Perth Games Industry

Community Profile

March 2009

Screenshot from "Ladybug Garden" by Jack Casey

letsmakegames.org

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Nick Lowe

Founder
OneTwenty

Foreword

It's been amazing to witness the growth of the Perth video-game development scene over the last three years.

I recall meeting with some other independent developers at a café in late 2005. At the time, none of us knew each other, but we arranged to meet anyway to discuss our common purpose - game development. As three separate two-person teams, we talked for hours about our aspirations to be successful in our individual pursuits, the difficulties we each faced, and our desire to see a viable, vibrant game development community exist in Perth.

Fast-forward to the present, and how things have changed. Educational institutions are running courses targeted at game development, and the pool of developers has growth to the point where it's possible to conduct an industry survey! Perth now has one of just three IGDA (International Game Developers Association) chapters in Australia. Numerous new companies of all shapes and sizes have come to life.

Whether it's casual games, Massively Multi-player Online games, or "Serious Games" for industry, there are now more options than ever for employment and career growth for passionate game developers in Perth.

It's an exciting time and I look forward to seeing what the future holds.

Paul Turbett

Founder
Black Lab Games

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Introduction

OneTwenty is a group of academics and professionals who are passionate about video games and the potential for a sustainable games industry here in Perth, Western Australia. In February 2009, we launched the "Let's Make Games" initiative, as part of our long-term commitment to supporting the local game development community.

The Perth games industry has seen massive growth recently, with over 50 new industry professionals added to the local talent pool in the last two years. With such quick change, it is vital to ensure that changing needs are met and new opportunities are capitalised upon. As part of the Let's Make Games initiative, we hope to coordinate with local industry, government, and educational institutions to ensure that this growth can continue at a sustainable and productive pace.

The first step in this process is to assess the characteristics of the local industry and identify pragmatic measures that can be undertaken to facilitate organic growth. With that mind, we conducted an online survey of the Perth Games Industry. This document describes the data collected by the survey, and outlines directives that we will pursue as a result.

Overview

The online survey ran over a period of two weeks in early March 2009. It garnered 109 responses (85 complete responses and 24 partial responses).

Here is a a general overview of responses:

1. Most respondents are young adult males (20-30 years of age)
2. The most common level of eduction is an undergraduate degree
3. Respondents have over 450 years related experience (with 130 years industry experience)
4. All skills for game development are well-represented, but marketing expertise is lacking
5. The vast majority of developers want to work in small to medium sized businesses in Perth
6. A much smaller, but significant number want to work overseas

Consideration of the above led to determination of clear directives, aimed at targeting shortcomings in the local industry in order to facilitate growth and maturation.

Directives

There are a number of practical measures that we will be undertaking (and promoting to others) in order to help grow the local industry:

1. Address gender imbalance (working with Women In Games Australia)
2. Coordinate training efforts between local industry and educational institutions
3. Assist in locating and securing office space and financial incentives for game developers
4. Provide marketing assistance to independent developers
5. Promote the local games industry (especially overseas) in order to attract investment
6. Conduct further research on why a number of developers feel that they must work overseas

As a small organisation with limited resources, we will be dependant on assistance from industry, government, and educational institutions. Much of our time will be spent on establishing channels of communication and pursuing collaboration. With this in mind, we are organising frequent "mixer" events, engaging the community through our website, and producing follow-up reports.

We will be monitoring progress with bi-annual surveys as we promote practical measures to help stimulate the local games industry.

Survey

The intent of the survey was to capture a general, high-level snapshot of the local games industry, from the perspective of those within it. The survey should not be seen as an exhaustive study on the capabilities of the local industry beyond this scope. However, it does provide a number of useful insights into the composition and potential of local game developers.

The survey is composed of three sections:

1. *Respondent Details*: providing a general view of worker demographics and capabilities
2. *Deciding Factor*s: identifying how to sustain and grow the local workforce
3. *Community*: evaluating cohesion of the community and related groups

The survey was advertised in coordination with the two major local industry groups: the International Game Developers Association (IGDA) Perth Chapter and the Perth Independent Game Makers' Initiative (PIGMI). After promotion on various websites and online mailing lists, as well as at an industry social event, it attracted 85 complete responses and 24 partial responses.

Many results led to formalisation of directives to address related issues. In this report, notes on these directives are included after presentation of each result.

Respondent Details

The first section of the survey was concerned with general respondent details such as age, gender, experience and professional skill-set.

Age

The average age of respondents was around 28 years old with the greatest concentration of respondents being between 20 and 30 years old.
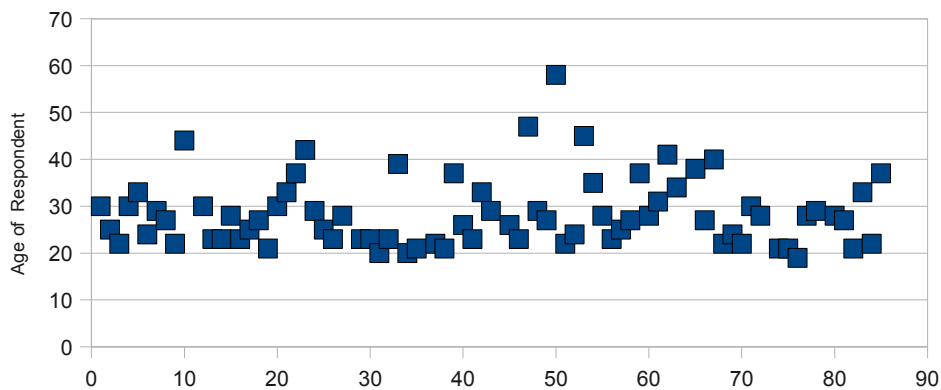
A common perception of the games industry is that it takes idealistic young people (keen to make games), burns them out, and makes them leave the industry. Inexperience and over-commitment can lead to long working hours to satisfy deadlines, and this can be very demanding. This issue needs to be addressed in order to retain the knowledge and experience of seasoned developers.

Gender

The majority (85%) of respondents were male, but there were a fair number (11%) of female respondents. A number of respondents (4%) opted to give no answer.
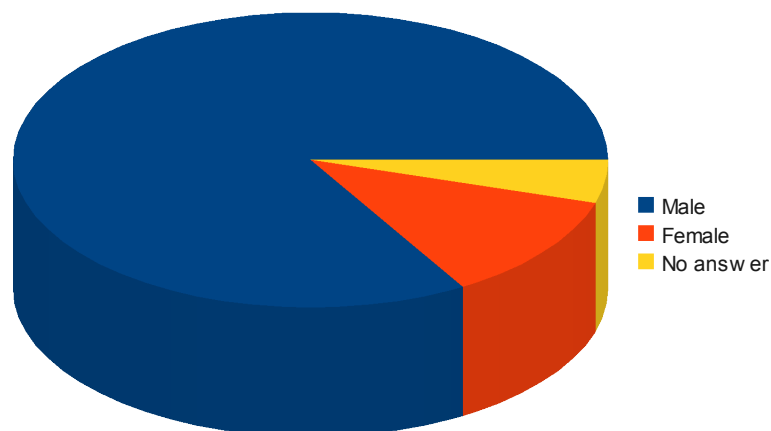
The games industry is male-dominated, but organisations such as Women In Games Australia seek to increase the number of women in the games industry in Australia, and to promote game development as a viable career path for women. Let's Make Games will seek to work with such groups to improve gender balance in the local games industry.

Formal Education

The highest level of formal eduction for most respondents (53%) is an undergraduate degree. The second largest group (19%) held TAFE diplomas (or equivalent) and approximately the same number (17%) have some form of higher eduction (eg. Masters or PhD).
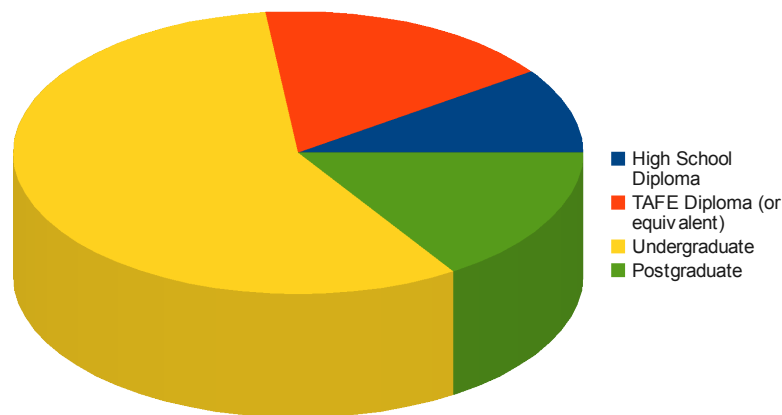
The number of games development diplomas and degrees offered in Australia and internationally has increased sharply in the last 10 years. Local game development studios (such as Interzone Entertainment's Perth studio) have worked with universities and TAFE to offer specialised units for future game developers.

Experience

Due to the lack of a large, established games industry in Perth, a lot of games development experience is either on hobby or independent projects or by Perth residents who have worked at large companies interstate or overseas.
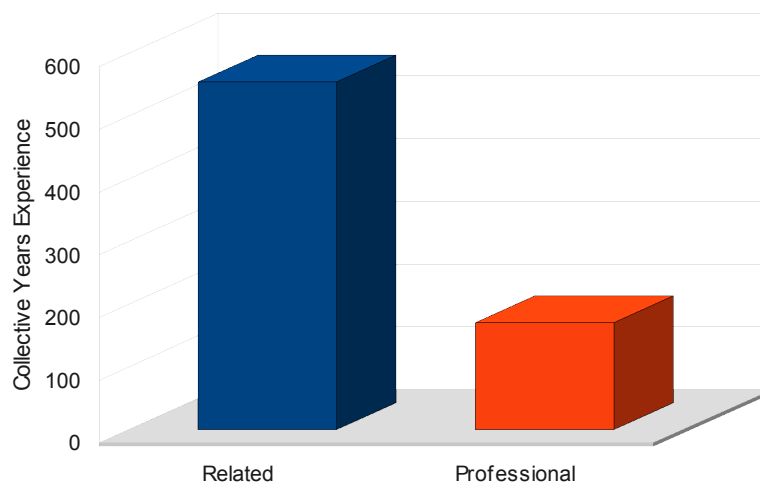
When considering all related game development experience (including hobby and TAFE or university projects), respondents boast over 550 years of collective experience. However, professional experience (working in the games industry) is just over 170 years with a maximum of 17 years with 20 credited titles.

It's common in the games industry for titles to be developed and never published. Much like many musicians seek to "get signed by a major" label, many game developers create games that may never see commercial release. The average number of unpublished titles was three.

Skill-set

A broad range of skills are required in order to produce a modern video game and bring it to market. It is crucial that we have all required skills represented in the local industry. Fortunately, respondents showed generally excellent coverage of skills with two notable exceptions: there is a dearth of respondents with technical art (5%) and marketing (9%) skills.

Technical Artists are very difficult to come by and very highly prized in the game industry. We are fortunate to have 4 respondents with technical art skills, meaning that they understand the aesthetic and technical aspects of digital (especially 3D) content composition.

Note: Questions regarding expertise in audio and music were not included in this survey, but will be included in the next survey. We do not anticipate that we will find deficiencies in these areas.
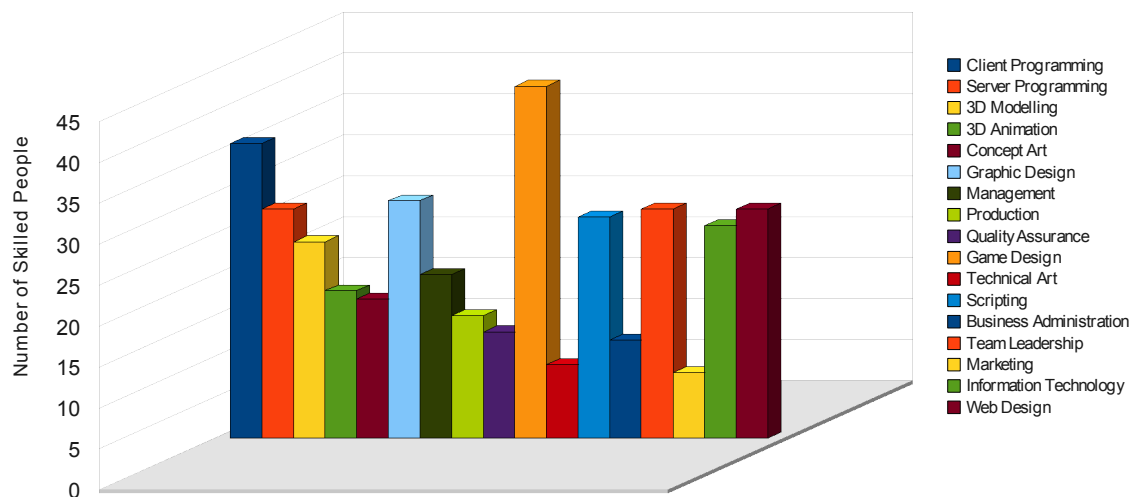

Marketing is often overlooked by game developers because it is more crucial to game publishing (rather than development). However, it is crucial for independent developers and a fledgling industry. We hope to improve engagement with marketing professionals.

Many respondents noted "Game Design" as a part of their skill-set, but we feel that this high result may be an outlier. We suspect that the number of professional, experienced and methodical game designers is much lower, and we hope to determine this in the next survey.

Team Size

We asked respondents to note the size of the *largest* development team that they have been part of, and the responses indicate that the industry is split approximately in half between those that have worked for large companies (48% worked in teams of more than 30 people) and independent developers and students (43% worked in teams of 15 or less).
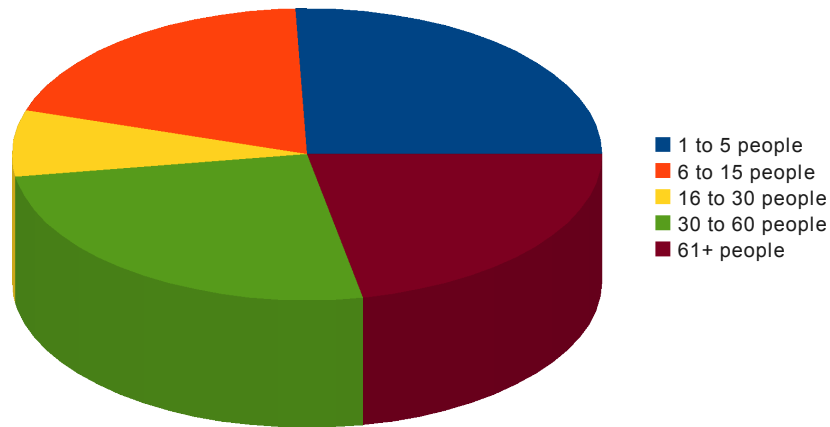
Current Involvement

The clear largest group of respondents (35%) work for a games company (publisher or developer). The equal second largest groups are independent games developers, hobbyist game developers, and students (each 14%). These groups are closely followed by those working in related fields (8%) or interested in developing games (9%). The smallest groups are those that operate games companies (4%) and those that have previously worked in the industry (4%).
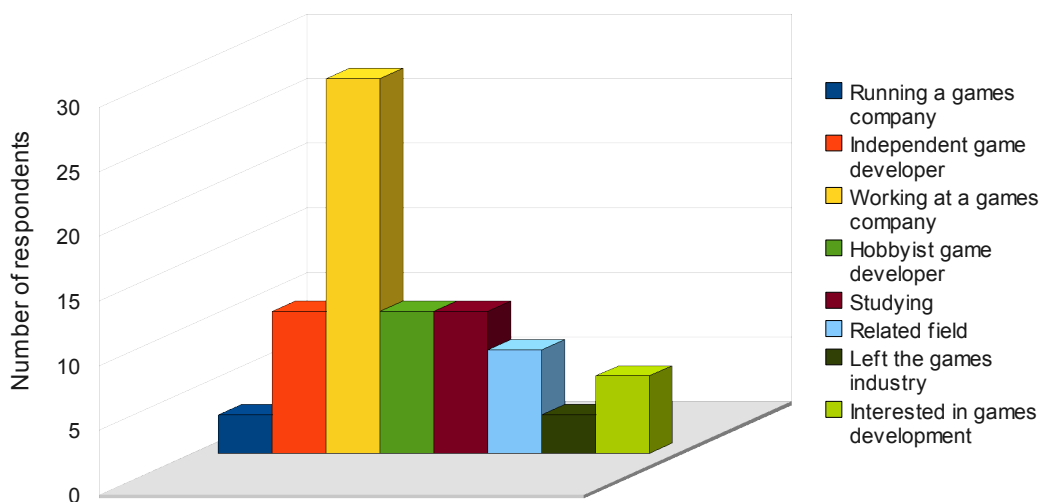
In our next survey we hope to determine why those who have left the industry chose to do so, and if there are any factors making others consider leaving the industry. We are concerned that the lack of an established local games industry may be a contributing factor.

Deciding Factors

In this section of the survey, we asked about factors that contribute to individuals' decisions to work in the games industry here in Perth. Although the substantial growth in the local industry has benefited many, a fair number are still left feeling that they don't have work options in the local industry, or that their long-term plan is to work elsewhere. This is concerning because it perpetuates a "brain drain" of talented professionals moving away from Western Australia.

Many issues may contribute to this perception: lack of publicity of local capabilities and options, limited hiring capacity of local companies, and difficulty in setting up a company and finding office space (for independent developers). As a creative industry, we cannot overlook the possibility that local talent may feel that local work options are limited and unappealing. However, we can address this issue by identifying common traits of local talent and developing strategies to capitalise on their strengths.

Location

In order to determine if there is a great desire for a local games industry, we asked all respondents to rate how important it was to them to live and work in: Perth, Australia, or overseas.
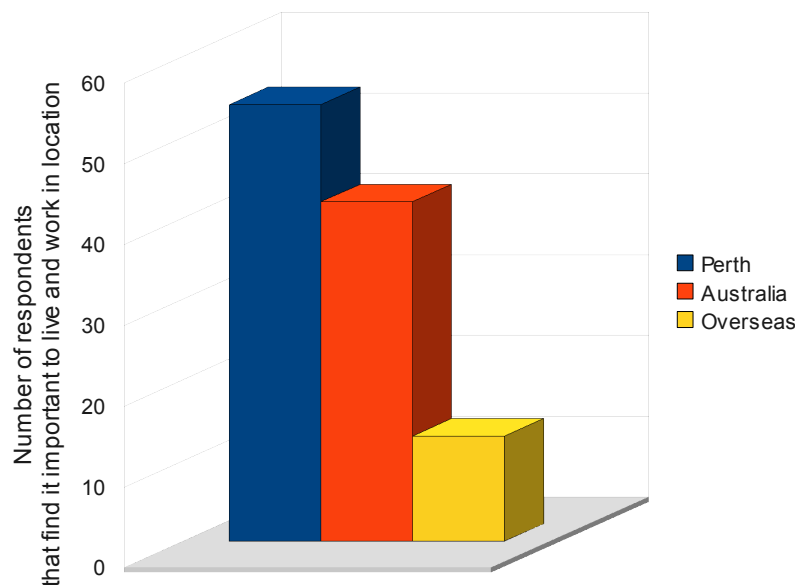
A clear majority (65%) of respondents consider it to be very important or crucial that they live and work in Perth. Over half of all (52%) respondents feel similarly about living and working in Australia, whereas a small amount (17%) wish to live and work overseas.

We feel that the desire to work overseas may be due to a perception that there are no suitable workplaces in Perth or Australia. Although it may also just be due to individual desires to travel. We seek to investigate this further in the next survey.

Project Time-frame

In determining what kind of games industry is feasible for Perth, it's important to objectively assess the level of interest of local professionals in working on different types of projects. Games projects vary from "casual" titles (such as simple web-based games) to "AAA" titles (such as movie tie-ins for home consoles).

Casual games can be developed and released within 6 months, whereas AAA titles take years to develop. Development of both types of games can be highly profitable, and casual games have recently exhibited much lower risk and much higher return on investment (ROI).

Respondents had a moderate aversion to project time-frames of greater than 24 months with a significant number (34%) having little to no interest in projects of this length. That said, a fair number (20%) wish to work on this length of project exclusively. Conversely, a large number of respondents (50%) wish to work on very short projects (less than 6 months) exclusively.

It is clear that there are two groups of respondents: those that want to work on AAA titles and those that want to work on smaller titles. Given the size of the local industry and the large number of respondents who wish to work on shorter development time-frames, it seems that casual titles will be the short-term driving force for the local industry.
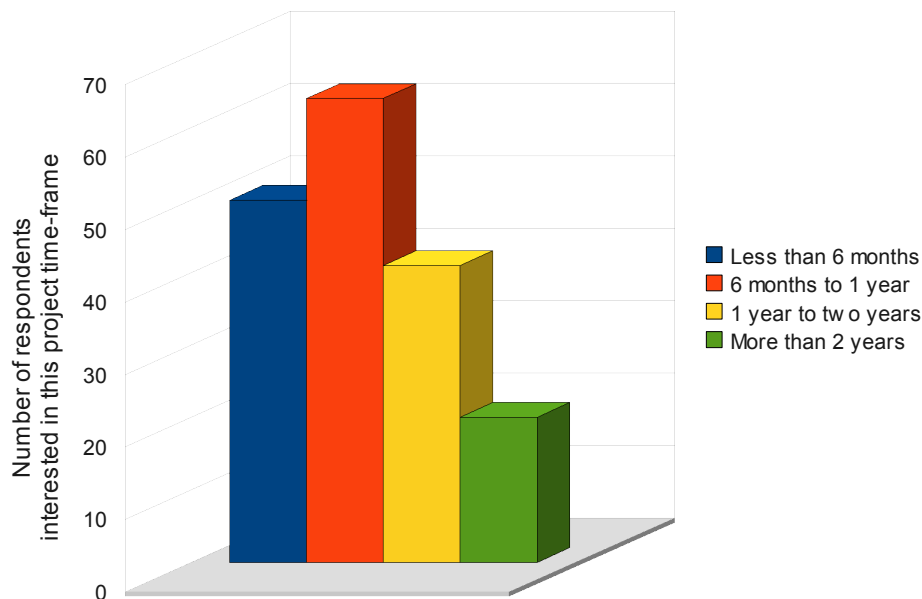
However, it is equally important to plan for and facilitate AAA development so that there are options for local games industry professionals in future. Hopefully, it could also provide an option to return home, for local game developers intent on working on AAA titles overseas.

Other Factors

Respondents were fairly pragmatic with all other factors affecting their involvement with the local industry. They are generally happy to develop a wide range of games for a range of target platforms (eg. personal computer, games console). Creative input is very important for almost all (89%) respondents, and creative control is notes as crucial by over half (54%) of respondents. These responses seem fairly normal for a young industry with a large proportion of independent developers, hobbyists, and students.

It is also widely preferred (76%) to work collaborative in a face-to-face environment (rather than independently or remotely, as is often the case with external contract work). Most respondents (around 60%) prefer to work in small (less than 15 people) to medium (less than 50 people) sized companies. It seems that the same group of people (20%) who wish to work overseas and on AAA titles tend to want to work in large companies (more than 50 people).

It is crucial that suitable office space is made available to small to medium sized teams if they are to work in the games industry in Perth. Let's Make Games will work to engage the state government for assistance in this area.

Community

There two large local games industry community groups and a number of game development events have been run within the last 12 months. We had a number of questions to gauge the visibility and participation of these groups and events.

Groups and Events

A "game jam" is a grass-roots game development event in which participants try to create games within a very short period of time. Simon Wittber operates a local game jam and organised for Perth to part of a recent inaugural global game jam. Perth was the only Australian city to be part of the global game jam. Participation amongst respondents was fairly high (39% for local game jams and 23% for the global game jam).

The International Game Developers Association (IGDA) is the world's largest professional body representing game developers. It operates a local chapter in Perth. The Perth Independent Game Makers Initiative (PIGMI) was setup prior to the IGDA Perth chapter and still maintains community engagement on its Internet-based mailing list.

Almost all respondents (95%) have heard of the IGDA and most (74%) have heard of PIGMI. Around half of all respondents are members of each group (53% are members of the IGDA and 57% are members of PIGMI). We asked respondents to list any other related groups that they are involved in, and we were informed of 15 additional groups.

In order to build a local industry from disparate groups, it is very important to focus industry engagement. IGDA has a very visible international face and PIGMI has groundswell support. It will be beneficial to formally coordinate efforts with these two groups (efforts are currently informally coordinated by key members).

Internet Presence

Over half (55%) of all respondents have some presence (either a website or blog) on the World Wide Web. Many have provided Internet hyper-links and Let's Make Games will be constructing an online industry profile with links to these web-pages.

Note: A number of related websites are listed in the References section. For the latest information on the Let's Make Games initiative, please visit our website at: http://www.letsmakegames.org

References

About the Cover

The cover includes a screen-shot from "Ladybug Garden", a locally developed game by Jack Casey.

Jack is a Senior Programmer at Interzone Games, Perth's largest game development studio. Prior to joining Interzone in its early days, Jack was a business software developer who started writing games "under his own steam" with a colleague.

Ladybug Garden was created in 2 weeks for the August 2008 Game Jam, a local initiative in which participants are challenged to create a game around a surprise theme. Ladybug Garden was also entered into the Nullarbor 2008 (a local games competition) where it won the Judge's Choice Prize.

Jack described the process of creating Ladybug Garden with the following:

"I really enjoy working in this way. Having a theme as a starting point, a fixed time frame and others participating alongside you really helps with creativity and motivation."

Like many local developers, Jack has a very broad skill-set outside of his area of most expertise. Aside from programming, Jack also developed the game design, wrote necessary software tools, and created all art for the game.

Internet Links

This section contains a number of links to websites related to this report. It is a sample only and not exhaustive. Let's Make Games will be developing a more detailed online industry profile with categorised links to website of interest.

OneTwenty and the Let's Make Games initiative:

- http://onetwenty.org: *OneTwenty, authors of this report*
- http://letsmakegames.org: *Let's Make Games initiative*

Major local games industry groups:

- http://pigmi.org: *Perth Independent Game Makers' Initiative*
- http://planet.pigmi.org: *News from various local developers personal websites*
- http://www.igda.org/perth: *International Game Developers' Association Perth Chapter*

Game industry events:

- http://gamejam.org: *Local "game jam" (frequent, short-term game development challenge)*
- http://globalgamejam.org: *Perth was the only Australian city to enter the global game jam*
- http://notrees.org: *Local game development competition (annual)*
- http://www.go3.com.au: *Local consumer expo and games conference*

Local game developers and locally developed games:

- http://spinfast.com.au: *iPhone game developer and publisher (creator of Spinfast Cricket)*
- http://interzonefutebol.com.au: *Product website for a locally developed online soccer game*
- http://blacklabgames.com.au: *Independent developer making casual console games*
- http://sandboxsoftware.com.au: *Team of engineers and artists developing game technology*
- http://rockethands.com: *Local games industry start-up currently seeking funding*

Note: Please contact Let's Make Games if you would your website listed on the upcoming industry profile. Contact details are on our website: http://letsmakegames.org

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