

Game Developer Collective

Survey Results

November 2024: Tools and Services

Methodology

This report presents the findings of a survey to the Game Developer Collective panel in November 2024 on the theme of Tools and Services.

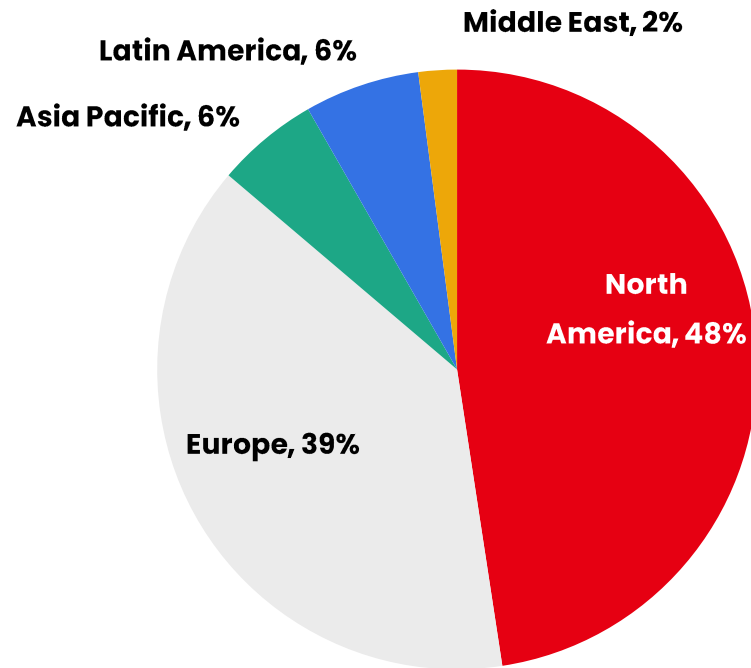
This survey contained several “metric” questions, which are returning questions from the October 2023 Tools and Services survey and the May 2024 Industry Conditions and Commercial Performance survey.

This report is complimentary to you as a valued member of the Game Developer Collective and a contributor to these insights.

Demographics

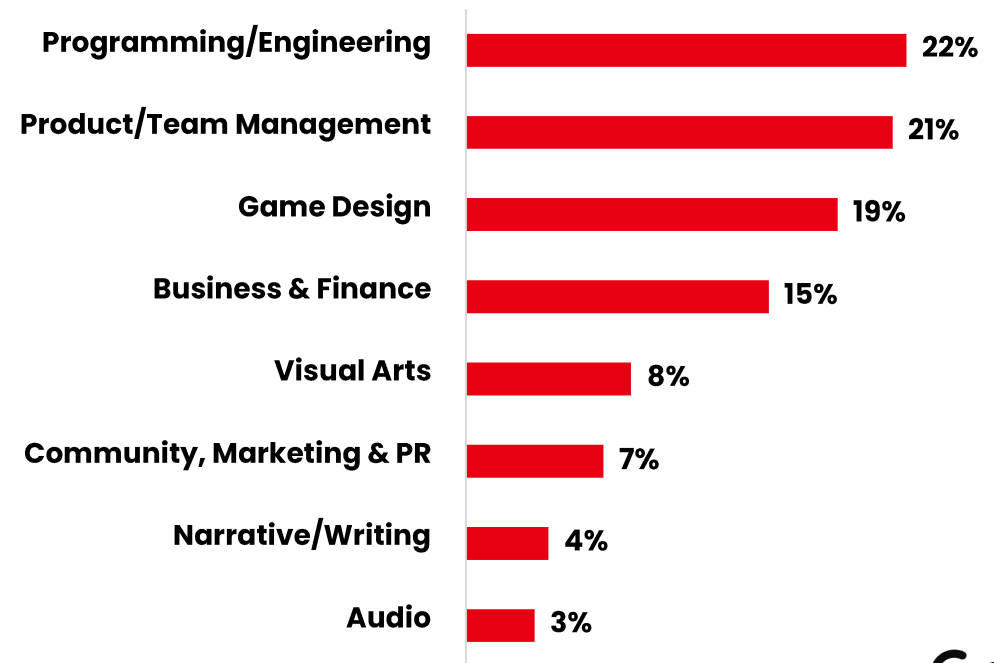
48% of survey respondents are based in North America, **39%** in Europe, and **14%** in other regions

Primary location of respondents



Programming and product/team management, and game design are the top job roles represented

Primary job role of respondents



Engines and tools

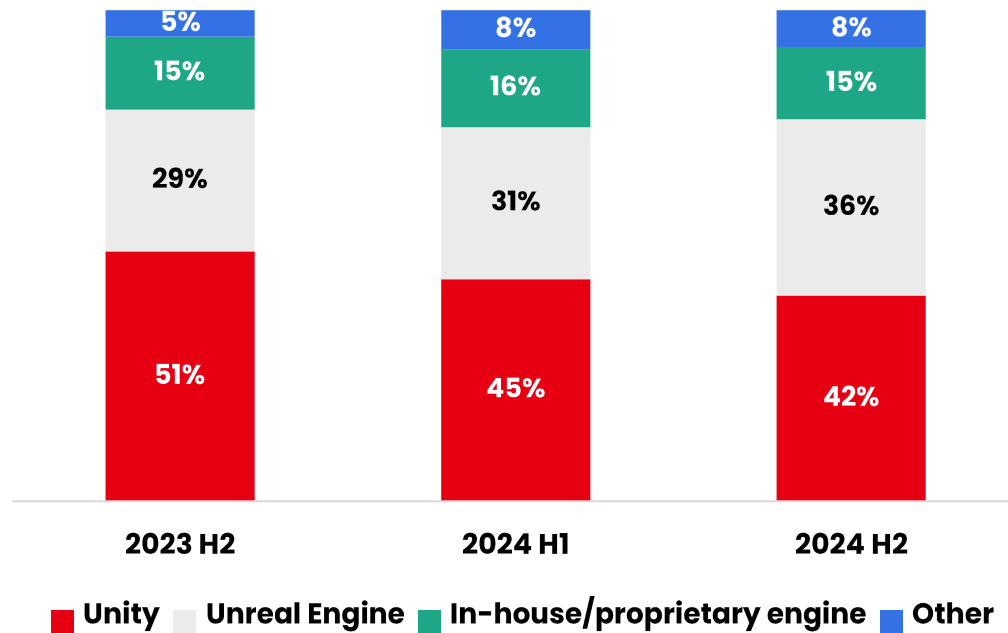
This section focuses on trends in the game engine market. The 2023 Tools and Services survey came in the wake of Unity's controversial "runtime fee" announcement.

Since then, Unity has dropped most of its proposed fee changes and the market continued to evolve, making it the right time to return to the Collective panel to see how usage and views of game engines have evolved over the past year.

The game engine market continues to shift

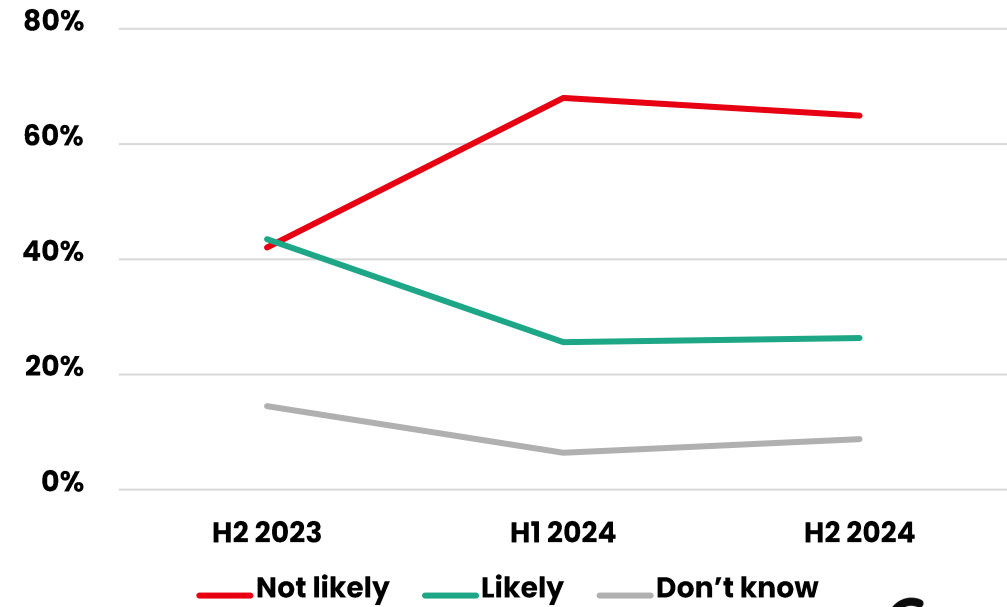
Unity has steadily lost market share over the past year, with Unreal Engine the main beneficiary

Which game engine does your current project use?



Likelihood of switching engines dropped in H1 2024 and has remained steady since then

How likely are you to change game engines when developing your next game?



Unity users remain more likely to switch engines

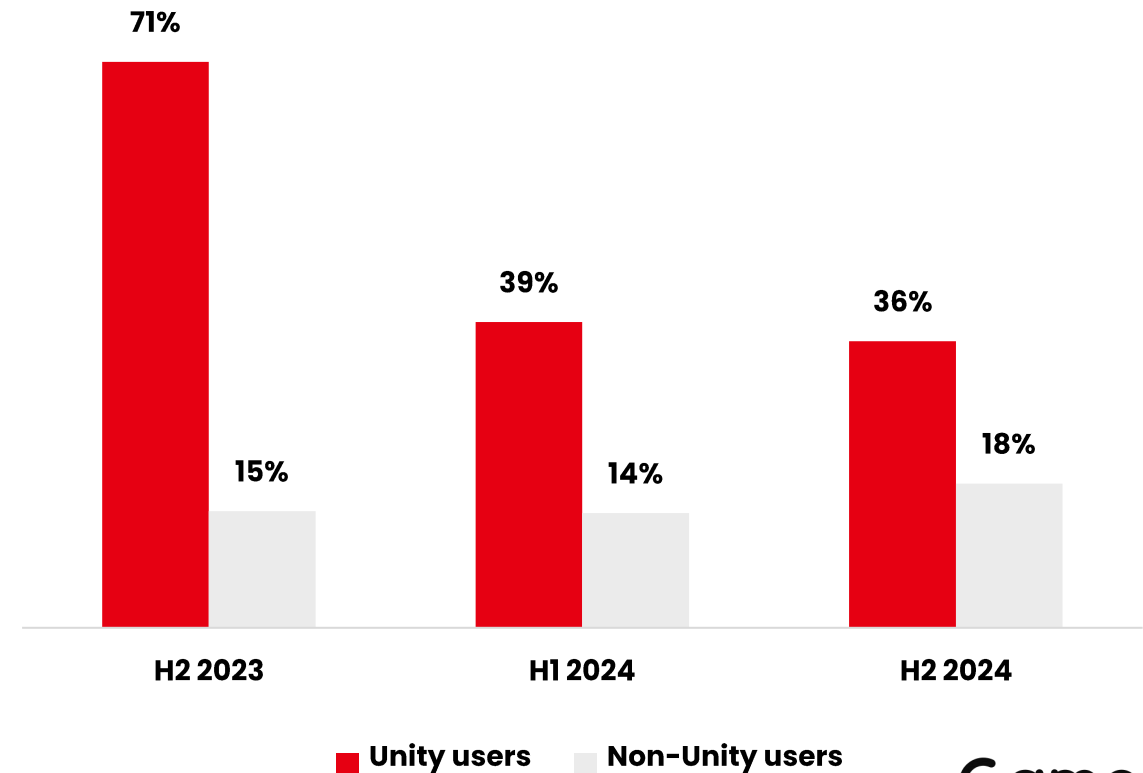
Unity's "runtime fee" announcement in September 2023 triggered a major backlash, with more than **70%** of Unity developers in our October 2023 survey saying they were "somewhat" or "very" likely to switch engines for their next game.

By May 2024, with more distance from the initial controversy, that figure dropped to **39%**, though still remaining far higher than the **14%** of users of other game engines likely to switch for their next game.

Despite Unity scrapping the runtime fee entirely since then, this survey finds little further change. **36%** of Unity developers are still likely to switch engines for their next game, suggesting that Unity's decision to drop the runtime fee has done little to win back disillusioned users.

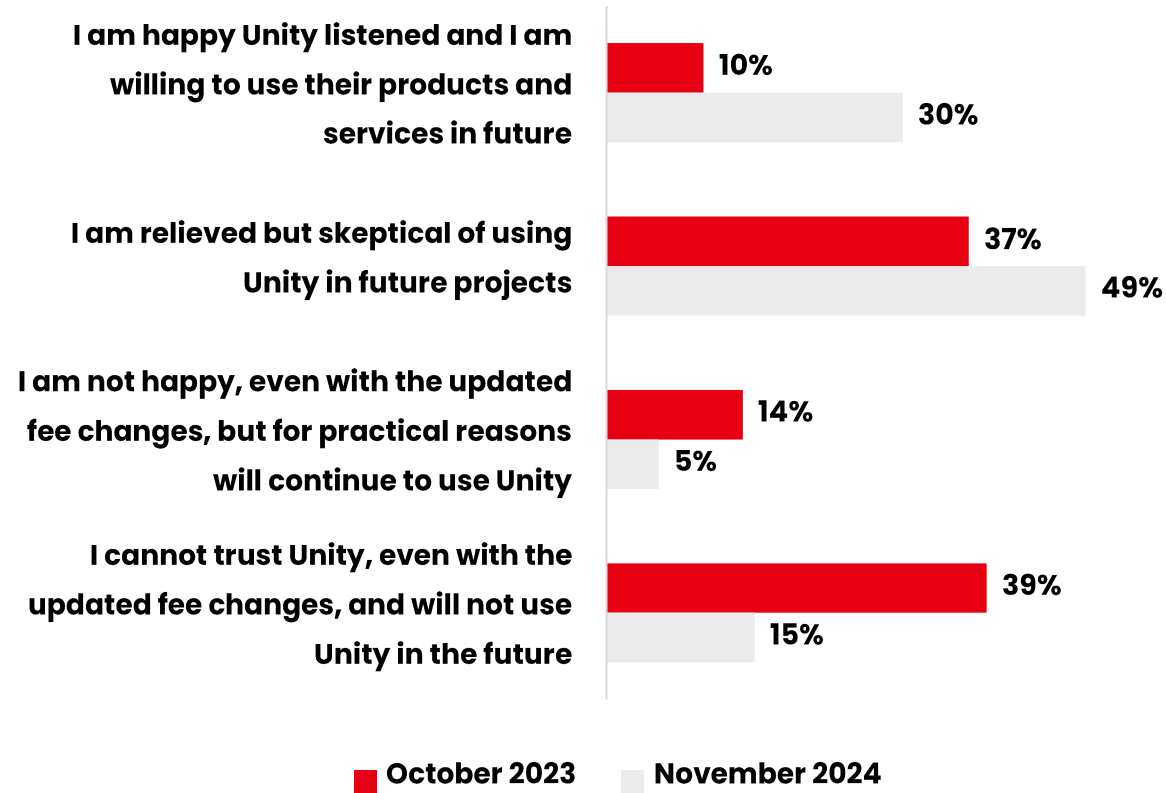
How likely are you to change game engines when developing your next game?

(Total percentage of developers 'Very likely' or 'Somewhat likely' to change engines in next game)



Sentiment towards Unity has moderated slightly

Which most closely describes your feelings after Unity revised its fee changes?



In the aftermath of Unity's initial runtime fee announcement last year, the company offered some concessions, including limiting cases where the fee would be incurred and capping the maximum charge.

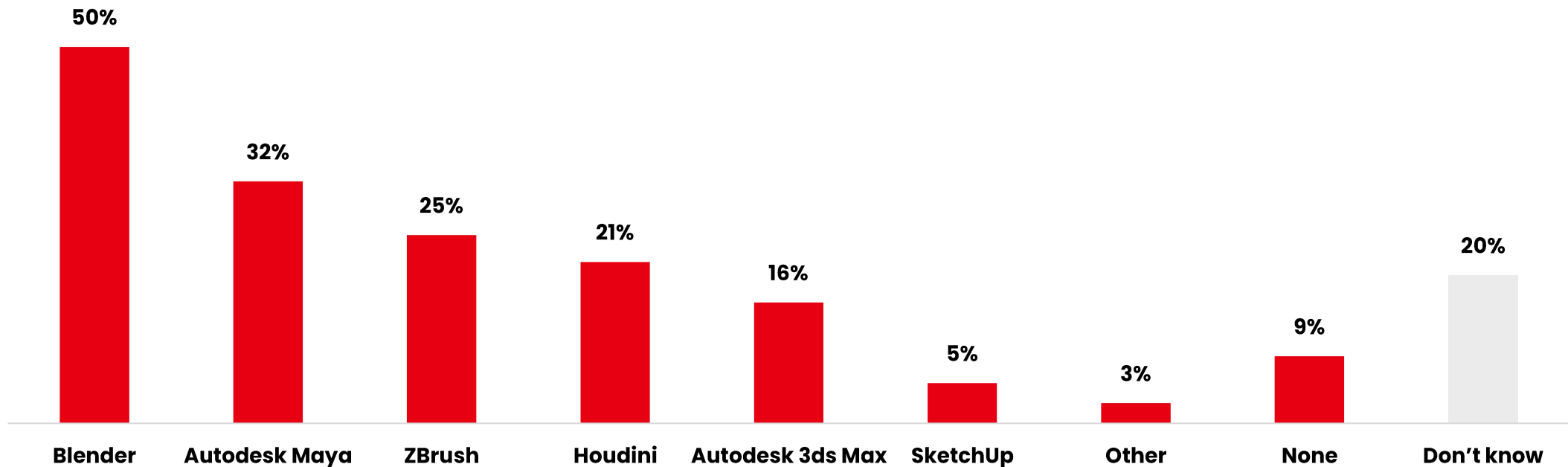
We asked Collective members to describe their feelings on these changes in the October 2023 survey. In this year's survey, we asked the same question with reference to Unity's full removal of the runtime fee.

This survey shows sentiment towards Unity has softened, but only moderately. Developers are now less likely to have an outright hostile view of the company, but only **30%** are happy with Unity.

3D modelling tools

Blender is the most popular 3D modelling tool among Collective respondents, used at **50%** of studios, followed by **Maya** at 32%. Studios made use of an average of **1.6** different 3D modelling tools.

What 3D modelling tool(s) does your company currently use? (Select all that apply)



Cloud and backend

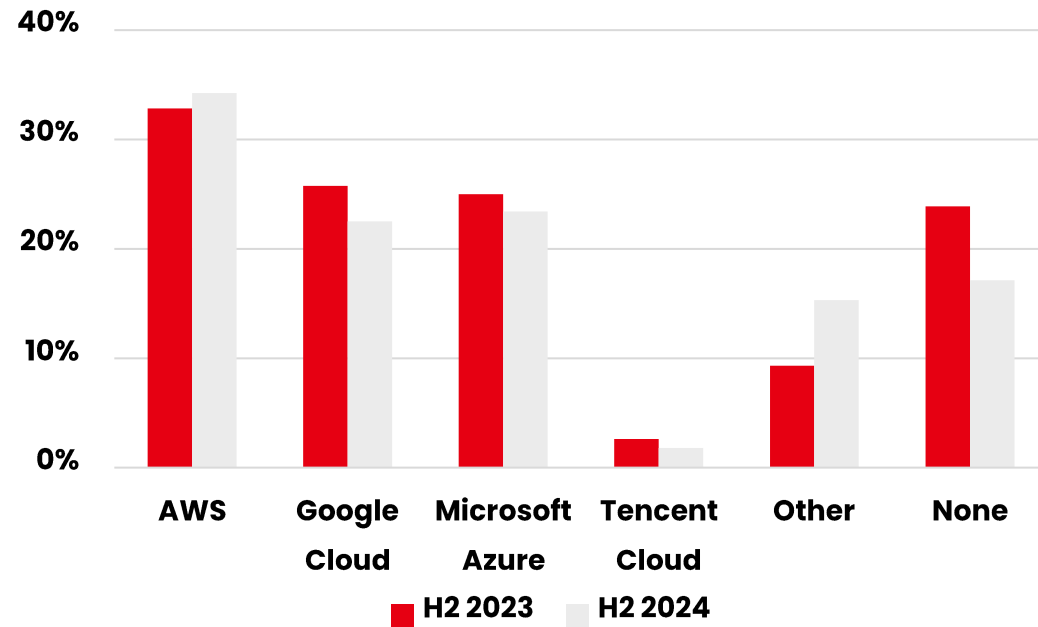
Cloud platforms play an increasingly critical role in game development, especially for live service and online multiplayer games. These titles are also the primary users of a growing category of backend platforms and tools.

This section of the survey examines how game developers are interacting with backend infrastructure and solutions, and how this has evolved over the past year.

Cloud platform usage is higher than ever

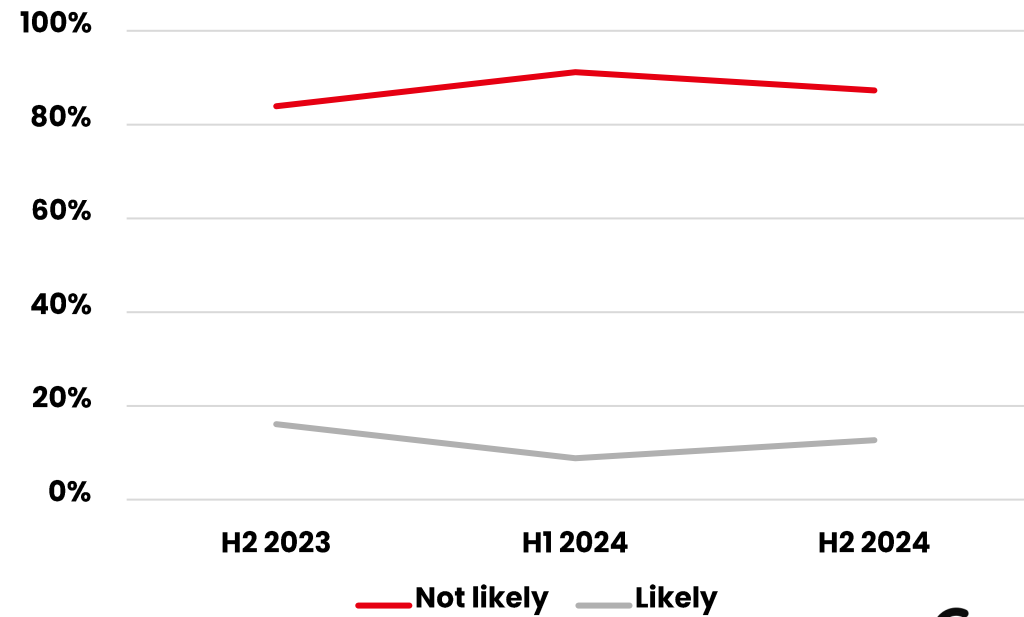
AWS and non-hyperscaler options have gained some market share over the past year

Which cloud platform provider(s) does your company currently use? (Select all that apply)



Cloud platforms remain very “sticky”, with most studios reluctant to change provider

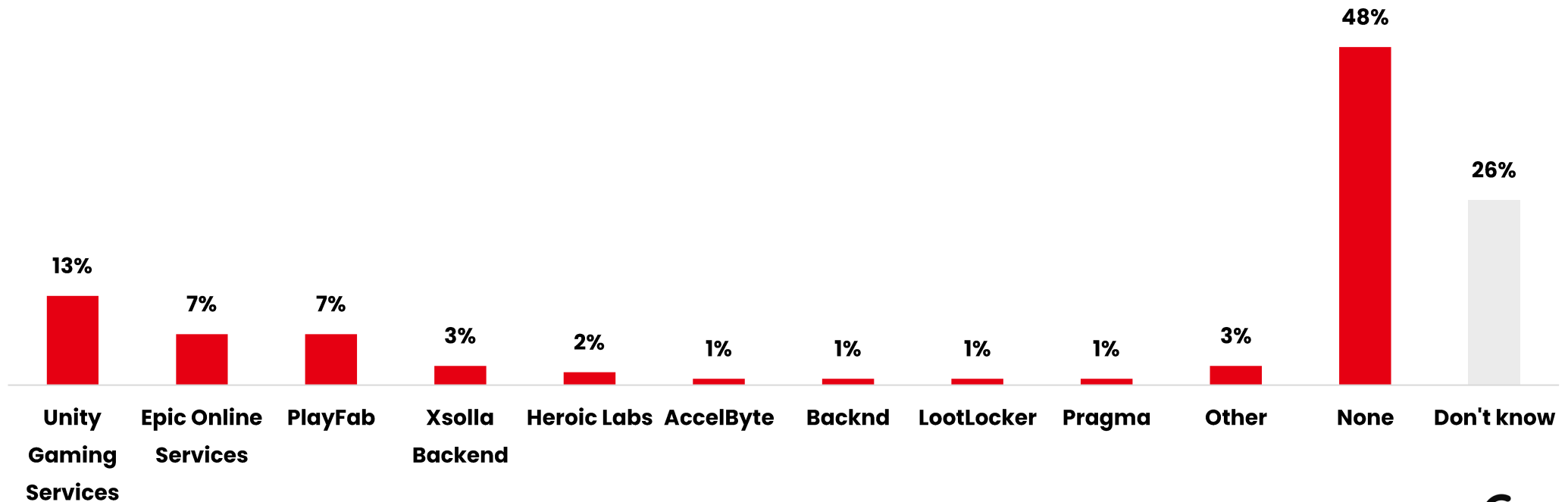
How likely are you to change cloud platform in the next six months? (“Don’t know” excluded)



Backend platforms struggle to gain traction

Backend platforms aim to centralize and simplify many aspects of backend infrastructure and tooling. Despite a wide range of options in the market, penetration remains relatively low, with just **38%** of studios using such platforms.

Which specialist backend service provider(s) does your company currently use? (Select all that apply)



Investment

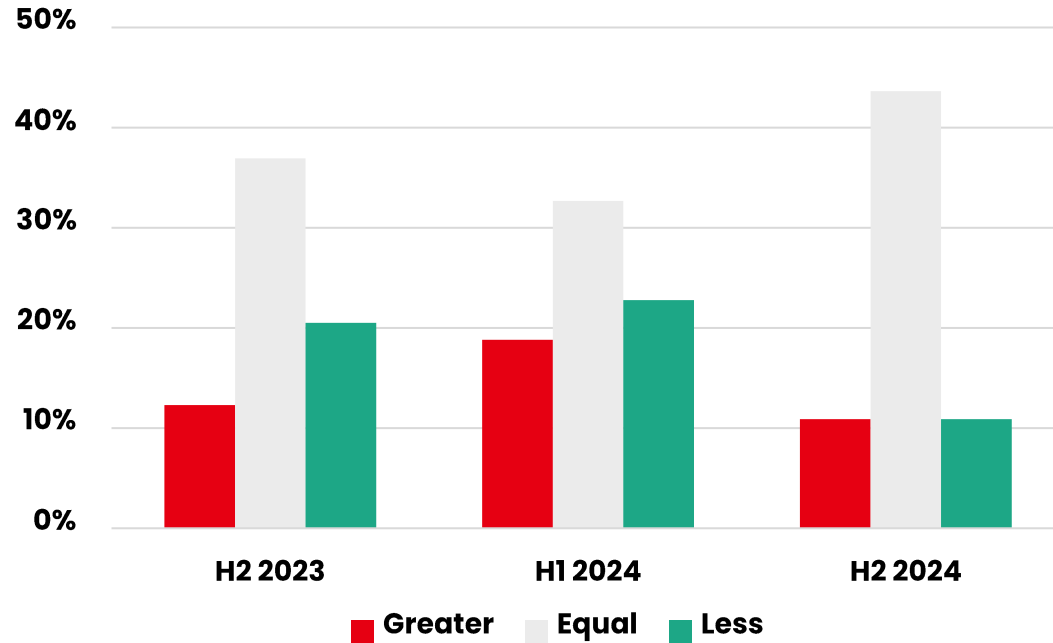
Game studios are under cost pressure more than ever as overall development costs rise and market conditions in many areas remain challenging. Willingness—and capacity—to invest in the tools and solutions underpinning game development is therefore an increasingly pressing question.

This section of the survey looks at the overall stance game developers are taking towards investment in tools and services, and the factors driving those decisions.

Overall investment in tools and services

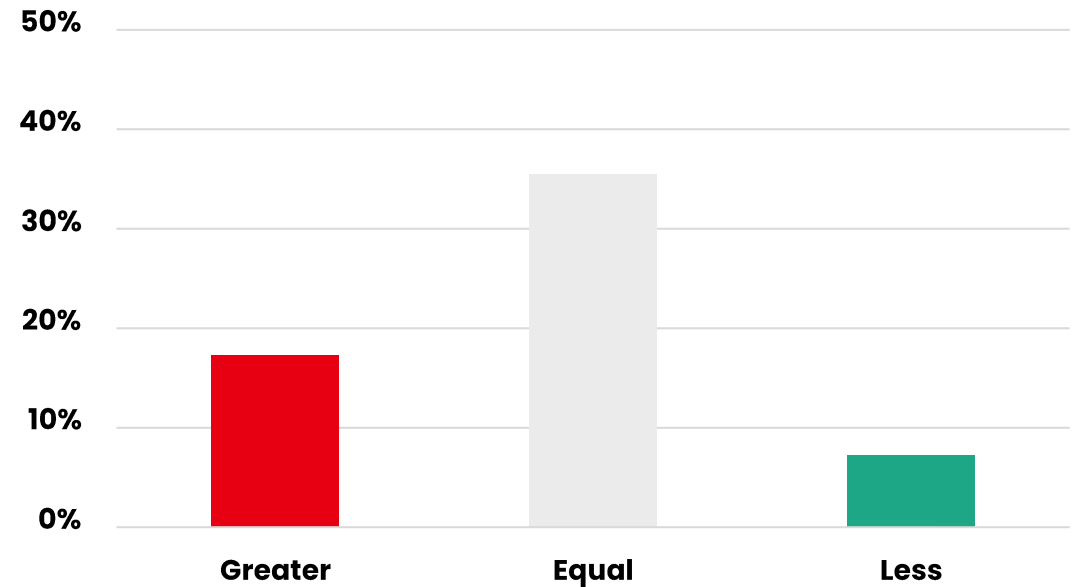
Most studios are holding steady on overall investment in tools and services for the current period

In the current half-year, how will your overall spending on tools and services compare to the previous half-year?



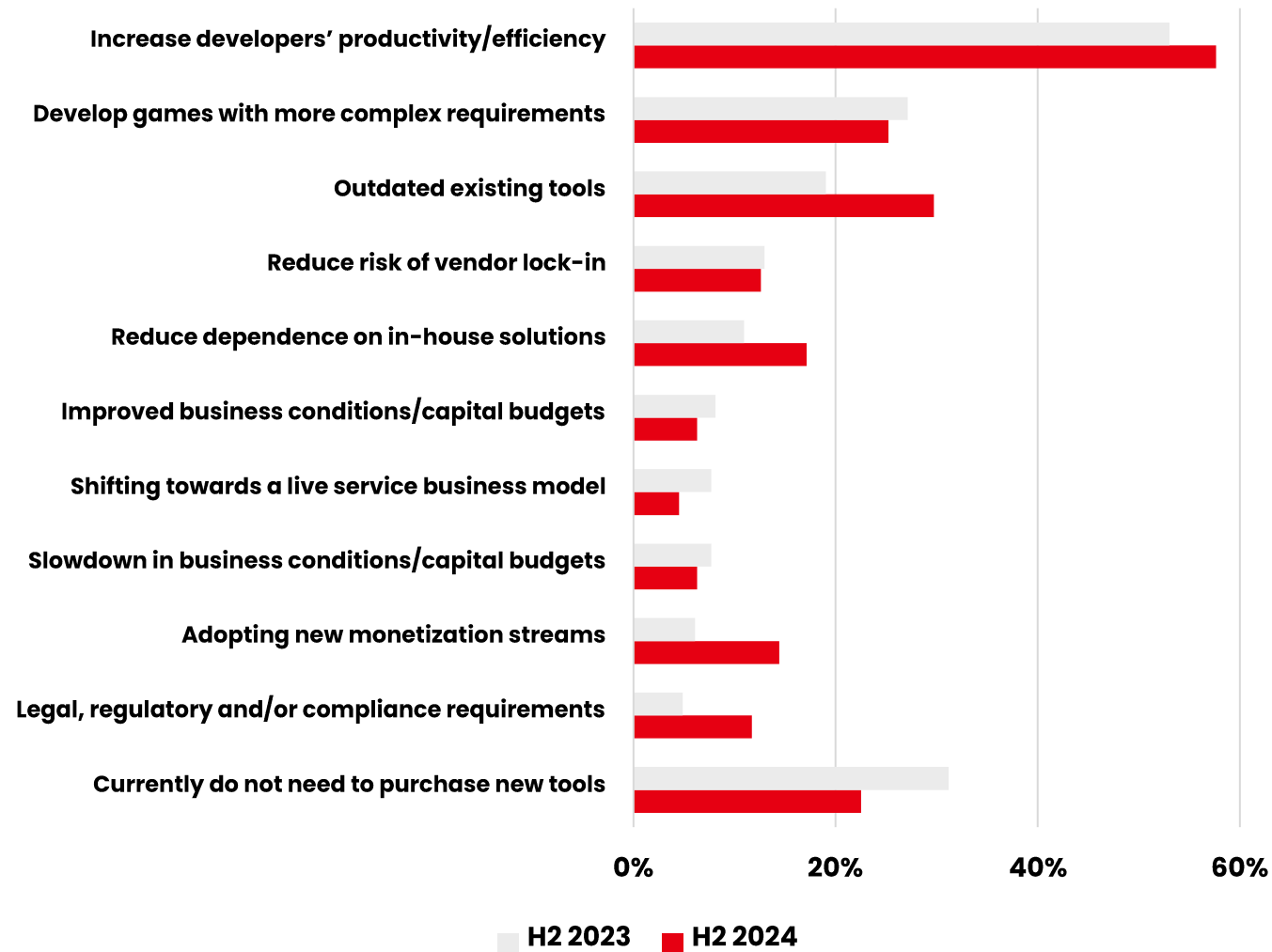
Studios are slightly more likely to increase investment in AI-powered tools and services

In the current half-year, how will your overall spending on AI-powered tools and services compare to the previous half-year?



Productivity and efficiency gains remain critical

Which factors are most driving purchase decisions for new tools and solutions?
(Select up to 3)



The need to increase developers' productivity and efficiency remains the leading reason studios seek out new tools and solutions, at **58%** in the latest survey, up from **53%** last year.

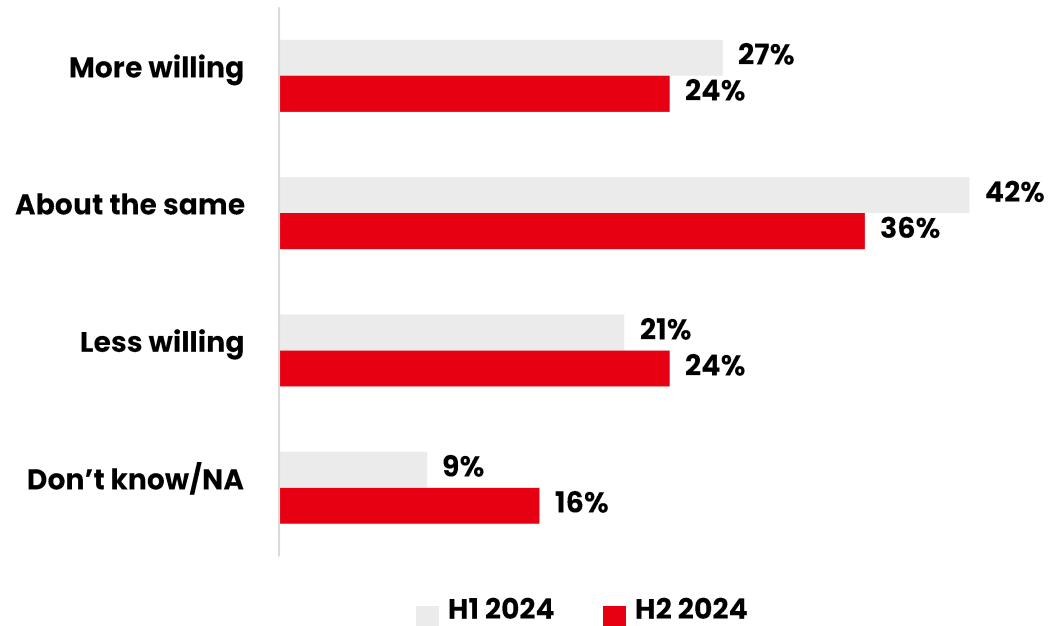
Other notable trends include a sharp rise in developers who feel their existing tools are outdated (from **19%** to **30%**), and a growing desire to reduce dependence on in-house solutions, now at **17%**.

Also notable is that the share of developers who do not currently need to purchase new tools has dropped from **31%** to **23%**.

Freelance and contract work

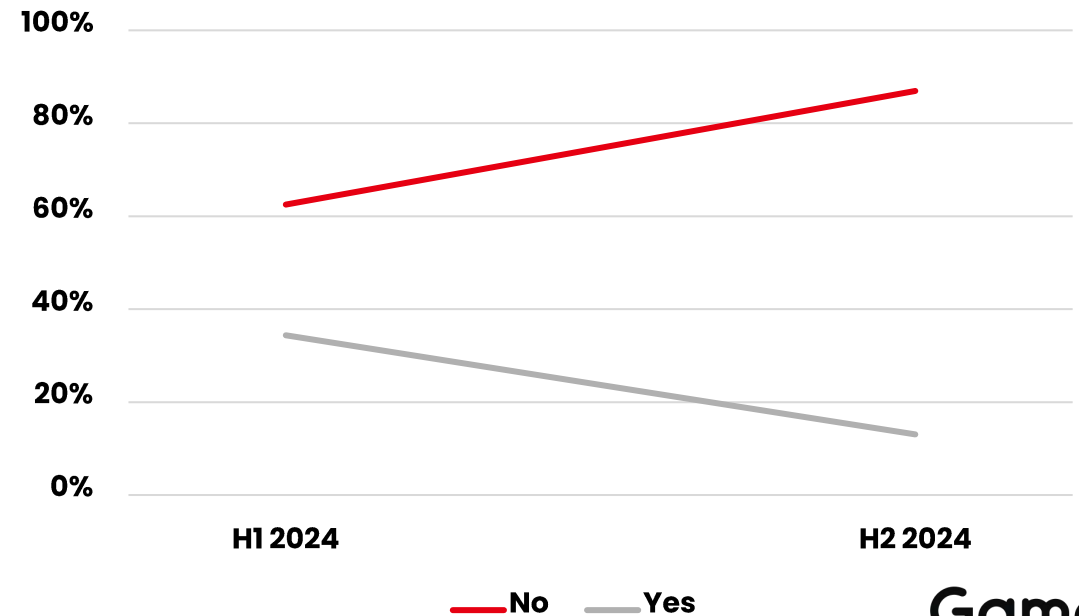
Freelancers indicated studios seem less likely to use their services now compared to six months ago, but these developers were also more hesitant to commit to an answer.

In general, do you believe that game studios are more or less willing to make use of freelance/contractor services in your area now compared to six months ago?



Freelancers have become significantly less likely to change their tools in recent months

Have you made any major changes to the tools and services used in your work over the past six months? (Freelancers/contractors only)



Industry conditions and commercial performance

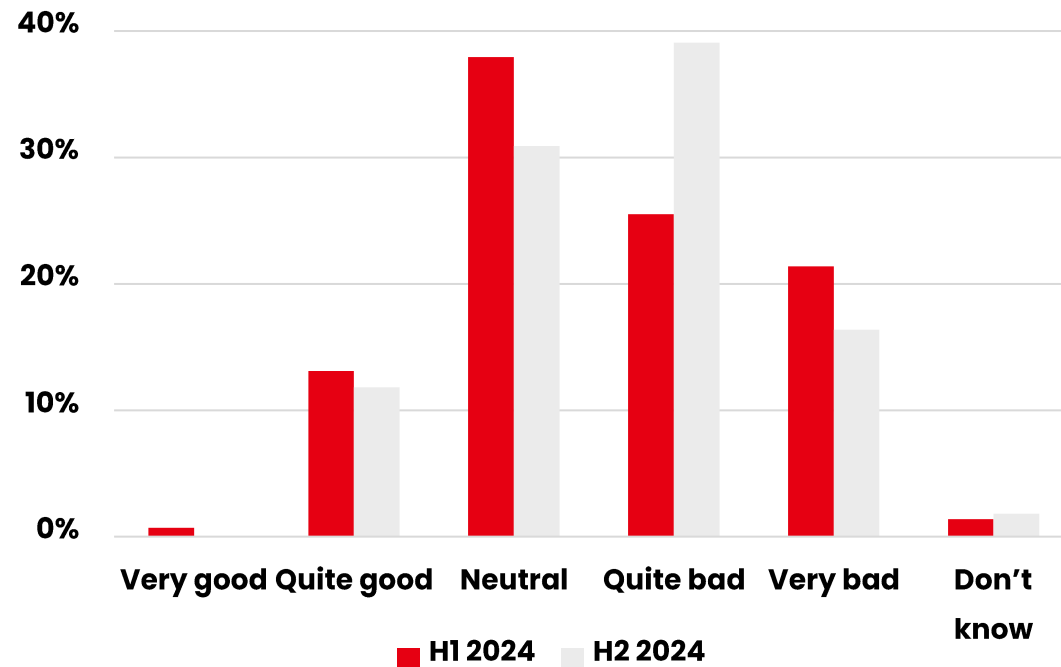
The games industry is widely considered to be in a difficult position at present, with many companies cutting costs and record numbers of layoffs in 2024.

This section of the survey returns to questions first asked in the May 2024 Industry Conditions and Commercial Performance survey to understand how developers' experiences and perspectives have changed as the market dynamics continued to evolve.

Industry conditions are increasingly challenging

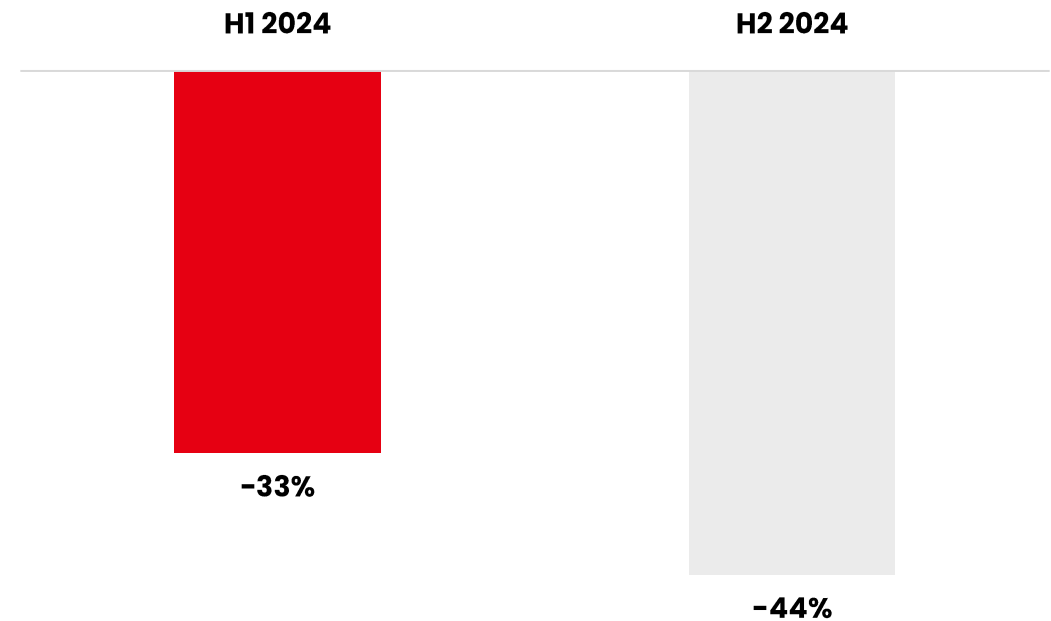
55% of developers now describe market conditions as “bad”, up from **47%** six months ago

How would you characterize overall market conditions at present in the games industry?



Net sentiment has dropped **11%** as developers grow increasingly concerned about market conditions

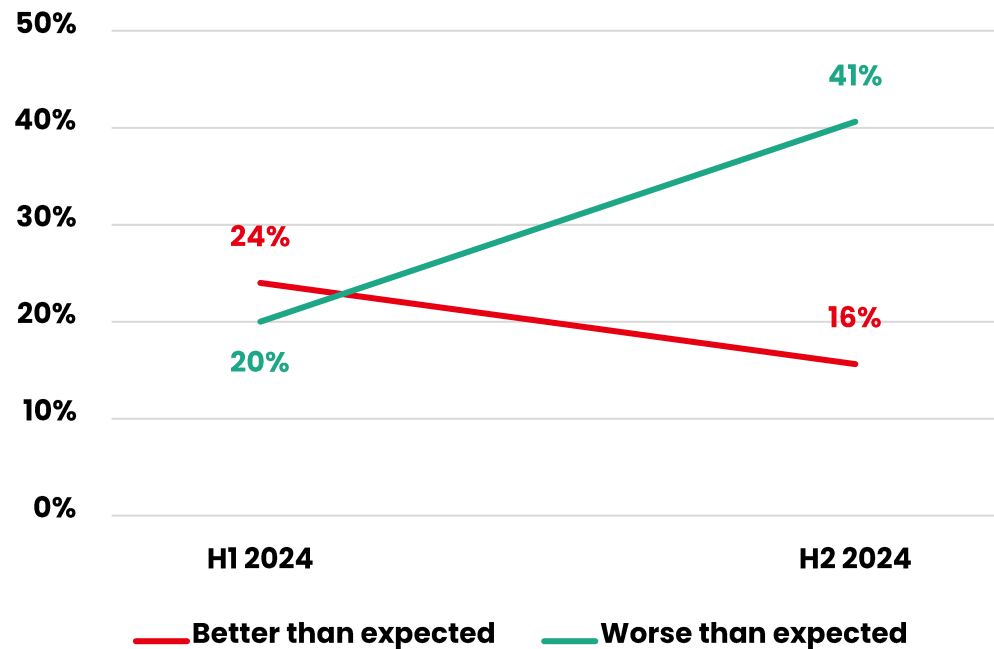
Net market conditions sentiment (total “good” minus “bad”)



Business performance has taken a hit

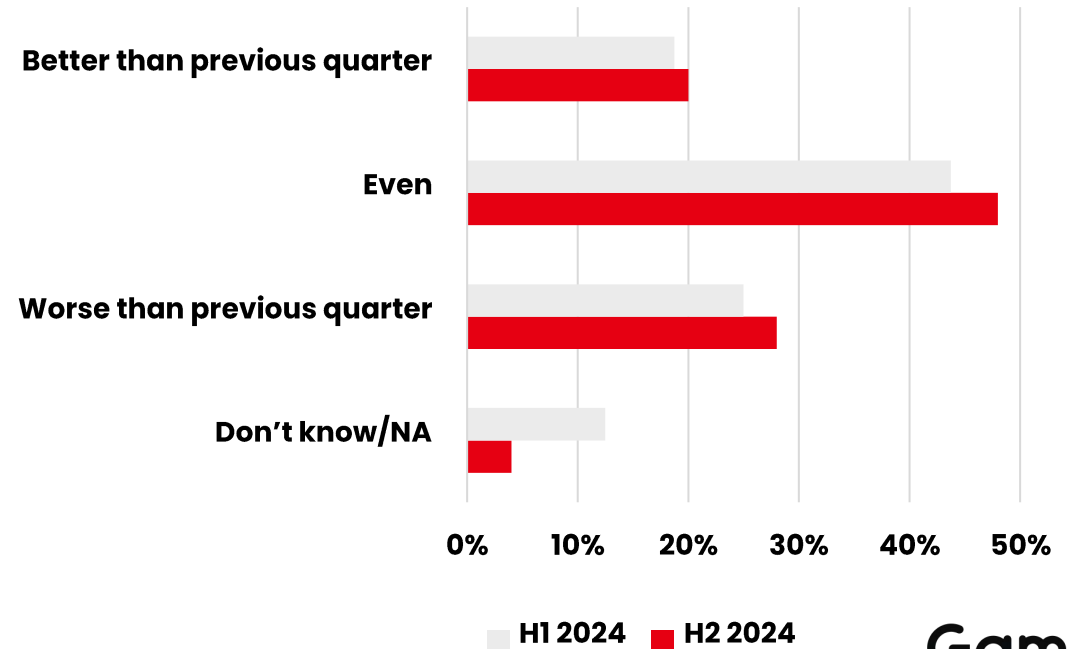
There has been a major jump in studios underperforming, from **20%** in H1 to **41%** in this survey

How did your business perform in the last quarter compared to expectations?



Only **20%** of developers expect to see improvement this quarter—largely unchanged since H1

How do you expect that your business will perform in the current quarter compared to the previous quarter?



Conclusions

This month's survey paints a nuanced picture of developers' use of and investment in tools and services. In many areas, including game engines and cloud platforms, developers have access to a wider range of solutions than ever before and are increasingly willing to make use of these options to deliver more efficiency and better results.

On the other hand, studios are under growing cost pressure and, in many cases, the capacity to invest in additional tools and services is not available at the moment.

This is underscored by the results from our Industry Conditions and Commercial Performance section, which paints a challenging picture of the current state of the games industry.

This will be a key theme examined in more depth by our next survey on Careers and Working Environments, which will launch in January 2025.

Thank you for your participation!

The logo for the Game Developer Collective is positioned on the left side of a horizontal banner. It features the words "Game Developer" in a bold, black, sans-serif font, with "Collective" in a red, sans-serif font below it. A thin black line extends from the left of the text and underlines it. The banner itself has a light gray background with a fine dot pattern. On the right side of the banner, there is a graphic of a map of North America composed of various colored hexagons (red, gray, and white). A large, solid red triangle points upwards from the bottom right corner of the banner.

**Game
Developer
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In partnership with **Game Developer, GDC, and Omdia**

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