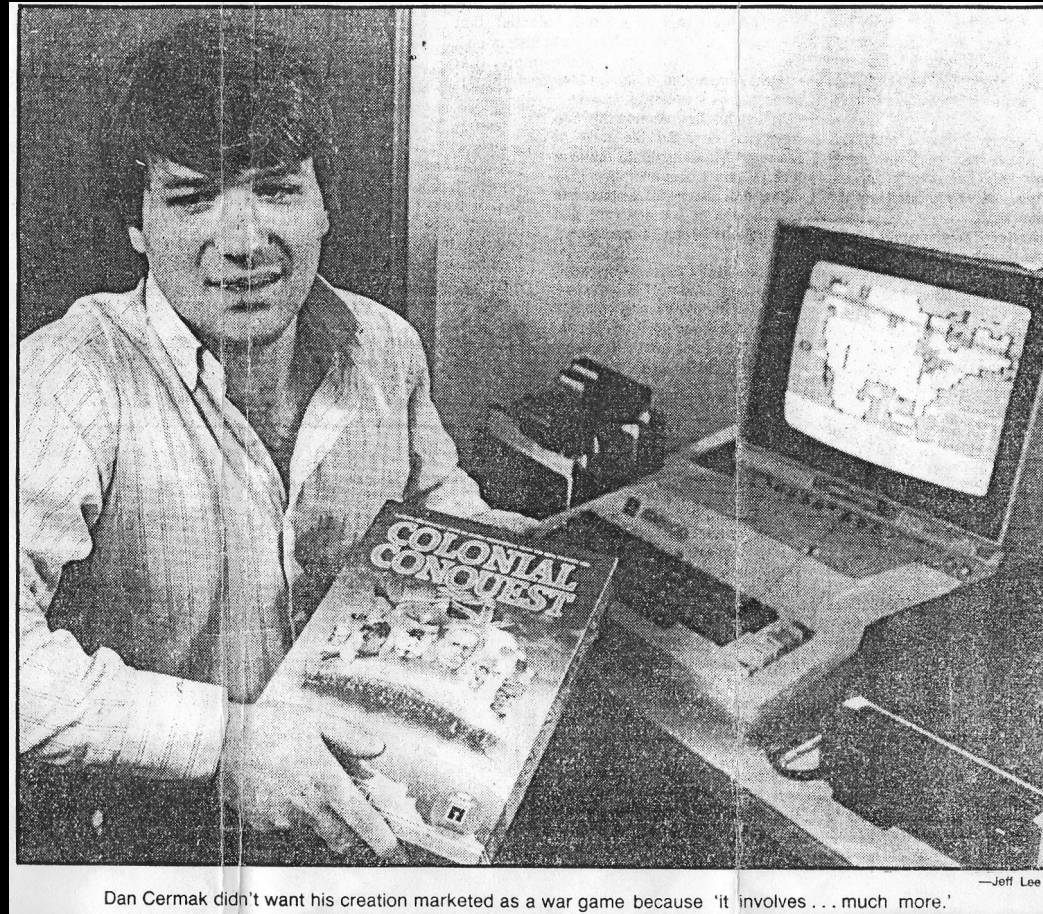
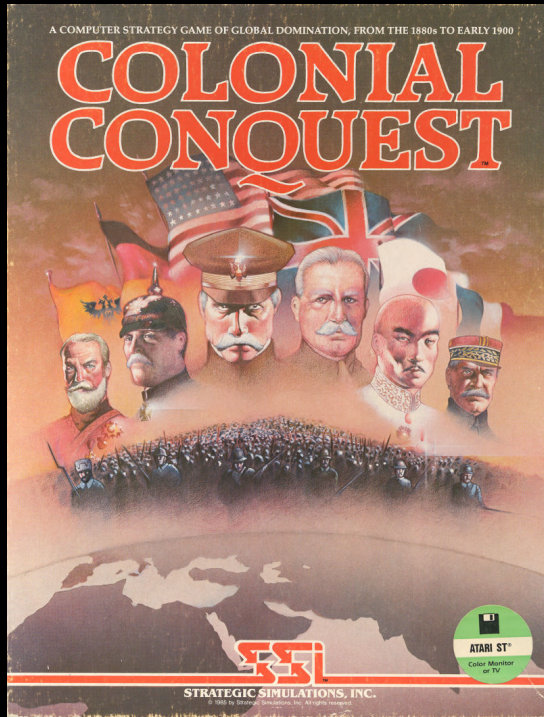


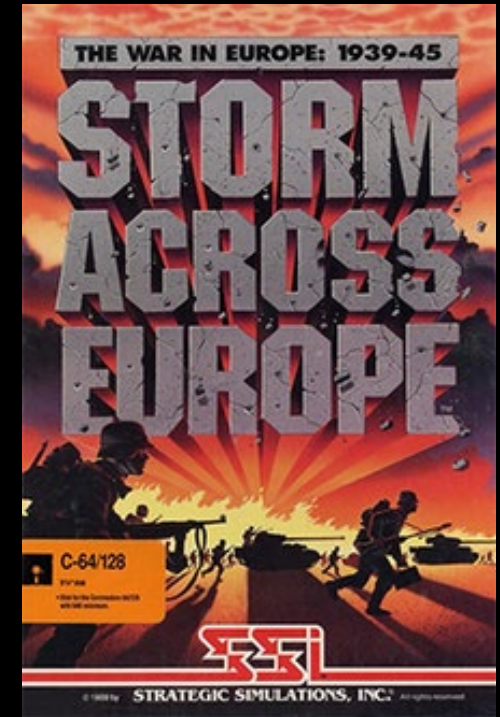
Introduction

- Game Studies Coordinator: Informatics
- 35 years in the video game industry
 - Started as an Indie developer
 - At SSI I produced, designed or oversaw over 100 games
 - Worked on the first AD&D video games
 - Worked on every genre out at the time
 - Held just about every production position in the industry
 - Was VP of Product Development then GM at Volition here in Champaign
 - Ran a studio of over 200+ folks
 - Volition is known for the Saints Row franchise
 - Was at Volition for almost 15 years

Indie



Dan Cermak didn't want his creation marketed as a war game because 'it involves . . . much more.'



Small Privately-Owned Publisher



TSR D&D IP: RPG, Action, Strategy, Simulators & one of the first Graphical MMOs



RPG



Abstract Strategy



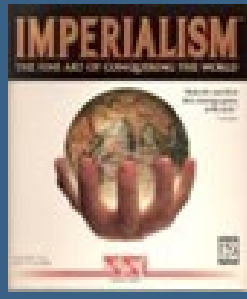
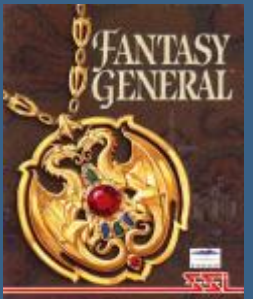
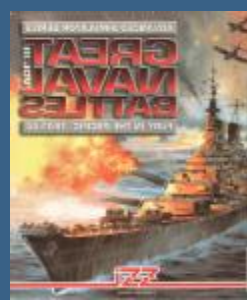
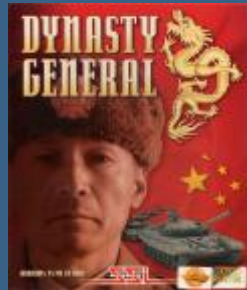
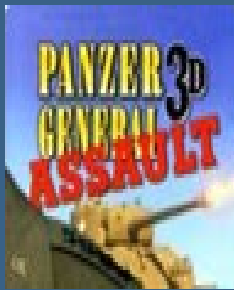
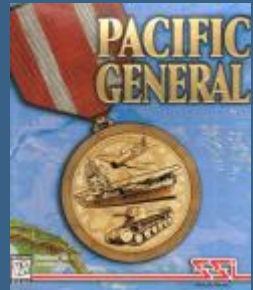
RTS

Wargame

Strategy

Sports

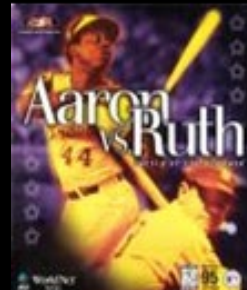
Mid-Sized Publicly Owned Publisher (Buncha names)



Strategy
and
Wargames



Space Sim



RTS

Vehicular
Combat

Sports

Big Studio, Huge Publisher (EA)

Westwood™
STUDIOS



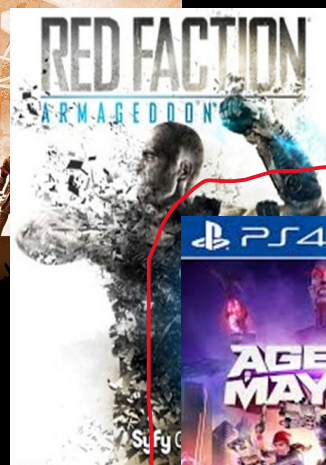
Volition, Big Publisher (THQ)



2004



2009



2011



2017



2006



2008



2011



2013

Koch Media
(Deep Silver)

Quick Industry Overview

Impact on the Economy

Disclaimer: I used Newzoo (newzoo.com) for market statistics, other data sources vary

Expected worldwide growth for 2020 was supposed to be around 4-5%

Actual growth was over ~15%, primarily due to the pandemic

Size of the Industry:

- Worldwide: \$177B

As a comparison, global film is \$100B, NA sports is \$75B

Gaming Stats

- Compensation in the industry averages \$121,459
- More than 225 million in the US?



143,045

Direct Industry Jobs



285,601

Supplier and Other
Supported Jobs



428,646

Total Industry
Supported Jobs

Video Game Industry Supported Output in the United States

\$40,913.9

Direct Industry
Output (\$M)

+

\$49,424.6

Supplier and Other
Supported Output (\$M)

=

\$90,338.5

Total Industry
Supported Output (\$M)

Broader Video Game Ecosystem in the United States

1958

Number of of Publisher, Developer, or
Hardware Company Locations

458

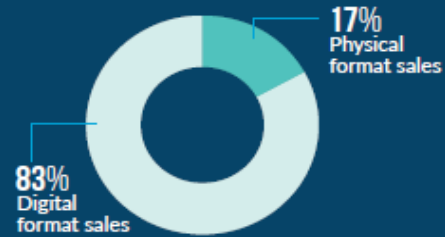
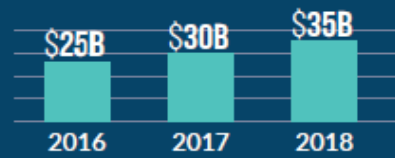
Higher Education
Programs

209

Varsity
Esports Teams

PURCHASING

Content



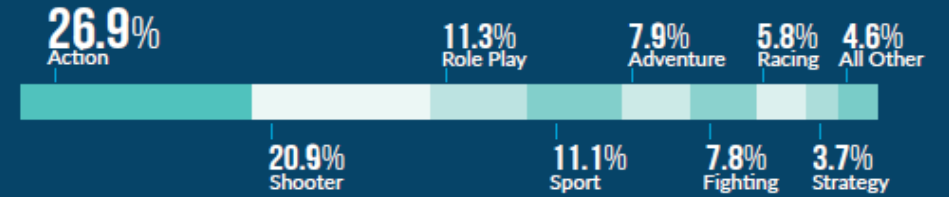
$$\begin{matrix} \$35.8B & + & \$5.1B & + & \$2.4B & = & \$43.4 \\ \text{Content} & & \text{Hardware} & & \text{Acc \& VR} & & \text{TOTAL} \end{matrix}$$

Top 20 Best-Selling Video Games of 2020 by Units Sold

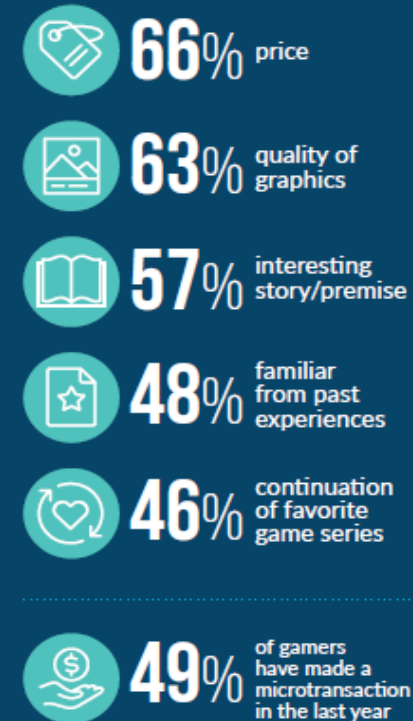
RANK	TITLE	ESRB
1	Call of Duty: Black Ops: Cold War	Activision Blizzard (Corp)
2	Call of Duty: Modern Warfare	Activision Blizzard (Corp)
3	Animal Crossing: New Horizons*	Nintendo
4	Madden NFL 21	Electronic Arts
5	Assassin's Creed: Valhalla	Ubisoft
6	The Last of Us: Part II	Sony (Corp)
7	Ghost of Tsushima	Sony (Corp)
8	Mario Kart 8: Deluxe*	Nintendo
9	Super Mario 3D All-Stars*	Nintendo
10	Final Fantasy VII: Remake	Square Enix Inc (Corp)
11	Marvel's Avengers	Square Enix Inc (Corp)
12	Marvel's Spider-Man: Miles Morales	Sony (Corp)
13	NBA 2K21*	Take 2 Interactive (Corp)
14	Super Smash Bros. Ultimate*	Nintendo
15	FIFA 21	Electronic Arts
16	Mortal Kombat 11	Warner Bros. Interactive
17	Dragon Ball Z: Kakarot	Bandai Namco Entertainment
18	MLB: The Show 20	Sony (Corp)
19	Cyberpunk 2077*	Warner Bros. Interactive
20	Tony Hawk's Pro Skater 1 + 2	Activision Blizzard (Corp)

Source: The NPD Group/Retail Tracking Service/Digital Games Tracking Service

Best Selling Video Game Super Genres



Top 5 influences for purchase



Gamers say the following are useful when deciding on a purchase



The Game Industry: **ESA** ESSENTIAL FACTS 2020



Men 18 - 34



75%
play video
games **on a
console**



51%
most often
play **action
games**



68%
prefer to
play **with
friends**

FAVORITE GAMES



80%
Shooter games
(e.g., *Call of
Duty*, *Fortnite*)



68%
Adventure games
(e.g., *Tomb Raider*,
Uncharted)



65%
Role-playing games
(e.g., *World of Warcraft*,
The Witcher)



70% say games **help them stay connected with friends and family**



Women 18 - 34



77%
play video
games **on a
smartphone**



46%
most often
*play casual
games*



48%
prefer to
play **with
friends**

FAVORITE GAMES



59%
Family games
(e.g., *Super Mario
Party*, *Just Dance*)



52%
Action games
(e.g., *Grand Theft
Auto*, *Super Mario
Odyssey*, *God of War*)



50%
Racing games
(e.g., *Need for
Speed*, *Mario Kart*)



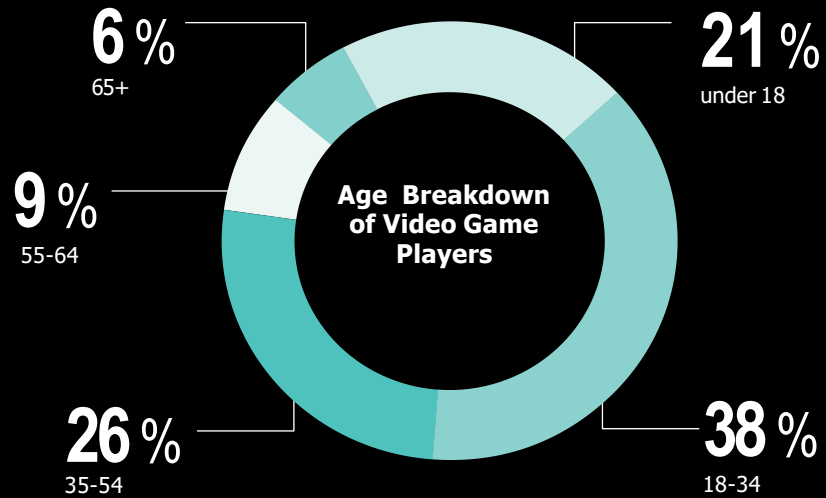
55% say games **help them stay connected with friends and family**

A Nation of Gamers

We're a nation that believes in the power of play. No matter who you are or where you're from, there's a game for everyone.

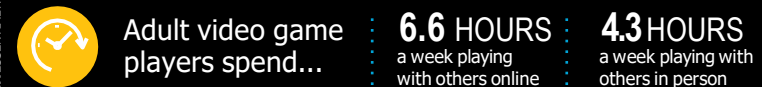
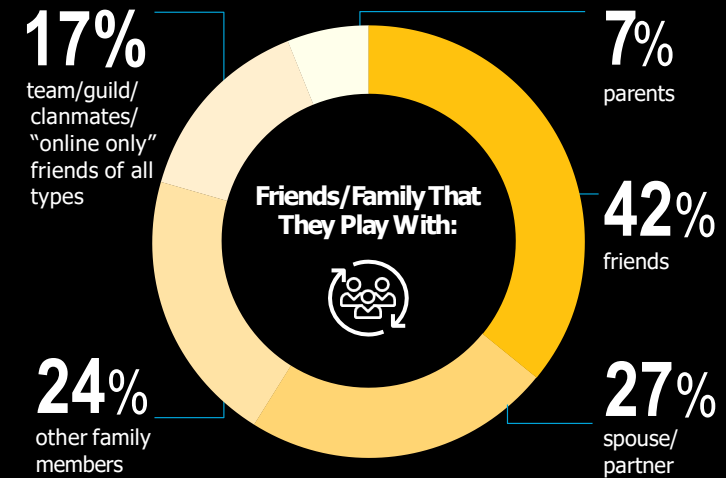
WHY WE PLAY

How you play... and anyone can play.



ESA ESSENTIAL FACTS 2020

* Source: The AbleGamers Charity



ESA ESSENTIAL FACTS 2020

Things to think about in terms of the industry

- Why join the game industry?
 - Careful of the passion trap
- Things to think about
 - Young industry (folks often do things cuz it's the way they learned rather than do it right)
 - Developers don't always make the best leaders
 - You won't have the control you think you will
- Studios and Company aren't loyal
- Being an Indie is hard
 - Financially
 - Planning/execution
- Politics
 - Positions
 - Promotions
 - Pay

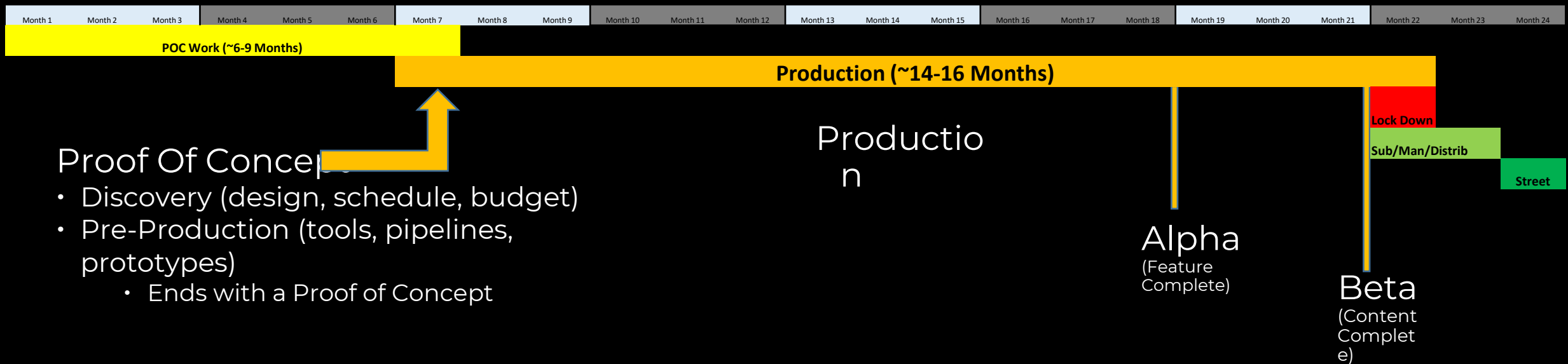
Things to think about in terms of the industry

Great talk: <https://www.youtube.com/watch?v=UaRnAXozc58>

- Industry vet Richard Vogel that started 3 studios (Bioware Austin, Sony Austin & Bethesda Austin)
- 30-minute talk on how to survive in the industry
- Key Points to start
 - People starting in the industry have a 90% probability of getting laid off in the first 5 years
 - Your average time in a company will be 4 years
 - Most places don't onboard, mentor, train, or career counsel
 - Programmers rule in the hierarchy, he wonders why the designers aren't more important

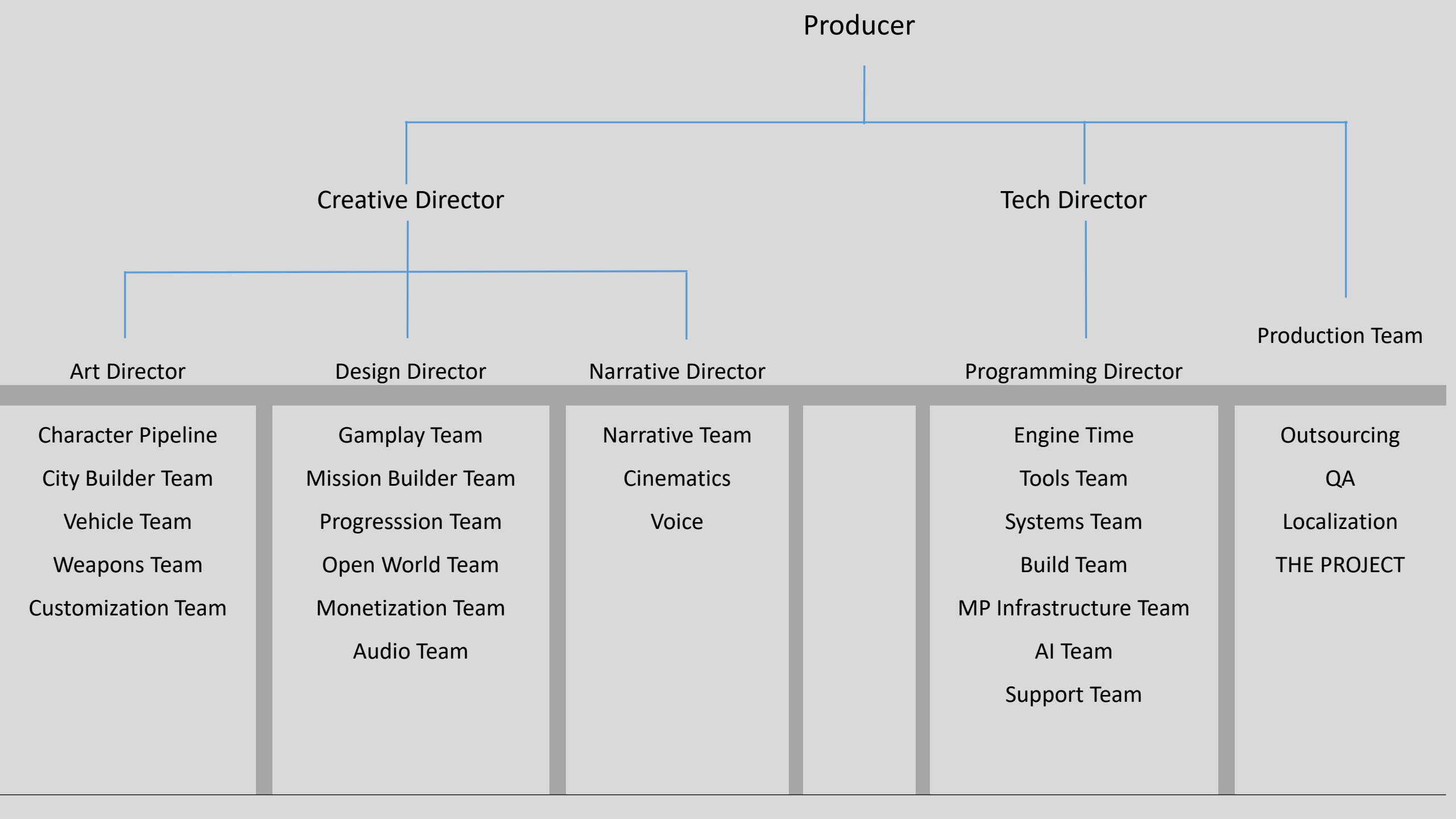
Game Production Methodologies: The Product Cycle

- Hasn't changed much over the years (Design, Produce, Ship)
 - Design has gotten more detailed and longer (Discovery, Pre-Pro and POC, or MVP)
 - Alpha and Beta are flexible in definition, changing by company
 - Post launch has become a new key part of the cycle
 - DLC methods
 - Persistent online games are starting to change the model (its all about community)



Game Production Methodologies: What has Changed

- The Team
 - Everybody but publisher internal teams were indies, no real big studios for some years
 - Publishers aggregated indies then in late 90s bought them up
- Positions: specialization hit the industry early, but new tech positions were added ~2000
 - Programming specialization
 - Design, animation, and art get Tech positions
- Teamwork systems
 - SCRUM
 - Agile
- The tools
 - Scheduling (task lists to full blown schedules)
 - Budgeting (we didn't really track the money, just the general time for the 1st 20 years)
 - Documentation (we went from full design docs to online docs to full wikis)
- Middleware & full Engines
- Outsourcing
- Marketing and Finance have changed quite a bit (channels, timing, free to play)



Dev Teams							
City Builder Team		Vehicle Team		Character Pipeline		Systems Team	
	Env Artists		Artist Modeller		Concept Artist		Programmers
	Env Designers		Artist Texturer		Character Modeller		Tech Designers
	Open World Designer		Tech Animator (rigging)		Character Texturer		Tech Artists
	Support Team		Animator		Tech Animator (rigging)		
Mission Builders			Support Team		Animator	Progression Team	
	Game Player Programmers				Audio (Voice)		Progression Designer
	Game Player Designers	Open World Team			Combat Designer		Support Team
	City Builder Team		Open World Designer		Weapons Designer		
			Support Team		Writer	Monetization Team	
Tools Team							Monetization Designer
	Tools Programmers	AI Team		Narrative Team			Support Team
	Tech Artists		AI Programmers		Writers		
	Tech Designers				Designers	MP infrastructure Team	
		Support Team			Audio		Programmers
Engine Team			Concept Aritst		Game Programmer (viability)		
	Graphics Programmers		Shader Artists			Build Team	
	Physics Programmers		VFX Artists	Weapons Team			Programmers
	Architects (Programmers)		Audio Designers		Artist (Modeller)		
	Systems Programmers		Tech Artists		Artist (Texturer)	Customization Team	
	Lighting Programmers		UI Team		Artist (VFX)		Customization Designer
					Combat Designer		Support Team
					Support Team		

Team Dynamics

The Creative Director owns the vision of the game

The Technical Director owns the viability of the feature set

Each Team has a Lead or coordinator (if the group is too small)

- Determined by skill and communication ability

Each Team is assigned a scheduler and an AP (Associate Producer)

- They drive the team forward, keeping them focused and on track

The Directors must own and drive the high-level elements

Art: Style & consistency (this does not mean moving individual items around)

Design: The player experience

Programming: Scope

Production must drive all of this with a very small staff.....

Questions