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MARCH 5-9
2007
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Quality of Life in a Global Game Industry

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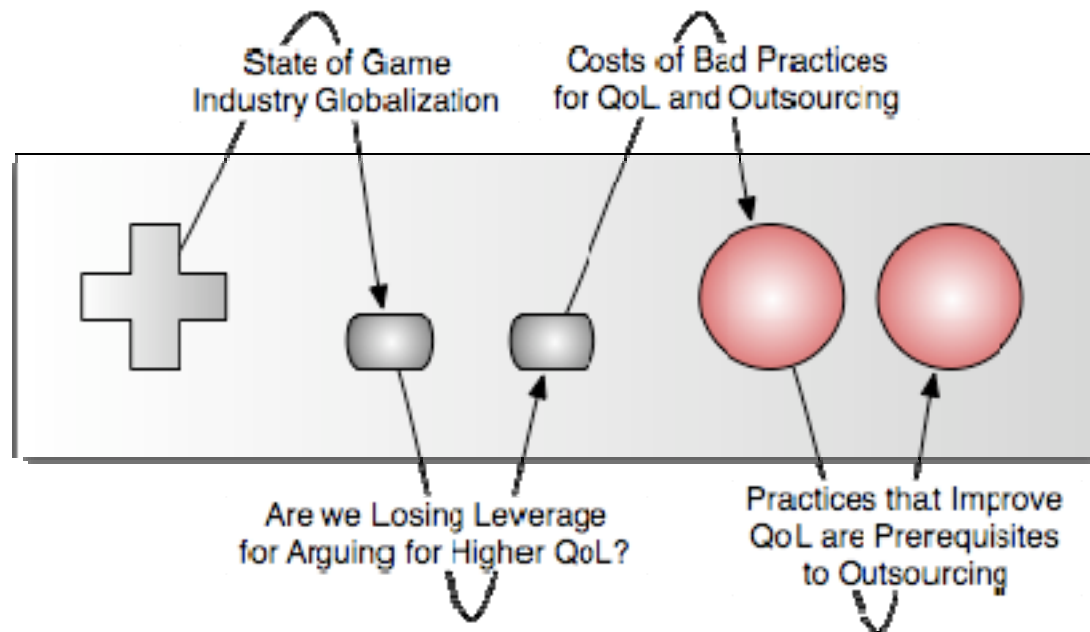
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Map Screen

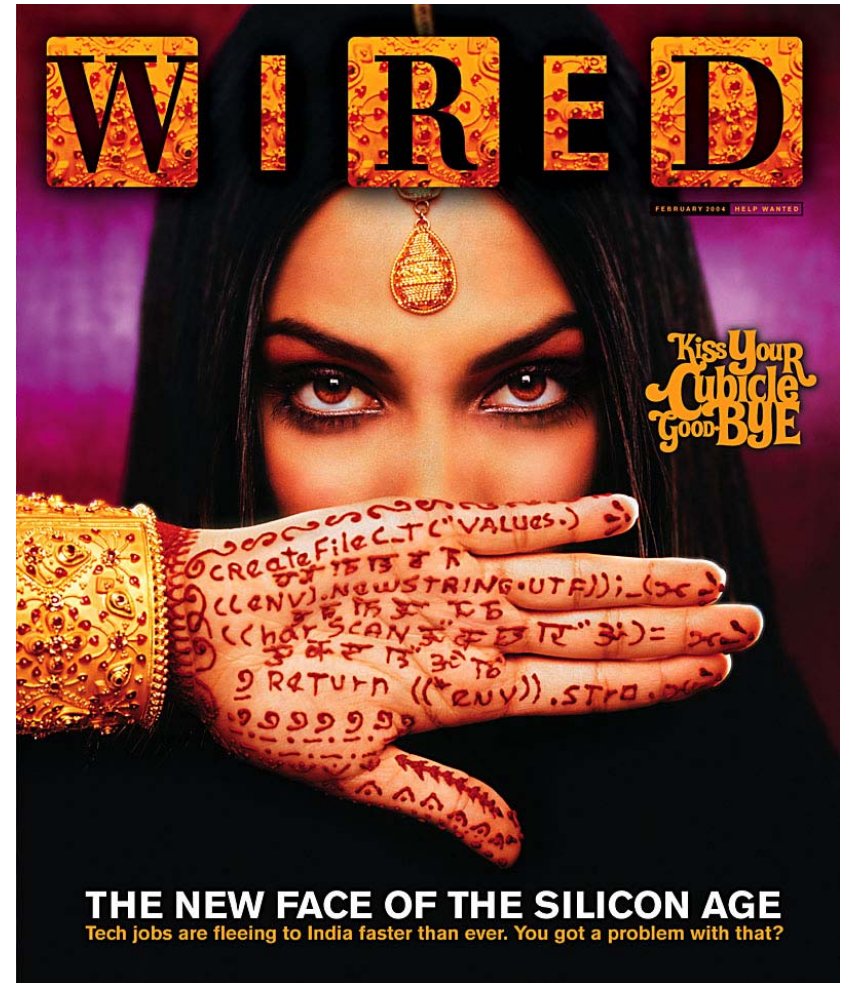




The Rise of Global Video Game Production

- ⚙ Rates Expected to Rise from 60% to 90%
- ⚙ Russia, Eastern Europe, India, China, Vietnam
- ⚙ Audio and Music
- ⚙ Art and Animation
- ⚙ Localization and Porting

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Increasing Demand for Asset Production

- ③ 50% rise in production costs for Next-Gen
- ③ 43% already outsourcing art production
- ③ Games asset bound rather than engineering bound

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The Three Categories of Outsourcing Firms

- ③ Pure Services Companies
- ③ Service Companies Eyeing Domestic Market
- ③ Service Companies Eying Global Market



Globalization is our Reality



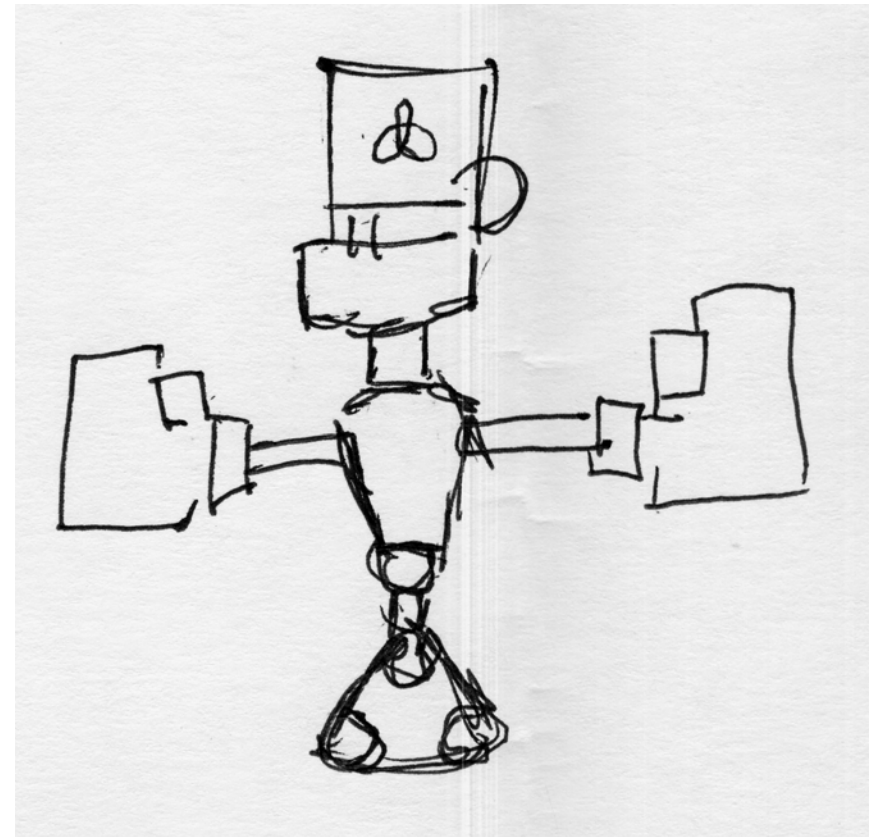
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Developers Losing Leverage for Arguing for QoL?

- ⊕ Is good QoL incompatible with a global game industry?
- ⊕ Is good QoL incompatible with the game industry?





Developers Losing Leverage for Arguing for QoL?

- ③ How many of you feel like arguing for improved QoL either just is not working or you don't have any leverage?
- ③ How many of you are worried about offshore outsourcing?

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“Outsourcing Rattles the Skeletons in the Closet”

- ③ Core competencies are reinforced
- ③ Weaknesses rise to the surface
- ③ Top problems with outsourcing is quality and scheduling





Costs of Bad QoL - Turnover

- ⌚ High turnover rates
- ⌚ High ramp up costs for new employees (\$32k/person avg.)
- ⌚ 47.2% of developers want to stay in the game industry
- ⌚ 34.3% expect to leave within 5 years

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Costs of Bad QoL - Turnover

- ③ Turnover rates in emerging economies is higher
- ③ Youth of new industry means we have very little data
- ③ Money will not win the battle for the best employees



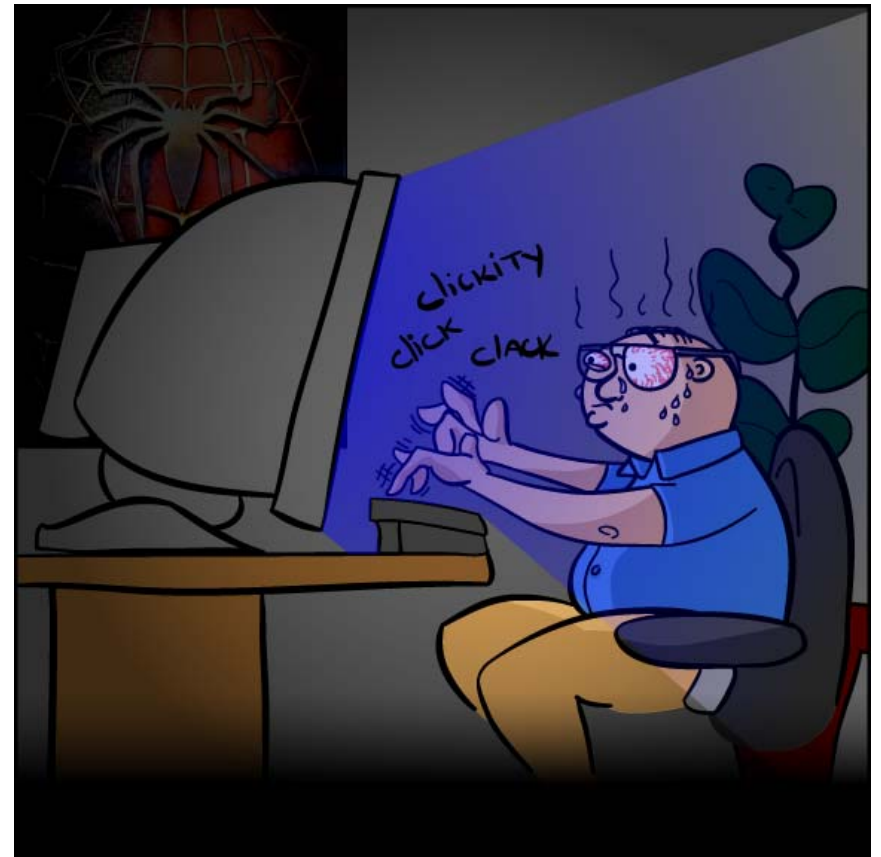
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Costs of Bad QoL - Rework

- ⊕ As much as 60% of production work can be rework
- ⊕ Well run projects rework rates as low as 20%





Costs of Bad QoL - Rework

- ③ Ever hear of a change order?
- ③ Less experience tends to mean more rework
- ③ Most companies successful with outsourcing are doing sequels or games with well defined pipelines

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Costs of Bad QoL - Schedules

- ③ Schedule slippage linked to insufficient pre-production
- ③ 13.5% of developers believe pre-production teams are able to accurately predict timelines





Costs of Bad QoL - Schedules

- ⊕ Pre-production is largely un-experienced in new industries
- ⊕ Production timelines already constricted by companies looking to go overseas





Costs of Bad QoL - Lost Sales

- ⌚ Missing the holiday season rush
- ⌚ Missing a movie tie-in release date
- ⌚ Missing a console launch
- ⌚ Missing a big conference or expo (lost publicity)



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ea_spouse China?

⦿ “This is a guy come from [location] studio. In this studio we over time every day.

This f*cker studio manager [NAME]. tell us we must over time every day, and he said if you don't I will be fire you! He pays all of our man just a little salary, and never gives our over-time money. That's an exploited!!!

He is unscrupulous in his exploitation of people. I was amazed to see we are all Chinese people, we are countrymen.”

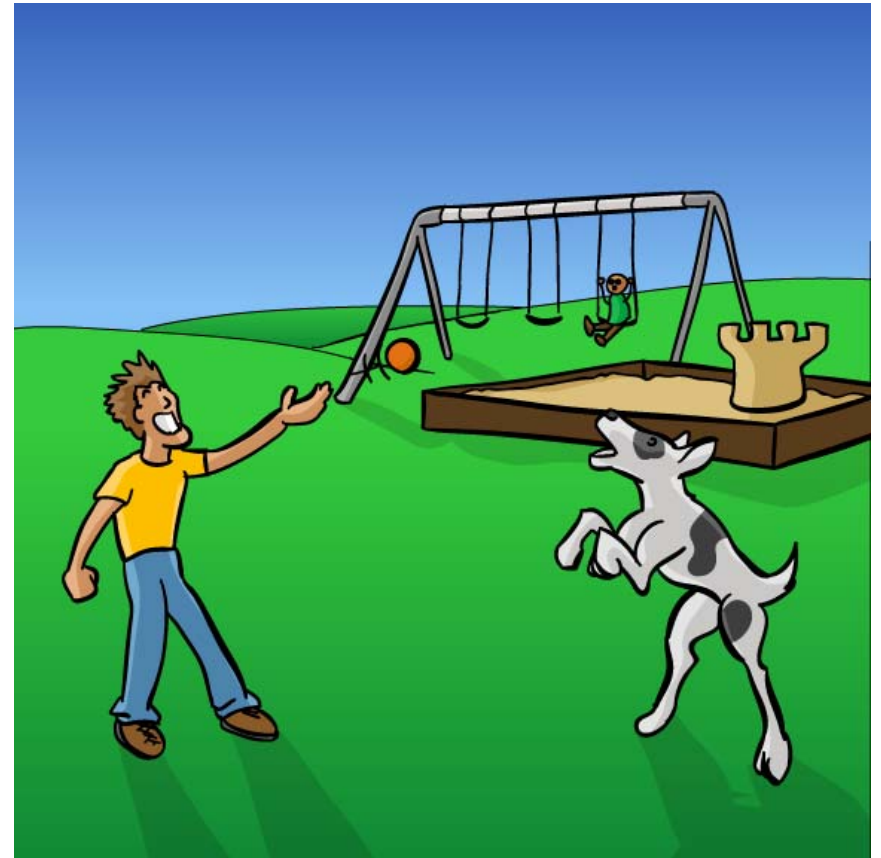
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Achieving Higher QoL

- ③ Optimization of 40-hour week
- ③ Longer pre-production phases and team buy-in
- ③ Change control during production
- ③ Effective negotiation



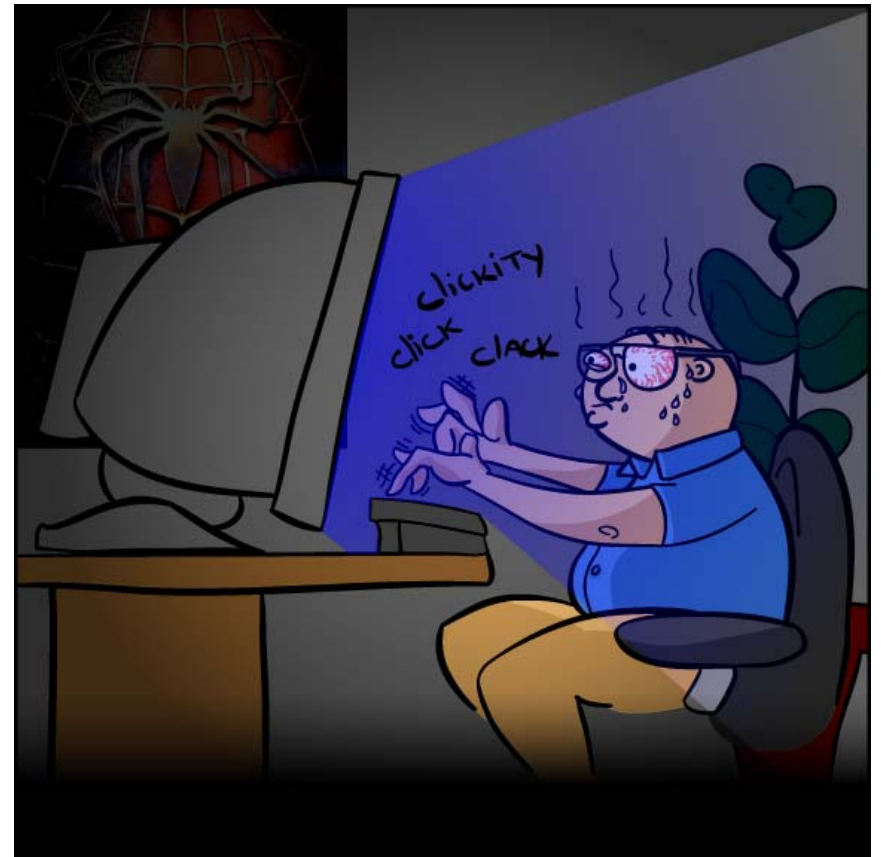
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Time at Work

- ⌚ Core Hours
- ⌚ Time Zones Matter

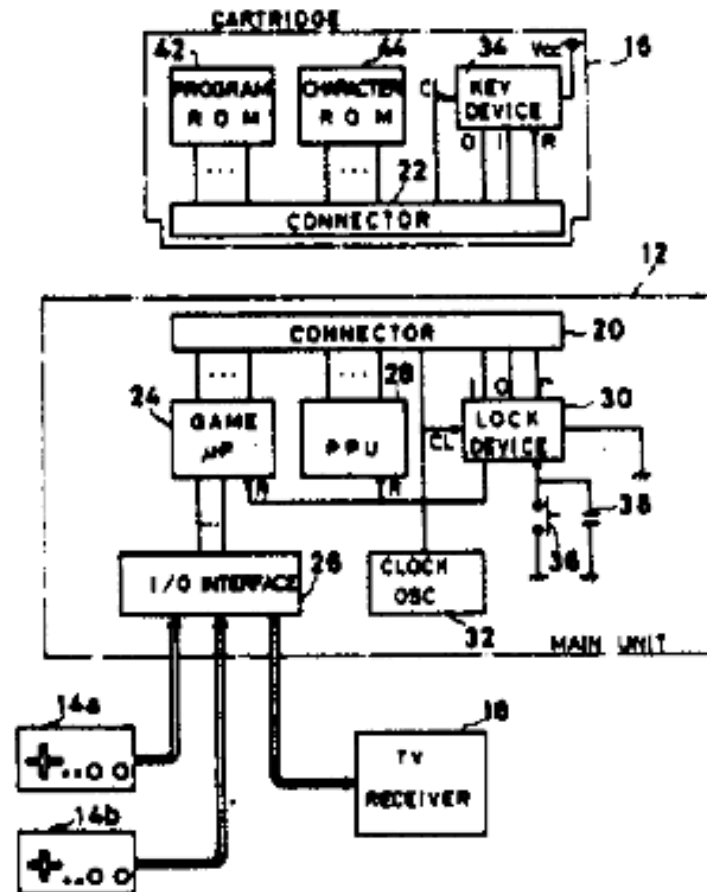


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Passion, Inc.



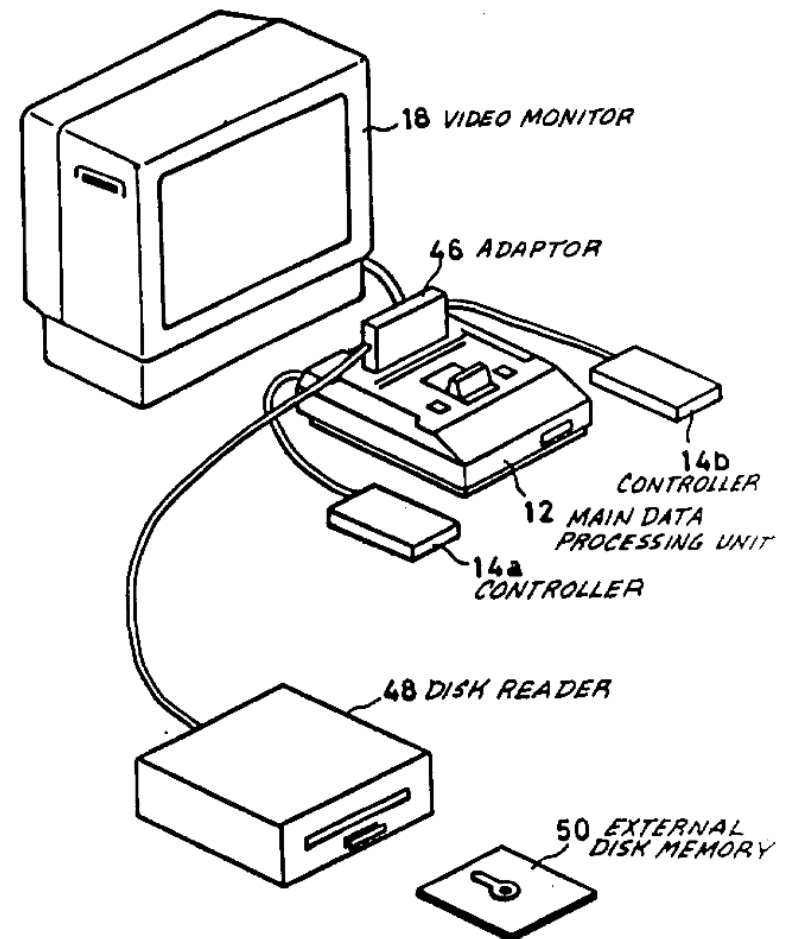
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The Pre-Production Equation

- What
 - x How
 -
 - Time
-
- Quantity of bad projects out there



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Change Control Processes

- ⦿ Effective Negotiation



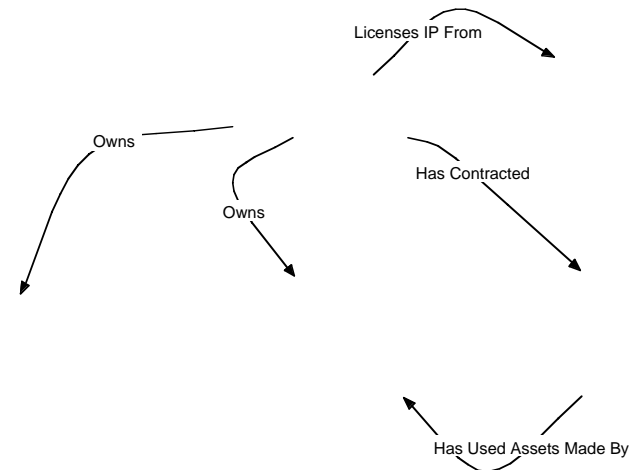
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What Does Management Want to Hear About QoL?

- ⊕ Not just about bottom line
- ⊕ Long term growth
- ⊕ Sustainability
- ⊕ Return on Investment
- ⊕ Organizational Learning
- ⊕ Industry Learning
- ⊕ Retention of Experience





Good QoL is a Prerequisite to Outsourcing

- ⊕ If it does not work in house, it will never work outside



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Conclusion



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