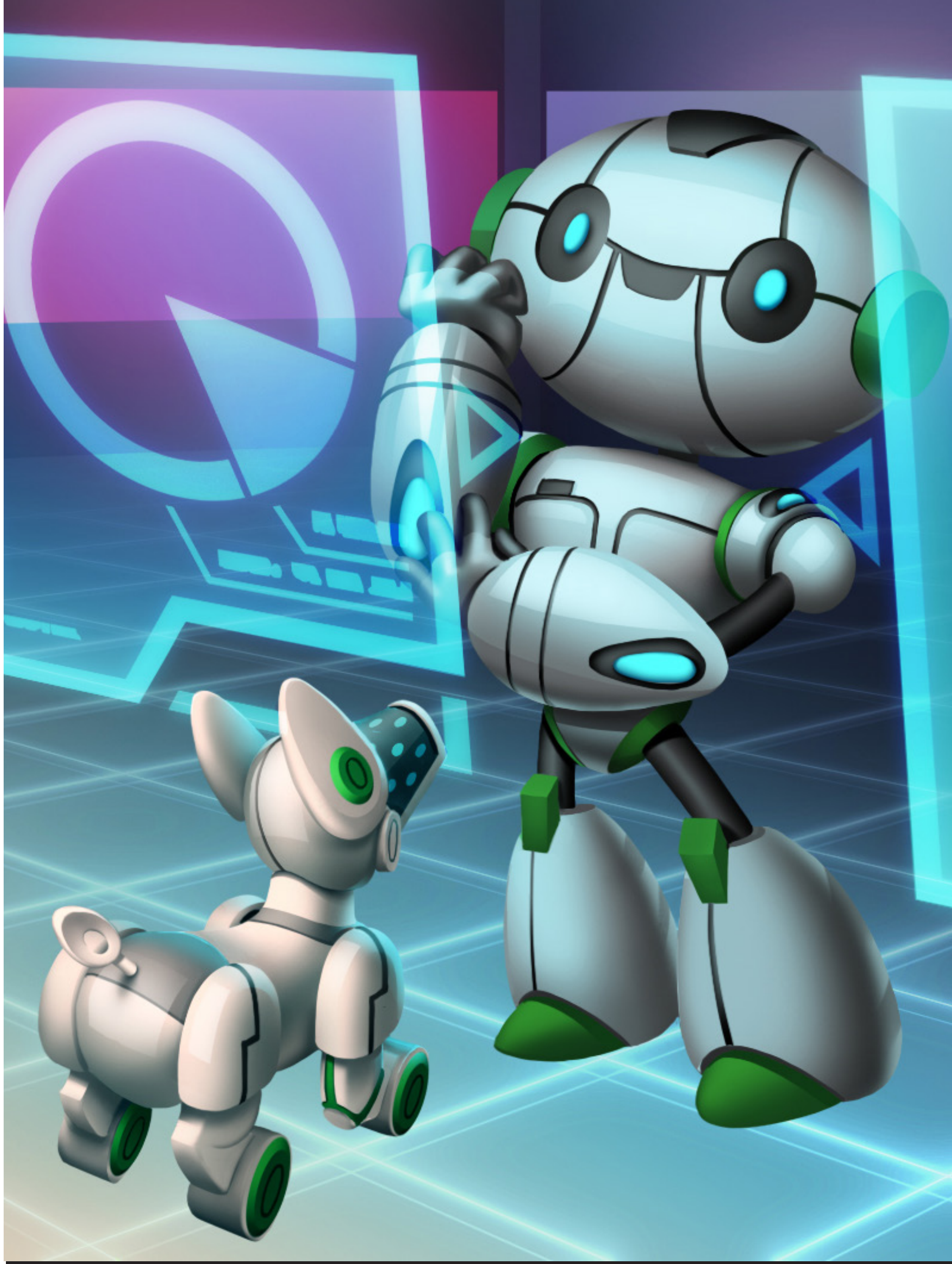
2019 INSIGHTS

on External Development for the Video Game Industry

XDS19 EXTERNAL DEVELOPMENT SUMMIT

advancing external development for the games industry



thank you to 5518 studios for providing illustrations

What's Inside

External development refers to the practice of video game Developers / Publishers (buyers) leveraging Service Providers (sellers) in any aspect of development including but not limited to art, animation, cinematics, audio, server-side/front-end engineering, porting, game development, UX-UI, motion capture QA, localization, and VFX. This report is intended to provide insights in to the changing trends in external development that have occurred in recent years as it becomes an increasingly integral part of game development.

The statistics in this report were derived from over 180 submissions from Service Providers and leading Developers / Publishers worldwide. Data was anonymously contributed to provide insights on engagements.

The research and data gathered to establish this report was collected by the organizers of the External Development Summit, with contributions from the **XDS Advisory Committee**. Permission must be requested if you would like to use this information in articles or industry presentations.

Who We Are

External Development Summit (XDS) is the only annual, international games industry event held in Canada, with a primary focus on external development for Art, Animation, Audio, Co-development, QA and Localization. Each year, a broad community of game Developers / Publishers, Service Providers, and middleware providers meet in Vancouver to contribute to the advancement of the video game industry through collaboration, sharing of best practices, networking and the delivery of a high-caliber, educational program. XDS 2019 will take place on September 4-6, 2019 in Vancouver, Canada.

The data in this report was collected between the dates of December 13, 2018 and January 31, 2019.
*Please note that some data tables throughout this report may not add to a total % of 100 due to rounding.

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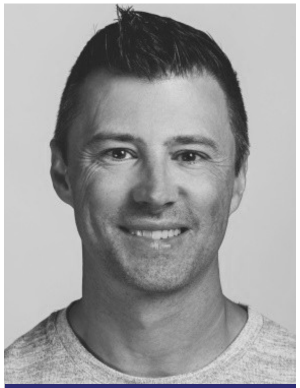

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Special thanks to Kelli Brunton for Visual Communications

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Service Provider Offerings

	% 2018		% 2019
Art	**19%**	↑	**24%**
Full SKU Game Development	**32%**	↓	**23%**
Animation	**14%**	↑	**16%**
Cinematics/VFX	**8%**	↑	**10%**
UI/UX	**5%**	↑	**10%**
Engineering	**8%**	↓	**5%**
Audio	**5%**		**5%**
Localization	**4%**		**4%**
QA	**–**		**4%**

* Results for Full SKU Game Development were divided equally between Console, Mobile, PC/Online and VR/AR

Service Providers reported an increase in projects from Multi Games Developer / Publisher clients. Projects from small independent console and mobile-focused developers also increased. We saw Full SKU development fall from the top-spot, to be replaced by Art as the key service provider offering of the year. Animation, VFX, and UI offerings also raised in the ranks from the previous year.

62%

of service providers surveyed have **LESS THAN 50 EMPLOYEES** with only 6% having more than 500 **EMPLOYEES**

EMPLOYEES

37%

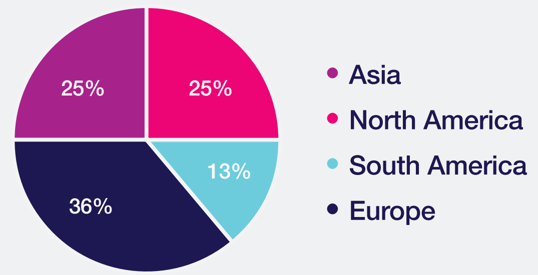
of these service providers have been in business for **MORE THAN 10 YEARS**

TIME IN BUSINESS

Client Make-up

	% 2018		% 2019
Multinational Games Developer / Publisher	18%	↑	36%
Small Independent Console Game Developer	15%	↑	19%
Mobile game-focused Developer	14%	↑	18%
Enterprise Clients	10%	↓	9%
MMO Game-Focused Developer	9%	↓	5%
Online Social Game-Focused Developer	7%	↓	4%
Motion Picture Company	9%	↓	4%
TV / Media Company	10%	↓	4%
Online Casino / Gambling	8%	↓	3%
MOBA Developer	0%		0%

Multinational game Developers / Publishers take the top spot in terms of the percentage of service providers client portfolios that they represent. Indie developers continue to increase and remain in the second spot, which continues the trend seen last year that indie developers are investing more in external development year over year.



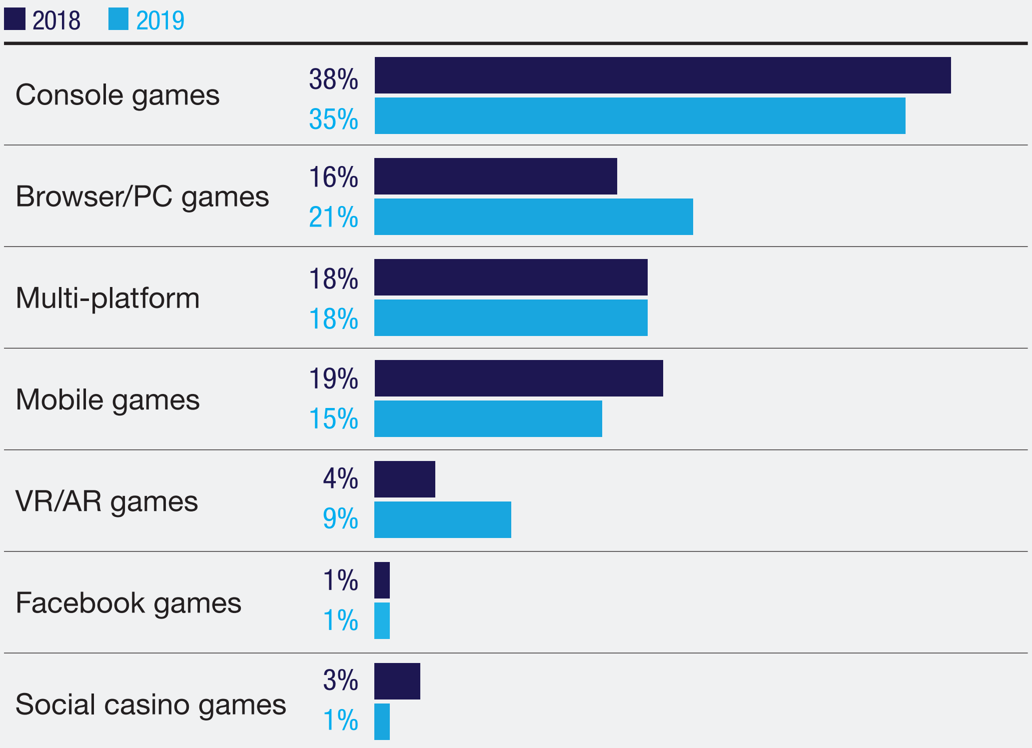
RESPONSE REGION SPLIT

57% of service providers that participated have only **ONE LOCATION**

8% operate out of more than **5 LOCATIONS**

LOCATIONS

Developer / Publishers Platform Focus



Console games remain at the top spot for our platform focus from the previous year, with browser/PC games now in the second spot up from 4th last year. Mobile games dropped from 2nd place to 4th. Could it be that developers are investing more in PC/Browser games due to the increasingly crowded mobile market? This is a trend we will be keeping an eye on.

We see a sharp increase in AR/VR games as a focus this year, as well as a small drop in social casino game focus. It's possible that laws introduced across the globe last year surrounding gacha mechanics and gambling in F2P games reduced the industry's appetite for social casino development.

2

Most frequent team size managing external development

10

The most frequent number of service providers a developer works with annually

92%

Foresee a growth in demand for external development

(6% decrease YoY)

44%

Developers / Publishers reported an annual spend of $6M or greater for external development

Top 3 most important factors when selecting a service provider

1 **Quality of Assets** (same Y-o-Y)

2 **Team Skill Sets** (moved up from 3rd place)

3 **Language/communication skills** (new entry)

Rates has fallen from 3rd place to 4th place since last years survey

56%

of all art is sent to external partners

GAME INDUSTRY EVENTS

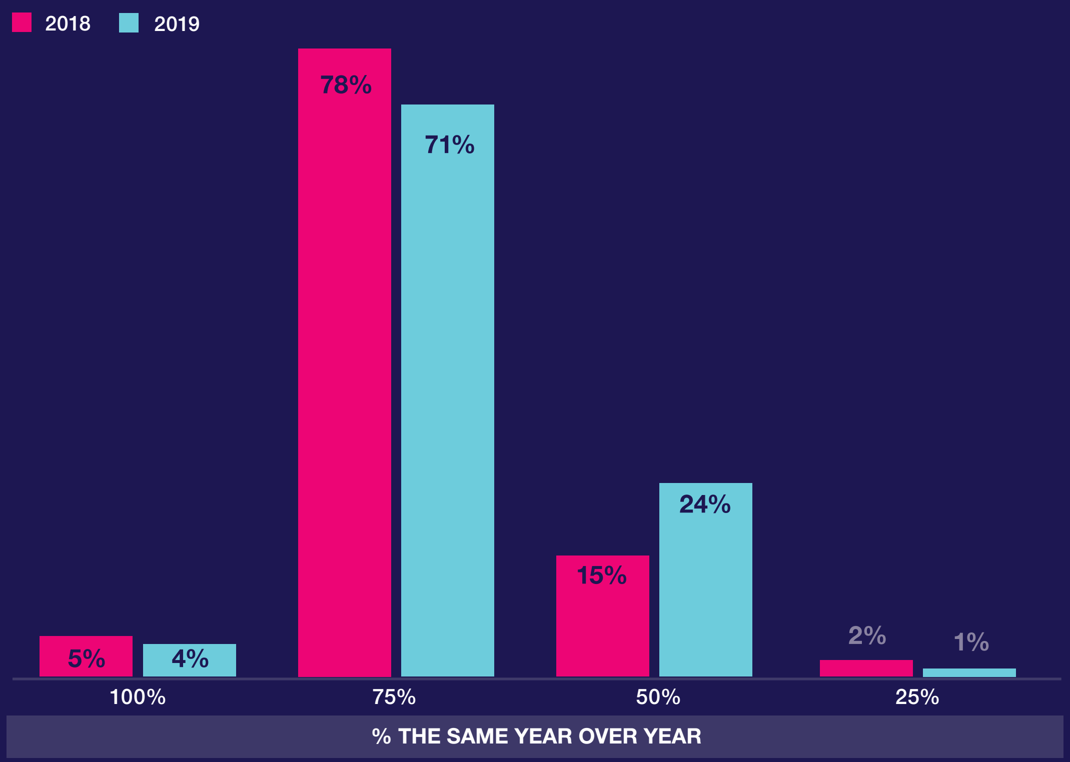
are the #1 place service providers meet new clients

(same Y-o-Y)

#1 Reason Companies Engage Service Providers:

to scale teams to deliver more content and features (same Y-o-Y)

Frequency of Changing Partners Year-on-Year



The majority of Developers / Publishers are keeping nearly the same external partners year over year, however, nearly all Developers / Publishers are swapping out at least 25% of the external partners they work with each year. There was an increase in Developers / Publishers who admit to swapping up to 50% of the companies they work with each year. It's possible that consolidation of the industry and M&A is contributing to this, but it's likely a result of a complex combination of factors (issues with external partners, wanting to diversify service providers, expansion into new regions with partners, etc).

38%

of Developers / Publishers **do not foresee switching their most frequently used partners in the next 2-years** due to their external development strategy.

The **most popular reason** why Developers / Publishers would change service providers in the next 2-years is to **diversify work with other partners.**

Diversity and Inclusion

Diversity can be classed as the range of human and organizational similarities and differences. Inclusion can be classed as the process of using those differences and similarities to achieve a common goal.

By leveraging Diversity and Inclusion in the workplace it can open up talent pools, increase retention, increase quality, and make for a more desirable place of work.

Developer / Publisher perspectives on D&I include the importance of knowing that partners are treating their Artists well, that their teams work in a safe and fulfilling environment, and that the teams that are being built externally are strong. An alternate recurring theme is that external partners hitting a high quality bar is the foremost priority, and harnessing D&I can help to achieve higher quality bars if implemented successfully. It is also noted that it's hard to understand how to integrate D&I into external development culture, and that harnessing D&I initiatives could open up opportunities for a wider variety of quality externally created content.

60%

of service providers have diversity and inclusion objectives within the workplace.

17%

of service providers plan to implement Diversity and Inclusion objectives in the future.

"Diversity and inclusion is about creating and respecting opportunity. Every interaction should focus on building trust and respect by valuing different opinions. When there is respect between those who work together, it is reflected in what they do together. Well-rounded discussions foster more informed decisions, so it is important to lean into transparency, collaboration, and to listen with an open mind. In order to hear diverse perspectives, we must first round out the table and those who sit at it. This allows us to address gaps in data and avoid blind spots. Through awareness of diversity and inclusion, we can build teams and partnerships trained to create experiences that resonate with a wider audience, and do so with respect."

Nikki Roth , Senior Technical Animator at Google

Mergers and Acquisitions

When compared to 2018's report, 11% of service providers were looking for targets and 2017s report indicated, 30% of service providers were looking. This is a sharp decline YoY. Interestingly, the % of respondents who claim they were approached for M&A is up 58% compared to 45% last year. This likely means a smaller subset of service providers are aggressively looking for M&A targets and represent the bulk of the conversations happening.

Top 3 services companies are interested in acquiring

	2018 RANKING	**2019 RANKING**
3D Art and Animation (joint 1st)	3D Art (1), Animation (3)	**1**
VFX	2	**2**
2D Art and Cinematics (joint 3rd)	2D Art (4), Cinematics (5)	**3**

3D Art, Animation and VFX all stay in the top 3, and we see 2D art and Cinematics climbing onto the board for this year.

8%

Only 8% of service providers reported that they are actively looking for acquisition targets

(14% could not disclose)

5%

of respondents have acquired service providers in the past 12-months.

58%

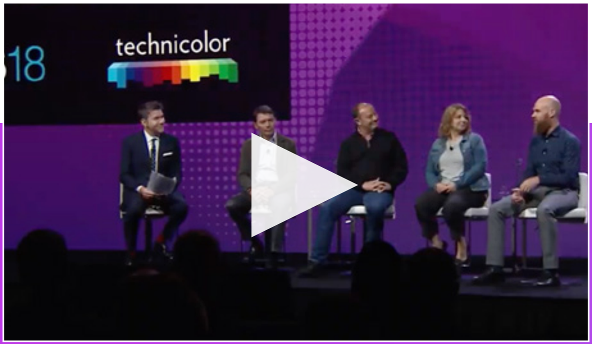
of respondents have been approached for M&A conversations in the past 12-months

(11% could not disclose)

55%

of respondents are open to being acquired

(24% could not disclose).



LEARN MORE

To learn more about the state of M&A, check out the Executive Panel **"Insights from the Top Floor on External Development"**, delivered at XDS 2018.

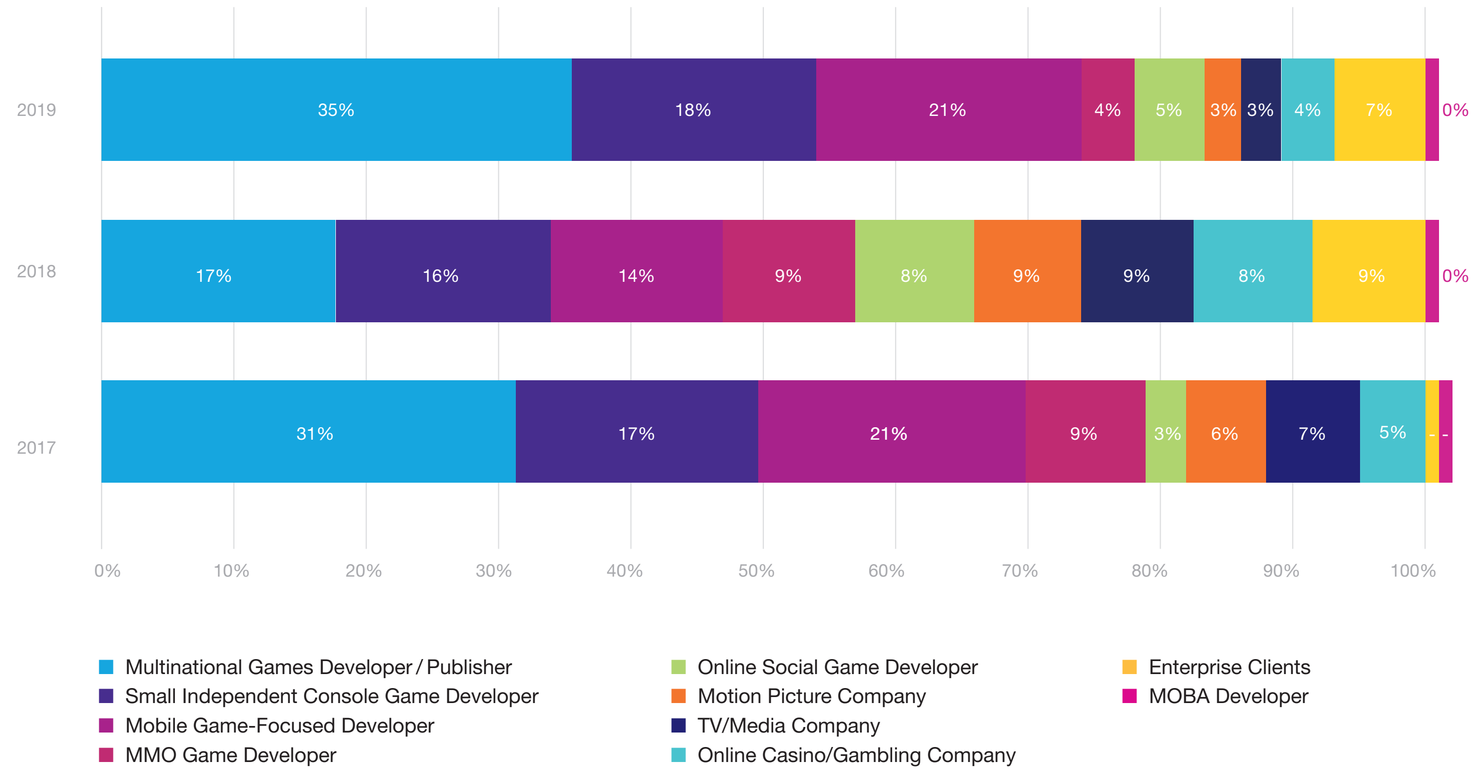
2019
Distribution of External Development Projects

1	**Multinational Developers / Publishers**
2	**Small Independent Console Developers**
3	**Mobile Developers**

Enterprise clients take 4th place in 2018, making up 8% of the total distribution (2% decline from 2018's report).
TV/Media clients dropped down from 10% to 4% since the previous year.
MOBA clients remain at 0% from the previous year.

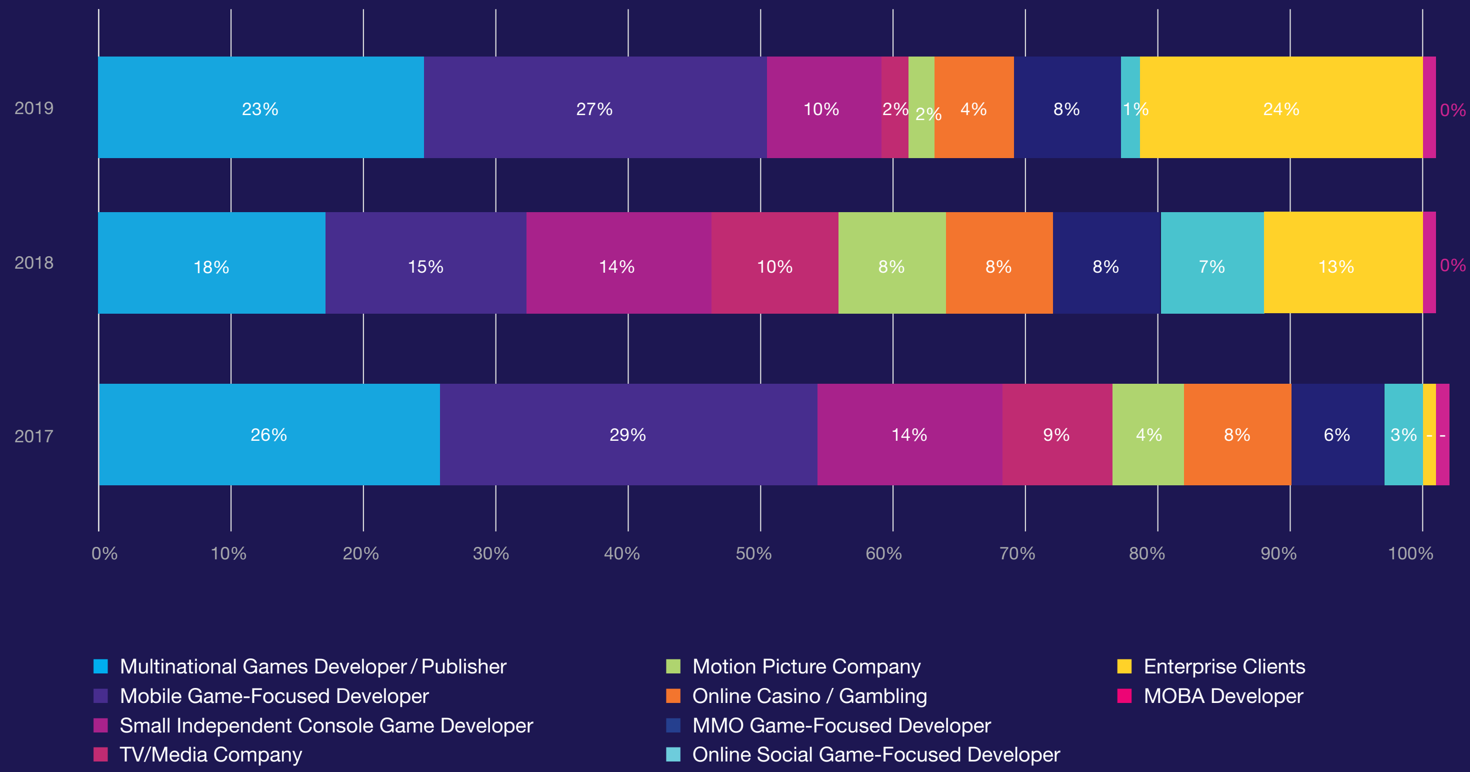
There has been no movement in the ranks for the distribution on the types of companies service providers are working with since the previous year.

Service Provider
ART CLIENT PORTFOLIO by Segment, 2017 – 2019



Service Providers art portfolios with their clients raised by 18% since last years report, remaining at the top of the board. Mobile game developers are small independent console game developers remain in the top 3 for art portfolios.

Service Provider
ENGINEERING CLIENT PORTFOLIO by Segment, 2017 - 2019



We see some movement on the board for Engineering client portfolios. Mobile games developer clients moved up to the top spot, with multi-national games Developers / Publishers moving down to third below enterprise clients. Enterprise clients rose by 11% since the previous year.

How do you meet the majority of your partners?

Games industry event remains in the top place for service providers to meet the majority of their clients, as well as for developers and publishers. We've seen a sharp rise in the percentage of service providers finding clients through online research, and a sharp drop in finding clients through internal company resources. The percentage of partners that were reported by developers and publishers which happened through cold calls dropped to 0%.

The majority of the responses from Developers / Publishers in the "Other" category stem from "an even mix of ways" and "internal databases".

Reported by SERVICE PROVIDERS	2018		2019
Games industry events	35%	↓	**29%**
Referrals	30%	↓	**29%**
Online research	13%	↑	**25%**
Buyer reaches out	14%	↑	**16%**
Internal company resources	8%	↓	**1%**
Other	2%	↓	**0%**

Reported by DEVELOPERS / PUBLISHERS	2018		2019
Games industry events	36%	↑	**44%**
Internal referrals and company resources	32%	↓	**28%**
Other	-		**14%**
External referrals (industry wide)	21%	↓	**6%**
Networking sites	6%	↓	**4%**
Industry news/media	-		**2%**
Online search engine	-		**2%**
External partner reach-out / cold-call	2%	↓	**0%**

3 MOST IMPORTANT FACTORS

Service Providers consider when accepting a new client project

- Potential for future projects
- Prestige of project/client
- Rates the client can pay

GAMES INDUSTRY EVENTS

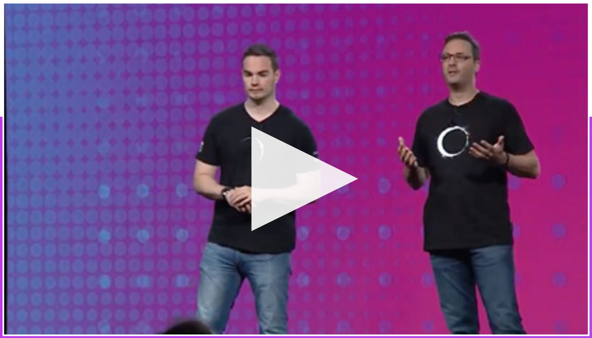
Find your next partner at XDS 2019!

Top Reasons Developers / Publishers Engage Service Providers

The "why" behind the reasons Developers/ Publishers engage with Service Providers.

There is very little movement in the rankings this year. **Lack of available local resources** jumps up to join 4th place to be aligned with **access hard to find skills/capabilities.**

	2018 RANKING		**2019 RANKING**
To build more content and features	1		**1**
Flexible skill-set ramp-up/ramp-down	2		**2**
Cost savings	3		**3**
Access hard-to-find skills/capabilities	4		**4**
Lack of available local resources	**5**	↑	**4**
Support content needs for live services	6		**6**
Speed up development through follow the sun (24x7) production model	7		**7**



LEARN MORE

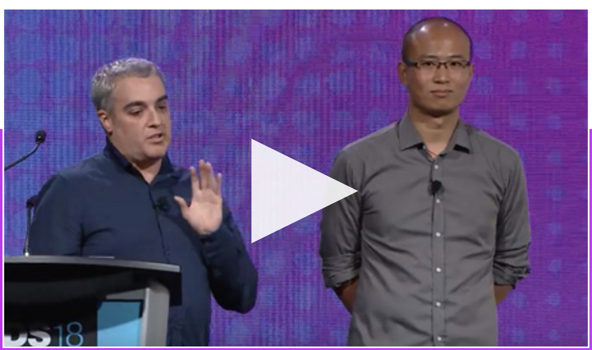
To learn more about cooperative external development, check out the **Executive Panel "Crafting Shadow of the Tomb Raider Challenge Tombs Cooperatively"**, delivered at XDS 2018.

Developers / Publishers: Factors considered when selecting an external partner for a project

The "what" behind the important factors Developers / Publishers consider when selecting Service Providers.

Quality of assets remains in the top spot for factors considered when selecting an external partner, and language/communication skills climbs up to 3rd place from last year. The importance of rates dropped down from 2nd to 4th place — this is perhaps not surprising as cost savings is indicated as the third most important reason Developers / Publishers engage partners.

	2018 RANKING	**2019 RANKING**
Quality of Assets	1	**1**
Team skill sets	3	**2**
Language/Communication Skills	6	**3**
Rates	2	**4**
Previous clients, projects, portfolio	5	**5**
Credibility/reputation	4	**6**
Technology Experience (i.e., tools, software, engines, etc.)	8	**7**
Security controls	7	**8**
Engagement model (Outsourcing, Co-Development, Full-Development)	—	**9**
Financial stability	—	**10**
Studio leadership	9	**10**
Independent studio, low risk of being acquired	—	**12**
Proximity	—	**12**
Size of company	10	**14**
Non-independent, part of a larger company	—	**14**



LEARN MORE

Learn more about successful collaboration in external development in the XDS 2018 presentation "**For Honor: What makes a Warrior? A Co-Development Partnership**"

TOP ISSUES

encountered with external development in 2018

Communication challenges climbed up to 1st place this year for top issues reported in external development with Developers / Publishers, which also correlates with a raise in the ranks for good language and communication skills in the **factors considered when selected external partner for a project section** of this report. On the other hand, communication challenges has dropped in the ranks in terms of top issues reported for service providers. Shifting project schedules and delays remains the top issue for service providers.

Reported by Service Providers

	2018 RANKING		**2019 RANKING**
Shifting project schedules and delays	1		**1**
Iteration issues (volume, speed)	-	↑	**2**
Inadequate documentation and direction	2	↓	**3**
Financial solvency of client	-	↑	**4**
Communication challenges	4	↓	**5**
Differences between internal and client time estimates	3	↓	**5**

Reported by Developers / Publishers

	2018 RANKING		**2019 RANKING**
Communication challenges	3	↑	**1**
Iteration issues (volume, speed)	2	↑	**1**
Poor quality deliverables	1	↓	**3**
Partners lack capacity	5	↑	**4**
Pipeline set-up	4	↓	**5**
Loss of talent	-		**5**

Ranking of Regions

This data below displays the ranking of regions based on standard of studio pipeline setup and infrastructure (1 = highest standard, 4 = lowest standard). We calculated the rankings based on the number of responses over regions, whilst also weighting this across the number of survey participants to give a fair depiction of infrastructure across regions. Europe ranks the number one region for pipeline and infrastructure standards.

	EUROPE	NORTH AMERICA	ASIA	SOUTH AMERICA
OVERALL REGION RANKING	1	2	3	4
Utilizes dedicated IT resources	3	2	1	4
Highest internet speed range	1	2	4	3
Highest network speed range	2	3	4	1
Newest workstations	4	1	3	2
Utilizes enterprise class storage	1	3	2	4
Varied areas of expertise*	1	3	2	4

*Expertise includes support networking, storage, VM Infrastructure, and Linux

3 MOST IMPORTANT FACTORS

Developers / Publishers look for when setting up a pipeline

Dedicated IT staff (internal or external)

Robust internet connectivity

Technical acumen of artists

LEARN MORE

Watch XDS19 presentation videos on Pipelines & Infrastructure

Achieving Scalable Integrated Development at High Volume for Blood and Truth

A Deep Dive into the Distributed Infrastructure and Workflows for Creating Gears of War

Tools commonly used to support external development

Basecamp has raised in the ranks for service providers from the previous year, and email has dropped in popularity as a tool for art reviews across the board. As tools for reviews become more robust, and make submissions and deliverables more consolidated, this may have affected the popularity of email as a key tool.

#1 Emerging Tools

by Service Provider:

SUBSTANCE

by Developer/Publisher:

slack

SHOTGUN

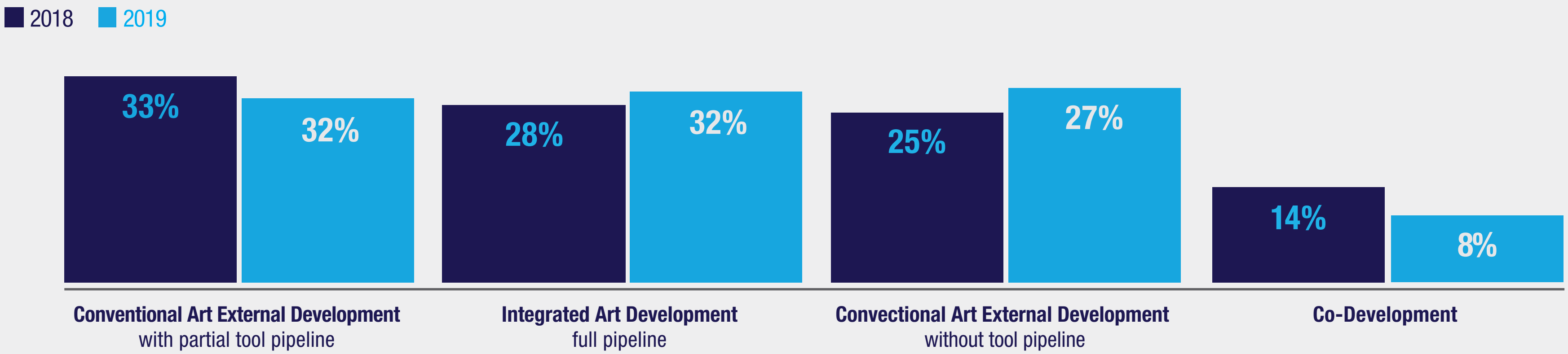
#1 Future Tool

by Service Provider & Developer/Publisher:

SHOTGUN

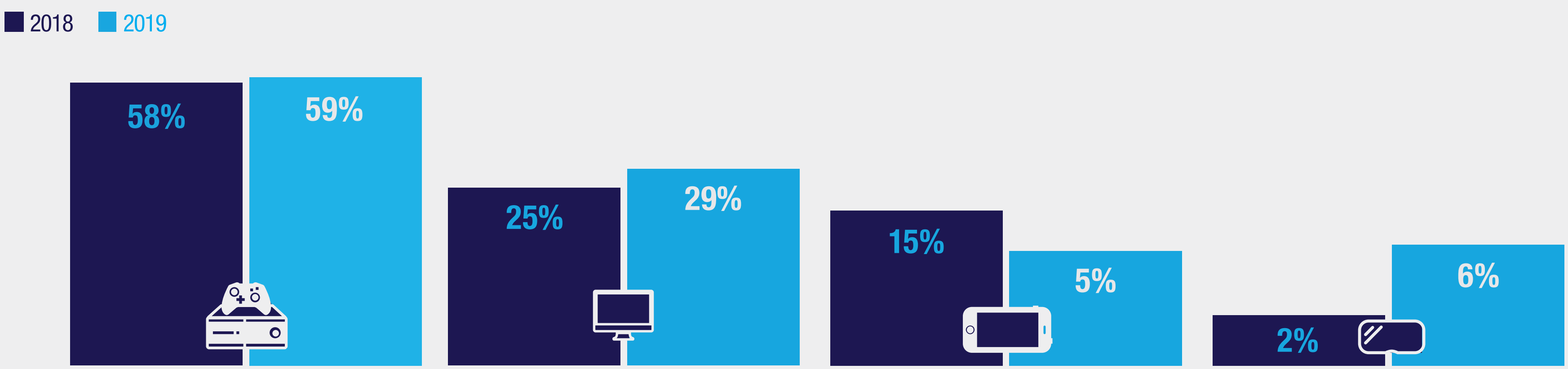
	SERVICE PROVIDERS	DEVELOPERS / PUBLISHERS
Project Management	1 Jira 2 Basecamp 3 Trello	1 Jira 2 Shotgun 3 Excel
Communication	1 Skype 2 Email 3 Slack	1 Email 2 Skype 3 Slack
File Transfer	1 Dropbox 2 FTP 3 Google Drive	1 P4 2 Aspera 3 Google Drive
Art Review	1 Shotgun 2 Basecamp 3 Trello, Slack , Email	1 Shotgun 2 Jira 3 Email
Code Review	1 Github 2 VPN, BitBucket, Email	1 Github 2 Jira, Slack, Asana
External Company Database	1 Pipedrive 2 Hubspot 3 Agile CRM, Salesforce, Excel	1 Excel 2 Shotgun, Jira, ADX, CRM, Shortlist, Airtable
Engines	1 Unity 2 Unreal 3 Proprietary	1 Proprietary 2 Unreal 3 Frostbite
Code Version Control	——	1 P4 2 Git 3 TFS, Internal Tools, Jira

TYPES OF ENGAGEMENT



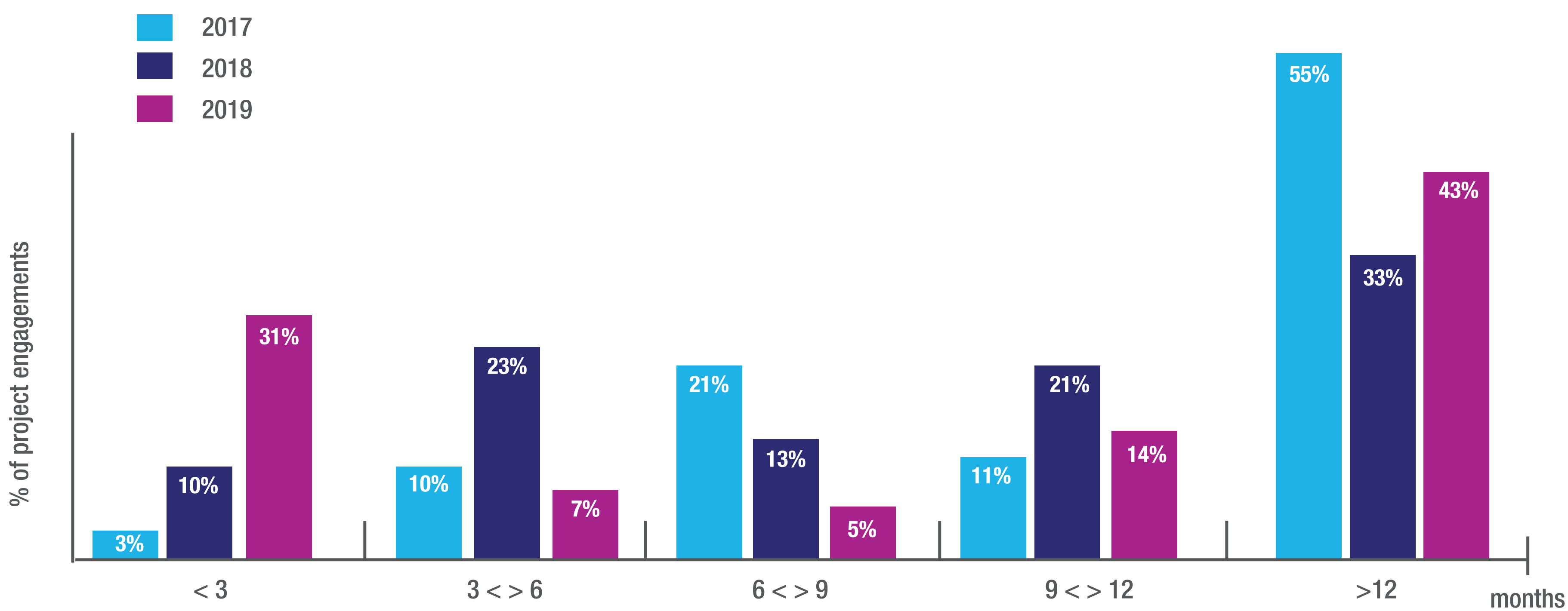
The percentage split for types of engagements has stayed at a steady level since the previous year.
However the data states that we have seen a sharp drop in co-development engagements.

PROJECTS AND PLATFORMS



Console platform projects remain on the top spot this year and stay at a consistent percentage.
Mobile and tablet projects made a steep drop since the previous year.

PERCENT OF PROJECT ENGAGEMENTS BY DURATION



The majority of project durations reported are either more than 12-months, or less than 3-months. As the majority of our developer/publisher respondents are console-focused multinational companies for 3D content, this could mean that service providers are retained with a view to completing a full project, to fill scope for temporary periods.

61%

of external projects are in a photo realistic style

6-10

people is the most utilized external team size

*at 28%

PERCENT OF COMPANIES SENDING
ART DISCIPLINES EXTERNALLY

Across the board, the percentage of art disciplines being sent externally has dropped. While Developers / Publishers are expanding their external development efforts in many areas, work may be being pulled internally to establish benchmarks, or with a view to build larger internal teams to build bigger games.

Following on from the previous year's report, UI/UX and VFX remains at the bottom of the charts for work being sent externally. 3D art still relies heavily on external development from last years report.

93%

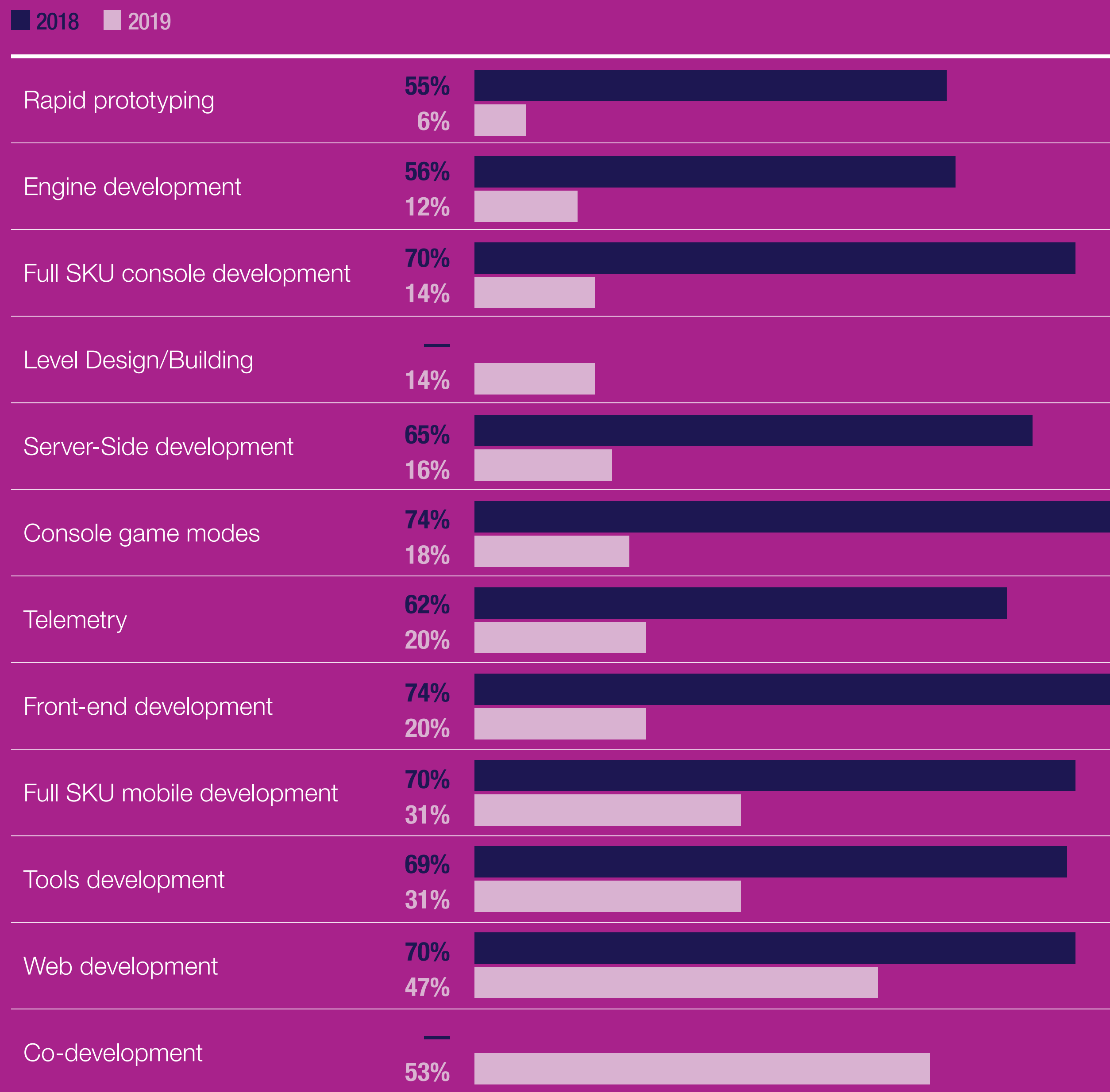
of Developers / Publishers send **3D Props** externally

only 23%

of Developers / Publishers send **UI/UX** externally

	% 2018		% 2019
UI/UX	88%	↓	**23%**
VFX	69%	↓	**27%**
3D Levels	-		**36%**
2D Levels (Mood Concepts)	-		**37%**
2D Environments	92%	↓	**39%**
Concept Art	94%	↓	**40%**
2D Animation	93%	↓	**41%**
Motion Capture	-		**49%**
Animation - Cutscenes	-		**52%**
2D Characters	96%	↓	**53%**
2D Weapons	91%	↓	**55%**
2D Vehicles	91%	↓	**56%**
2D Props	92%	↓	**56%**
3D Animation	88%	↓	**60%**
Animation - Cinematics	81%	↓	**65%**
3D Environments	100%	↓	**68%**
3D Vehicles	-		**86%**
3D Characters	98%	↓	**88%**
3D Weapons	97%	↓	**90%**
3D Props	100%	↓	**93%**

PERCENT OF COMPANIES SENDING
ENGINEERING DISCIPLINES EXTERNALLY



15%

of respondents Full SKU development projects

53%

of Developers / Publishers send co-development externally

Top Countries Offering Different Types of Work

Canada makes its way to the top spot for the majority of the types of work for 2018. Ukraine also climbs up to collect some of the top spots throughout. The USA declines in the rankings through art, engineering and UI/UX, and we see some emerging countries into the rankings with Hungary for Full SKU, Argentina for Cinematics and VFX, and Poland for Engineering.

ANIMATION		
2018	**2019**	
1 China	1 Canada	↑
2 USA	2 China	NC
3 Canada	3 India	NC
4 India	4 Ukraine	↑

ART		
2018	**2019**	
1 China	1 Canada	↑
2 USA	2 Ukraine	↑
3 India	2 USA	NC
4 Canada	3 China	↓
	3 India	NC

CINE/VFX		
2018	**2019**	
1 USA	1 Canada	↑
2 UK	2 UK	NC
3 Canada	2 Ukraine	↑
4 China	3 India	↑
5 India	3 USA	↓
	3 Argentina	↑
	5 France	↑

ENGINEERING		
2018	**2019**	
1 USA	1 Ukraine	↑
2 Canada	2 Canada	NC
3 UK	3 USA	↓
4 China	4 UK	↓
5 Ukraine	4 China	NC
	4 Poland	↑
	4 Hungary	↑
	4 France	↑

FULL SKU DEVELOPMENT		
2018	**2019**	
1 USA	1 Canada	↑
2 UK	2 Ukraine	↑
3 Canada	3 India	↑
4 Finland	4 Hungary	↑
5 China	4 Brazil	↑

UI/UX		
2018	**2019**	
1 USA	1 UK	↑
2 UK	2 USA	↓
3 China	3 Ukraine	↑
4 Canada	3 Canada	NC

AUDIO
NEW IN 2019
1 USA
2 Canada
2 Ukraine
3 UK
3 China
3 Lithuania

QA
NEW IN 2019
1 Ukraine
2 Canada
2 India
2 Poland
2 USA
2 Romania

Main drivers in demand for services over the next 3 years

Service providers and Developers/ Publishers are in consensus that the number one driver in demand in external development over the next 3 years is a **demand for more content.**

SERVICE PROVIDERS	2018 RANKING	2019 RANKING
Players demand for more content	1	**1**
VR/AR	4	**2**
Need for developers to decrease development costs	2	**3**
New consoles	-	**3**

DEVELOPERS / PUBLISHERS	2018 RANKING	2019 RANKING
Demand for more content	1	**1**
Richer/Deeper games	3	**2**
New consoles	-	**3**
Meet demand for headcount	-	**4**

Disciplines Service Providers are most optimistic about growth in demand over 12-18 months

Full SKU

Audio

Cinematics

Full SKU mobile

UI/UX

IN THE PAST 12 MONTHS

areas Developers / Publishers have seen a growing demand for external development services

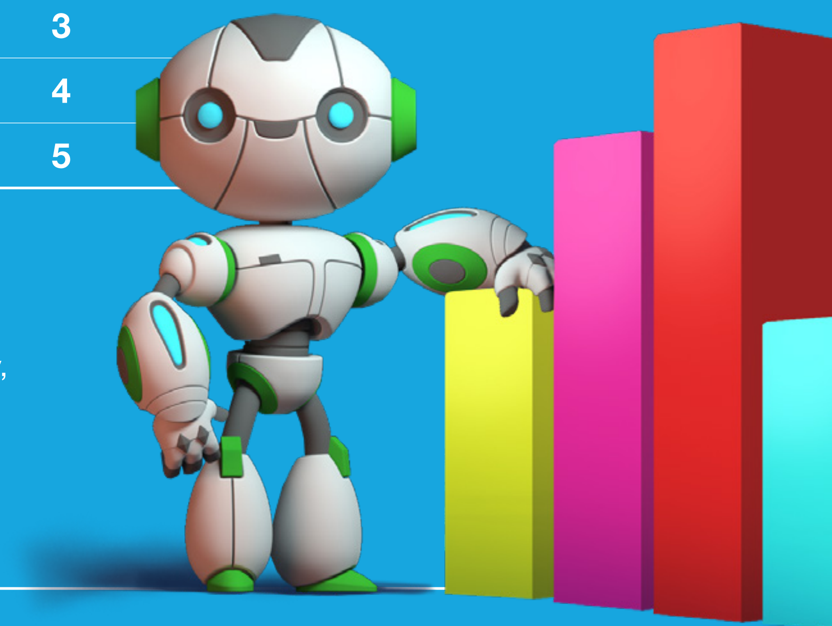
	2018 RANKING		2019 RANKING
3D Characters	1		1
3D Props	2		2
Concept Art	4	↑	3
Other 3D Art	3	↓	4
VFX	6	↑	5

IN THE NEXT 18 MONTHS

areas Developers / Publishers foresee growing demand for external development services

	2018 RANKING		2019 RANKING
3D Characters	1		1
All other 3D Art	3	↑	2
Concept Art	6	↑	3
3D Animation	5	↑	4
VFX	4	↓	5

The need for concept art has been growing and is expected to continue to grow over the next 18 months. Even though we have seen a raise in the rankings for VFX work externally, they drop a place in the growth of demand going forwards. 3D character remains at the top of both charts since the previous year.



Main concerns about the future of external development

A recurring theme we saw through the collected data is that Developers / Publishers reported concern regarding communication with external teams, which is also reflected in the data collected regarding main concerns with external development. There is also concern regarding resources, whether it be the availability of relevant talent, or with scale. We also see concern regarding consolidation leading to price raises, although rate concerns did drop down in our charts throughout this report. Finding partners to fit external development requirements, including with tools and software, makes an appearance in this years main concerns.

Service Providers also mention competition with consolidation, which could relate to locking down clients and rates. Quality is the number one factor for Developers / Publishers when selecting a Service Provider, and this has been highlighted as a concern in the data. Games as a service is also raising concerns, as well as hitting targets for security and standardization.

SERVICE PROVIDERS

- Consolidation leading to competition
- Maintaining quality
- Competition with pricing
- Constant changing of art direction (as games evolve through production)
- Games as a service
- Retaining talent
- Security and standardization
- Lack of stability

DEVELOPERS / PUBLISHERS

- Consolidation leading to rise in prices
- Lack of talent diversity
- Resource scale greater than availability
- Availability of high quality resources
- Stability of Service Providers as demand grows
- Finding partners to fit external development requirements
- Maintaining good communication
- Software and tools not up to standard

Glossary of Terms

The following definitions may be subject to the context in which they were used in this report.

Co-Development
Cooperative engagement where significant parts of development are shared by a client and service provider

Conventional Art External Development (without tool pipeline)
A service provider builds art content without any tools to integrate or export the assets to the developer

Conventional Art External Development (with partial tool pipeline)
A service provider builds art content with the support of tools that allow them to export content, or use a viewer to check their work

Developers / Publishers (buyers)
Companies that develop video games and/or publish games that they own, or publish games on behalf of other developers

External Development
The practice of video game developers and publishers (buyers) leveraging third party service providers (sellers) in any aspect of development

Full Development
A developer requires a full game to be developed by service providers

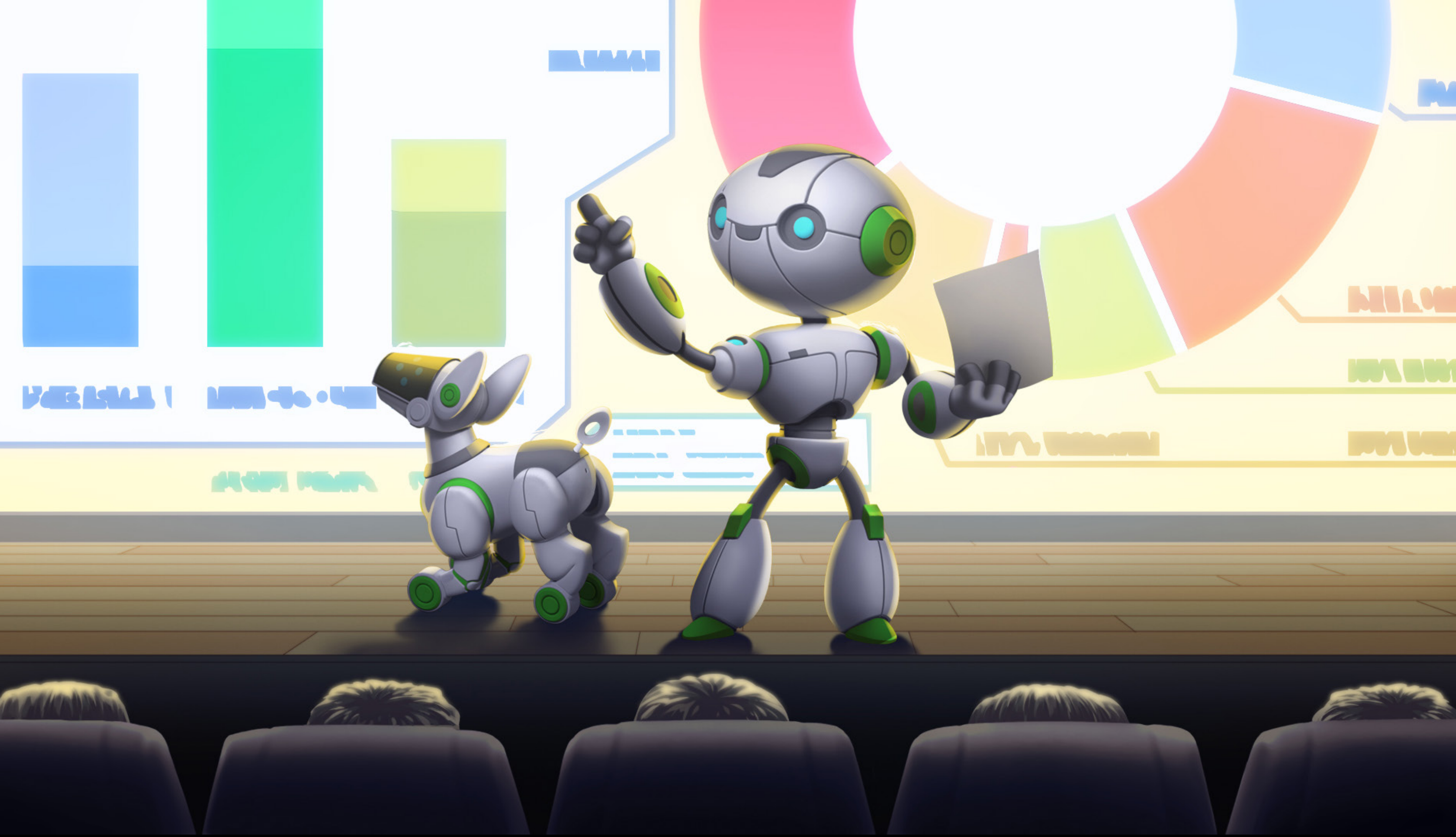
Industry Professional (buyer)
An individual under the employment of a video game developer responsible for managing, influencing or decision making for external development.

Integrated Art Development
A developer's full technical pipeline is used by the service provider

Photo Real Art
Art that is intended to simulate aspects of the real world, whether organic or inorganic, as realistically as possible

Service Provider (seller)
A third party external partner hired to contribute to certain or all aspects of game development

Stylized Art
Design according to a style or stylistic pattern rather than according to nature or tradition



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