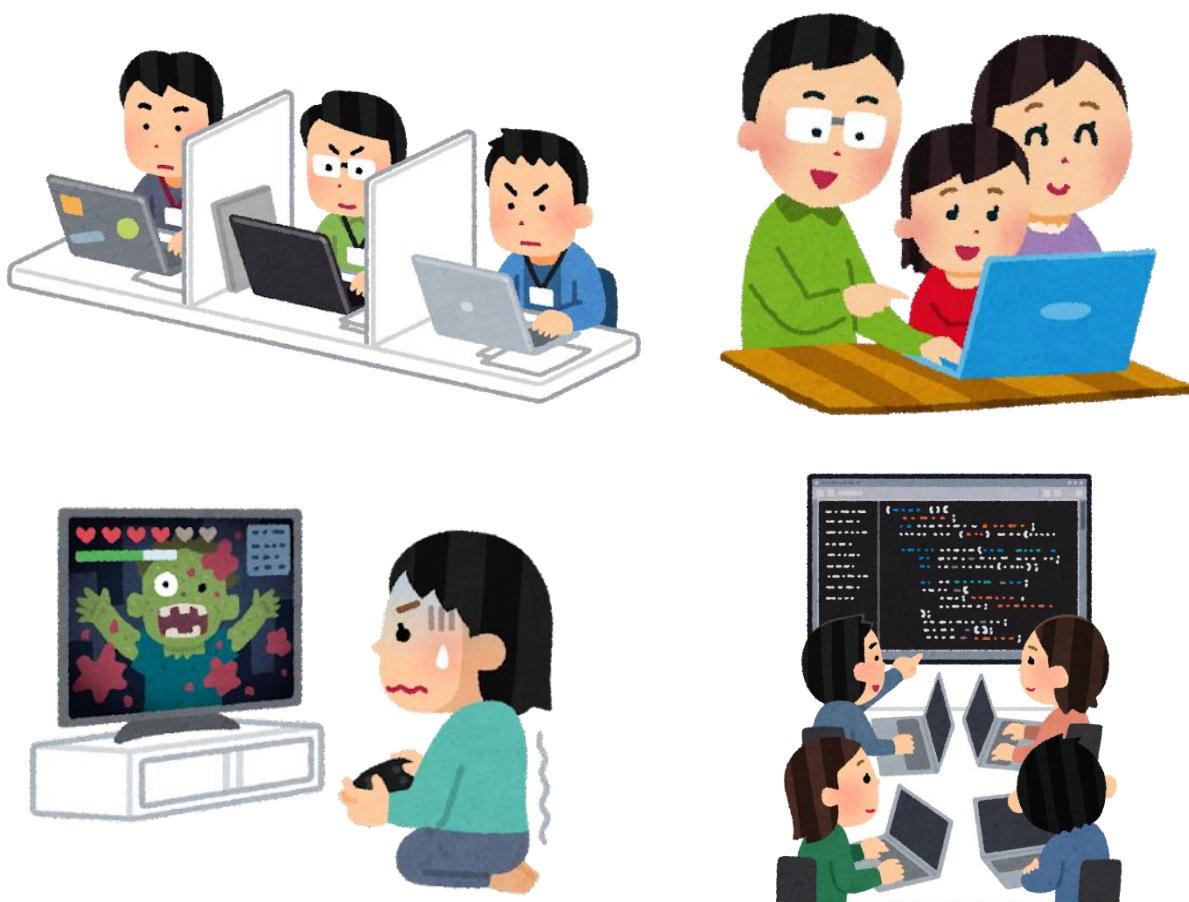# The Reality of Independent Game Development

"Tokyo Game Show 2021 Indie Game Corner" Survey
Report Pamphlet

【Message】

This survey was conducted on all applicants to the "TOKYO GAME SHOW 2021 Indie Game Corner" with the aim of keeping a record of the actual state of independent game development activities. The information obtained from the survey will be used by TOKYO GAME SHOW to understand and record the current status of the Indie Game Corner, and for academic research by the Digital Game Research Group. The survey was conducted in September 2021 and responses were received from 82 groups.

This pamphlet is a brief introduction to the survey results as a small thank you to those who participated in the survey. We hope you find it useful.

February 2022

Nobushige Kobayashi (Associate Professor, Tohoku Gakuin University)

１．Number of Respondents and Countries/Regions

This survey was conducted in both Japanese and English. We received responses from a total of 82 people, 9 for the Japanese survey and 73 for the English survey.
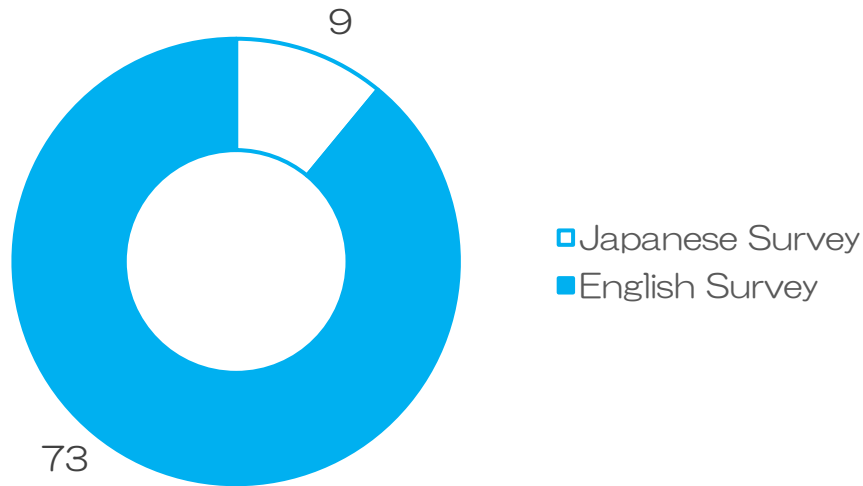
9

Japanese Survey
English Survey

73

Figure 1 Number of respondents for each survey (people)

In terms of country/region, 13 groups had addresses in Japan, followed by 8 groups in Brazil and Canada.

Table 1 Number of countries/regions where each group's address is located

	No. of Groups
Japan	13
Brazil, Canada	8
United States, Taiwan	6
Argentina	4
Poland, Sweden, Belgium	3
Italy, Spain, Chile, France, Denmark, India, Colombia	2
Russia, UK, Australia, Finland, Czech Republic, El Salvador, Slovakia, Pakistan, Germany, Peru, Philippines, Mexico, South Korea, Israel	1

2．Gender, Age, Occupation, Number of Members

The distribution of the gender, age, and occupation of the respondents (those responsible for the application) and the number of members in the group is shown in Figures 2-5.

About gender, the largest number of respondents were males at 63 (77%).
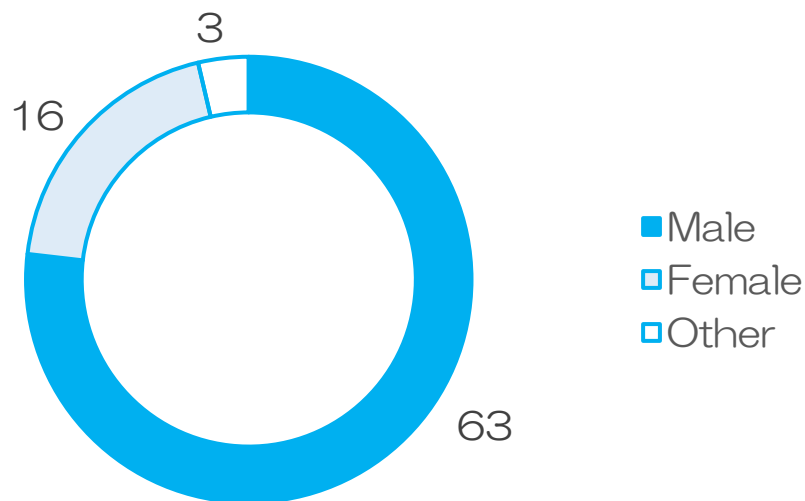

Figure 2 Number of respondents for each gender (people)

About age, 96% of the respondents were in their 20s to 40s. The average age was 34, with the youngest at 18 and the oldest at 61.
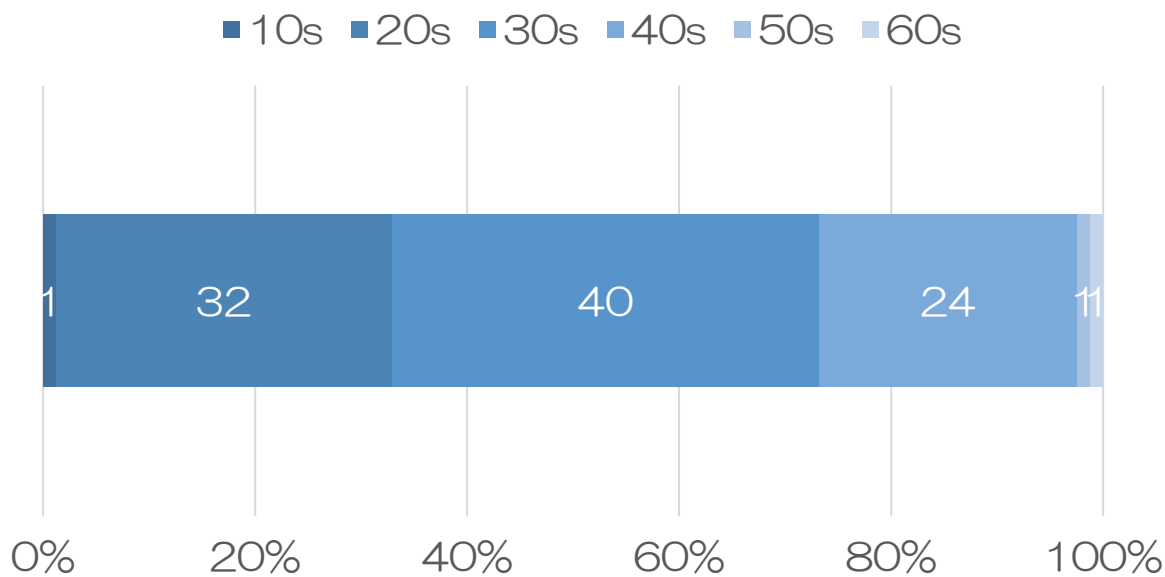

Figure 3 Percentage of respondents' generations (%)

About occupation, a high percentage of respondents were company executives / board member of a company and freelancers.
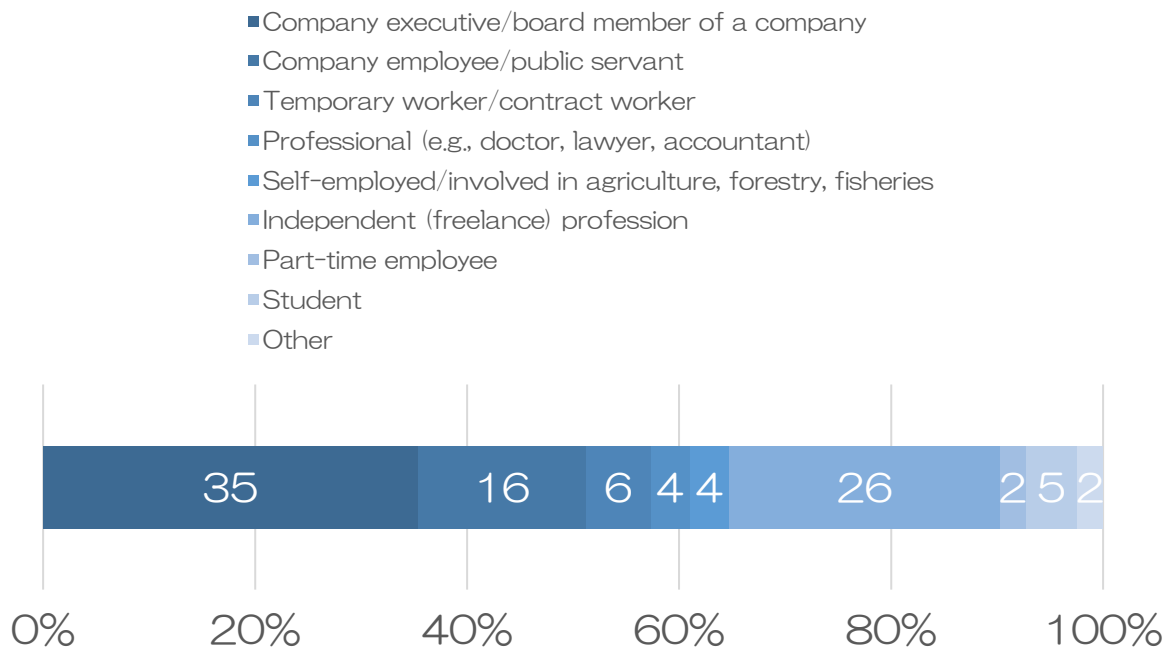
Figure 4 Percentage of respondents' occupations (%)

As for the number of members in each group, 71% of the respondents were in groups with five or fewer members.

Most respondents were individual or small groups, but there was a group consisting of 30 people.

Figure 5　Percentage of groups' members (%)

3. Game Genres

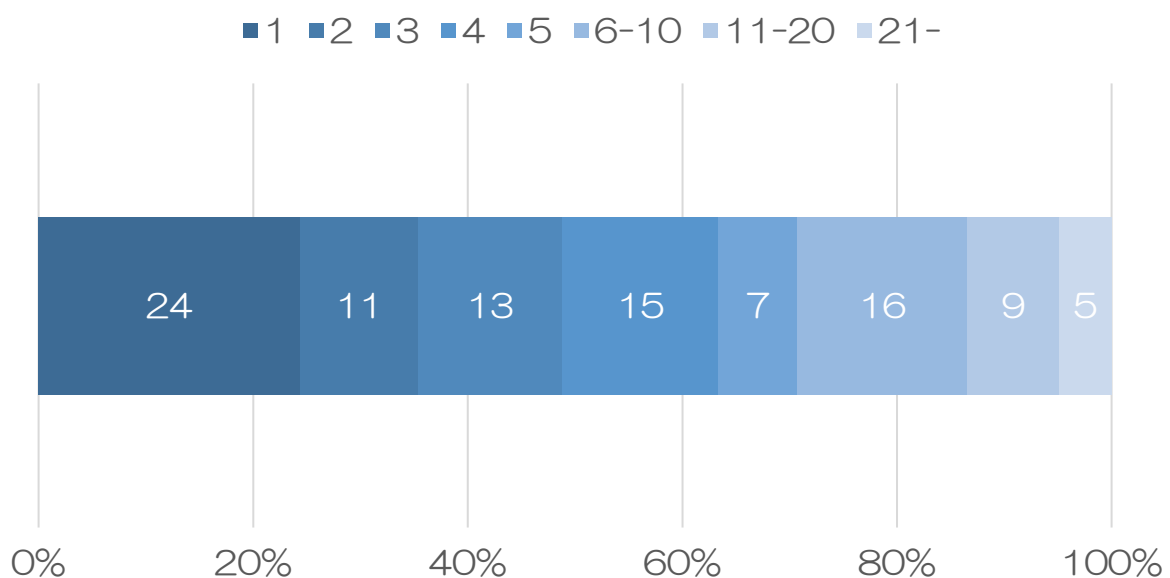Fig. 6 shows the results of the survey in which the respondents were asked to select all the genres of each group's games.

About half of the groups selected "adventure", followed by "puzzle", "action-adventure" and "action" in that order.
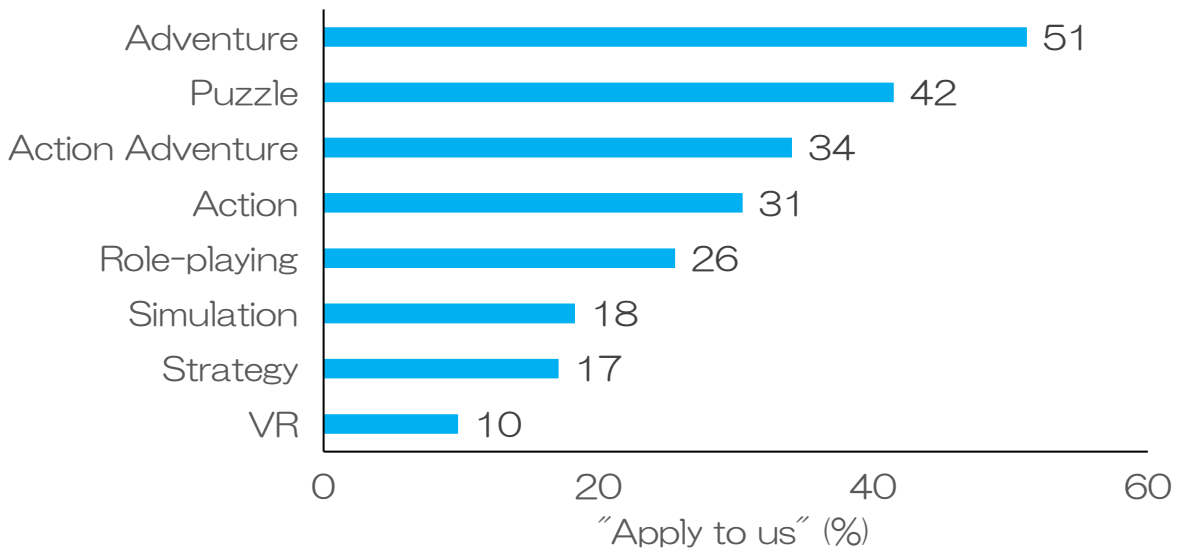
Figure 6 Percentage of groups' game genres (%)

4. Number of Languages and Awards won

The average number of languages supported by each group's games was 5.3. 21% of the respondents supported only their native language (one language), but there were also 12% of respondents who supported 11 or more languages.
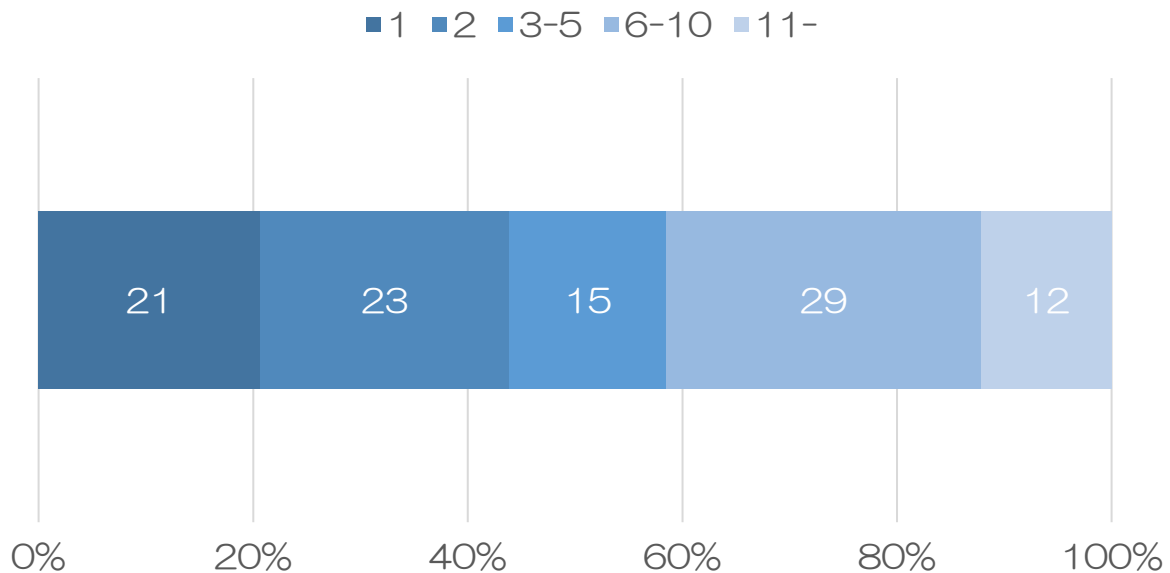
Figure 7 Percentage of number of languages supported (%)

The average number of awards each group won in the contest was 1.8. 42% of the respondents had never won an award, but 9% of the respondents had won six or more awards.
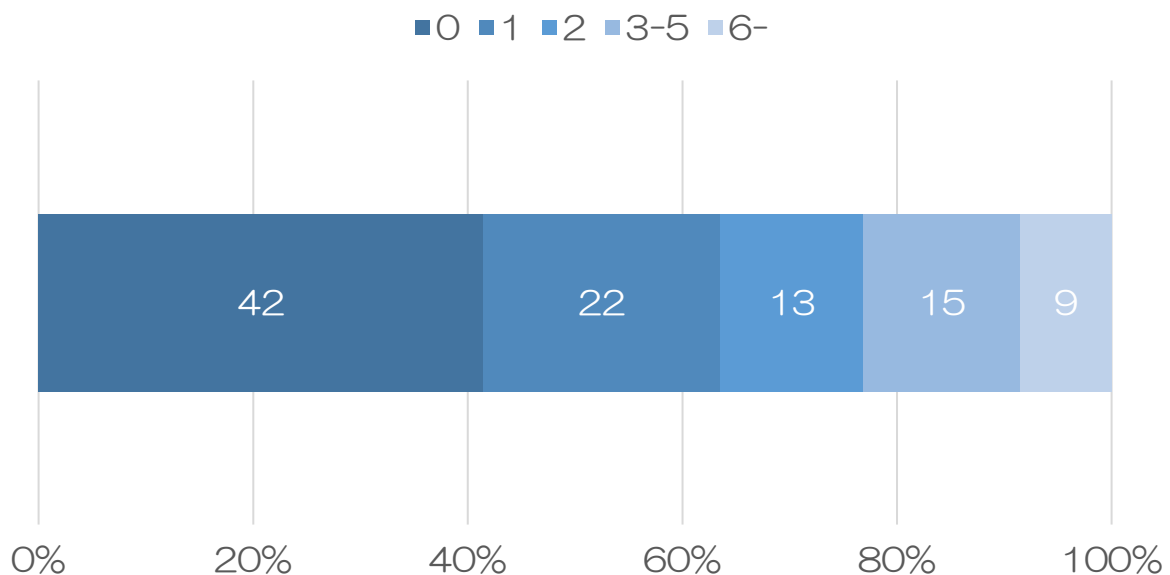
Figure 8 Percentage of number of awards won (%)

5．Use of Game Engines

Figure 9 shows the types of game engines used in the development of independent games.

Unity was used by 82% of the respondents, and Unreal Engine by 24%. Other game engines were rarely used.

Figure 9 Game engine usage rate (%)

6．Events and Means to Exhibit and Sell Games

What kind of places are independent games exhibited and sold?　Fig. 10 shows the results of the question about events where games are exhibited and sold.

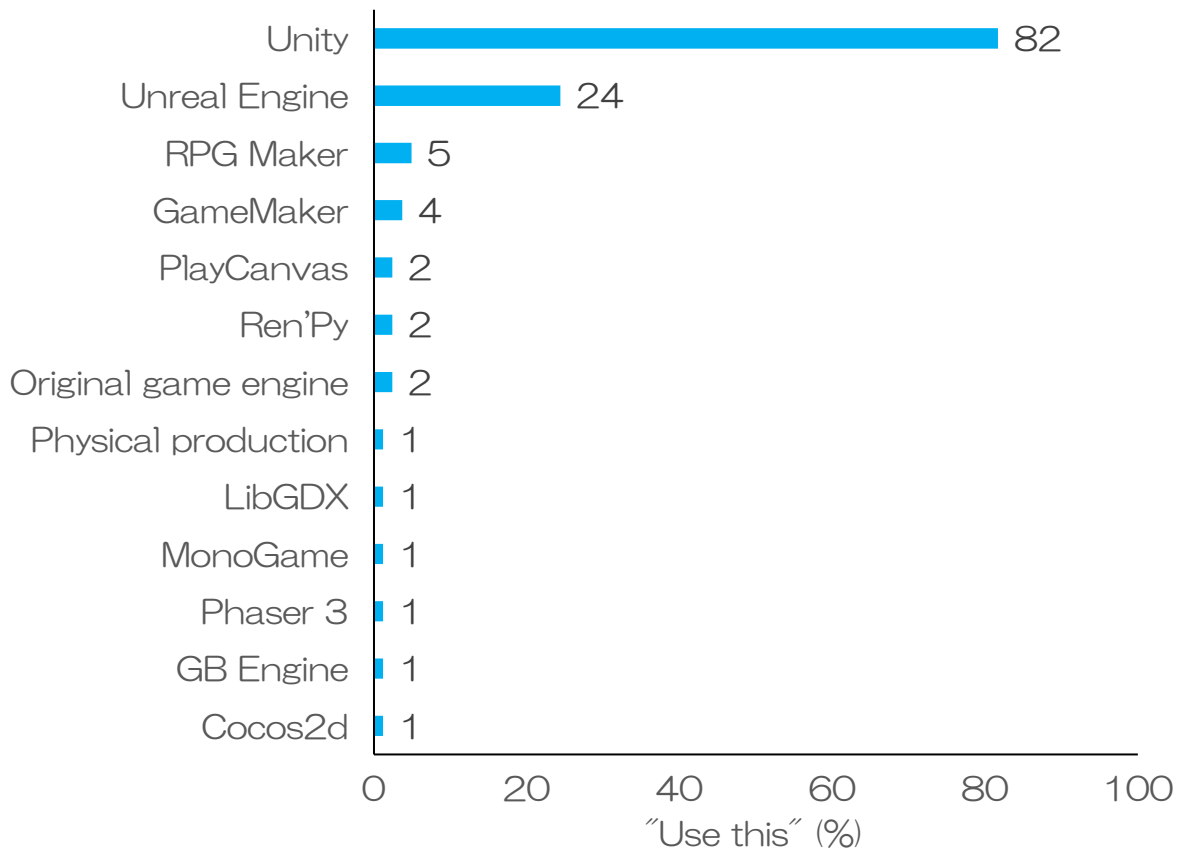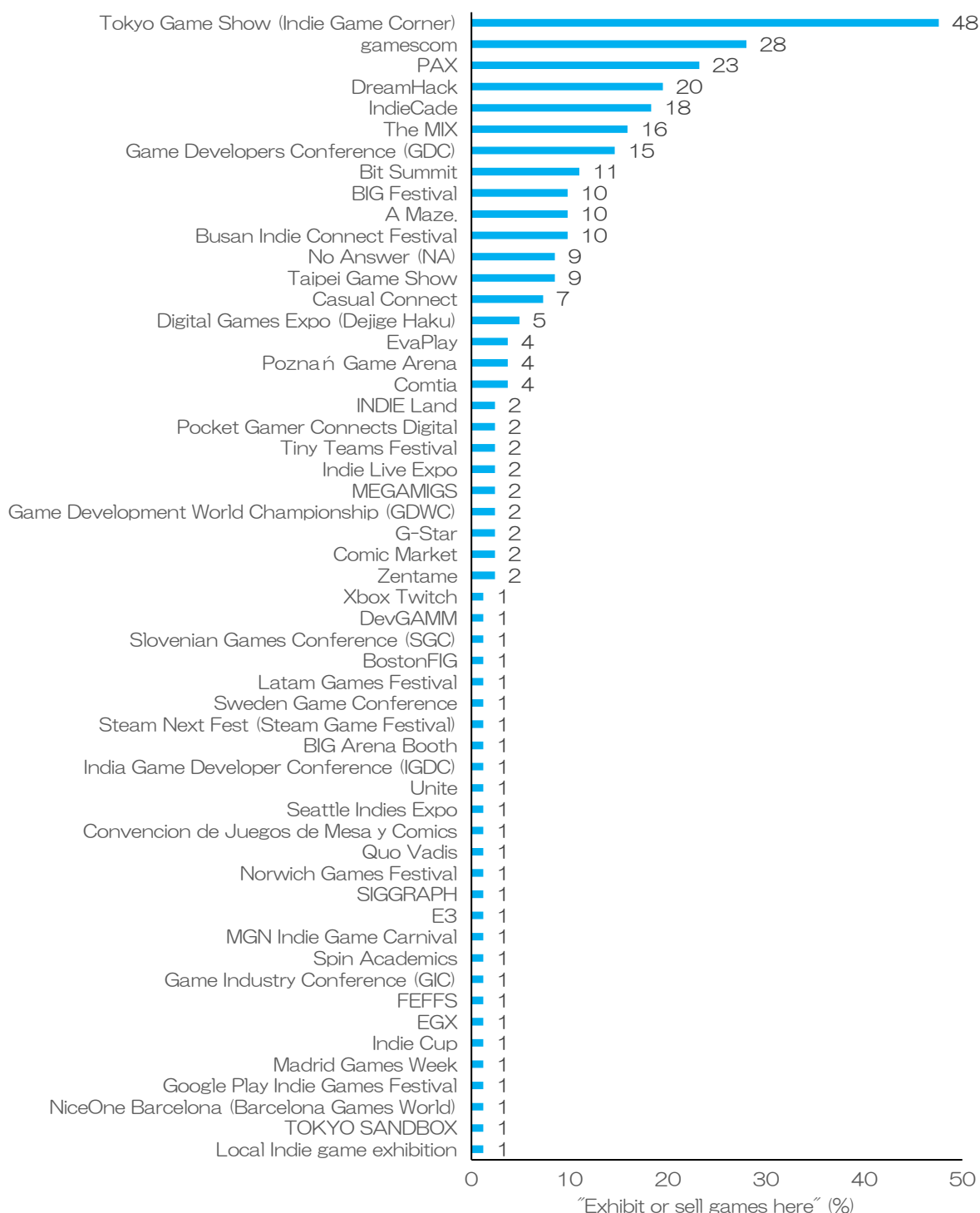| Event	"Exhibit or sell games here" (%)
Tokyo Game Show (Indie Game Corner)	48
gamescom	28
PAX	23
DreamHack	20
IndieCade	18
The MIX	16
Game Developers Conference (GDC)	15
Bit Summit	11
BIG Festival	10
A Maze.	10
Busan Indie Connect Festival	10
No Answer (NA)	9
Taipei Game Show	9
Casual Connect	7
Digital Games Expo (Dejige Haku)	5
EvaPlay	4
Poznań Game Arena	4
Comtia	4
INDIE Land	2
Pocket Gamer Connects Digital	2
Tiny Teams Festival	2
Indie Live Expo	2
MEGAMIGS	2
Game Development World Championship (GDWC)	2
G-Star	2
Comic Market	2
Zentame	2
Xbox Twitch	1
DevGAMM	1
Slovenian Games Conference (SGC)	1
BostonFIG	1
Latam Games Festival	1
Sweden Game Conference	1
Steam Next Fest (Steam Game Festival)	1
BIG Arena Booth	1
India Game Developer Conference (IGDC)	1
Unite	1
Seattle Indies Expo	1
Convencion de Juegos de Mesa y Comics	1
Quo Vadis	1
Norwich Games Festival	1
SIGGRAPH	1
E3	1
MGN Indie Game Carnival	1
Spin Academics	1
Game Industry Conference (GIC)	1
FEFFS	1
EGX	1
Indie Cup	1
Madrid Games Week	1
Google Play Indie Games Festival	1
NiceOne Barcelona (Barcelona Games World)	1
TOKYO SANDBOX	1
Local Indie game exhibition	1

Figure 10 Percentage of events where games are exhibited and sold (%) ├

Since the survey was conducted for applicants to the Tokyo Game Show, the participation rate for this event was the highest. This was followed by groups participating in famous events around the world such as gamescom (Germany), PAX (U.S.), DreamHack (Sweden), BIG Festival (Brazil), and Busan Indie Connect Festival (Korea).

Next, Figure 11 shows the results of the question about the means of distributing and selling games.
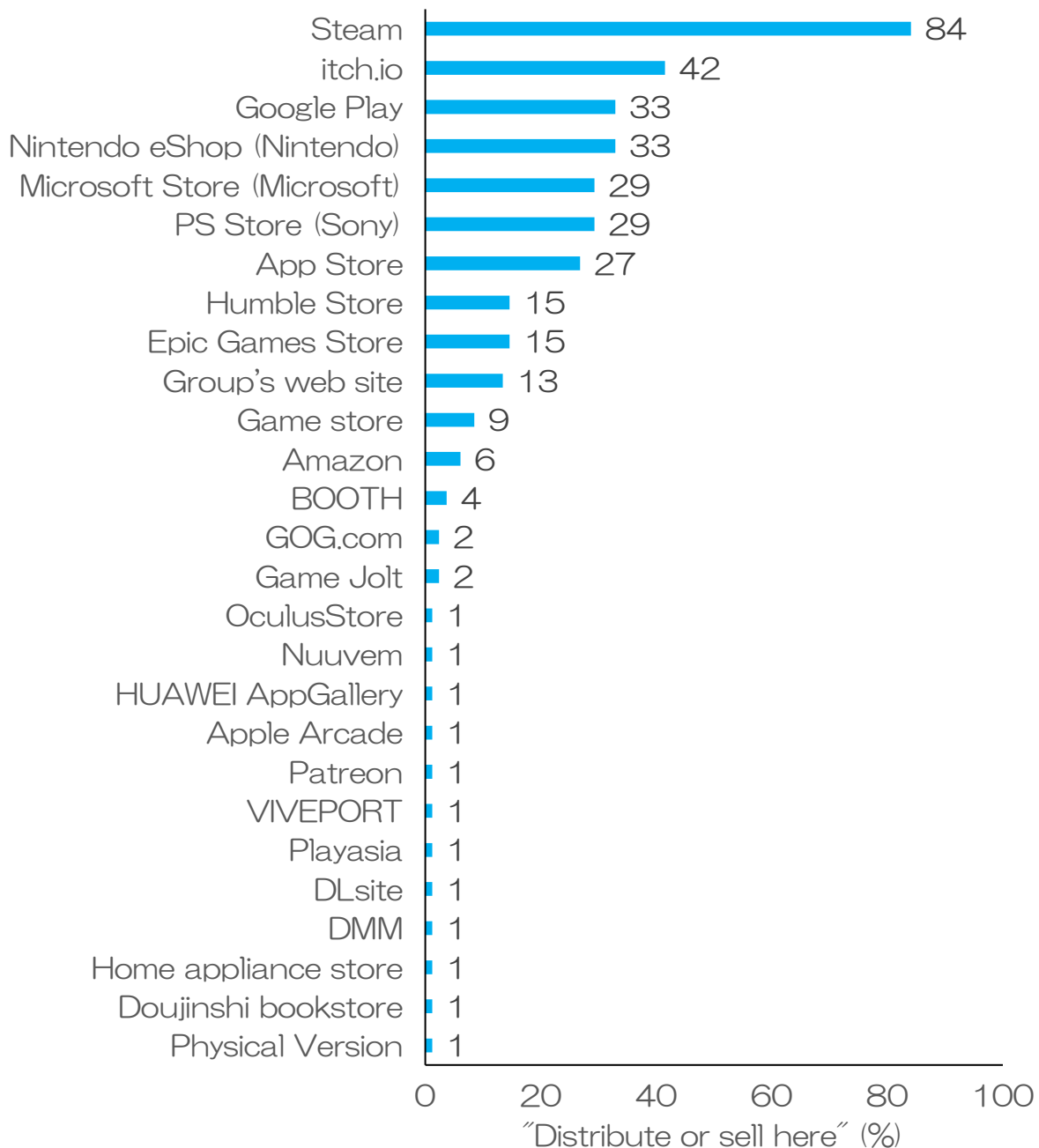
Figure 11 Percentage of means of distributing and selling games (%)

More than 80% of the respondents answered that they distribute/sell games on Steam. Many groups also used game sales websites for PCs, smart phones and game consoles.

7. Game Platforms

Independent games are distributed on a variety of platforms including PCs, consoles, smartphones and tablets. This survey asked about the platforms the respondents' games are compatible with.

93% of the respondents answered PCs (Windows). In addition, about 30% said that their games were compatible with the Xbox series and PCs (Linux), which are not so widespread in Japan.
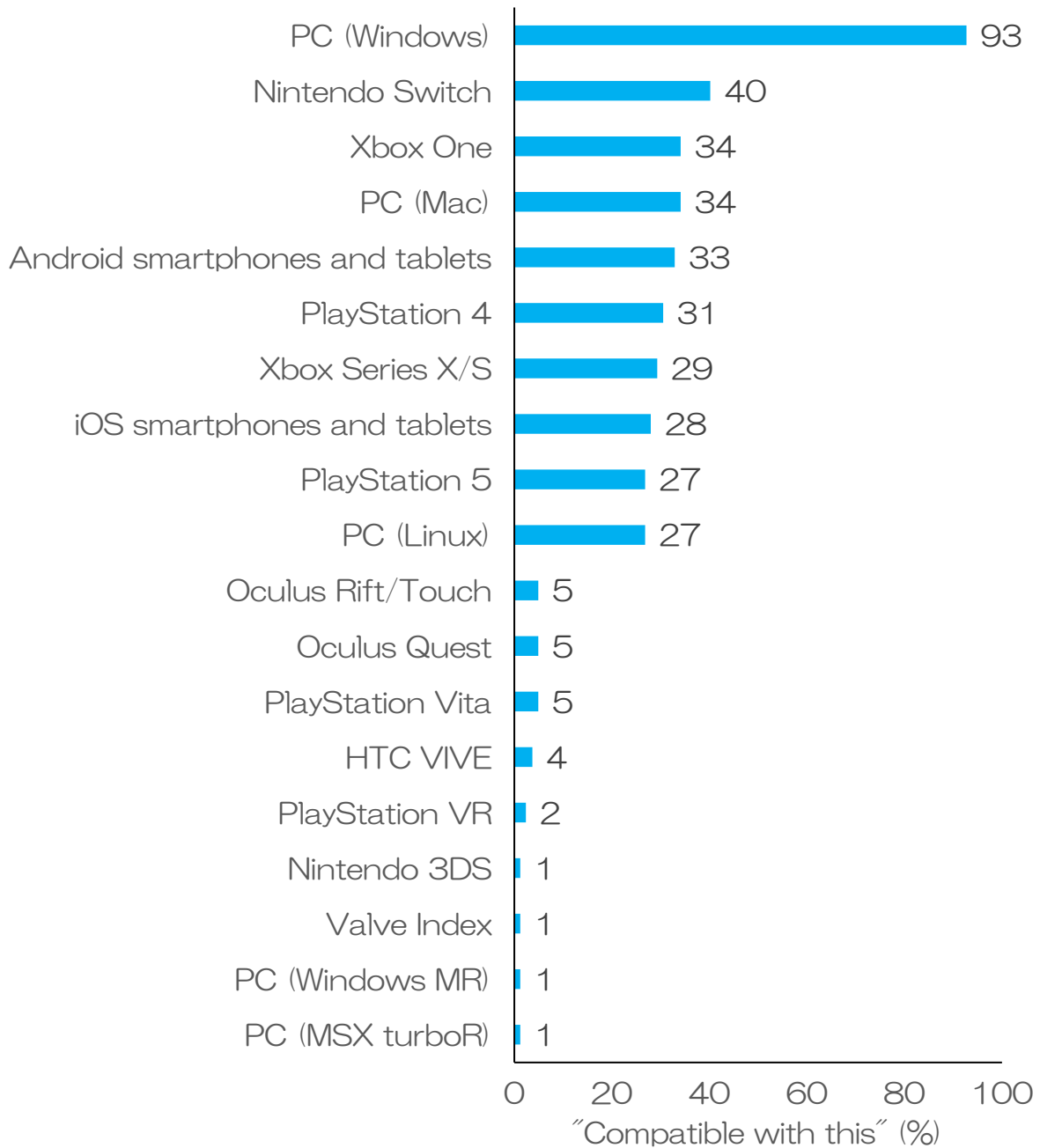
Platform	%
PC (Windows)	93
Nintendo Switch	40
Xbox One	34
PC (Mac)	34
Android smartphones and tablets	33
PlayStation 4	31
Xbox Series X/S	29
iOS smartphones and tablets	28
PlayStation 5	27
PC (Linux)	27
Oculus Rift/Touch	5
Oculus Quest	5
PlayStation Vita	5
HTC VIVE	4
PlayStation VR	2
Nintendo 3DS	1
Valve Index	1
PC (Windows MR)	1
PC (MSX turboR)	1

"Compatible with this" (%)

Figure 12 Percentage of platforms supported by games (%)

8．Motives for Creation and Participating in Events

　　We asked the respondents what they thought about the 18 items considered to be reasons and motivations for creating games and participating in events. Fig. 13 shows the percentage of groups that answered "strongly agree" to each question.

　　The percentage of groups answering "strongly agree" to "Because I enjoy making games in itself" or "Because I want to make a living from games" was the highest, at about 80% each.
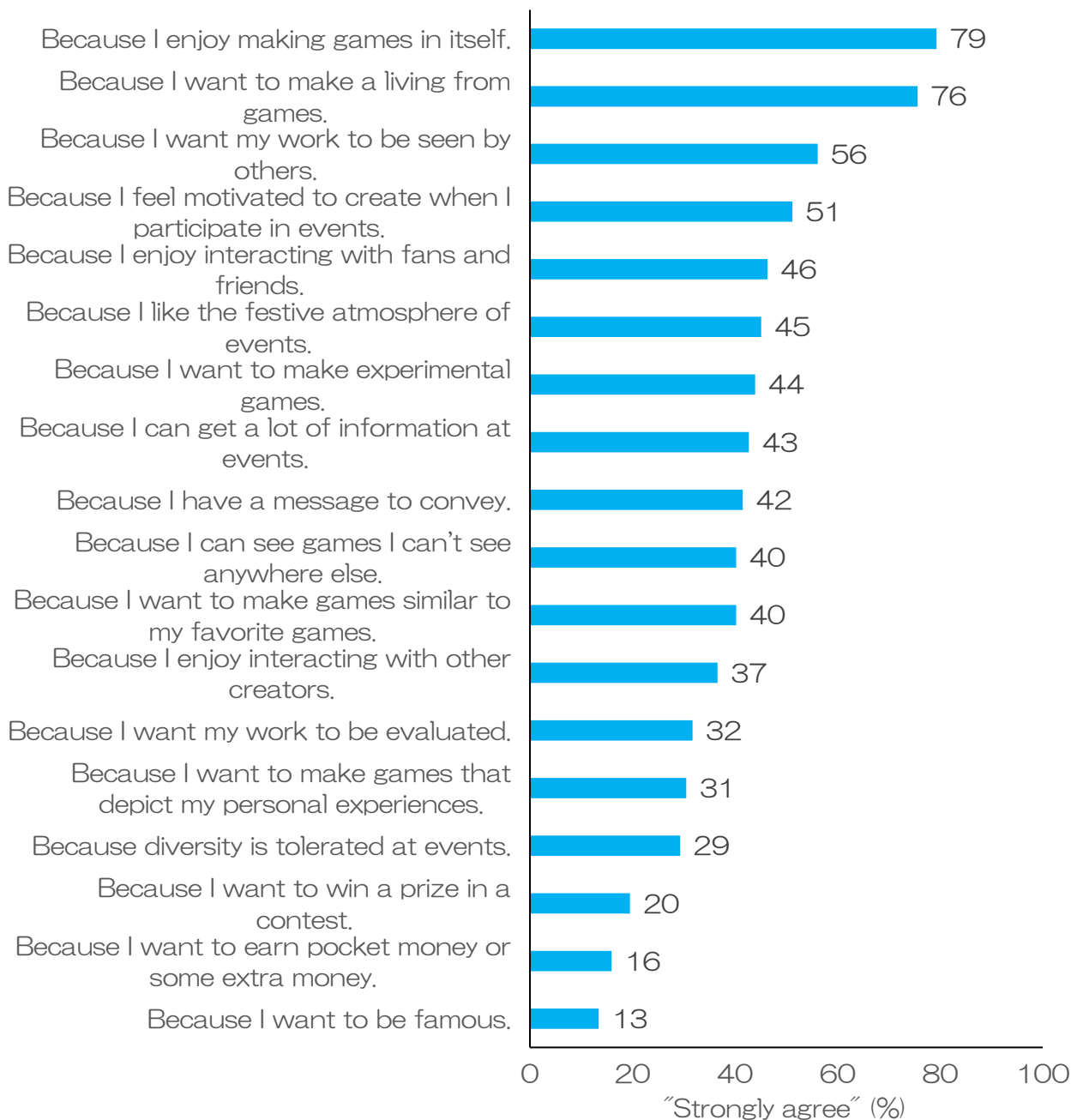

Figure 13　Percentage of Motives for creating games and participating in events（%）

9．Opinions and Positions

What do independent game developers think about themselves and society? Do they have occupations related to games? Fig. 14 shows the results of the questionnaire about their opinions about themselves and society and their current positions.

The percentage of respondents who answered "I am an independent game developer/indie" and "I think video/computer games are art" was about 80% each. In addition, 60-70% of the respondents emphasized self-determination and self-responsibility.
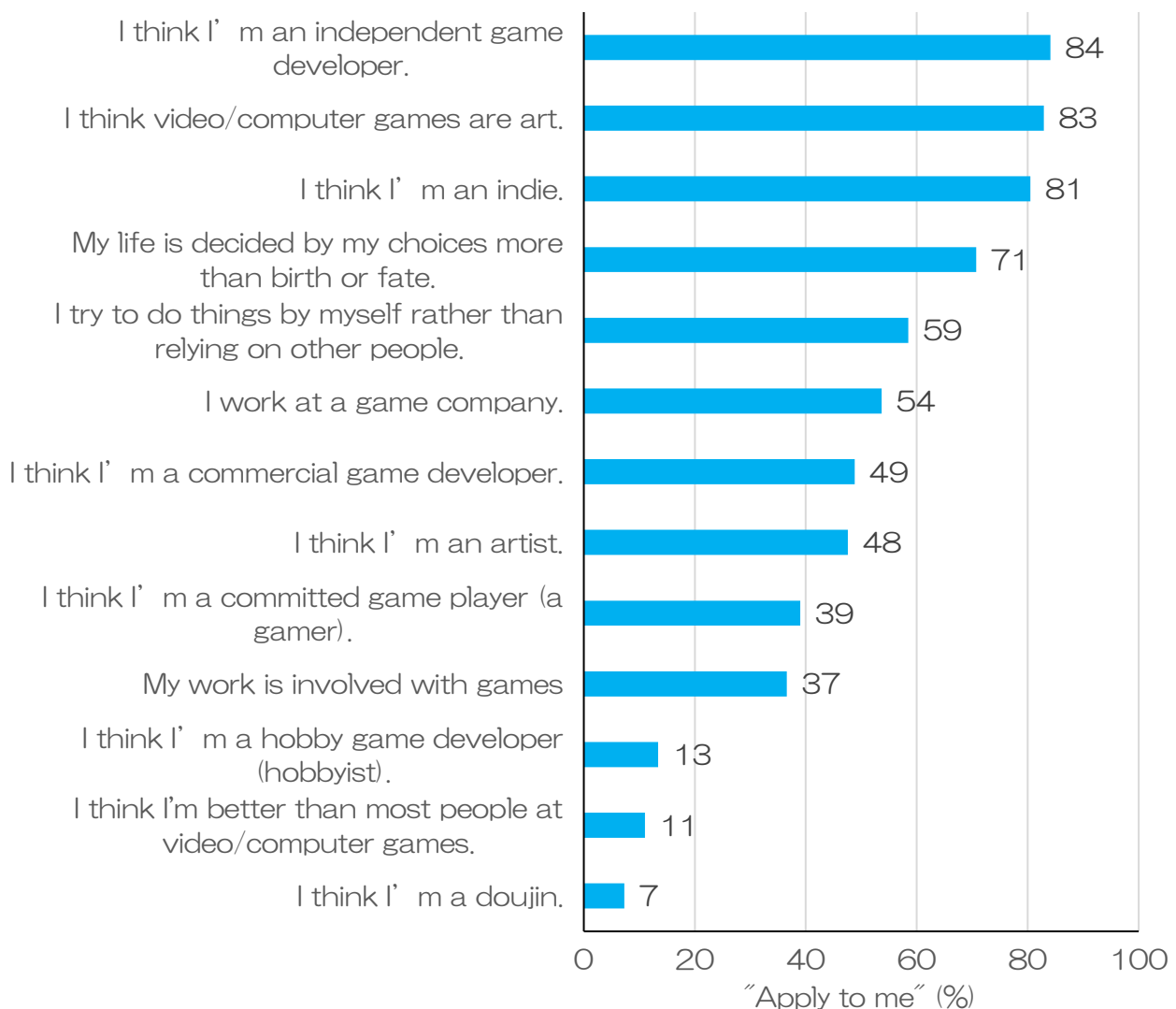
Figure 14 Percentage of groups' opinions and positions (%)

10. Revenues, Income, and Livelihood

Figure 15 shows the distribution of responses to the question about "the ratio of income from the sale of independent games to your group's total income". Many groups answered "all or most of the income" or "no profit or loss".

- It accounts for all or most of our group's total income.
- It accounts for part of our group's total income.
- It is about an extra bonus.
- It is about pocket money.
- Our group is not making a profit or is in the red.
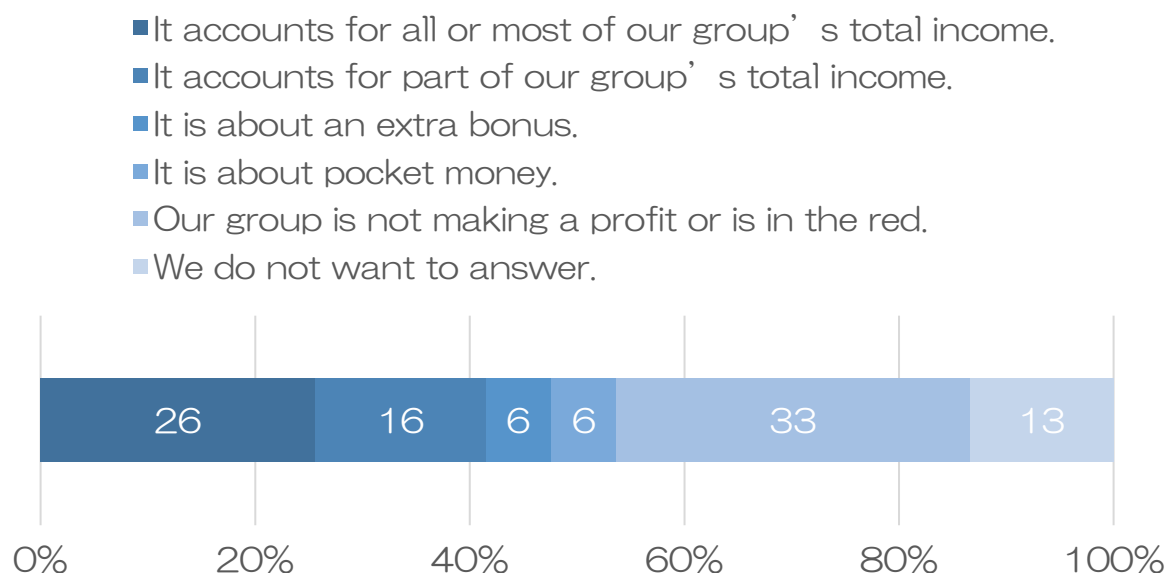- We do not want to answer.

| 26 | 16 | 6 | 6 | 33 | 13 |

Figure 15 Percentage of total income from independent games (%)

Figure 16 summarizes the results of the question on whether they want to make a living from independent game sales. Most of the groups answered that they were already making a living or would like to do so.

- We are already making a living from them.
- We strongly hope so.
- We hope so a little.
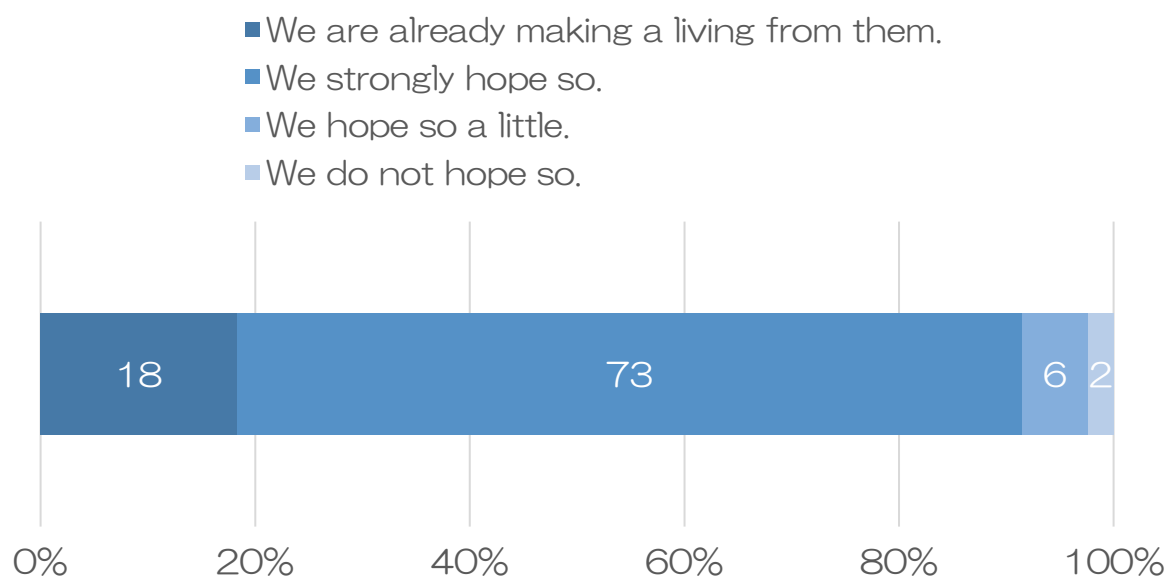- We do not hope so.

| 18 | 73 | 6 | 2 |

Figure 16 Percentage of hopes to make a living from independent game production (%)

We also asked about the impact of the spread of the new coronavirus infection. Figure 17 summarizes the results of the question about the changes in game sales before the infection spread (before January 2020) and after it (after February 2020).

72% of the groups saw no change in sales, but 20% saw an increase.
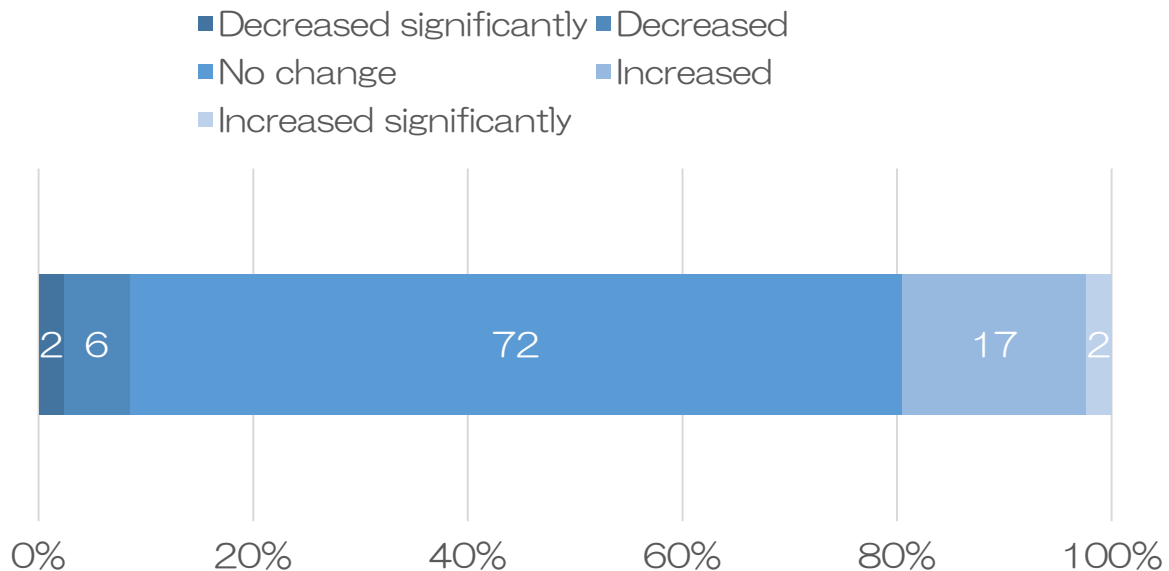
Figure 17 Percentage of changes in game sales due to the spread of a new coronavirus infection (%)

We also asked the respondents to voluntarily answer the approximate amount of revenues that each group earned from the sales of independent games in 2020. We received responses from nearly half of all respondents. Please note that answers that were considered to be mistakes were excluded.

The average annual sales was $15,600 (1.72 million yen), and half of the responses were $0.

11. Opinions from Respondents

In this survey, we also asked respondents to voluntarily answer one independent game you like and why, your impressions of this survey and what you noticed, and your expectations for the TOKYO GAME SHOW's Indie Game Corner and Sense of Wonder Night (SOWN). We would like to use your valuable opinions as a reference for future surveys.

1. One independent game you like and why

- Hollow Knight はアートです！このゲームのグラフィックデザイン、音楽、ゲームプレイはとても良いです 。私の日本語は良くないです、ごめんなさい。

- Hollow Knight – despite being made by essentially 3 people, they were able to achieve a quality and quantity of content that puts bigger productions to shame, simply by making extremely smart decisions.

- Hollow Knight. The reason is because they show us that it's possible to be successful with a small team, breaking out of the small indie atmosphere and onto the wide general audience.

- hollow knight, the quality this game has achieved is unbelievable

- I absolutely love Slay the Spire because it takes an RPG battle system and does something really fresh with it. The fact that every run feels unique even after playing it hundreds of times really keeps the game fresh.

- Slay the Spire – probably the most elegant videogame I've ever played.

- Slay The Spire – innovative card mechanics that turn every round into a 7 (I have more than 800 hours played of this game!)

- Return of the Obra Dinn

- Return of the Obra Dinn is a great example of an interesting and experimental gameplay mechanics beautifully rendered into a deep and enjoyable experience.

- Into the Breach, it found an amazing way to differentiate itself from other

tactics games in the market without becoming overly complicated. Truly set a milestone in the genre.

- Into the Breach, for it's polished game mechanics and short playthrough times.

- Shovel Knight was a favourite of mine, because it felt like a continuation (rather than a retread) of a genre that I love, but also did new and bold things.

- Shovel Knight - Because it combines nostalgic and modern game designs and is of high quality and fun to play.

- Cuphead

- I like many independent games. One that really suits our Studio is Cup Head as developers bet on having great art in their game to attract people and become profitable, therefore accomplishing the dream of making a living out of making games.

- Undertale - because of it's rich narrative

- Thomas Was Alone is an incredible example of taking a single idea and going all the way to excellence. (evoking emotional reaction with blocks as characters)

- Eastward, it has a lot of heart.

- Terraria

- Mundaun because of the unique art style

- 冠を持つ神の手 -- The player's choices are really reflected in the game, and you can immerse yourself in the world. Playing this game changed my life because it made me want to create my own games.

- アンディーメンテのスターダンスというフリーゲーム。ゲームを通して自己肯定感を得られ、それを同じゲームをプレイした人たちと共有できた最初の体験だったから。

- Hiper Light Drifter

- The Witness because it's a master class in game design.

- Kerbal Space Program: A beautiful and engaging physics sandbox that happens to be surprisingly educational on the topic of orbital mechanics and rocket science.

- Township tale, They work with the medium (VR) as I think you should, rather on relying on it for content.

- Monument Valley - incredible game mechanics and artstyle

- The Talos Principle

- Hades

- Thimbleweed Park, it was made by Ron Gilbert (the maker of Maniac Mansion and Monkey Island) and he just made what he wanted to do, with the graphics he liked and the community supported him. It's a great game and project.

- Journey. Music.

- Rocket League, because it shows what you can do with a simple, fun idea

- Limbo - A beautiful and atmospheric game with brilliant 7s.

- Iconoclasts because of its rich worldbuilding and storytelling

- Downwell : this is a game that can be play with very simple control but the game as an complexity in the gameplay that a like

- Sally Face because of the rich story, interesting graphics and diversed gameplay.

- Kind Words - because it makes me optimistic about people

- Dead cells stood out for me in the recent past.

- Mobile Legends - being able to play mobile multiplayer game as a team

- QuietMansion2

- Hyper Light Drifter. Because i like its pixel art style, Zelda style gameplay and some mechanics, Storytelling by only images and sounds, boss fights and awesome apocaliptic places to explore.

- Blasphemous, the story behing its production is inspiring

- The Binding of Isaac: I really like this game for its narative design, narrative, and cor-mechanics. It is a very enjoyable and intense roguelike game.

- No toilet paper!!

- Shadow of the Colossus: Such a unique game at the time. I loved the atmosphere and the wonderful build up to taking on the bosses.   The scale was like nothing I'd seen.

- What Remains of Edith Finch – tells an impactful story and is commercially successful.

- La-Mulana. It's one of a kind and you can tell how much passion was put into its development.

- Aeterna Noctis

- The Vale – awesome game for the visually impaired

- Secret design of the HEARTS -DREAM DROPS- 初めて当初の企画からスケールダウンせずに開発できたタイトルだから。

- "1f y0u're a gh0st ca11 me here! I think this is a good example of how my ideas could be incorporated into a game system https://store.steampowered.com/app/1647740/1f_y0ure_a_gh0st_ca11_me_here/"

- I like a lot of indie games and it would be unfair to choose just one. Because they were all made by people who dedicated themselves with a lot of love, affection and dedication. That's what builds the independent gaming industry.

2. Your impressions of this survey and what you noticed

- どのような意図の質問なのか想像しながら回答するのが楽しいです。

- Even though I am using Google Translate, the questions are easy to understand.

- very well done

- It was great and very straightforward

- I think it collect information to know more about the developers.

- It was interesting to see objectively how much of my life I devote to indie games. And this is not related to the main topic, but the fact that I received this inquiry in English, unlike the previous guides, made me think that there are many indie developers selected from overseas. It's good to see the diversity.

- I believe that it is very important to investigate the income status of individual developers in order to consider future support activities. Thank you very much for this opportunity

- You're gathering data on the types of applicants to your expo; size, profitability, etc. I'd be curious how the numbers are different for teams that were selected to exhibit at the indie area. What sorts of teams are successful at being chosen?

- Very varying in terms of the resonants position. Although not much for companies that haven't released any game yet. (in some questions)

- I believe that the research was developed for the production of academic scientific articles, I would like to know more about these types of works carried out by Professor Nobushige Kobayashi from Tohoku Gakuin University and in the future to be able to work together.

- 日本発の催事で、国内宛に英語のアンケートとは恐れ入る。グローバル(笑)な姿勢は否定も肯定もしないが、先ずは己を立脚させているものをどう捉えているのか問いたい。

垣根を無くす名目で、あらゆるものの混交を目指している意図は理解できるが、障壁や差異があるからこそ生まれる個性や習性、価値もある。『視野を広く持つ』ことに執心して視野狭窄に陥ってはいまいか。非常な驕りを感じるものであり、他人事と云えど非常に恥ずかしく思う。

- Please focus the Tokyo Game Show on games and their development and please do not turn it into a platform for social activism. Let them do that in their games like we are doing.

- I think the questions are very good

- It's ok.

- Nice, We need questions what indies devs thinks about big corps commercial models.

- The questions became increasing difficult to answer.

- It was an interesting survey. I liked it.

- Good survey, clear and concise.

- Very philosophical but sometimes too specific. I'd give it 7/10.

- Very interesting.

- Interesting last question in the previous page

- Few questions don't apply on first time developers; can do with NA as an option

- Focused towards indie developers

- I liked the part where we could say that our choices in life are important! I believe in this a lot.

- I liked the way the questions were presented and the simplicity of the answers.

- It's a good survey. I liked the questions themselves, as they are quite clear and informative and provide an opportunity to get the necessary information on

the topic of the survey itself.

3. Your expectations for the TOKYO GAME SHOW and SOWN

- I think it will be a great show.

- To be honest, I don't think my game will be selected as a SOWN finalist since it was moved up from the alternate list, but as audience, I'm looking forward to seeing other interesting games.

- In this day and age when there are so many game producers, I consider this award to be the last hope for Japanese indies, as it gives them the opportunity to focus on their artistry.   I live and develop games in Japan. I'm often told by Japanese publishers that I'm artistic (in a bad way). In 2019, I was heartbroken and this award chose my work for the indie selection slot. Because of that event, I can believe in myself and make games.

- None, my game wasn't invited to participate.

- I'm hoping for Indies in general to gain more importance at events (better support, affordable prizes, better placing online and at events)

- I hope to make presentations of the games developed by my team and that we can meet other game producers from different countries and markets.

- My expectation is to be able to see great indies games to come.

- We would like for Japanese players to discover our game Shikon-X, and also find a publisher to help us release the game in Asia.

- I attended TGS in 2009 and saw Miyamoto-san win some kind of award (I could not understand the Japanese). I will never forget seeing him in person. It left a deep impression on me and I would be honored if Iron Corbo can participate in TGS as well !

- We are really looking forward to checking out the other interesting Indie games and to reaching a new audience with our game. The event organization has been really smooth and we are very excited for the show to start :)

- Making people see our game

- We expect exposure to our games and increases in wishlists and sales.

- Expecting to see a lot of cool and innovative games and hopefully get my game noticed amongst all of them.

- I hope my game gets more attention! :)

- I hope to get a lot of visibility on the game during the show and I hope SOWN is going to be a wonderful night (no pun intended)!

- I hope, more than anything, that people enjoy our game.

- To get more people to learn about new games

- Will be a first and expectation will be to get visibility for our game

- Exciting games and vast number of entries

- 非常に期待している

- I hope to reach potential japanese players and show the games from my studio to a country which i love equal (or even more) than mine.

- As a independent developing studio from Latin America we would love to connect with not only the Japanese Gaming Communty and Industry but also with the Asian region, and we find this as a great opportunity to do so.

- I am hoping that we will get more ″kindred spirits″ to take a look at our 7 game & enjoy it! I hope we can start some conversations around the new word 7 mechanics that we've created.

- We would like for our game I SEE RED to be noticed and enjoyed. We expect the contests and exhibition to show great games and boost developers, especially beginners or indies.

- Hoping to let more people know about our game.

- I'm really looking forward to the event. I personally have been a fan of TGS since my childhood so it's amazing to have our game Night Reverie selected to participate in the Sense of Wonder Night awards!

- We hope to improve our visibility, meet people form the industry and become part of the Final for the SOWN.

- Participating to the Steam event and win awards

- ありません、最初から受賞者が決まっているので。

- I hope its going to be amazing as always.

- I have never attended TGS and hope to do so next year

- Super hyped! =) can't wait for it!

- I participated in TGS as an indie developer last year. It was a very nice experience.

- Would hope for more exposure and wishlist counts.

◇ **Summary of the "Tokyo Game Show 2021 Indie Game Corner" Survey**

1. Survey Target: All applicants to the "Tokyo Game Show 2021 Indie Game Corner"
2. Survey Entity: Digital Game Research Group (Nobushige Kobayashi, Associate Professor, Tohoku Gakuin University)
3. Sampling Method: Survey of all applicants to the "TOKYO GAME SHOW 2021 Indie Game Corner"
4. Survey Period: September 2021
5. Survey Method: Internet survey (self-administered): The URL of the questionnaire created using Google Form was distributed via the Tokyo Game Show Secretariat, and respondents were asked to answer directly
6. Number of valid responses and valid response rate as of February 17, 2022: 82 (28.6%)
   *Number of applicants: 286

➤ If you have any questions about this report pamphlet, please contact the following
   mail: natsunokumo2008@gmail.com (Kobayashi)
➤ The illustrations in the pamphlet are taken from Irasutoya (http://www.irasutoya.com/).

Thank you very much for your cooperation!