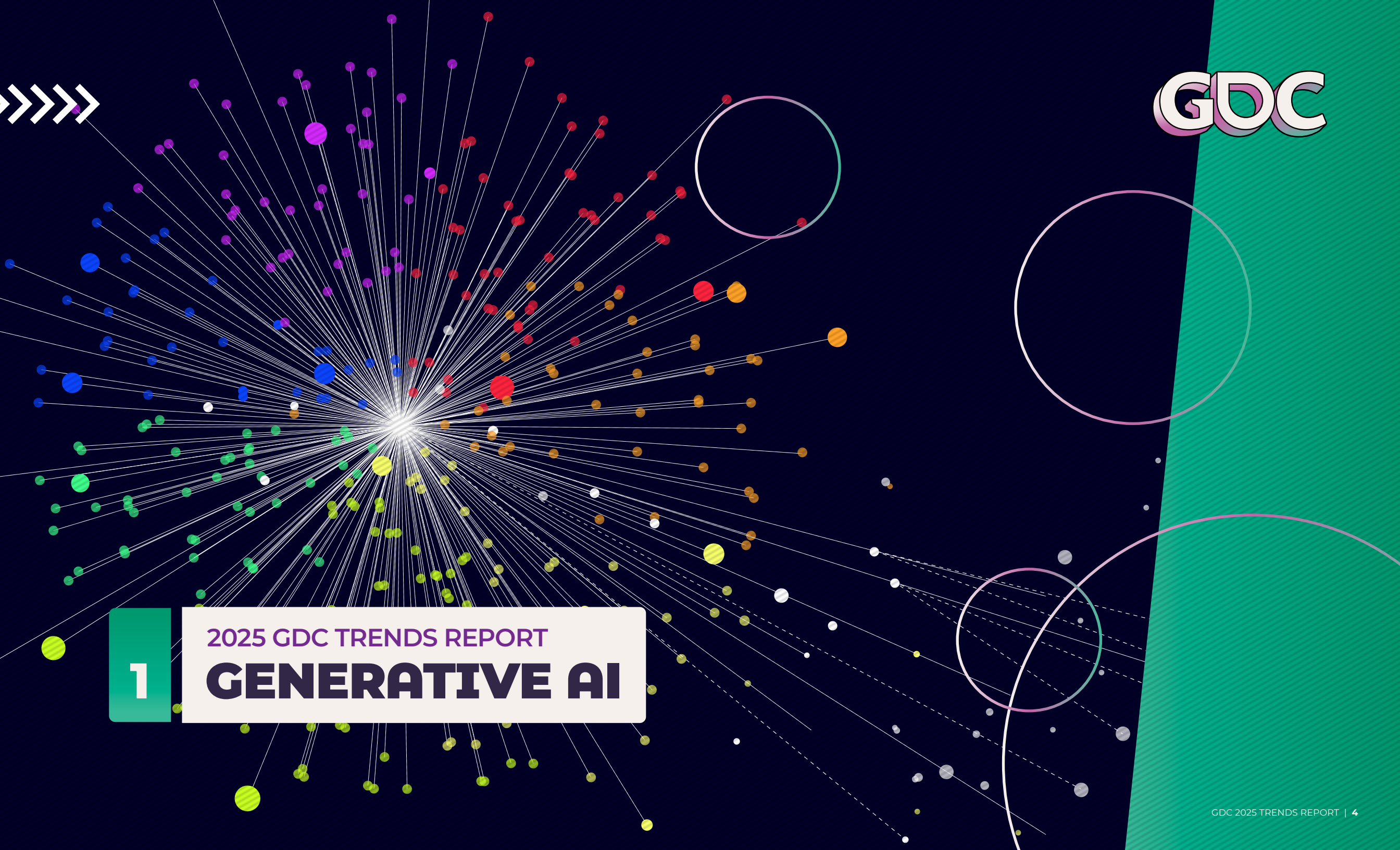
2025 GDC TRENDS REPORT

1 GENERATIVE AI

State of (AI) Play

'Faster and Cheaper'

When it comes to generative AI in the game industry, the word "if" no longer applies. After all, our 2025 State of the Game Industry report[1] showed that one-third of developers who responded use these tools now.

As Rez Graham, independent creative and technical director, put it directly during his GDC talk: "It's changing so fast, it's gonna be obsolete by the time the conference is over."

At GDC 2025, the focus was less on the introduction of generative AI tools and more on what's being done to make them "faster and cheaper." To help in tasks like building prototypes for game pitching, generating repetitive assets across levels, or creating more detailed NPCs using LLMs. For many developers, the dream is to achieve "AI at runtime," which some believe is possible within the next five to 10 years.

AI proponents touted the latest developments in world models, human action models, and neural rendering technologies. These include new projects like Anthropic's Claude 3.7 Sonnet[2] (the

market's first "hybrid reasoning model)," NVIDIA's RTX Kit[3] for neural rendering and Microsoft's World and Human Action Model (WHAM[4]), unveiled in a study published by Nature[5].

As part of this effort to speed along innovation, there was a bit of talk at GDC 2025 about open source versus proprietary. Our 2025 State of the Game Industry report showed a growing number of studios are developing their own proprietary tools, which allow for better customization but also risk falling behind other companies' progress.

Supporters of open-source models have advocated that sharing resources can benefit the industry at large, especially new and indie developers. However, as we saw with the 2025 Studio Ghibli controversy, there are ongoing concerns about ownership and copyright infringement that have yet to be addressed.

> *"There is such potential to build a game on a deeper level, connecting with players and emotions. The kind of insight people have—from visual recognition, or speech, or the kind of music you're playing, or even what you're thinking."*
>
> — Nivi Baral, CTO, 2K

Spotlight: Game Personalization

What if your video game could talk back, adapt to your emotions, or offer to remove spiders from the game after learning you have arachnophobia? Personalization is the next stage in generative AI.

GDC 2025 attendees were abuzz about the potential for game personalization, in which generative AI is used in response to players performing specific actions. This includes things like free-form NPCs that react to players in real time or AI-powered body tracking in VR.

Personalization goes beyond gameplay too. According to Haiyan Zhang, general manager of AI innovation and science at Xbox, their team is working on a program through CoPilot for Gaming that creates AI-generated "recaps" for players who leave a game for a certain period of time.

Some games are already experimenting with personalization technology. There's *Suck Up!* by Proxima, where players (as vampires) try to coax their way into AI villagers' homes. Ada Eden's *1001 Nights* project has the player use conversational AI to create elaborate stories, so they can survive the night with a murderous king.

Although right now, the technology is largely limited to what Amy Wu Martin, partner at Menlo Ventures called "speaking games with questions," some believe it could evolve into its own genre of games one day.

There are some ethical concerns that have been brought up in response to game personalization, like privacy concerns, taking advantage of inexperienced players, or marketplace personalization that uses dynamic pricing based on how the player is performing.

In addition, advocates have argued that using LLMs to build NPCs could hurt narrative developers, impacting their ability to tell stories or even threatening their jobs. Threats like this place even more stress on the narrative field, which has been the most impacted by layoffs over the past 12 months (as reported by our 2025 State of the Game Industry respondents).

Perspectives

Does GenAI Need Humans?

'Amplifying Creativity'

A major theme we saw at GDC 2025 can best be described as "The Comedown." AI developers and proponents were determined to convey the reality of generative AI versus the promise that may have been touted in previous years.

Many of them pushed back against the idea that generative AI is (or should be) an autonomous machine that will solve all of the industry's problems. It's a tactic that CEO and Founder Kent Keirsey of Invoke called a "valuable story for AI companies to sell," but he said it doesn't reflect reality. According to him and other AI developers, generative AI is a tool that cannot work without human creativity.

In their view, much like how a Photoshop tool needs a human hand, an AI model needs a human perspective. Their goal is for generative AI to simplify and expedite the mundane tasks people are already having to do, so they have more time for experimentation.

> "*I believe in human creativity more than I believe in AI creativity. If we make everything automated with an AI, then we lose that creativity.*"
>
> — Pierre Paul Giroux, VP of AI Engineering, Unity

> "*AI is not inherently evil. It may sound like it is based on what I'm saying, but it's really not. But someone's intentions might be.*"
>
> — Rez Graham, Independent Creative & Technical Director

'Their Goal Is to Replace People'

During his GDC 2025 talk on "The Human Cost of Generative AI," Rez Graham told the story of an art director whose current work is mostly cleaning up AI-generated art. It's not exactly his dream job. "If you ever want to interview someone and watch their soul leave their body, interview someone like that."

Graham and others argue that the issue isn't necessarily the tool itself, but the person wielding it. There are individuals (especially those in positions of power) who want generative AI in the workplace to cut costs, not assist developers in their creative endeavors. This could not only result in even more layoffs across the industry, but also a rise in subpar content built from data that may not have been ethically sourced.

Their solution is for leaders to consult with their teams before implementing these tools—to make sure they're serving each developer's needs, instead of circumventing them.

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2

VR/MR/AR

State of (Virtual) Play

'Friction-Free Fun'

Virtual reality (VR) development has stagnated over the past few years. Developers have reported declining revenue, with some criticizing Meta for recent changes to their storefront. And our latest State of the Game Industry report[6] shows 16% of developers surveyed are currently working on virtual or augmented reality (AR) games.

GDC 2025 demonstrated how that could soon change, as the VR industry is focused on engaging new players entering the virtual world.

At their GDC 2025 sponsored talk, Meta reported seeing increases in overall time spent in VR (30%)—

> **"**I think the idea that 'the audiences grow and change as we expand the user base' is fundamentally always going to be true. We are not going to be successful as a VR platform if we constrain ourselves to a single audience.**"**
>
> — Chris Pruett, Director of Games, Meta

much of it coming from newer player groups[7]. The arrival of more affordable headsets like Meta's Quest3S have brought even more teenagers and young adults to the space, as well as older adults who wouldn't consider themselves "VR true believers."

These players are flocking to midcore and casual free-to-play games, especially multiplayer games (like the surprise hit *Gorilla Tag* from indie developer Another Axiom). This isn't limited to virtual reality: Mixed reality (MR) multiplayer games are also seeing a rise in player interest. Several GDC speakers touted the benefits of MR games as a way to make VR more accessible for players with spatial sensitivity.

State of (Virtual) Play cont'd

At GDC 2025, Senior Design Manager Joey Ziolkowski of Schell Games discussed the importance of (and challenges in) building MR spaces like *Party Versus* for players of all experience levels, particularly those who've never used a headset. One of the ways Schell Games did this was by turning the setup tutorial into a fun series of minigames—teaching the rules of the space for newcomers while ensuring that experienced players still had a good time.

"Our core design challenge was to craft social spaces and gameplay for a rapidly evolving medium that most players are unfamiliar with," said XR Developer María Laura Mirabelli Jimenez at Gensler.

Mixed reality might be VR's answer to blending video games into the real world (like the Independent Games Festival Awards-nominated game *Starship Home*), but augmented reality (AR) is working on something equally as immersive: Bringing "virtual" into the real world. Immersive AR was all the rage at GDC 2025.

Snapchat shared advancements in the Spectacles series and their AR authoring tool Lens Studio, which are designed to help developers build games and other AR experiences. Niantic brought their AR tech to Yerba Buena Gardens with "Into the Scaniverse," an interactive art display showcasing the Scaniverse app[8]. And shortly after GDC 2025, Niantic debuted Morpheus[9], an AI-powered tool that can generate AR environments on top of existing ones using text prompts.

Spotlight: Spatial Audio in VR

Making a compelling virtual reality game isn't just about how it looks, but also how it sounds. After all, standard sound design practices don't work as well in a fully immersive world. There were several talks and demonstrations at GDC 2025 about spatial audio design, covering everything from player audio in multiplayer experiences to haptic integration.

New technologies were brought to the forefront— like Acoustic Ray Tracing[10], which launched in 2024 and was on full display in the Quest-exclusive VR game *Batman: Arkham Shadow*. Julian Korzeniowsky, studio sound designer at Meta Platforms, shared how *Arkham Shadow* became a quasi-testing ground for this new tool developed by XR Sonic Experiences, which "generates room acoustics based on the geometry and materials of a specific given scene."

Creating quality spatial audio for a AAA VR game is its own challenge, but what about an indie VR game on a smaller budget that's also being optimized for mobile VR? Lead Sound Designer Idan Egozy described how One Hamsa worked to "create a rich, realistic, responsible, and enveloping soundscape while adhering to mobile [digital signal processing] limitations."

The solution was First-Order Ambisonics, which gave a fully 360-degree sphere while letting them "pre-bake really complex stuff into one file." But he noted that there's a steep learning curve and reduced precision and accuracy. He also said that there are times, especially for indie developers, when it's okay to fall back on 2D audio. As an example, Egozy shared what they did to ensure headshots weren't lost in all the noise.

"We needed the sound to be immediately recognizable, reliably repeated, and easy to mix over combat. To ensure immediate recognition, the sound had to be clear, consistent, and reliably heard, regardless of how far the hit occurred from the player," he said. "To achieve this, we kept the headshot impact sound in 2D, ensuring it always cuts through the mix, while the enemy's pain reaction remained spatialized at the point of impact."

> **"***Spatialization is essentially being able to tell via sound where an object is in space. Is the sound to my left? Is it to my right? How far away is it? Stuff like that. And yeah, there is an art form in making that feel really good.***"**
>
> — Julian Korzeniowsky, Studio Sound Designer, Meta Platforms

Perspectives

VR on the Expo Floor

GDC has long been the space for developers to experiment with the latest hardware and technology, and GDC 2025 saw some of the latest innovations in VR, MR, and other interactive experiences take center stage.

On the expo floor, haptic tech companies like bHaptics and Miraisens showcased their latest gear and tools, with bHaptics showing off the immersive TactSuit Pro and Air vests. X-Arcade demonstrated their arcade-style controllers, which integrate with VR headsets to turn a single cabinet into an entire arcade. GDC also saw the debut of the Ovamind, a wearable smartband that captures a player's emotional state and translates it directly into the game.

However, one piece of new VR technology was missing from GDC 2025: the Android XR[11]. Google's upcoming VR headset was not sighted on the GDC expo floor, leaving developers without the opportunity to test the hardware and see how they can optimize their games for it.

From the Dev: Challenges of VR/MR Multiplayer

Maria Laura Mirabelli Jimenez, XR Developer, Gensler

Future Realities Summit: How 'Party Versus' is Reimagining Social Spaces for MR

"From the start of development, we knew that our target audience was going to be essentially anyone and everyone. The only condition was that you had access to the headsets that this was designed for.

We were designing for people of all ages, levels of familiarity with the device, levels of familiarity with mixed reality, levels of comfort with party games, all of those things. We were keeping in mind teenagers who maybe are pros at VR games and already own the headset, but also their grandparents who have maybe never worn a device like the Quest and who are excited to jump into the space but haven't quite found an experience to do so.

That leads me into our core design challenge, which was to craft social spaces and gameplay for a rapidly evolving medium that most players are unfamiliar with. This is a challenge with designing for any new medium—for *Party Versus*, it just so happened to be in MR. But we were dealing with the tension between knowing all the possibilities that this medium has, and all the cool, fresh, innovative interactions and mechanics that we could tap into, but then also the tension of players having never experienced this before.

How do you teach them to go into this space and enjoy themselves?"

2025 GDC TRENDS REPORT

3

LIVE SERVICE

State of (Live) Play

'Path Through the Woods'

Live service was poised to save the game industry. Except it didn't. Millions of dollars were poured into AAA titles like *Redfall* and *Concord*, only for the anticipated boom to fizzle out. Bandai Namco shut down *Blue Protocol* in January 2025 and Warner Bros. pulled the plug on *MultiVersus*, and the team behind it.

Despite these setbacks, live service proponents like Scott Hartsman said they see a "path through the woods" for developers willing to take risks and think outside the box.

The top suggestion: Think niche. Several GDC speakers proposed developing smaller live service games (in the $20 to $40 range) for more focused audiences. Smaller titles can be operated under smaller teams and budgets. In addition, having a focused group of highly engaged players can be better in the long run, since it lessens the risk of drop-off.

Other recommendations include embracing *World of Warcraft*'s model of layered release cycles of new content instead of linear releases, creating systems that balance different player types and skill levels (akin to *Elder Scrolls Online*), and looking at both quantitative and qualitative data to monitor your audience and anticipate their needs.

There was also an emphasis on making sure the "free" part of "free-to-play" is active in the live service game's ecosystem, especially for mobile games. The idea is that players should be able to enjoy the game without putting any money into it, because that builds engagement and brand loyalty… which increases the likelihood of future revenue.

> **"***2024 was not the comeback year we all would have preferred to see.***"**
>
> — Scott Hartsman, Advisor & Director, Independent

Spotlight: Telemetry Enabled Marketing

Nowadays, publishers don't just want a pitch deck and an early demo. They want an audience. They want ongoing revenue. They want to know the games they're putting money into will bring money back to them... without them having to carry it.

That's immense pressure to put on developers. They're not only on the hook for making the game, but also ensuring it's financially viable. This is especially challenging with live service games. After all, these games are designed to be never-ending. To remain sustainable, live service games (especially free-to-play games) need to optimize their revenue streams and keep players spending money. But there are smarter ways to do so than tossing out a bunch of new content and hoping something sticks.

In his GDC 2025 talk, Richard Goldsmith, senior manager at Deloitte Consulting, shared the benefits of personalizing a game's marketplace using telemetry (for example, putting sniper rifles on the front page for players who tend to favor them in gameplay). This can lead to increased order value and purchase frequency, as well as player satisfaction.

That said, developers need to make sure paid content is designed to help the player have a better experience, not take advantage of them. "They're playing the game for a reason: They find it fun," Goldsmith said. "Making sure they can find the fun in the stuff you're making for them to buy is also pretty important."

> "We talk about monetization quite a bit. Players hate it. They're all over Reddit complaining about it. Live service is killing the industry, et cetera. And it certainly has its problems. But ultimately, if you give them the things they want in a way that's easier for them to get at it, they like it."
>
> — Richard Goldsmith, Sr. Manager, Deloitte Consulting

Perspectives

Creative Burnout

Burnout is an issue in the overall game industry, but it's especially prevalent for live service developers. Instead of building a single experience, maybe with a DLC or two, developers are constantly working on new changes, updates, and content. For example, CEO and Founder Joe Ferencz of Gamefan said their team creates "weekly content" for almost all their Roblox games.

"It is a wild practice to have to come up with new ideas for content in your game every single week. But we know that's what TV writers do," Ferencz said.

Keisha Howard, founder of Sugar Gamers Labs, called this phenomenon "constant optimization". She said it's not something humans are naturally

equipped to handle, and it can easily lead to burnout. Since live service games rely on their LiveOps teams to keep the revenue stream flowing, it quickly becomes a lose-lose situation for the developers and their studio.

Howard said the key to addressing this issue is community—that connecting with your peers and building relationships with people you trust is important to ensuring that you have the support to continue growing and take more risks. It's also important to advocate for a sustainable workload, build content that challenges the audience, and keep creativity at the forefront. "Otherwise, this career can easily turn into a soulless slog."

> "*Making [live service] games is like developing rides for a theme park constantly that stays open all year round. And you have to come up with more rides and more rides, and the park never closes. And it has to be fun, all the time, forever.*"
>
> — Keisha Howard, Founder, Sugar Gamers Labs

Perspectives

Retain or Regain?

One of the debates currently taking place in the live service sphere is about player retention. Is it better to keep existing players engaged or prioritize bringing in new ones? Peter Whalen, senior game director at Riot Games, has a third suggestion:

Bring inactive players back.

In his GDC 2025 talk, Whalen shared how *Teamfight Tactics* (*TFT*) operates on a set model. Every four months, the team replaces the old content with a whole new slate of goodies. New theme, new characters, new game mechanics, "effectively giving players a new game to explore." It looks to be working for *TFT*— they've doubled their engagement over the past three years.

Whalen said churn is inevitable, and working to bring players back with something big is better than trying to keep someone in the game as long as possible. Things like daily quests, short battle passes, and other engagement tactics might help revenue in the short term, but they can lead to fatigue and eventual player decline.

However, prioritizing new player acquisition over reengaging inactive ones can make it harder to build long-term brand loyalty. It's why Whalen advises against making these players feel guilty or remorseful about missed opportunities, like an expired limited-time offer.

"Players can't feel bad about the time that they missed," he added.

> "We can't rely solely on acquisition. We'll run out of players. We have to realistically assume that players are going to churn, and there are only so many hours in the day for them to engage. That really only leaves one option, which naturally leads to the question: What if we went all in on re-acquisition?"
>
> — Peter Whalen, Sr. Game Director, Riot Games
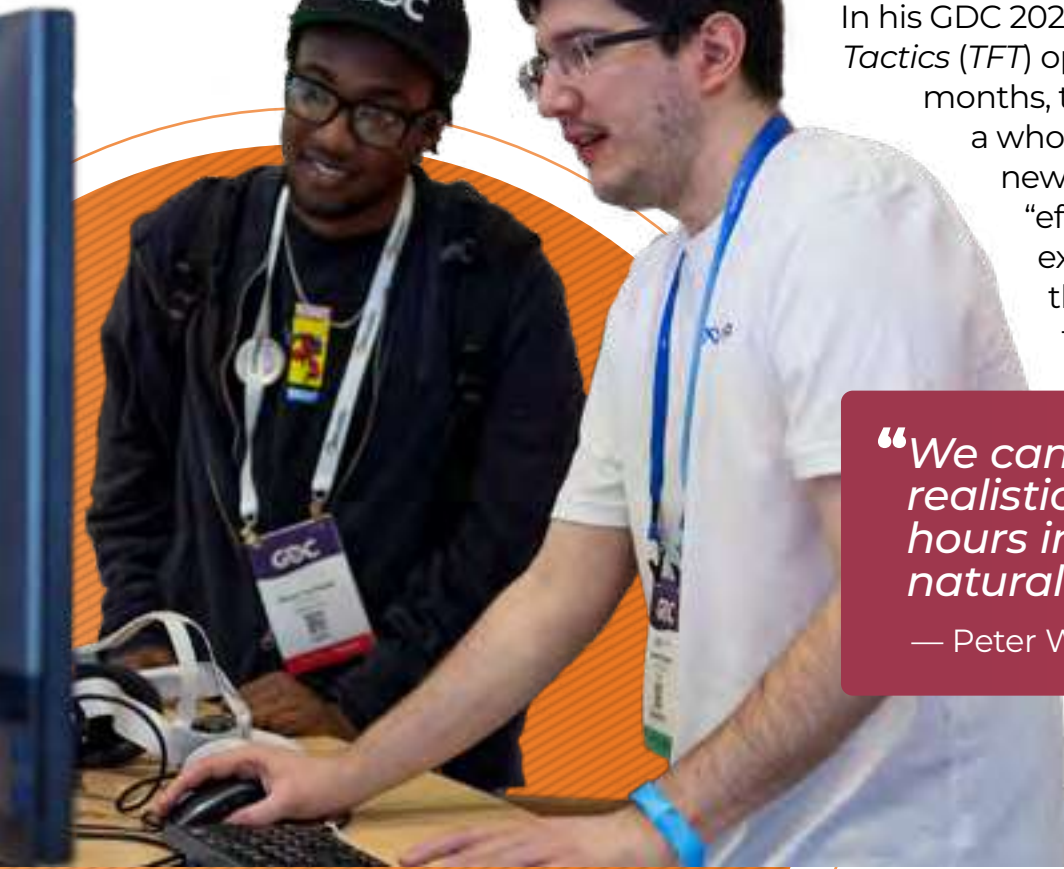
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MOBILE

State of (Mobile) Play

Mobile games remain a major player in the industry, and the market is poised for continued growth (though not as much as in previous years). In fact, according to our 2025 State of the Game Industry report[12], the number of developers working on mobile games has increased for the first time in years.

Mariusz Gasiewski, CEE mobile games and apps lead at Google, said part of the success can be attributed to the increase in smartphone adoption among those living in countries like Brazil, India, Nigeria, and the Philippines. He noted that many internet users in these regions use smartphones to play games, "more than 90%" of them in some

places.[13]. These players also tend to favor free-to-play over premium and are more likely to embrace AI in gaming.

Hybrid Casual: 'A Better Bet'

When it comes to mobile games themselves, there's a focus on moving from "hyper" to "hybrid." Unity's 2025 State of Play[16] discussed the industry-wide shift to hybrid-casual games, which combine "the mass appeal and marketability of hyper-casual games with the deeper, more engaging gameplay and content usually affiliated with casual games."

At GDC 2025, Chairman Dave Rohrl of Mobile Game Doctor presented Habby's *Capybara Go!* as a top example of hybrid-casual gaming. *Capybara Go!* has no core gameplay, and almost all the player's decisions take place in the metagame. This helps players feel connected to the game's story while avoiding tough gameplay mechanics, and it allows mobile developers to experiment more with narrative and worldbuilding.

It's also a boon for studios looking to stand out in the highly saturated mobile games

market. Steven Meretzky, vice president of design at PeopleFun, noted how the $3-billion hybrid-casual market may be smaller than the $30-billion market for casual games, but it's not as crowded.

"Hybrid casual is probably a better bet than the red oceans of most of casual gaming," he said. "It's a small enough pond where you may have a slightly higher chance to survive, but still a large enough pond where there are reasonable profits to be made."

> **"***The hope with hybrid casuals is to provide a deeper experience that will keep players around a lot longer, without sacrificing the benefits of hyper casuals.***"**
>
> — Steven Meretzky, VP of Design, PeopleFun

Spotlight: HTML Gaming

Our 2025 State of the Game Industry report[12] featured a suprising statistic: 16% of developers surveyed are working on web browser releases, the largest percentage in a decade. It outpaced virtual reality, tabletop games, and cloud gaming for Xbox and PlayStation.

HTML5 gaming, or web–based games that can operate on any device with an internet browser, has seen a resurgence over the past few years. WebGL tools give developers the opportunity to build HTML5 games with better graphics and faster runtimes. There's also the introduction of WebGPU[17], the next generation of HTML5 tools, which are poised to continue growing the medium. Game engines are not quite ready for widespread adoption of WebGPU, but proponents say it's likely within the next few years.

"Think of WebGPU as WebGL's cooler, more powerful sibling," said Amaresh Adak, self-employed software engineer and creator of The Syntax Diaries. "While WebGL opened the door to 3D graphics on the web, WebGPU is kicking that door wide open and bringing a whole party of features with it. It's like upgrading from a bicycle to a sports car[18]."

There are advantages to developing games for browsers instead of other platforms, according to Elina Arponen, CEO and co-founder of Quicksave Interactive. They include easier user acquisition (since all players need to do is click a link) and being able to use a variety of screens (like billboards, smartphones, and tablets). In addition, publishing through popular platforms like Facebook or itch.io makes it easier.

"Sometimes, when I show our games to people, they are like, 'You're not showing an HTML5 game, that's a mobile game.' I'm like, no—well, it's kind of both," Arponen said.

However, there are some drawbacks to the technology. It can be tough to get strong, consistent visibility on platforms like Discord, YouTube, and Facebook (YouTube Playables isn't even available in every country yet). Many of these platforms take cuts of up to 50%—meaning that, while HTML5 publishing is more budget-friendly, it's not without cost. It's also not an ideal space for premium paid games at this time, as there isn't a space or store that players can easily turn to for those offerings.

> **"**_It is a place where you can actually make business. It's not for, you know, throwaway mini games that somebody plays for five minutes and never gets back to and forgets them._**"**
>
> — Elina Arponen, CEO & Co-Founder, Quicksave Interactive

Perspectives

Mobile Advertising

When Metacore started advertising their to-be-released game, *Merge Mansion*, they were promoting a chill, cozy game about a woman and her grandma taking care of a mysterious house. But they discovered something unexpected.

"We noticed that this ad where Grandma is being arrested resonated especially well with our audience," said Mika Tammenkoski, CEO of Metacore. "We thought the story in the "We thought the story in the game should be a cozy one. Grandma has secrets, but the story is still safe. But through this ad, we learned more about our audience, that they want more tension and mystery. They find a story where Grandma has darker secrets more interesting."

Metacore chose to change their entire game narrative in response to that one viral advertisement, and it worked in their favor. *Merge Mansion* became widely successful, and not just in-game: There's an online community of fans who follow the lore of *Merge Mansion* without ever opening the app. There's even a series of short films starring Kathy Bates.

According to Tammenkoski, this demonstrates how important advertising is to the success of mobile games—and this isn't even the most lucrative one. n his GDC 2025 talk, Mariusz Gasiewski reported that the in-game advertising market in 2024 was estimated to be around $100 billion[14], "bigger than all in-app and purchases in the gaming market combined together[15]."

But with great power comes greater responsibility. Tammenkoski made a point to emphasize the importance of honesty in mobile game advertising, saying that misleading ads for mobile games are "hampering the growth of the industry." Not only because they fail to accurately sell the game to their audiences, but he said they also do long-term damage to overall public opinion.

> "For us, it didn't make sense to create low-quality or misleading ads that the audience couldn't associate with our game. If we want to have high-intent players coming into the game, it all starts with an interesting story."
>
> — Mika Tammenkoski, CEO, Metacore
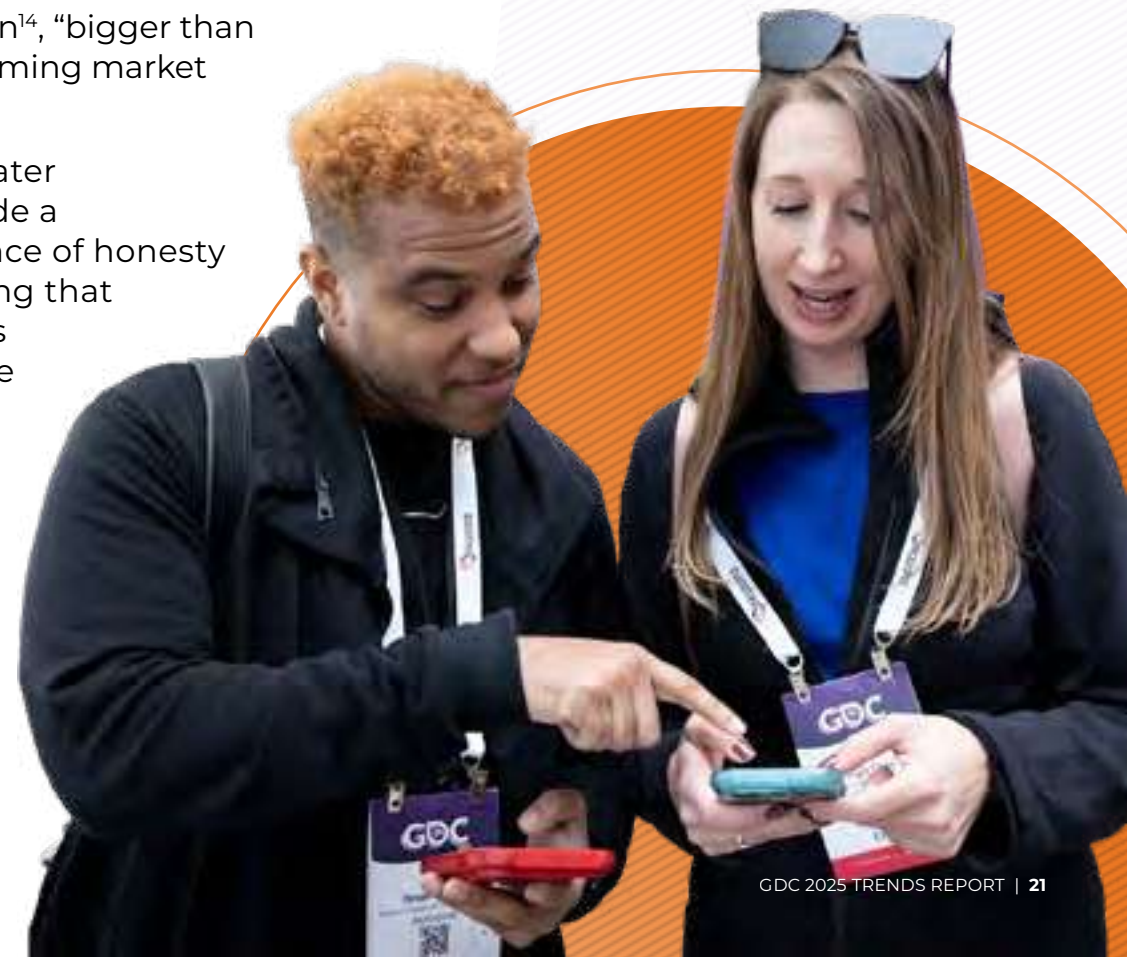
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5 ACCESSIBILITY

State of (Equal) Play

'Remove Those Barriers'

Accessibility has become an important topic in the game industry, and for good reason. People with disabilities make up about 16% of the global population[19], and 15 to 20% of people around the world show signs of neurodivergence[20]. In addition, as a significant portion of today's gaming population ages, the needs of older players are becoming more prevalent.

Several developers, particularly those from smaller studios, presented their methods for improving accessibility in their games at GDC 2025. For example, UX Director Tabby Rose shared how, for Mighty Yell Studios' VR game *A Knight in the Attic*, players with visibility issues could "pull almost everything in the game world" closer to them, including the UI elements.

Developers emphasized that every team member needs to bring accessibility into their workflows—whether in programming, UX, narrative, marketing, sales, or any other field. This extends to QA and player testing as well: Anna Waismeyer, senior accessibility research lead at Microsoft/Xbox, noted how crucial it is to bring players with

a range of disabilities into the testing process, and to make sure "research pipelines are actually accessible themselves."

While it was great to see how smaller studios are embracing accessibility, it did shine a light on the ongoing issue of consistency in the game industry. The lack of universal guidelines, along with a shortage of opportunities for people with disabilities to thrive in the industry, have kept some barriers from coming down. There are efforts to change this, like the new Accessible Games Initiative that was announced at GDC 2025 (see Spotlight: Accessible Games Initiative on page 24).

Spotlight: Accessible Games Initiative

At GDC 2025, the Entertainment Software Association (ESA) announced the launch of the Accessible Games Initiative. It's the culmination of a years-long project, founded by developers from Electronic Arts, Google, Microsoft, Nintendo of America, and Ubisoft, that is poised to shape the future of accessibility in games.

In the past, figuring out which games are accessible hasn't been easy. Some companies, like Meta and Xbox, have built their own guidelines. But the lack of consistency (and resources for smaller studios) can make things confusing for some players. The Accessible Games Initiative is determined to address this.

"Gone will be the days where someone will have to sacrificially buy the game and test out all the features," said streamer Mike Luckett in a video presentation[21].

The initiative has published a series of tags for a variety of accessibility features, like clear text, narrated menus, stick inversion, and more. Studios and companies are invited to place the tags on their storefronts, product pages, and catalogs, so customers can see what features are available before buying a game.

The initiative's founders said these tags can "coexist easily" with any company's existing accessibility features tags. They also noted that the current list of 24 tags is designed to grow and change, because game accessibility is always evolving. For example, something that helps one person with a disability may not have the same impact on someone else with the same disability.

For those who are interested in finding out more about the Accessible Games Initiative, or to help continue the movement's growth, there is a membership application for developers, publishers, and storefronts on their website.

> "*Those of us who are in a position to make the world more accessible should work together to do just that.*"
>
> — Aubrey Quinn, SVP, ESA

Perspectives

Accessibility in South Korea

After attending GDC 2023, D&I Lead Kyoung Jin Lee of Smilegate had a mission: "We will do accessibility in Korea." But achieving that goal wasn't easy.

Social and cultural stigma toward disabilities has been an issue in South Korea in the past. Today's Korean game industry, which leans toward online and competitive games, tends to "optimize for the majority" instead of accommodating individual needs. Not to mention how accessibility, like many other topics in the game industry, can be subject to Western bias. For example, Jin Lee noted how most of today's accessibility guides and materials are only available in English.

Smilegate took matters into their own hands, pioneering a new focus on accessibility—not just in *Crossfire* and their other games, but across the Korean industry as a whole.. They developed an e-learning course on accessibility in inclusive game design that is now part of Hanshin University's core curriculum. They also worked with the Korea Employment Agency

for Persons with Disabilities to develop a specialized six-week training program to bring more people with disabilities into the game industry.

"The goal was not just to hire," Jin Lee said. "The goal was to create meaningful roles where diverse perspectives and abilities could directly influence the development process."

Today, Smilegate has a dedicated accessibility team with seven employees. One of them is Accessibility Specialist Se Jin Kim, who wears prosthetics on both legs and has only two fingers on his right hand. He shared his story at GDC 2025, emphasizing the importance of making games accessible for everyone, no matter where you live.

"This is what I believe gaming should be about. Different players, different abilities, but we are all sharing the same joy. Some play together, some play alone. Some use standard controllers, others use adaptive devices. But we are all just gamers who are seeking the same thrill," Kim said. "When we design for everyone, we don't just make better games. We create a world where everyone can belong."

Perspectives

AI and Accessibility

At the beginning of his GDC 2025 talk, Brannon Zahand, senior gaming accessibility technical program manager at Microsoft and co-founder of Accessible Games Initiative, shared how some of the content for his presentation was made with the help of AI.

"As someone who is neurodiverse, AI has given me some really great new ways to collect and organize my thoughts and to get them on digital paper more quickly and efficiently," he said.

According to Zahand, generative AI has the potential to be a great tool for game accessibility. It can provide real-time assistance to players, recommend accessible games, settings, or controllers, and help developers build content.

However, there are many ways AI content can be risky, or even dangerous, to those with disabilities. Situations like giving inaccurate accessibility information, showing systemic bias, or providing harmful medical advice. Zahand said standard accessibility testing practices are insufficient to address these issues, especially ones that show up on the back end.

Instead, he suggested development teams take a "red team" approach, simulating various accessibility queries and scenarios to find vulnerabilities before the players do. By ensuring the AI communicates in a respectful, empathetic, and accurate tone, developers can improve the overall user experience.

"Accessibility is about creating digital environments that accommodate the full spectrum of the human experience," Zahand said. "No one wants to be left out."

According to Zahand, 93% of respondents to a 2023 Fable Community survey[23] said there is not enough representation of people with disabilities in the development of AI tools. It's important to involve the disability community early in the process—but make sure to provide them with proper support, as the process may put them face-to-face with the very harms the tests are trying to prevent.

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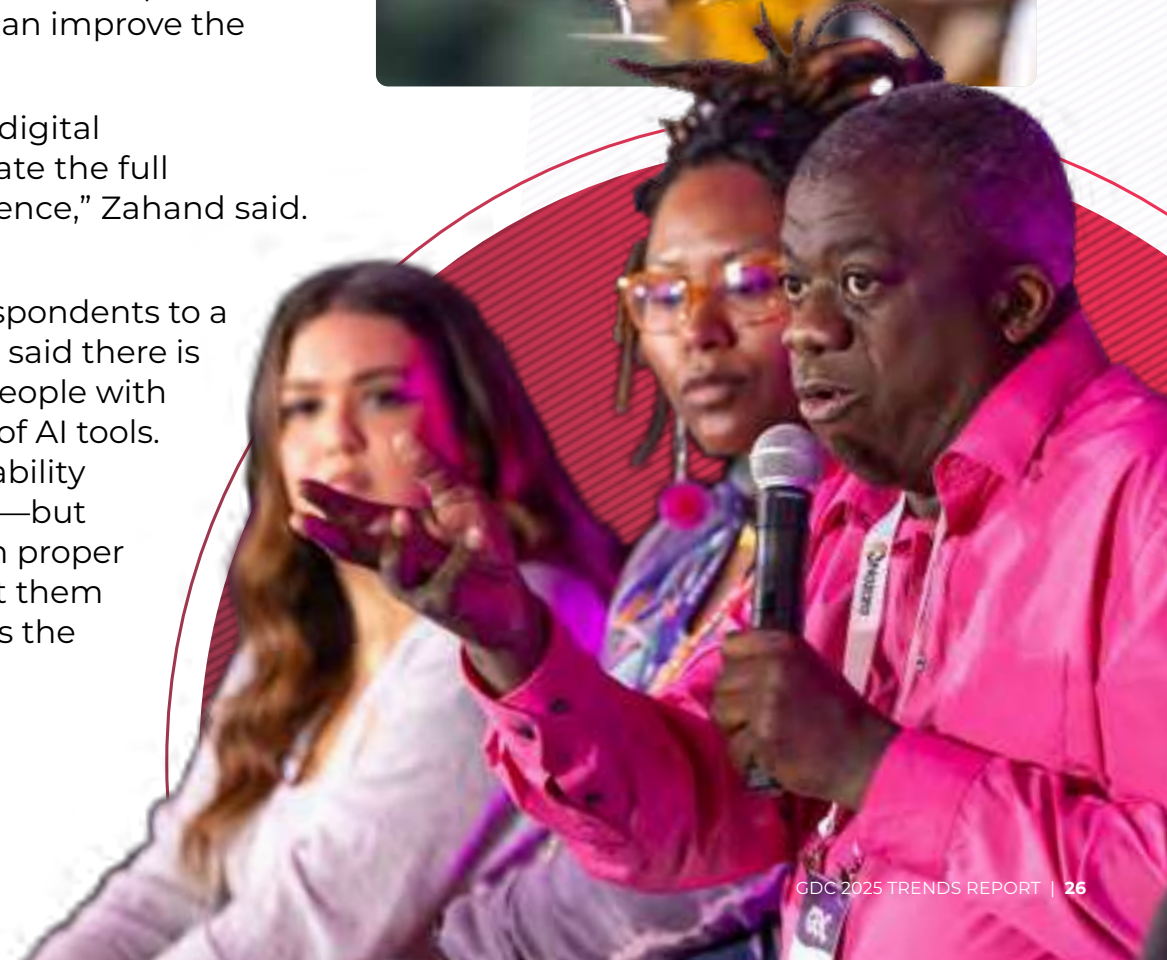
PUBLISHING & FINANCE

State of (Funding) Play

'Build It and They Will Come'

Ask the average game developer or indie studio what challenge they're facing in the industry; they will most likely say money. Developers at GDC 2025 shared how it's become harder to secure funding for projects, to the point where over half (56%) of 2025 State of the Game Industry survey respondents say they've put their own money into their games.

Investors and publishers seem to hold the cards, giving them incentive to demand more from the studios they're looking to support. A primary demand is hype. Several GDC speakers shared how publishers are looking for assurances that the games they put money into will be successful.

One of the best ways to achieve that is community building, according to several GDC 2025 speakers. Launching a Discord, live-streaming the development process on Twitch, releasing demos, and reaching out to content creators and media for early access. Karah Sutton, chief publishing officer of PikPok, explained that building a fan base is critical—not just for the game's success, but also for the studio's longevity.

"Create loyalty to your vision and creativity, then you already have people you can talk to. They're already in your corner," Sutton said. "Building a fan base means greater probability of the success of future games."

Sutton also discussed the importance of key art and making sure the first impression players get on the storefront is the right one. She described how her team made a fake Steam storefront to figure out the best way to visually market one of their games.

There are situations to avoid. According to Tony Grayson, studio head of Summitsphere, one of the pitfalls he's seen is studios trying to follow trends. As much as publishers might say they want their own *Balatro* or *Vampire Survivors*, making clones of breakthrough hits probably won't work because, by the time the game is finished, fans have already moved on to the next thing.

And if all else fails, publish it yourself. There were several talks about self-publishing, covering everything from which platforms to prioritize to the benefits and pitfalls of total creative control.

Spotlight: Funding Futures Series

GDC 2025 saw the debut of Funding Futures—a series of panels focused on opportunities developers can explore to get funding for their games and studios. The three-part series was hosted by Jason Della Rocca, co-founder of Execution Labs, and brought together some of the industry's top minds on publishing, investing, and more.

Self-Publishing

The first Funding Futures panel dove into self-publishing, which Della Rocca called "the best approach" for creating and maximizing value across your team, IP, and audience (though it might not always be feasible or realistic).

They also discussed alternate project funds or services that developers can explore without needing an actual publisher. For example, Kirsten-Lee Naidoo talked about her company, popagenda's for-hire publishing services, in which developers pay a direct sum for production support, PR, release management, and other benefits instead of the traditional revenue share system.

Venture Capital

The second panel worked to demystify venture capital, a divisive funding option that 15% of surveyed developers pursued last year, with 68% of them reporting it was at least somewhat successful (according to our 2025 State of the Game Industry report).

Jonathan Lai, general partner at Andreessen Horowitz/a16z, shared that venture capital is best for developers looking for long-term growth, as VC firms are often focused on "funding companies versus individual games or projects." However, Della Rocca emphasized that it's not for everyone. Venture capital firms can help studios fund multiple projects and expand their teams, but it may also involve giving away a percentage of ownership of your company and losing portions of creative control.

'Publishers Are Dead, Long Live Publishers'

The final panel looked at the changing role of publishers in today's market and what they're experiencing. Right now, the number of games seeking publishing support vastly outweighs the companies that can provide it. For example, Communications Director and Publishing Manager John Buckley of Pocketpair said they received "several thousand requests" in just five weeks.

While there are times when publishers will take a risk on a project they believe in, panelists said there are ways developers can make sure their games stand out, like having engaging public demos and high wishlist numbers on Steam. "The pressure is on the developer to generate market validation," Della Rocca said.

Perspectives

From the Dev: Story of a Failed Pitch

Jenny Xu (CEO & Founder, Tafola Games)

Xsolla Developer Summit: The Dirty Truth About Funding and Games (Presented by Xsolla)

" It was one of my very first pitches at GDC. So, I was meeting somebody outside of Peet's Coffee, it's on 773 Market, so it's still around. I remember sitting at a chair and this person— somebody with money, an investor-type person— was on the other side. I was pitching this vision, like, 'This is a billion-dollar opportunity.'

At the time, I was pretty afraid of investors, intimidated even. These are people who decide my life... And this person just said, 'Jenny, I can see the future after hearing everything you said, and I know that you're going to fail.'

I was about to cry at that point, probably. This weight was sinking down. They're right, I'm going to fail. 99.9% of startups fail, who am I to think that I'm the 0.1% to succeed?

This guy was trying to convince me to quit my startup. He was, like, 'I want to save you the pain. I want to help you live a better, happier life.' And I think I understood that. But it was just this really soul-crushing thing. I think he said the quiet part out loud. Maybe not all investors are so honest. And now we're actually good friends."

[That experience is] informative because... I'm finding now that I feel so sorry for the person I was then—to put so much emphasis on how they thought about me, reflecting on how I felt about my company."

Game Industry Union Debuts at GDC 2025

The past few years have impacted developers in more ways than losing funding opportunities. There's been a rise in layoffs, with 11% of developers surveyed in the 2025 State of the Game Industry report[12] saying they lost their jobs in the past year. It's no surprise that 58% of respondents said game industry workers should unionize, including two-thirds (69%) of younger developers.

At GDC 2025, workers in the United States and Canada announced the United Videogame Workers-CWA Local 9433 (UVW-CVA), a direct-join union for video game professionals. As part of the announcement, representatives participated in conference talks about ongoing unionizing efforts and hosted a booth on the expo floor[24].

"These workers are taking a bold stand, joining together to build power for the workers behind the games we all know and love," said Tom Smith, senior director of organizing at UVW-CVA[25].

Announcements at GDC 2025

The Game Developers Conference is a space for the latest ideas and innovations in the game industry. Here are some of the exciting reveals and announcements that took place during GDC 2025.

AYANEO unveiled three new mobile devices powered by Qualcomm's upgraded Snapdragon Gen 3 chip: the AYANEO Pocket S2 (their latest flagship Android handheld), the AYANEO Gaming Pad (the company's first Android gaming tablet), and the OneXPlayer OneXSugar 1 (the first transformable dual-screen Android gaming handheld).

Roblox showcased its new open-source 3D foundational model, Cube 3D, which generates 3D models and environments directly from text (and eventually image) inputs.

Netflix announced it would be releasing its first MMO, *Spirit Crossing*. The massively cooperative life sim comes from Spry Fox, the team behind *Alphabear* and *Cozy Grove*.

The Entertainment Software Association took to the Main Stage during GDC 2025 to unveil the Accessible Games Initiative, a years-long project founded by developers from several key studios, which has created a series of accessibility tags for studios to implement on storefronts and product pages.

Game workers introduced a new industry-wide union, the United Videogame Workers, organized under the Communications Workers of America. The union aims to improve working conditions for developers and establish better protections against layoffs and generative AI.
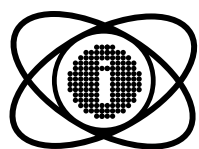
2025 Independent Games Festival Awards winners

EXCELLENCE IN VISUAL ART
Hauntii
(Moonloop Games / Firestoke)

EXCELLENCE IN AUDIO
Despelote
(Julián Cordero, Sebastian Valbuena / Panic)

EXCELLENCE IN DESIGN
Tactical Breach Wizards
(Suspicious Developments)

EXCELLENCE IN NARRATIVE
Caves of Qud
*(Freehold Games / Kitfox Games)*

NUOVO AWARD
Consume Me
(Jenny Jiao Hsia, AP Thomson, Jie En Lee, Violet W-P, Ken "coda" Snyder)

BEST STUDENT GAME
Slot Waste
(Vinny Roca)

AUDIENCE AWARD
The WereCleaner
(The WereCleaner Team / USC Games)

ALT.CTRL.GDC AWARD
ChromaCorp
(The ChromaCorp Team)

SEUMAS MCNALLY GRAND PRIZE
Consume Me
(Jenny Jiao Hsia, AP Thomson, Jie En Lee, Violet W-P, Ken "coda" Snyder)
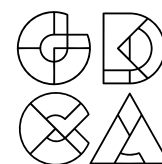
2025 Game Developers Choice Awards winners

BEST DEBUT
Balatro
(LocalThunk / Playstack)

BEST VISUAL ART
Black Myth: Wukong
(Game Science)

BEST AUDIO
Astro Bot
(PlayStation Studios Team ASOBI / Sony Interactive Entertainment)

BEST NARRATIVE
Metaphor: ReFantazio
(ATLUS / SEGA / Studio Zero)

SOCIAL IMPACT AWARD
Life is Strange: Double Exposure
(Deck Nine Games / Square Enix)

INNOVATION AWARD
Balatro
(LocalThunk / Playstack)

BEST TECHNOLOGY
Astro Bot
(PlayStation Studios Team ASOBI / Sony Interactive Entertainment)

BEST DESIGN
Balatro
(LocalThunk / Playstack)

AUDIENCE AWARD
Final Fantasy VII Rebirth
(Square Enix)

GAME OF THE YEAR
Balatro
(LocalThunk / Playstack)

PIONEER AWARD
Lucas Pope

LIFETIME ACHIEVEMENT AWARD
Sam Lake

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GDC 2025 SESSIONS

Sessions marked with ⭐ require a GDC Vault subscription to view. To request unlimited access to GDC's comprehensive library of game development content, including these sessions, subscribe at gdcvault.com/inquiry.

1. Generative AI

Game AI Summit: The Human Cost of Generative AI – Referenced p. 5

Rez Graham, Creative & Technical Director, Independent
https://gdcvault.com/play/1035183/Game-AI-Summit-The-Human

AI Executive Panel: Exploring What's Next in AI for Gaming (Presented by EPAM) – Referenced pp. 6-7

Nibedita (Nivi) Baral, CTO, 2K
Stef Corazza, Head of Roblox Studio, Roblox
Pierre Paul Giroux, VP of AI Engineering, Unity
Craig Nowell, VP of Global AI, Databricks
Vitalii Vashchuk, Head of Gaming Solutions, EPAM
Haiyan Zhang, General Manager of AI Innovation & Science, Xbox
https://gdcvault.com/play/1035342/AI-Executive-Panel-Exploring-What

Community Clubhouse Developer Summit: Breaking the Productivity Trap: Reimagining Game in the AI Era – Referenced p. 6

Oren Debi, VP Product of AI & Innovation, SciPlay
Volkan Gurel, CEO & Co-Founder, Layer AI
Vered Horesh, Chief of Strategic AI Partnerships, BRIA
Andrei Muratov, Head of Game Analytics & AI/ML Solutions & BD, AWS GameTech, AWS
Amy Wu Martin, Partner, Menlo Ventures
https://gdcvault.com/play/1035388/Community-Clubhouse-Developer-Summit-Breaking

⭐ Game AI Summit: LLM as Core Gameplay: Co-Creative Storytelling in '1001 Nights' – Referenced p. 6

Yuqian Sun, Founder & Director, Ada Eden
https://gdcvault.com/play/1035179/Game-AI-Summit-LLM-as

Next-Gen Tech Forum: Generative AI's Honeymoon Is Over: What's Working for Developers Today? (Presented by Invoke) – Referenced p. 7

Kent Keirsey, CEO & Founder, Invoke
https://gdcvault.com/play/1035392/Next-Gen-Tech-Forum-Generative

2. VR/AR/MR

The Past, Present, and Future of Developing VR and MR with Meta (Presented by Meta) – Referenced p. 9

Chris Pruett, Director of Games, Meta
https://gdcvault.com/play/1035432/The-Past-Present-and-Future

⭐ Future Realities Summit: How 'Party Versus' is Reimagining Social Spaces for MR – Referenced pp. 10, 12

Maria Laura Mirabelli Jimenez, XR Developer, Gensler
Joey Ziolkowski, Sr. Design Manager, Schell Games
https://gdcvault.com/play/1035165/Future-Realities-Summit-How-Party

Spatial Audio for VR: 'Batman: Arkham Shadow' – Referenced p. 11

Ryan David Kull, Studio Sound Designer, Meta Platforms
Julian Korzeniowsky, Studio Sound Designer, Meta Platforms
Pete Stirling, Software Engineer, Meta Platforms
https://gdcvault.com/play/1035011/Spatial-Audio-for-VR-Batman

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Visceral Sound on Tiny Speakers: The VR Audio of Indie Game 'UNDERDOGS' – Referenced p. 11

Idan Egozy, Lead Sound Designer, One Hamsa
https://gdcvault.com/play/1034984/Visceral-Sound-on-Tiny-Speakers

3. Live Service

★ **Live Service Games Summit: The Year in Live Service Games – Referenced p. 14**

Scott Hartsman, Advisor & Director, Independent
Steven Meretzky, VP of Design, PeopleFun
Dave Rohrl, Chairman, Mobile Game Doctor
https://gdcvault.com/play/1035211/Live-Service-Games-Summit-The

★ **Improving Live Service Monetization Through Player Telemetry Enabled Marketing – Referenced p. 15**

Richard Goldsmith, Sr. Manager, Deloitte Consulting
https://gdcvault.com/play/1035030/Improving-Live-Service-Monetization-Through

★ **Live Service Games Summit: One Billion Plays: The Next Generation Meets 'Sonic' on 'Roblox' – Referenced p. 16**

Joe Ferencz, CEO & Founder, Gamefan
https://gdcvault.com/play/1035211/Live-Service-Games-Summit-The

★ **Live Service Games Summit: The Soul of LiveOps: Building Teams, Trust, and Long-Term Success – Referenced p. 16**

Keisha Howard, Founder, Sugar Gamers Labs
https://gdcvault.com/play/1035479/Live-Service-Games-Summit-The

★ **Live Service Games Summit: Welcome Back, Tacticians: How 'Teamfight Tactics' Supports Returning Players – Referenced p. 17**

Peter Whalen, Sr. Game Director, Riot Games
https://gdcvault.com/play/1035214/Live-Service-Games-Summit-Welcome

4. Mobile

★ **Live Service Games Summit: The Year in Live Service Games – Referenced p. 19**

Scott Hartsman, Advisor & Director, Independent
Steven Meretzky, VP of Design, PeopleFun
Dave Rohrl, Chairman, Mobile Game Doctor
https://gdcvault.com/play/1035211/Live-Service-Games-Summit-The

Quo Vadis Mobile Gaming 2025? – Referenced p. 19

Mariusz Gasiewski, CEE Mobile Games & Apps Lead, Google
https://gdcvault.com/play/1035027/Quo-Vadis-Mobile-Gaming-2025

★ **Are You Missing 10% of the Market? – Referenced p. 20**

Elina Arponen, CEO & Co-Founder, Quicksave Interactive
https://gdcvault.com/play/1035033/Are-You-Missing-10-of

★ **Live Service Games Summit: The Untapped Future and Opportunities of Free-To-Play – Referenced p. 21**

Mika Tammenkoski, CEO, Metacore
https://gdcvault.com/play/1035218/Live-Service-Games-Summit-The

5. Accessibility

GDC Main Stage: From Idea to Action: Lessons from a New Accessibility Initiative (Presented by The Entertainment Software Association) – Referenced pp. 23-24

Paul Amadeus Lane, Accessibility Consultant, Amadeus 4th Corp
Se Jin Kim, Sr. Technical Program Manager, Nintendo of America
Amy Lazarus, Director of Player Inclusion, Electronic Arts
Dara Monasch, Product Manager, Google
Aubrey Quinn, SVP, Entertainment Software Association (ESA)
David Tisserand, Director of Accessibility, Ubisoft

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https://gdcvault.com/play/1035389/GDC-Main-Stage-From-Idea

UX Summit: VR Is for Everyone: Designing Comfortable Virtual Reality – Referenced p. 23

Tabby Rose, UX Director, Mighty Yell Studios
https://gdcvault.com/play/1035305/UX-Summit-VR-Is-for

Accessibility for Everyone in Gaming: When Games Are Accessible, Everyone Can Be Part of the Story – Referenced p. 25

Se Jin Kim, Accessibility Specialist, Smilegate
Kyoung Jin Lee, D&I Lead, Smilegate
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Inclusive Gaming AI: Red Teaming for Accessibility and Disability – Referenced p. 26

Brannon Zahand, Sr. Gaming Accessibility Technical Program Manager at Microsoft, Co-Founder of Accessible Game Initiatives
https://gdcvault.com/play/1034941/Inclusive-Gaming-AI-Red-Teaming

6. Publishing & Financing

What Publishing a Book Taught Me About Publishing Video Games – Referenced p. 28

Karah Sutton, Chief Publishing Officer, PikPok
https://gdcvault.com/play/1035032/What-Publishing-a-Book-Taught

Xsolla Developer Summit: The Dirty Truth About Funding and Games (Presented by Xsolla) – Referenced pp. 28, 30

Justin Berenbaum, VP of Strategic Planning & GM of Xsolla Funding Club, Xsolla
Tony Grayson, Studio Head, Summitsphere
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Funding Futures Series: Chasing Unicorns: How Venture Funding Really Works – Referenced p. 29

Jonathan Lai, General Partner, Andreessen Horowitz/a16z
https://gdcvault.com/play/1035045/Funding-Futures-Series-Chasing-Unicorns

Funding Futures Series: Inception Publishing: The Shift to Indie Self-Publishing – Referenced p. 29

Soren Lundgaard, CEO, Ghost Ship Games
Kirsten-Lee Naidoo, Head of Publishing, Landfall

Genevieve St-Onge, CEO & Co-Founder, popagenda
Victoria Tran, Community Director, Innersloth
https://gdcvault.com/play/1035046/Funding-Futures-Series-Inception-Publishing

Funding Futures Series: The Evolving Role of Publishers – Referenced p. 29

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