

2023

Rates and Conditions
Survey Results



Introduction

In 2023, games revenue worldwide will generate \$187.7 billion, and in 2026 it is expected to generate \$212.4 billion. Employment in the sector is increasing by 3.5% annually. At the same time, Major Film and TV Production Studios have been steadily increasing their investments in games to diversify their revenue streams. As the Federal Trade Commission noted, video games are now five times more profitable for these employers than motion pictures.¹

In March of 2023, a group of game workers and rank-and-file members of the International Alliance of Theatrical Stage Employees (IATSE) who frequently work in games began collaborating on unionizing game workers across the United States. This committee created the 2023 Gameworkers.org Rates and Conditions study to build a public resource for game workers concerning wage and benefit information, draw attention to game workers' shared challenges in building sustainable careers in the industry, and compare non-union game workers' experiences with those of their unionized colleagues in other sectors of the entertainment industry, such as Motion Picture and Television production.

The findings illustrate an industry suspended in a parallel reality compared to other sectors of entertainment where union representation is more common. Most game workers reported that their game career is either unsustainable or they're unsure whether it is sustainable, and less than half make it to their seventh year working in the industry. Unfair pay disparities within singular job titles, lack of retirement security, pressure to work unpaid overtime, low wages, burnout, and exhaustion were widespread and commonly reported. Ultimately, two in three respondents indicated they did not believe they were in a position to negotiate viable solutions to these problems on their own, highlighting an environment where unionization and collective bargaining could be a viable alternative to the status quo.

Method of data collection

All information used in this study was collected using [an online form on gameworkers.org](https://www.gameworkers.org/rates-conditions) which required respondents' names and contact information to verify the authenticity of individual responses. Workers were asked questions about their recent employment, wages, and working conditions. The survey ran from March 2023 to August 2023 and will remain open to generate more results in the future. In preparation for this report, any identifying information was removed, and aggregate data was compiled into industry-wide data sets and broken down into subsectors such as AAA, AA, Mobile, Indie, Esports, TTRPG, and Gambling, each of which has unique audiences and operates on distinct platforms and technologies.

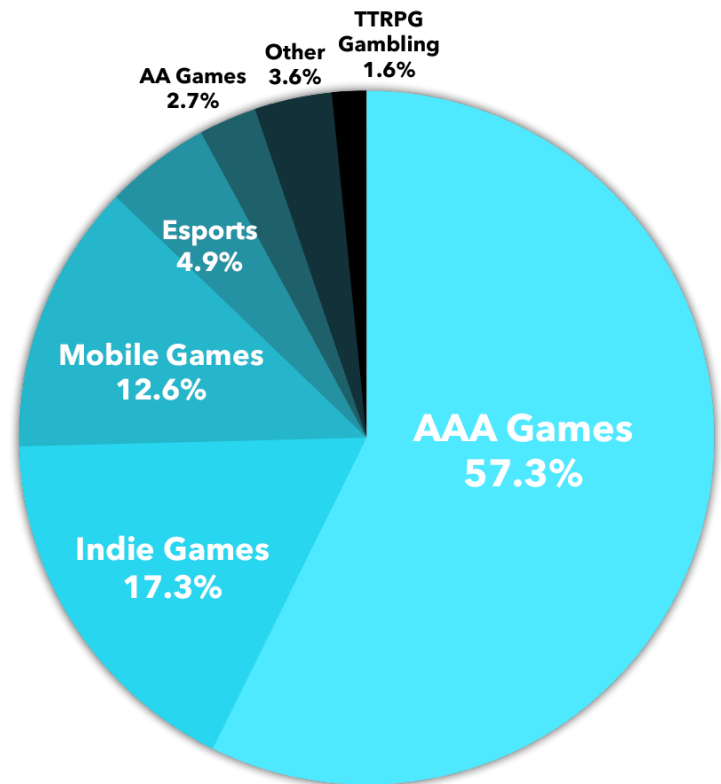
¹ UNITED STATES OF AMERICA BEFORE THE FEDERAL TRADE COMMISSION, COMMISSIONERS: Lina M. Khan, Chair; Rebecca Kelly Slaughter; Christine S. Wilson; Alvaro M. Bedoya, In the Matter of Microsoft Corp., a corporation, and Activision Blizzard, Inc., a corporation, Docket No. 9412, REDACTED PUBLIC VERSION, Page 5, FILED 12/22/2022.
https://www.ftc.gov/system/files/ftc_gov/pdf/D09412MicrosoftActivisionAdministrativeComplaintPublicVersionFinal.pdf



Subsectors of the Games Industry

Respondents were asked, "What type of gaming did you work on for your most recent employer?"

- AAA games are considered "blockbuster" games made with large teams focused on widespread sales.
- AA games are similar in these aspects; however, they generate less revenue or are less widely available.
- Mobile games are games that are made for mobile platforms like iOS and Android. Indie games are games made by small, independently-funded teams, sometimes consisting of just one person.
- TTRPG (tabletop role-playing games) are board and card games not played on consoles or PCs.
- Esports is a result of video games becoming competitive, with these workers broadcasting large gaming events with teams playing against each other and supporting the production of these events.
- Gambling sector workers develop games for the casino and gambling industry.

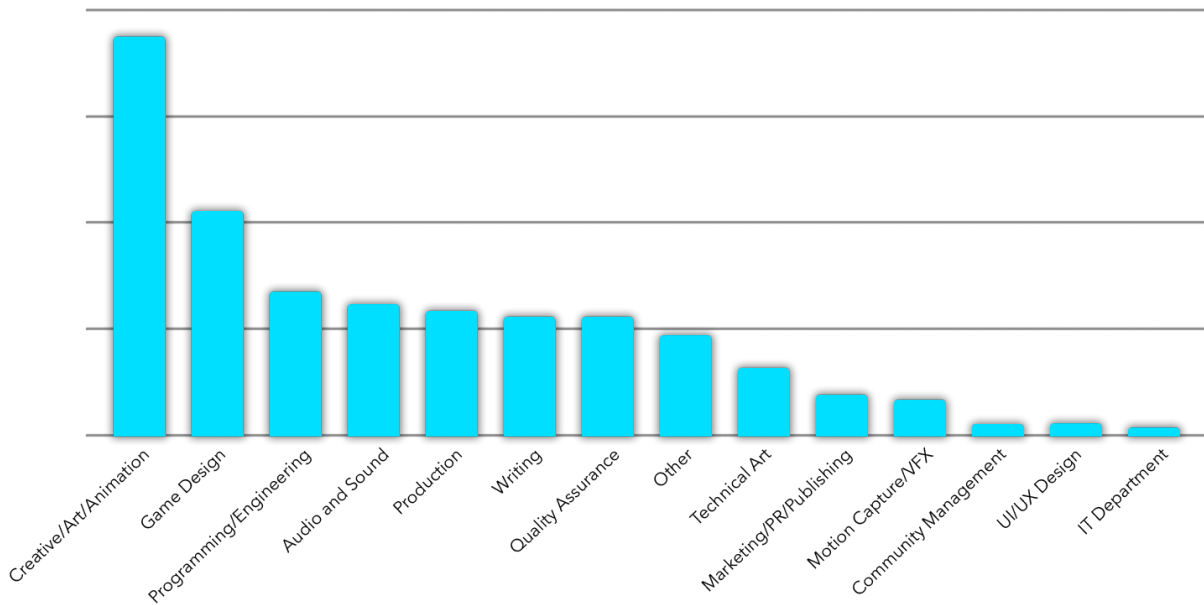


AAA and indie games are the most recognizable games within the industry, with console platforms widely available for AAA games and the Steam marketplace creating a direct-to-consumer connection for indie developers. Unsurprisingly, these were the sub-sectors with the most representation in our survey results.



Games Industry Departments

Respondents were asked to select their department from a dropdown of options.



Most respondents were in creative fields, followed by game design and programming. Some of the most common departments, such as Creative/Art/Animation and Audio/Sound, are squarely within IATSE's traditionally represented crafts. It should be noted that the high number of responses in these departments could be a byproduct of IATSE's existing relationships with workers in those fields, who may have taken their unique talents to the game sector. Departments such as Animation, Production² and Motion Capture/VFX³ include job titles which IATSE has recently made significant gains towards unionizing.

While respondents' job titles were collected for the purposes of this study, the titles were too numerous and unstandardized to be a helpful dimension by which to present the survey results. Instead, the committee elected to use respondents' departments to further cross-sect the data, which allowed the committee to identify whether specific departments were treated disproportionately well or poorly and ensured the sample sizes necessary for statistical analysis were met.

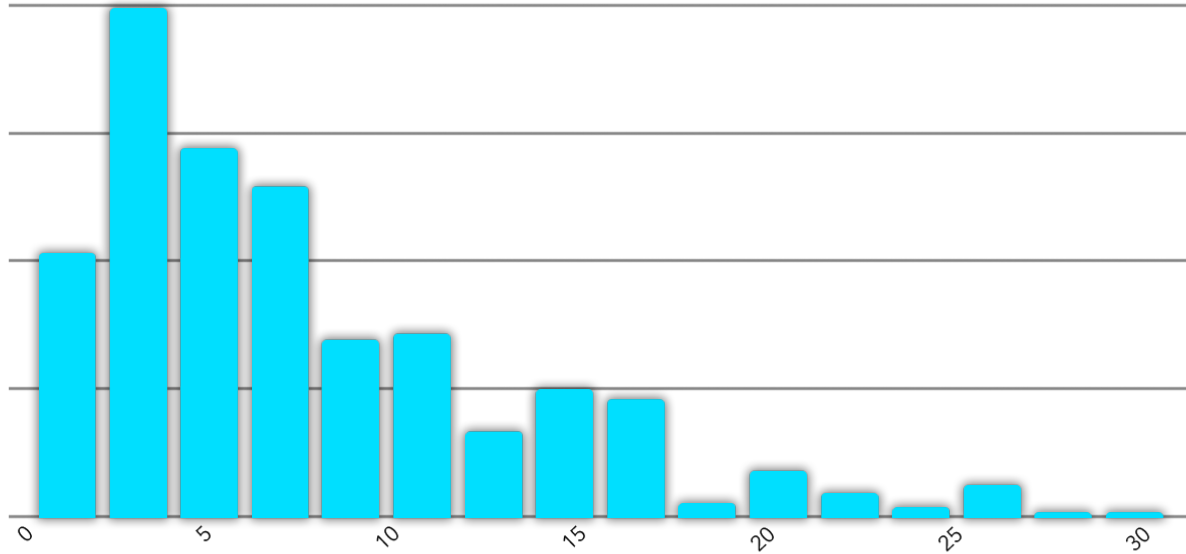
² "5,000 Unionizing Commercial Production Workers Have Certified Majority, Will Win Voluntary Recognition," IATSE, July 25, 2023, <https://iatse.net/5000-unionizing-commercial-production-workers-have-certified-majority-will-win-voluntary-recognition/>.

³ "Marvel Studios VFX Workers File for Unprecedented Union Election at National Labor Relations Board," IATSE, August 7, 2023, <https://iatse.net/marvel-studios-vfx-workers-file-for-unprecedented-union-election-at-national-labor-relations-board/>.



Career Longevity: Years in Games Industry

Respondents were asked, "How many years have you worked in games?"



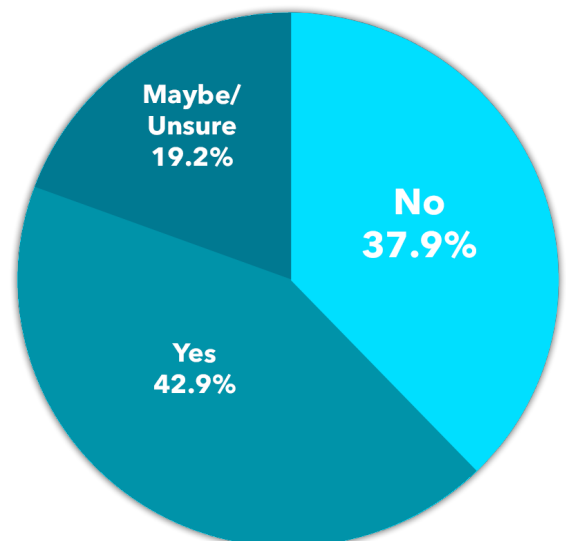
Most respondents had worked between one and three years. The average years of industry experience was 6.9, though this number was notably driven upward by a handful of outliers. The median was five, and the most common response was two. A response of seven years was the 55th percentile, meaning less than half of respondents had made it to their seventh year in the business. There was a drastic decrease in the number of respondents who had worked seven years or more. This trend illustrates how quickly game workers burn out and leave the industry, often for higher-paying tech jobs that are not games-related.

Career Longevity: Is working in games sustainable?

Respondents were asked, "Do you think working in the games industry is sustainable for you long term?"

37.9% responded no, and a further 19.2% were unsure if they had longevity for their career in games. In other words, less than half of workers agreed that they are able to continue in games until they retire.

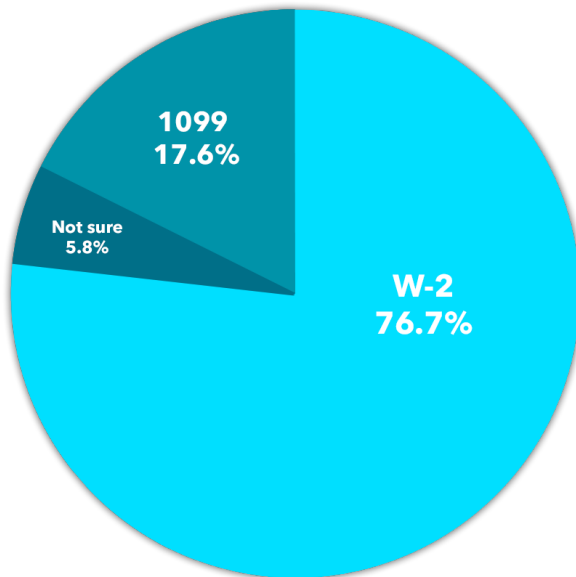
This survey question was open-ended, offering participants an opportunity to provide qualitative and anecdotal information regarding their outlooks on their careers. Those who had spent more time in the industry were unsurprisingly more likely to believe their career was sustainable, though several recognized the difficulties faced by newer workers.





Pay: Tax Form

In reference to their current or most recent employer, workers were asked, "Are you a 1099 contractor or a W-2 employee?"



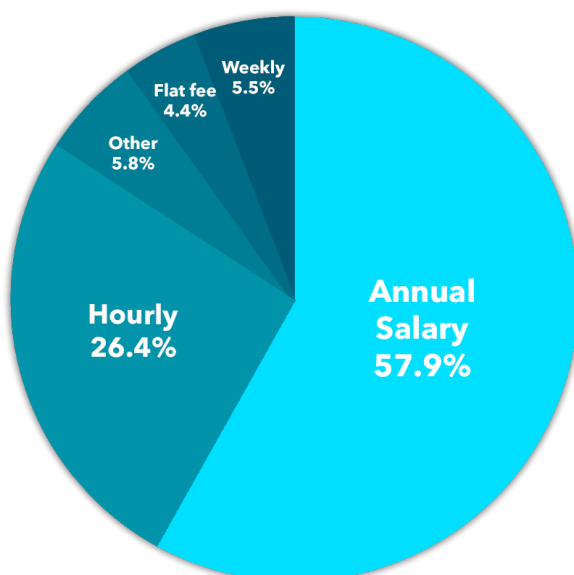
Most workers reported being paid as W-2 employees, with 17.5% of workers stating they were 1099 freelancers.

This information was collected for two reasons. First, under the National Labor Relations Act (NLRA), genuine independent contractors are not eligible to unionize through the National Labor Relations Board (NLRB) Election Process. While the Labor Board's standard for determining whether a worker is an independent contractor for the purposes of a unionization election considers several factors, workers who are paid under 1099's have historically been more likely to be ruled as ineligible.

Second, the tax form workers are paid under can be indicative of their relationship with their employer, and these relationships should be considered when analyzing pay data.

Pay: Compensation Structure

Respondents were asked how they were paid at their most recent or current employer, with an option to select from several common choices.



57.9% reported that they are paid an annual salary, while 26.4% say they are paid hourly.

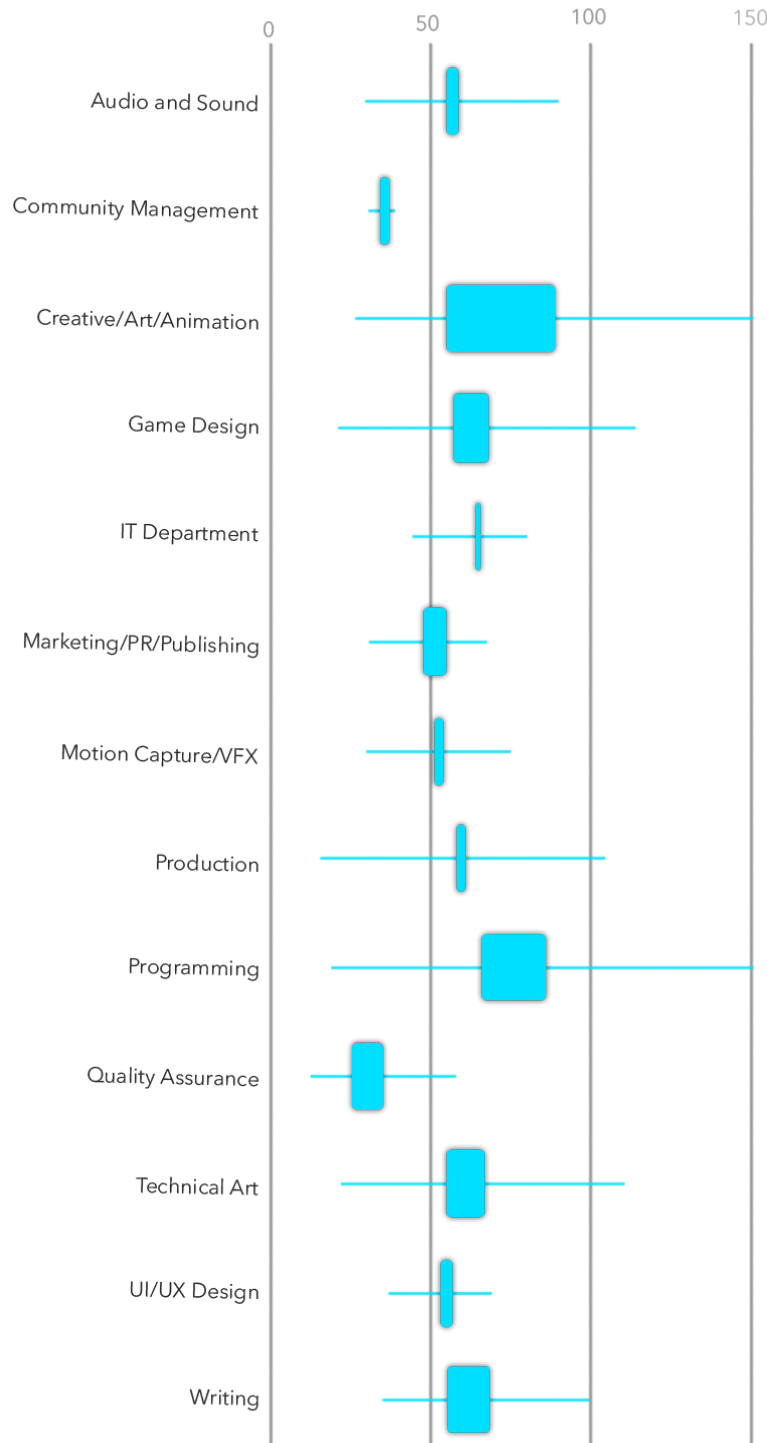
Salaried workers are often "exempt" from overtime, meaning employers aren't legally obligated to pay workers for extra hours worked. With a collective bargaining agreement, these workers could include language around overtime hours to be compensated fairly for extra hours they work.

One worker stated "It's frustrating to work a 14-hour day and know that with California overtime laws, I should be getting paid for 18 hours of my time when I'm only getting paid 8."



Pay: Hourly Rates by Department (W-2 Workers)

Workers were asked for their hourly rate, and to convert their annual, weekly, or flat-rate pay to an hourly rate based on the number of hours per week they reported. In U.S. Dollars per hour.



Pay varied across departments within the reported wages for W-2 workers. The highest and lowest rates were significantly offset from the averages per department, illustrating how widely pay rates vary even within individual departments.

For W-2 employees, the maximum pay rate reported was \$153.85/hour, while the lowest was \$12.50/hour. Freelancers exhibited a greater variance, with a high of \$200/hour and a low of \$10.75/hour.

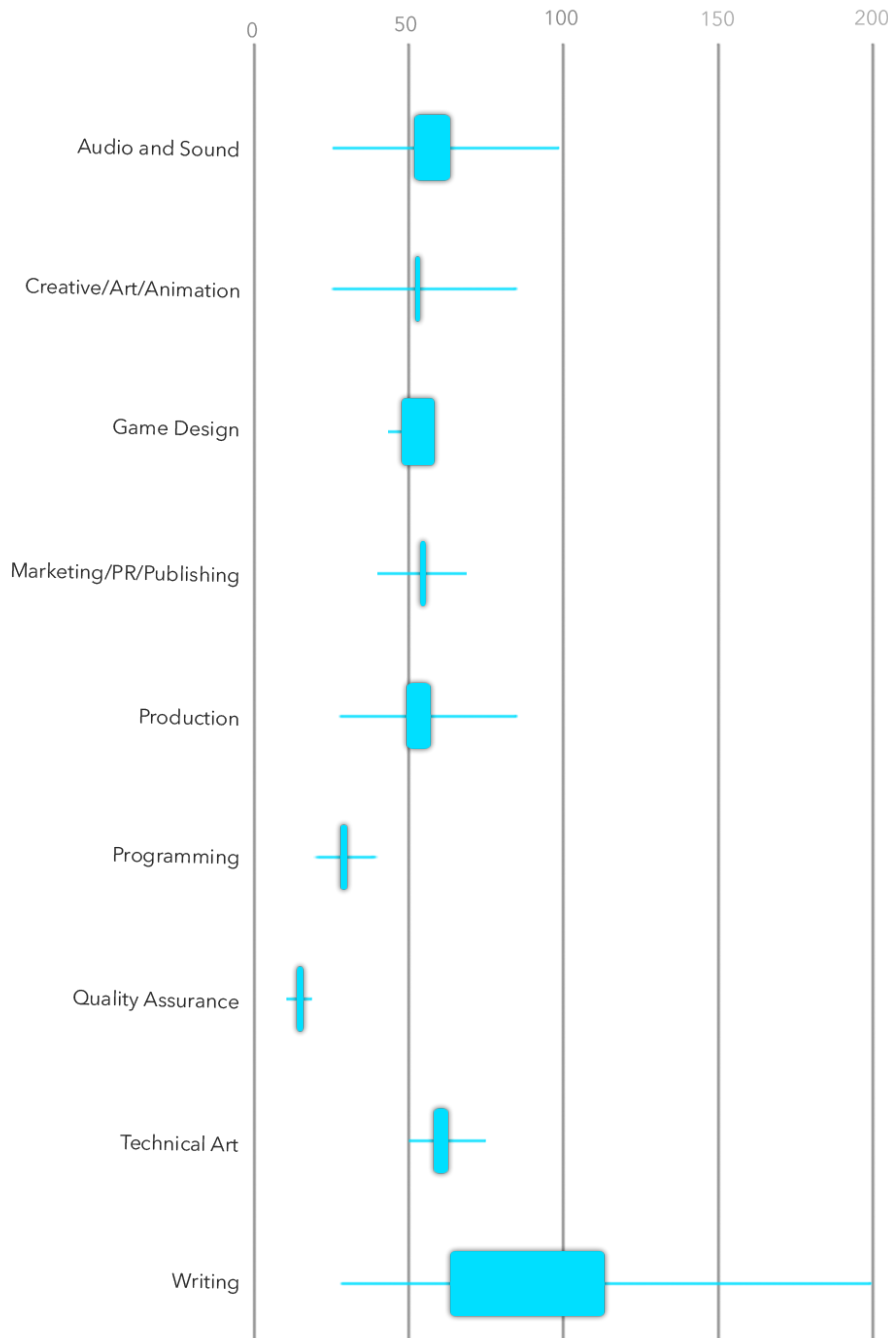
Overall, being a W-2 employee corresponded with earning \$6.45 more per hour compared to other workers when controlling for other factors such as years in the business and department.

One respondent stated "Compensation and benefits are highly irregular and unregulated. Salaries are all over the place [...] It is hard especially for new workers to know if they are getting a fair deal."



Pay: Hourly Rates by Department (1099 Freelance Workers)

Workers were asked for their hourly rate, and to convert their annual, weekly, or flat-rate pay to an hourly rate based on the number of hours per week they reported. In U.S. Dollars per hour.



For freelancers, there were fewer reports across all departments. Writing saw the most freelance respondents with the highest median pay and greatest variance.

Across both W-2 and 1099, Quality Assurance was the lowest-paid department, with responses in this category averaging \$25.38 less earned per hour than workers in other departments even when controlling for factors such as years in the business and subsector. This is notable because the effort to unionize in the gaming industry has thus far primarily been spearheaded by workers in this category.

Variations in pay within departments and even individual job titles demonstrate a lack of standardization across the industry, as there are no established minimums in the absence of a collective bargaining agreement. Instead, workers in games are left to negotiate their rates individually with their employers, a feat a majority of workers stated they felt impossible to achieve.

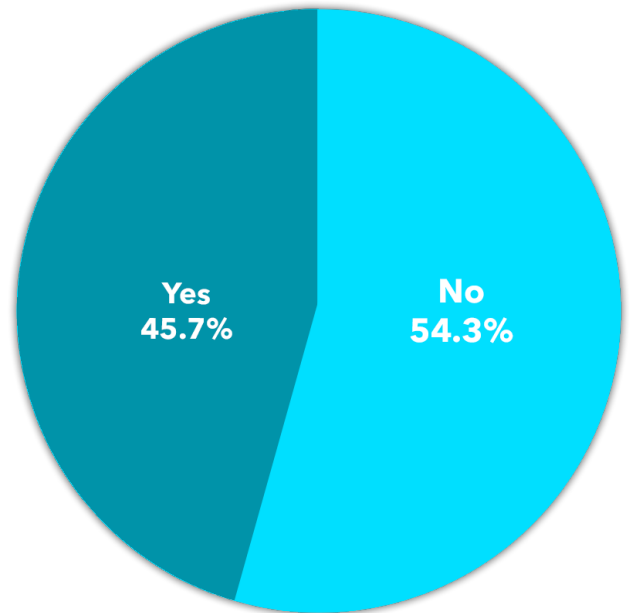


Pay: Ability to Negotiate Raises Individually

"Have you, as an individual, been able to negotiate with your employers for better pay?"

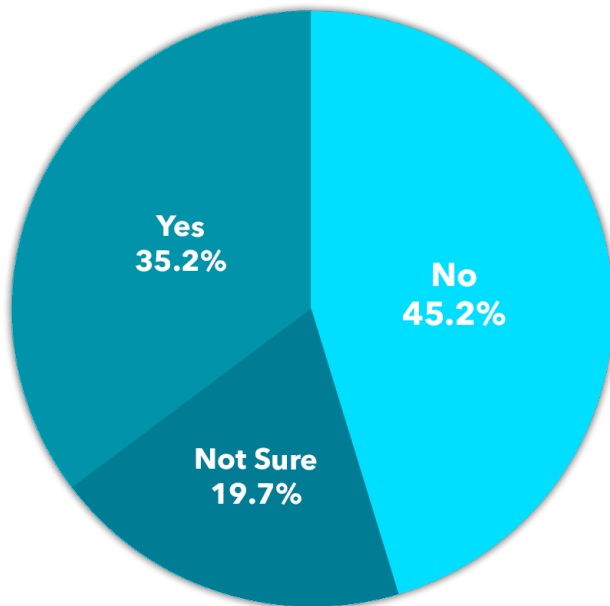
When asked, 54.3% of respondents said they were not able to negotiate for raises on an individual basis.

Workers ultimately cannot improve their wages and, subsequently, their individual lives, particularly in the face of rising costs.



Pay: Not keeping pace with rising costs of living

Workers were asked, "Does your pay keep up with the rising cost of living?"



45.2% of respondents said their pay does not keep up with rising costs, with another 19.7% being unsure.

With most respondents hailing from major metropolitan areas where costs are relatively high, game workers' income, like many others in the US, has stagnated in the face of historic inflation and increasing rent in their regions.

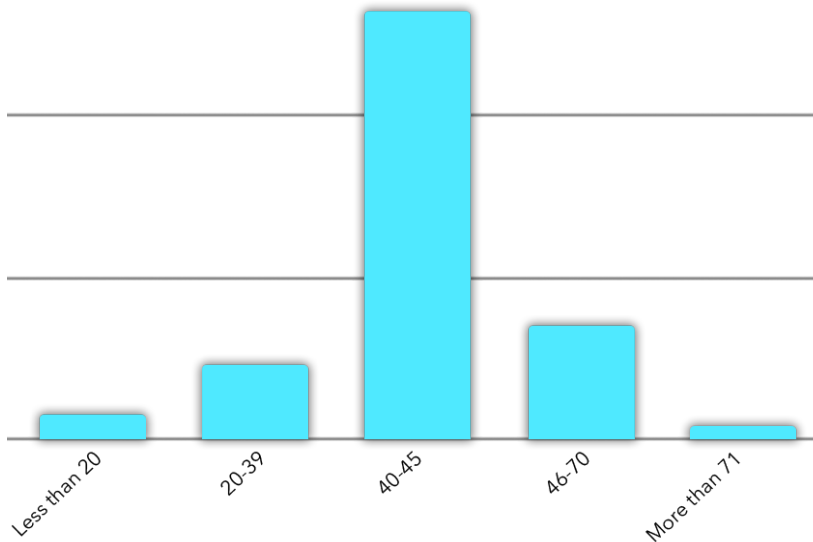
One worker stated "[My] current pay is the best I've had yet and still barely sustainable at [the] current cost of living. I often have to balance multiple part-time contracts simultaneously and am nearly always looking for my next job."

Ultimately, pay failing to keep pace with increasing costs is likely a symptom of workers' reported inability to negotiate pay raises individually.



Hours: Worked Per Week

Respondents were asked, "On average, how many hours per week do/did you work?"



Respondents' workweeks exhibited a bell curve pattern, with most workers working an average of 40 hours per work week. 25% of the respondents worked 41 hours or more, with the longest average work week being 95 hours.

While these results may seem surprisingly similar to hours worked by "white collar" professionals in other industries, crunch and unpaid overtime remained stubbornly widespread.

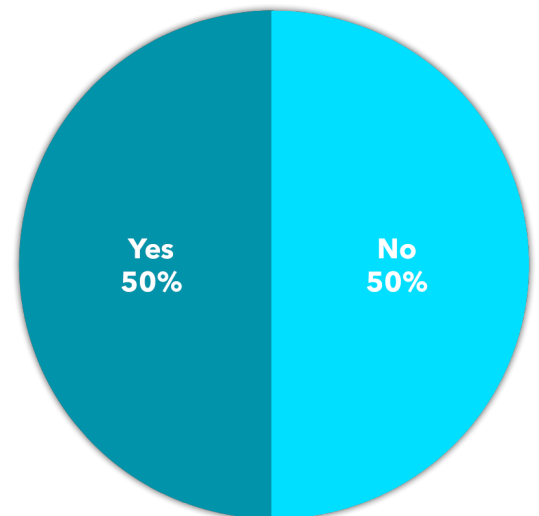
Hours: Crunch

"Have you experienced 'crunch' in the past two years?"

Respondents selected overtime and crunch as the second most urgent issue within the games industry, and half of surveyed workers reported experiencing crunch in the last two years. "Crunch" time at games studios requires workers to work excessively long hours to meet deadlines, usually towards the end of a project, and often for no additional pay. Workers reported dedicating hours of their free time, often to exhaustion, straining their health and personal lives during these periods.

Many attributed crunch to mismanaged project timelines.

When asked about their top priorities for game workers, one worker said, "If there is no way to make a game in 2 years without crunch, then we need to stop trying to make games in 2 years." These hours have become considered a normal part of working in games, and studios will sometimes schedule it in advance. The juxtaposition of an average workweek being around 40 hours per week while half of workers reported experiencing acute periods of significantly increased workloads supports the idea that project management is a factor.



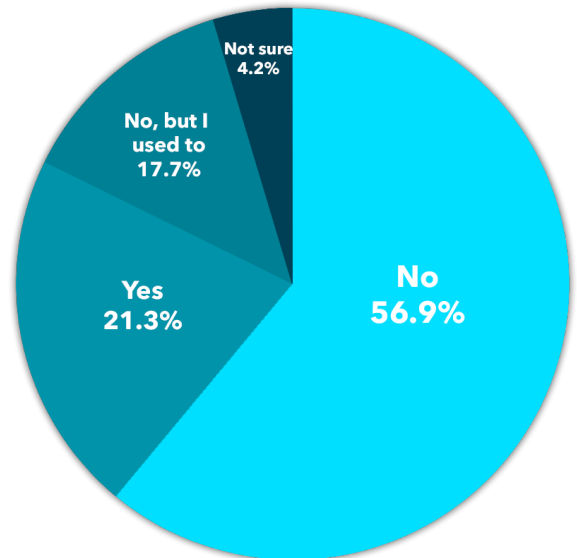


Hours: Unpaid Overtime

"Do you work hours for your employer that you are not compensated for?"

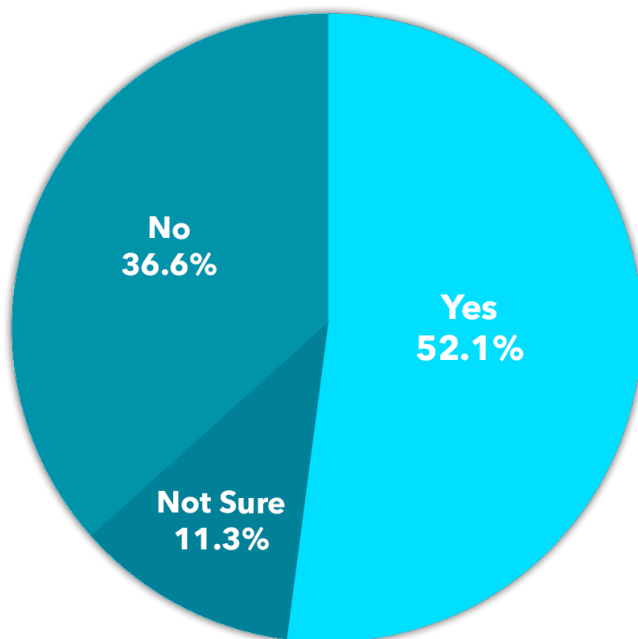
22.3% of respondents said yes, and 17.7% said they are not now but have previously. While over half of respondents said they did not work hours for their employer they are not compensated for, the wording of the question and the rarity of overtime pay in the Games Industry may have skewed the results.

IATSE has fought for shorter workweeks, defined rest periods, and strong overtime protections that financially discourage management from pushing workers for too many hours. The way games studios stretch these hours into workers' free time is unjust, and we know how to negotiate for reasonable working hours and conditions.



Workload: Tasks Outside Job Description

Workers were asked, "Have you ever been expected to complete tasks that are under the description of another job title without additional pay?"



Most game workers reported that they are often asked to complete tasks outside of their job title or description. 52.1% of respondents said they perform duties that are part of another job title.

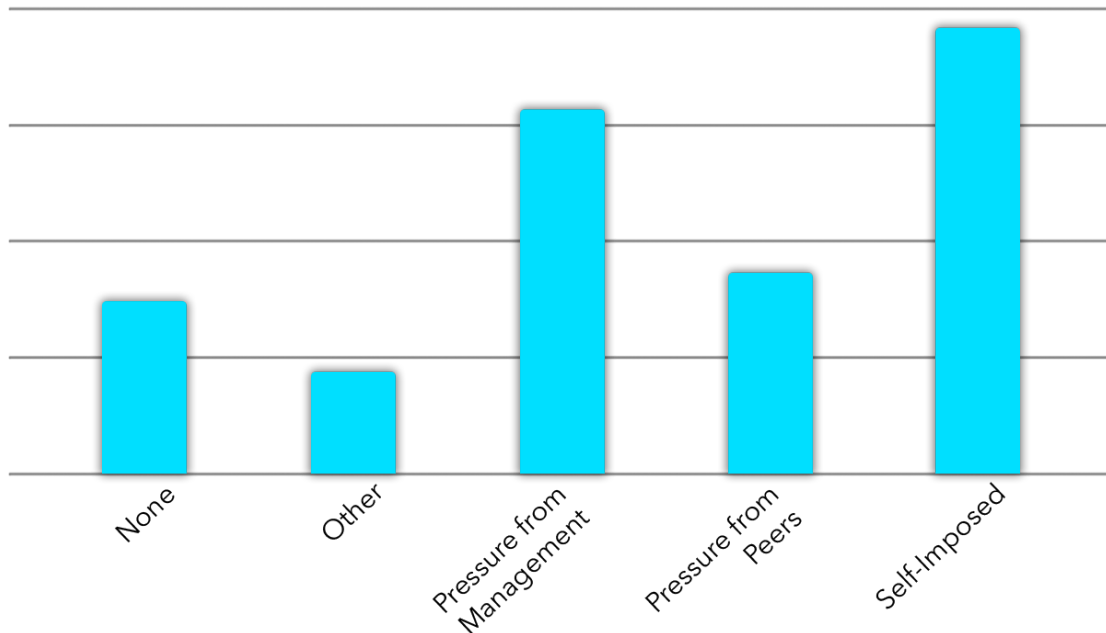
Game workers frequently reported being stretched beyond their ordinary workloads and asked to complete extra tasks to save companies money on additional hires, pressuring them to extend themselves beyond what is reasonable for an individual worker.

When asked about promotions within their company, one worker said "They only come if you've already been doing work in that role, uncompensated, for an extended time."



Overtime: Where is the culture of Overwork coming from?

Workers were asked, "Do you feel overtime hours are self-imposed, pressure from management, or pressure from peers?"



When asked if workers felt that pressure to participate in crunch or long hours was self-imposed, pressure from their peers, pressure from management, or some other source, the most common response was self-imposed, with pressure from management lagging shortly behind.

Several workers cited multiple sources of pressure, showing how it ultimately comes from the individual, their peers in the industry, and, especially, management. This means that on an individual level, workers feel pressured to work extra hours; however, at this point, the pressure individuals feel likely stems from a widespread cultural issue that has developed out of longstanding operating practices in the industry.

While many in management view crunch and long hours as an unavoidable part of working in games and workers must extend their working hours to their employers' whim to work in the industry, a union can start a conversation and even negotiate provisions into a collective contract that can influence and change the existing culture of overwork.

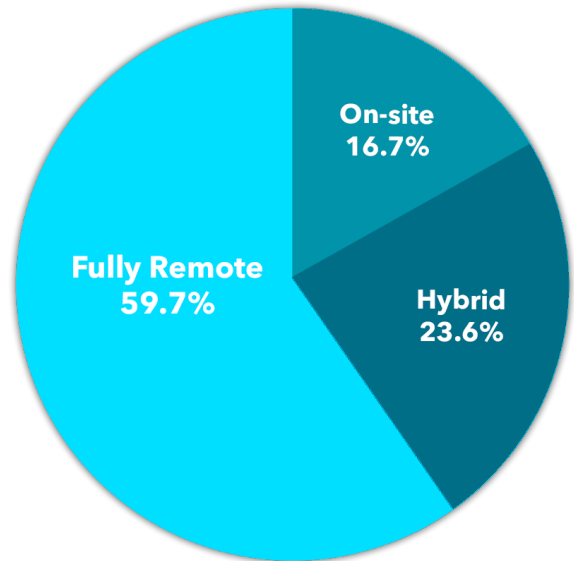


Remote Work

Respondents were asked, "Do/did you work on-site, fully remote, or hybrid schedule?"

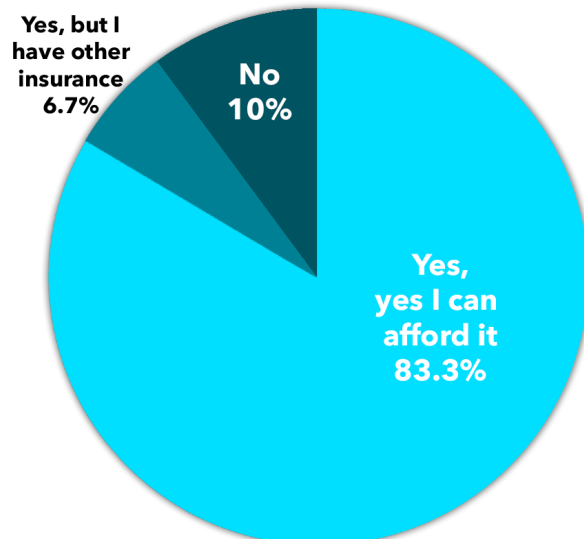
A majority of game workers reported working entirely remotely, while 23.6% worked a hybrid schedule, and 16.7% worked on-site full-time. Maintaining remote work was reported to be a major priority for game workers, as many enjoyed the flexibility in their ability to care for themselves and others who rely on them.

In the absence of a union, workers may be called back into the office at any time and penalized without recourse if they refuse. However, with a union, a return to office would be subject to negotiations, and the workers would be included in discussions regarding if, when, and how they do so.

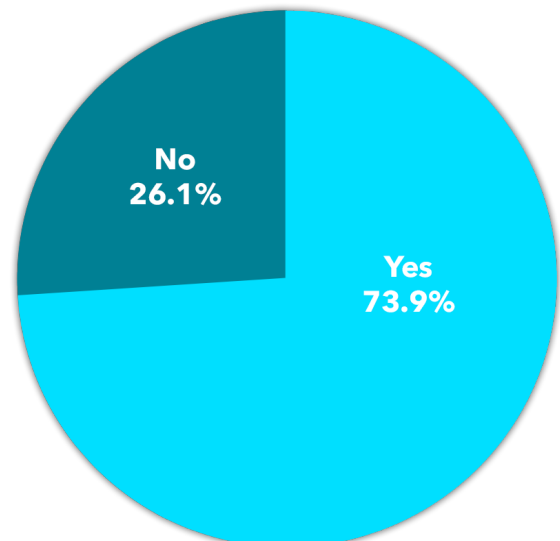


Benefits: Healthcare

Left: "Does your employer provide health insurance, and can you afford it?"



Right: "Does the insurance plan adequately provide for your needs?"



10% of workers said they do not have any health insurance plan. While many have health coverage they can afford, almost 30% said that it did not adequately provide for their needs. "I needed a second full-time job to gain access to better healthcare fees and coverage," said one worker.



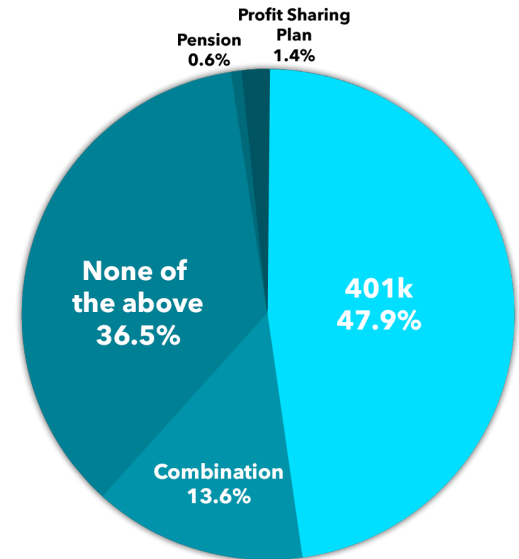
Benefits: Employer-Provided Retirement Funds

"Does your employer contribute to a 401k, pension, or profit-sharing plan on your behalf?"

Retirement was also a significant concern for these workers, with 36.7% of respondents lacking any employer-sponsored retirement plan. Less than 1% of these workers are offered a pension plan, a stark contrast compared to unionized workers in the Motion Picture and Television production industry.

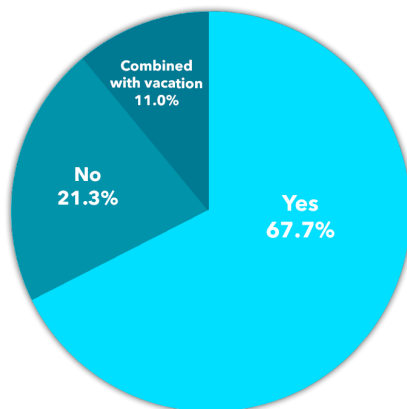
When asked if working in games was sustainable, one worker said, "Retirement prospects and low pay for tech work relative to other industries make[s] it difficult to justify staying," relating the issue to that of career longevity.

For games workers, a pension plan that travels between studios would grant them the peace of mind to retire comfortably.

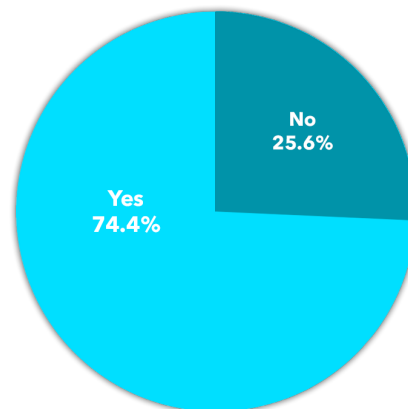


Benefits: Paid Time Off (Vacation and Sick Time)

Left: "Do/did you receive paid sick time?"



Right: "Do/did you receive paid vacation time?"

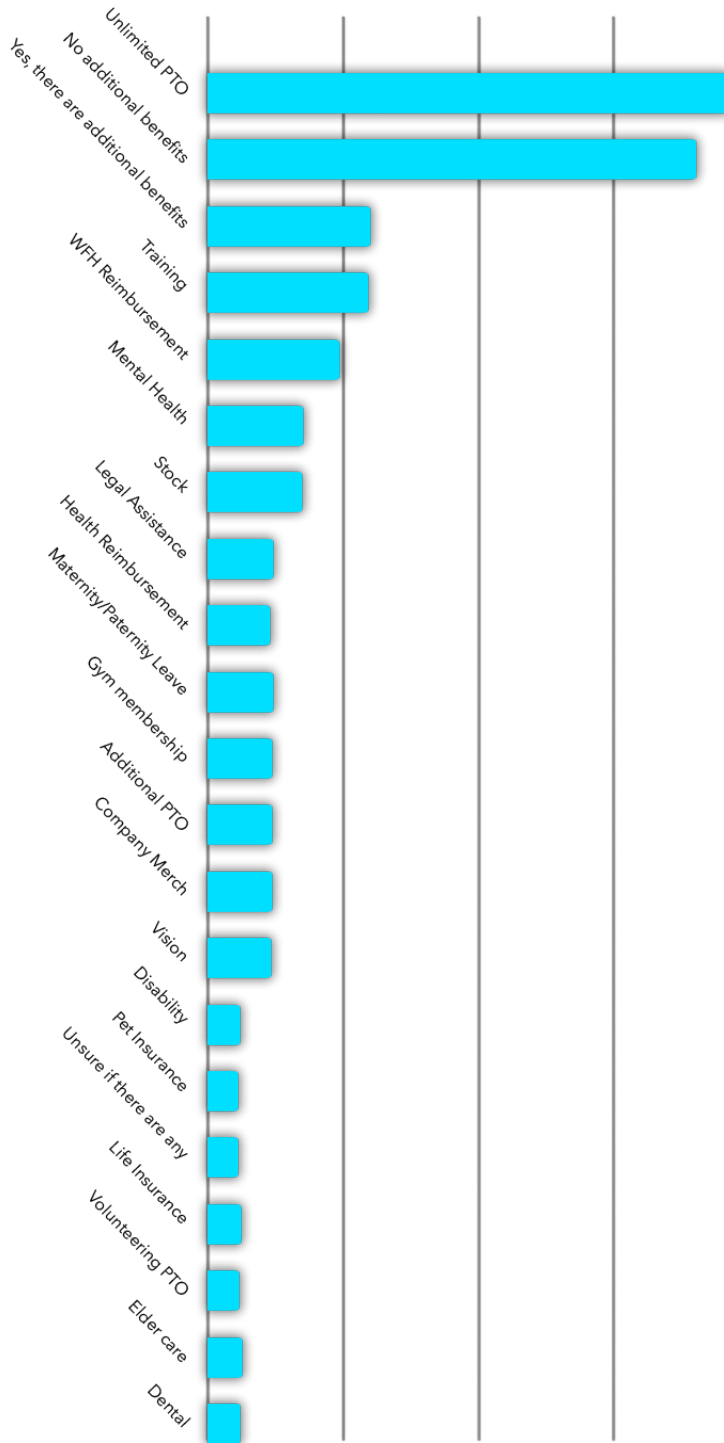


25.6% of respondents said they do not receive paid vacation at their jobs. 21.3% stated they do not receive paid sick time, and 11% stated that their vacation and sick time are combined. In an industry where workers frequently burn out, workers overwhelmingly cannot get rest and reprieve from their demanding jobs or take time off when they are ill.



Benefits: Other

"Does your employer provide any other benefits not mentioned above? (for example, childcare, training courses, unlimited vacation)"



When asked about other benefits in an open-ended, long-answer format, 19.9% of respondents said they received benefits in addition to the ones listed above.

16.9% of respondents said they were offered unlimited PTO, the most common response. Many workers elaborated that unlimited PTO was not genuinely unlimited, that they felt guilty asking and inevitably did not use it as a benefit.

Only 1.3% of respondents said they were offered maternity or paternity leave. The same number, 1.3% said they were provided childcare benefits. The lack of help for working parents reportedly prevents game workers from growing their families or bonding with their children.

A handful of respondents reported receiving miscellaneous perks such as theme park tickets, free event tickets, game credits, free merchandise, or other unique company-specific perks.

There were also several comments reflecting discontent with their benefits packages or their employment status (e.g., being a contractor and hence ineligible for some benefits).



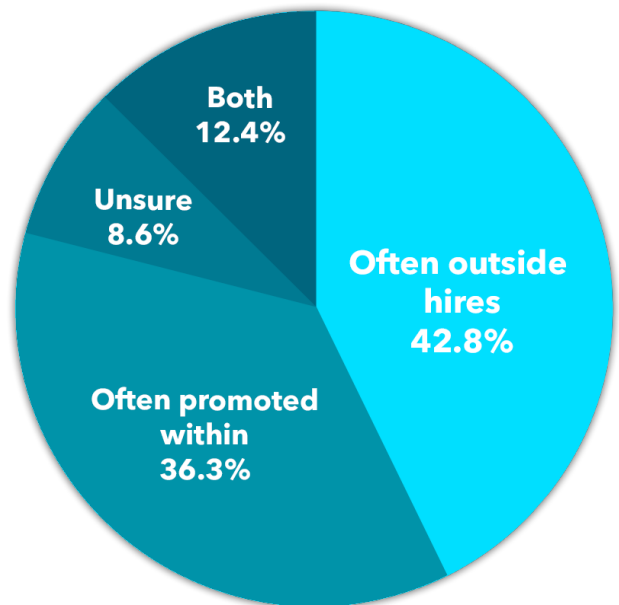
Career Advancement: Promotion Opportunities

Respondents were asked, "Are you offered any opportunities to be promoted within your company, or are team leads and supervisors often brought in as new hires?"

36.3% said promotions exclusively or most often come from within their company. In contrast, 42.8% said there was no upward momentum for their careers, and they struggled to find a path to promotion without leaving their current job.

Ultimately, upward mobility is also a function of the available training opportunities for workers. Training not only ensures workers can stay current or advance with new technologies as they arise, take on additional work, enter a new field, become more productive, and eventually receive promotions.

While around half had access to some training (see below), a substantial number of game workers report being stuck in their roles with no support to move upward in their careers.

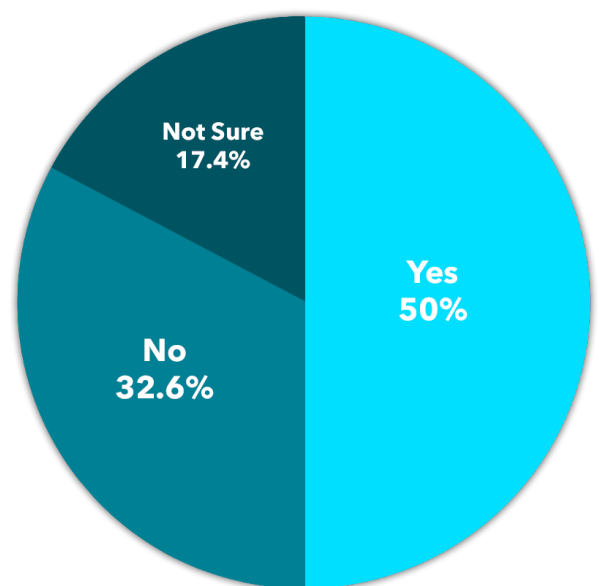


Career Advancement: Training

Respondents were asked, "Does your employer offer training or educational resources to you and your coworkers to further your career opportunities?"

50.6% reported they are offered training opportunities by their employers, while 30.7% said their employer provides no training. The remaining 18.7% stated they were unsure if training opportunities were available for career advancement.

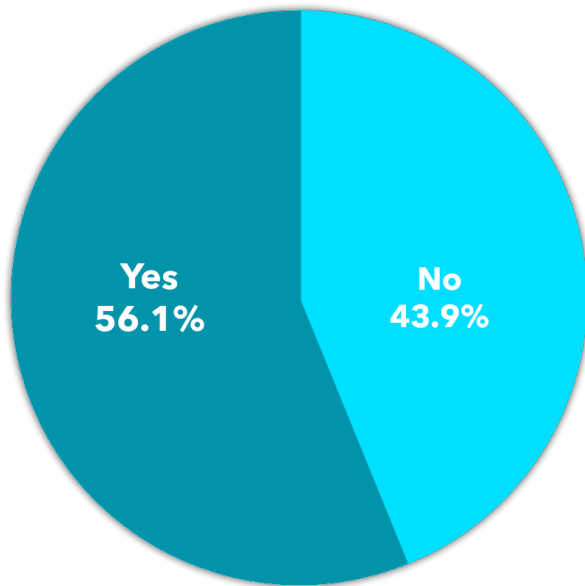
Artificial intelligence was repeatedly mentioned when workers answered the question regarding whether they believed their careers were sustainable. Workers perceive AI to be a threat, and training opportunities are viewed as necessary to prevent it from displacing them at work. Without a union, new technologies can be implemented by employers without workers' consent, but with a union, the implementation of AI would be subject to negotiations.





Noncompete Clauses

Has an employer ever asked you to sign a contract that limits you from working elsewhere or working on personal projects (often known as a non-compete clause)?



When asked if workers have ever been asked to sign a non-compete clause in their employment contracts, a staggering 56.1% of workers said yes.

Non-compete contract clauses typically prevent a worker from gaining employment at a competing game studio for a certain period, either during or after employment. They often cause workers to spend extended periods unemployed and contribute heavily to workers' ability to continue working in games.

This is one of the major reasons the Biden Administration's Federal Trade Commission (FTC) proposed a rule to Ban noncompete clauses in January on the basis that they harm workers and competition.⁴

⁴ FTC Proposes Rule to Ban Noncompete Clauses, Which Hurt Workers and Harm Competition," Federal Trade Commission (FTC), January 5, 2023, <https://www.ftc.gov/news-events/news/press-releases/2023/01/ftc-proposes-rule-ban-noncompete-clauses-which-hurt-workers-harm-competition>.



Game Worker Overall Priorities

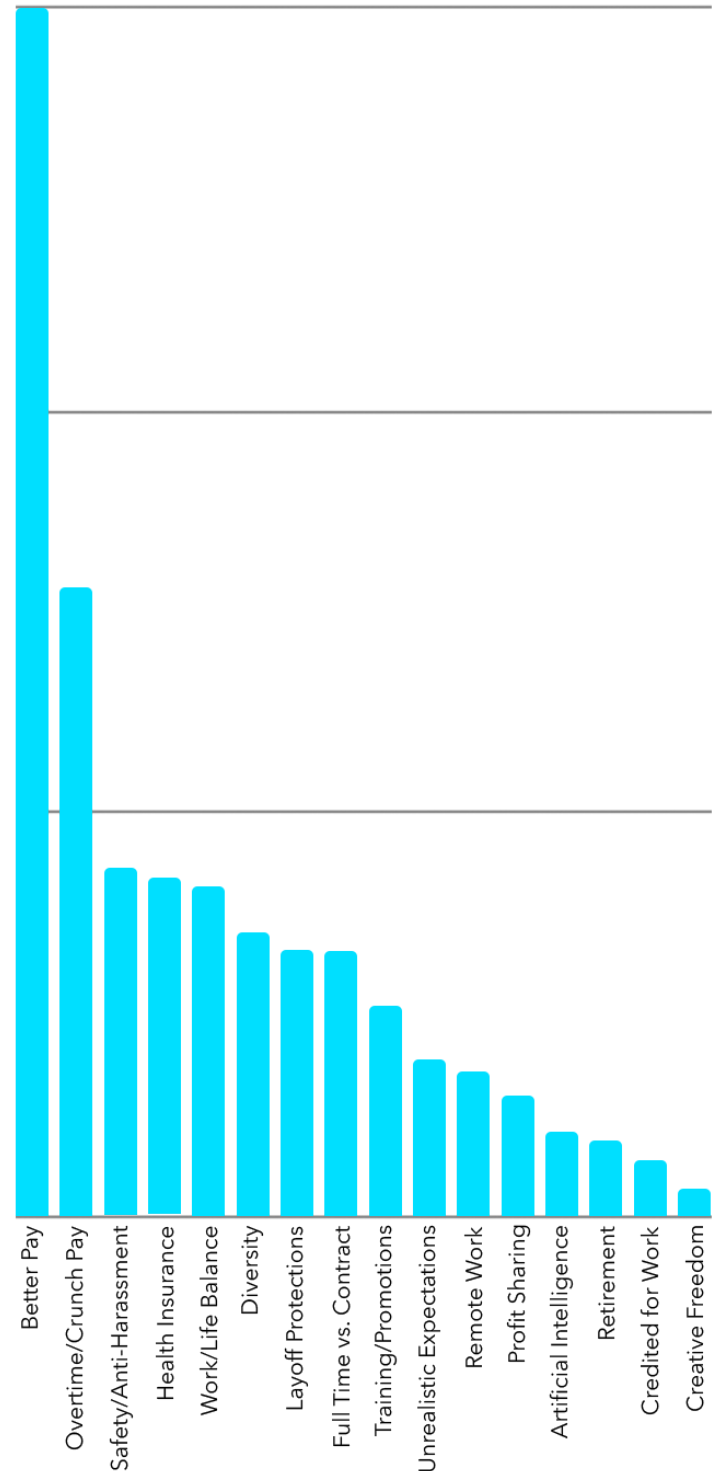
Respondents were asked "What is your top priority for what you would like to see changed in the game development industry to improve working conditions for you and your coworkers?" in an open-ended, long answer format.

Several workers cited more than one priorities for change within games, reflecting how many issues workers feel they face in their careers.

The most frequently mentioned industry improving changes were better pay, overtime, safety and anti-harassment policies, health insurance, work/life balance, diversity, and layoff protections.

Many of these priorities have been previously addressed within IATSE's existing collective bargaining agreements in other sectors of the entertainment industry⁵ would help these workers achieve the longevity they're seeking.

"I'd like to see my current employer's intention to create a safe, positive, sustainable workplace solidified in writing[...] and I'd like to see those protections become a standard within the industry that would allow me and my peers not have to count on the goodwill of our employers to provide us with what ought to be basic protections we deserve as workers."

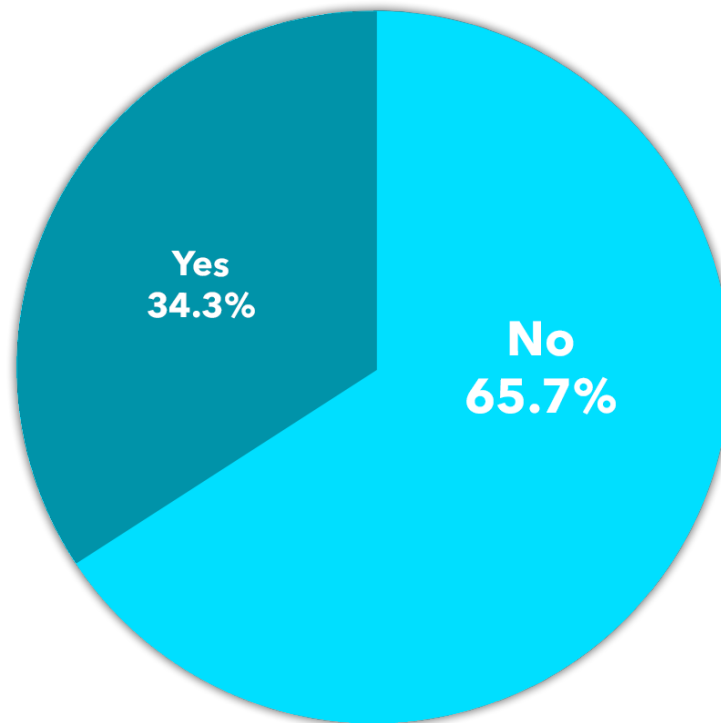


⁵ Why Unionize Section, " IATSE, 2023, Gameworkers.org, <https://gameworkers.org/#achieve>



What is the solution?

Respondents were asked, “Do you feel that you have the ability as an individual to negotiate with your employer for viable solutions to your priorities?”



Once workers were asked to state their priorities, they were then asked if they felt they could negotiate for viable solutions to their priority issues as an individual, and 65.7% responded no. These results indicate that game workers recognize their priority issues are longstanding and widespread, but as individuals, they feel powerless to do anything concrete on their own.

It’s clear game workers have been struggling to address these issues for too long, and overall, the survey data indicates the games industry is leaving many out to dry as it operates, as one worker put it, “similar to the wild west, or Hollywood before it was unionized.”

Workers’ inability to improve their working conditions, negotiate for improvements, and the cultural pressure they feel to work extended hours for less pay than other entertainment workers exposes how necessary change is in this industry across all job titles and factions.

Ultimately, the IATSE Game Worker committee believes collective bargaining is the only viable path to win, long-term solutions to make working in games a sustainable life-long career choice for current, future, and returning game workers.



Glossary

- AAA games are considered to be “blockbuster” type games that are made with large teams and are focused on widespread sales.
- AA games are similar in these aspects; however, they generate less revenue or are less widely available.
- Mobile games are games that are made for mobile platforms like iOS and Android. Indie games are games made by small, independently-funded small teams, sometimes consisting of just one person.
- TTRPG (tabletop role-playing games) are board and card games not played on consoles or PCs.
- Esports is a result of the games industry becoming competitive, with these workers broadcasting large gaming events with teams playing against each other and supporting the production of these events.
- Gambling sector workers develop games for the casino and gambling industry.
- AAA and indie games are the most recognizable games within the industry, with console platforms widely available for AAA games and the Steam marketplace creating a direct-to-consumer connection for indie developers.
- IATSE: The International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts of the United States, Its Territories, and Canada, known as simply the International Alliance of Theatrical Stage Employees, is a North American labor union representing over 168,000 technicians, artisans, and craftspersons in the entertainment industry, including live theatre, motion picture and television production, broadcast and trade shows in the United States and Canada.
- NLRA: The National Labor Relations Act is a foundational statute of United States labor law that guarantees the right of private sector employees to organize into trade unions, engage in collective bargaining, and take collective action such as strikes.
- NLRB: The National Labor Relations Board is an independent agency of the federal government of the United States with responsibilities for enforcing U.S. labor law in relation to collective bargaining and unfair labor practices.



References

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