Developer Satisfaction Survey 2021

Diversity in the Game Industry: Regional Snapshots

Prepared for the International Game Developers Association

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Table of Contents

Introduction

The International Game Developers Association (IGDA) supports and empowers game developers around the world in achieving fulfilling and sustainable careers. We strive for greater global diversity, inclusion, equity, and belongingness (DEIB) within the games industry, and we value the creation and dissemination of knowledge that informs these efforts.

Diversity and equity are central themes to the current discourse of the evolution and trajectory of the games industry. In partnership with Western University, the IGDA is proud to share the latest findings of this Regional Report that will steer critical conversations on DEIB and educate developers and studios on pathways toward a diverse and equitable industry for all.

The 2021 Developer Satisfaction Survey showed improvements to several key indicators of diversity within the industry, such as an increase in women and developers of color compared to previous surveys. The findings in the Regional Report extend previous insights and implications by analyzing the data with a focus on the differences and similarities across a sub-set of regions, namely North America, the Nordics, and Europe. By digging deeper into the data, this report provides regionally based insights and emphasizes the importance of assessing diversity and equity from a global lens.

Discussions of DEIB in games are commonly situated in a Western (and more particularly, North American) context, focusing on demographics such as gender, race/ethnicity, socioeconomic status, sexual orientation, and ability. Although these demographics are significant across the globe, their salience as well as how they are understood and measured may vary from region to region. Additional group-based and social identities, such as religion and cultural background, may hold greater salience and social implications in some regions compared to others. As a result, research on diversity and equity in the games industry must consider geographical, cultural, political, and societal influences that impact trends and data. The Regional Report begins to account for these considerations.

For example, racial and ethnic discrimination can have serious implications for the lives of ethnic minorities. The current findings show that among the whole sample, the most frequently cited workplace inequities for ethnic minorities included microaggressions, social inequities, and monetary inequities. Yet, when considering regional differences for North America and Europe compared to the whole sample, the top three inequities shifted to include inequities related to promotion. Furthermore, women in North America reported higher instances of inequity at work compared to women and men in other regions,

whereas North American respondents with a disability reported higher rates of inequity compared to respondents in European and Nordic regions.

The Regional Report highlights the need for actionable and measurable initiatives the industry must adopt to meet varying regional demands of more diverse and equitable recruitment opportunities, career progression, compensation, employment practices, workplace cultures, and team compositions across disciplines. Industry leaders, studio executives, managers, and all who are invested in improving the workplace for game developers will glean critical insights from this data that will support the identification of gaps in one's own work environment alongside opportunities for improvements.

As a global community, we must work together to ensure accessible and equitable opportunities for a fulfilling and sustainable career in the industry. The future of the industry depends on it.

If you would like to assist with translating this report into other languages or helping us reach a wider audience for our next survey in 2023, please reach out to us at staff@igda.org.

Dr. Jakin Vela
Executive Director, IGDA

Overview

The 2021 IGDA Developer Satisfaction Survey (DSS) was live from February to April 2021 and it accrued a valid sample of 803 responses. A summary report on the DSS 2021 data was released on October 18, 2021.

The DSS is an international survey conducted in seven languages. It has hundreds of respondents from around the world, but most are in the United States and Canada. As such, the views and experiences of North American respondents dominate the DSS reports and could conceal the experiences of game industry workers from different regions of the world.

This report is one of a series that utilize the DSS 2021 survey data[1] about diversity, equity, and inclusion. It presents data from a sub-set of regions to obtain a more granular understanding of regional differences on this topic. Three regions had an adequate sample size and data to draw meaningful conclusions: North America (n = 151), the Nordics (n = 40), and Europe (n = 50) (Table 1). Throughout the report, these three regions are contrasted with each other and with the Whole Sample of respondents, which includes the identified regions (n = 803). This report examines questions related to respondent demographics, experiences of inequity, social support, diversity perceptions, and company support for diversity.

Report Highlights

- A higher percentage of North American respondents (23%) perceived themselves as racial or ethnic minorities in their workplaces compared to European (16%) and Nordic respondents (7%).

- In North America and Europe, inequities at work were reported more by ethnic minority respondents than by non-ethnic minority respondents (i.e., 53- 57%, respectively versus 27% and 25%, respectively for social inequities).

- The relative ranking of inequities experienced by ethnic minority respondents differed by region (i.e., 86% of European ethnic minority respondents reported microaggressions compared 53% of North American respondents).

[1] Full Diversity in the Games Industry Report on all diversity-related survey questions (including employment and working conditions) across multiple employment types and LGBTQA2+ Report available at the IGDA website.

- North American women reported substantially higher instances of inequity at work compared to women and men from the Nordic and European regions.

- Consistent across regions, sexual minorities[2] were less open about their sexuality at work than heterosexual respondents by a margin of 10-12%. Sexual minorities from Europe were the least likely to be open about their sexuality at work.

- Mental illness was the highest selected disability within each region - twice the prevalence of the second highest selected disability.

- More respondents with a disability reported inequity compared to respondents without a disability. North American respondents with a disability reported the highest rates of inequity.

- Health benefits and support differed across each region in terms of provision and funding source.

- North American respondents had much stronger views about the importance of diversity than Nordic or European respondents

Table 1: Countries represented by respondents within each region

Region	Represented Countries	
North America	• Canada • United States	
Europe	• Albania • Austria • Croatia • Czech Republic • France • Germany	• Ireland • Poland • Spain • Switzerland • United Kingdom • Ukraine
Nordic	• Denmark • Finland • Iceland • Norway • Sweden	

Source: IGDA DSS 2021

[2] Respondents who identified as gay, lesbian, bisexual, pansexual, demisexual, asexual and queer

Demographics

Age

Age of respondents does not fluctuate by region. Across the Whole Sample, the average age was 34 years old. This was similar across the Nordic (*M* = 35 years), North American (*M* = 35 years), and European (*M* = 33 years) regions. Like the Whole Sample, approximately 50% of respondents from these regions were between the ages of 28 and 40 years old. People over the age of 43 years accounted for only 10% of the sample in each region.

Gender

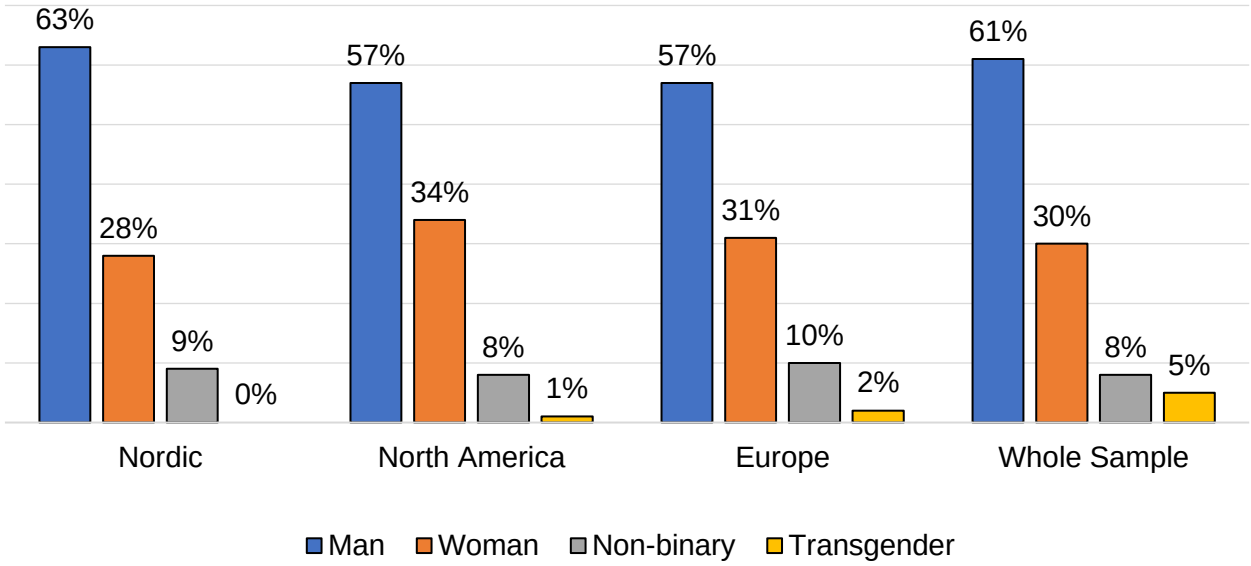
Across the Whole Sample, most identified as men (61%), followed by women (30%) and non-binary gender (8%). In a separate question, 5% identified as transgender. There was variation in gender by region (Figure 1). Respondents from the Nordic region had more men respondents (63%) compared to North America and Europe (each 57%). North America (34%) and Europe (31%) had a larger proportion of women compared to the Nordic (28%) region and the Whole Sample (30%). Though significantly less represented relative to men and women, more DSS respondents identified as non-binary and/or transgender than general population statistics. While many countries do not collect census data on trans and non-binary gender, data from Statistics Canada indicates that less than 1% of the population is transgender or non-binary (Statistics Canada, 2021).

Perceived Inequity by Gender

There were regional and gender differences in the inequities respondents experienced at work (Table 2). Due to small sample size, respondents identifying as non-binary and/or transgender were excluded from the analysis.

Overall, North American and European women reported substantially more experiences of inequity at work compared to Nordic women, especially in terms of microaggressions and social inequity. Nordic women had fewer experiences with inequity across the board and a very low percentage of Nordic men reported any forms of inequity at work. On average across all categories of inequity, North American women reported experiencing inequity at substantially higher proportions (40%) than all other respondent categories (ranging from 3% for Nordic men to 32% for all women in the Whole Sample).

Figure 1: Gender identity by region



Source: IGDA DSS 2021

Table 2: Experienced inequity by binary gender and region

	% of respondents							
	Nordic		North America		Europe		Whole Sample	
	Man	Woman	Man	Woman	Man	Woman	Man	Woman
Recruitment	4	0	8	22	14	13	10	19
Hiring	4	0	11	16	14	13	15	19
Promotion	0	0	17	42	18	19	9	27
Monetary	0	17	13	48	21	38	11	37
Discipline	0	8	10	42	18	25	8	26
Social	8	33	14	60	7	56	12	53
Microagg-ression	8	25	17	64	14	69	16	57
Workload	0	25	6	24	18	0	7	17
Average[1]	3	14	12	40	15	29	11	32

Source: IGDA DSS 2021
Note: Figures represent the percent from each group who reported the inequity type.
[1] Summed percentage who reported an inequity divided by eight inequity categories

Ethnicity

There was substantial variation in ethnicity across regions with North America the most diverse. The Nordic and European regions had more White[3] respondents (95 and 92%, respectively) than North America (83%). Comparatively, the Whole Sample had fewer respondents who identified as white (78%) because it included respondents from a greater range of countries not included in the three comparative regions. In the Whole Sample, the second largest selected ethnicity was Hispanic or Latino/a/x (10%) and other ethnicities comprised 5% or less of the sample (for more see the full DSS 2021 Diversity in the Game Industry Report). Across the regions, North America had more Asian (12%) and Black (5%) respondents than Europe (4% each) and the Nordics (2% and 0%, respectively). The Nordic region also had the lowest representation of Hispanic respondents (2%) followed by Europe (8%) and North America (10%). There were very few Indigenous respondents in the sample.

Table 3: Ethnicity by region

	% of respondents			
	Nordic	**North America**	**Europe**	**Whole Sample**
White	95	83	92	78
Hispanic	2	10	8	10
Black	0	5	4	5
Asian[1]	2	12	4	12
Indigenous	0	1	2	3

Source: IGDA DSS 2021
Note: Percentages do not add to 100% within categories due to multiple response allowances.
[1] Due to smaller sample sizes, Asian respondents included those who identified as Chinese, Japanese, Korean, South-east Asian, South Asian, and West Asian

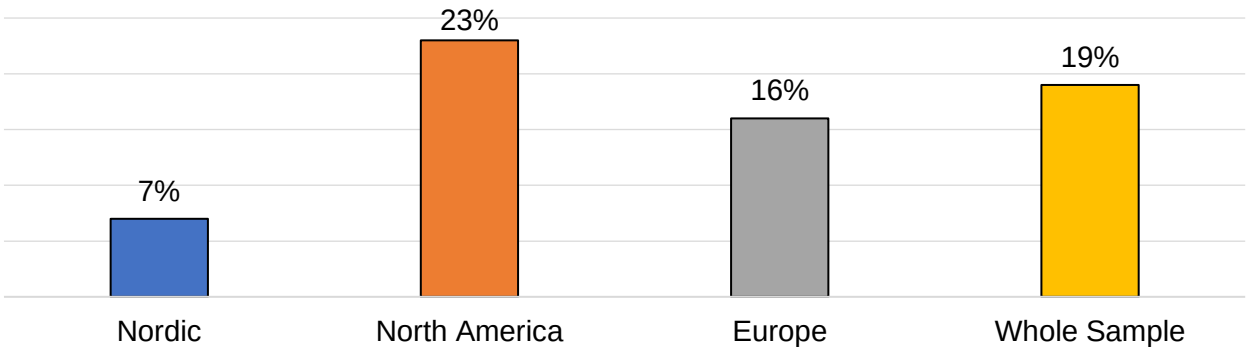
Self-Perceived Ethnic Minority

In addition to race/ethnicity, the DSS asks respondents if they identify as a racial or ethnic minority in their country of work. Among the Whole Sample 19% of respondents said yes (see Figure 2). The regions showed substantial

[3] The DSS allows respondents to "check all that apply" when indicating their racial/ethnic identity. We present the number of respondents who checked a particular box (i.e., White, Caucasian, European or Hispanic/Latino/a/x), but they might have also checked another box to represent bi- or multi-ethnicity.

variation; North America had the highest percentage of self-perceived ethnic minorities (23%) compared to the European (16%) and Nordic (7%) regions. Notably, a higher percentage of respondents within each region perceived themselves as ethnic minorities (7 to 23%) than the respective percentage classified as non-White (5 to 17%). This indicates that some respondents who selected White within each region perceived themselves as ethnic minorities, even though a vast majority of respondents in their region identified as White. This likely reflects individuals who are bi- or multi-racial, or who have distinct ethnic identities within broader categorizations of 'whiteness'.

Figure 2: Self-perceived ethnic minority status by region



Source: IGDA DSS 2021

Perceived Inequity of Ethnic Minorities

Racial discrimination can have detrimental consequences for the health (Carter et al., 2019; Bardol et al., 2020) and workplace outcomes (del Carmen et al., 2015) of individuals.

More ethnic minority respondents experienced workplace inequities than non-ethnic minority respondents (Table 4). For many forms of inequity, the difference was over twice as much. This effect held across North America, Europe, and the Whole Sample. The Nordic region was excluded from this analysis due to insufficient sample size. Ethnic minority respondents across the Whole Sample reported microaggressions, social, and monetary inequities the most frequently. Among ethnic minority respondents from North America and Europe, the top three forms of experienced inequity were microaggressions, social inequities, and inequity related to promotion.

A larger percentage of European ethnic minority respondents reported microaggressions at work (86%) compared to those in North America (53%) or among the Whole Sample (60%). Conversely, North American ethnic minority respondents reported less inequity in recruitment (16%) compared to respondents from Europe (29%) and among the Whole Sample (23%).

Table 4: Experiences inequity by minority status and region

	% of respondents					
	North America		Europe		Whole Sample	
	Minority	Non-minority	Minority	Non-minority	Minority	Non-minority
Recruitment	16	12	29	8	23	12
Hiring	22	9	29	10	33	13
Promotion	41	23	57	13	31	17
Monetary	34	25	43	25	34	17
Discipline	38	18	14	20	23	14
Social	53	27	57	25	60	26
Microaggression	53	31	86	30	60	28
Workload	16	10	29	10	17	9

Source: IGDA DSS 2021
Note: Figures represent the percent from each group who reported the inequity type.

Sexual Orientation

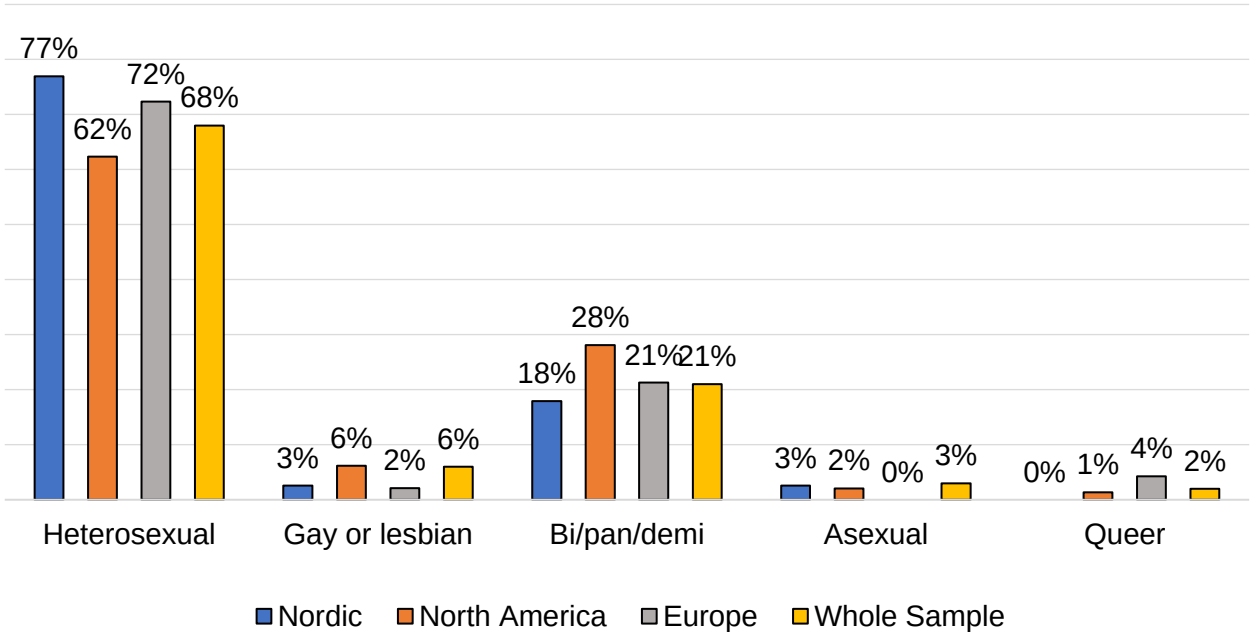
As indicated in the full Diversity in the Game Industry Report, most respondents were heterosexual (68%), followed by bisexual, pansexual, or demisexual (21%), gay or lesbian (6%), asexual (3%) and queer (2%). There was some regional variation in sexual orientation (Figure 3). The Nordic region had the highest percentage of heterosexual respondents (77%) compared to Europe (72%) or North America (62%). North America had a higher percentage of both gay or lesbian respondents (6%) and bisexual, pansexual, or demisexual respondents (28%) than the Nordic (3 and 18%, respectively) and European regions (2 and 21%, respectively).

Openness about sexual orientation

Openness about sexual orientation can influence work outcomes such as job satisfaction (Ellis & Riggle, 2010) and perceptions of hirability (Arena & Jones, 2017) as well as the psychological health of members from sexual minority groups (Lewis et al., 2009). Among the Whole Sample, more heterosexuals reported being open about their sexual orientation at work (74%) compared to gay or lesbian (70%), bisexual, pansexual, or demisexual (60%), asexual

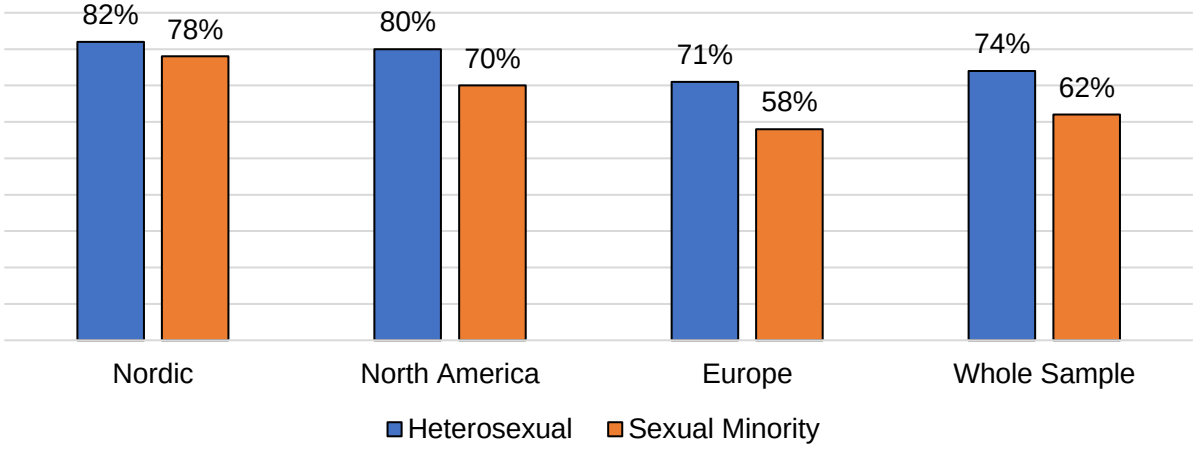
(62%), and queer (55%) respondents. Openness about sexual orientation at work varied slightly by region. More sexual minorities from the Nordic region were open about their sexual orientation at work than the other two regions or among the Whole Sample. European respondents were generally less open about their sexual orientation at work (67%), with sexual minorities particularly so (58%).

Figure 3: Sexual orientation by region



Source: IGDA DSS 2021

Figure 4: Percentage of respondents open about sexuality at work by sexual orientation and region



Source: IGDA DSS 2021

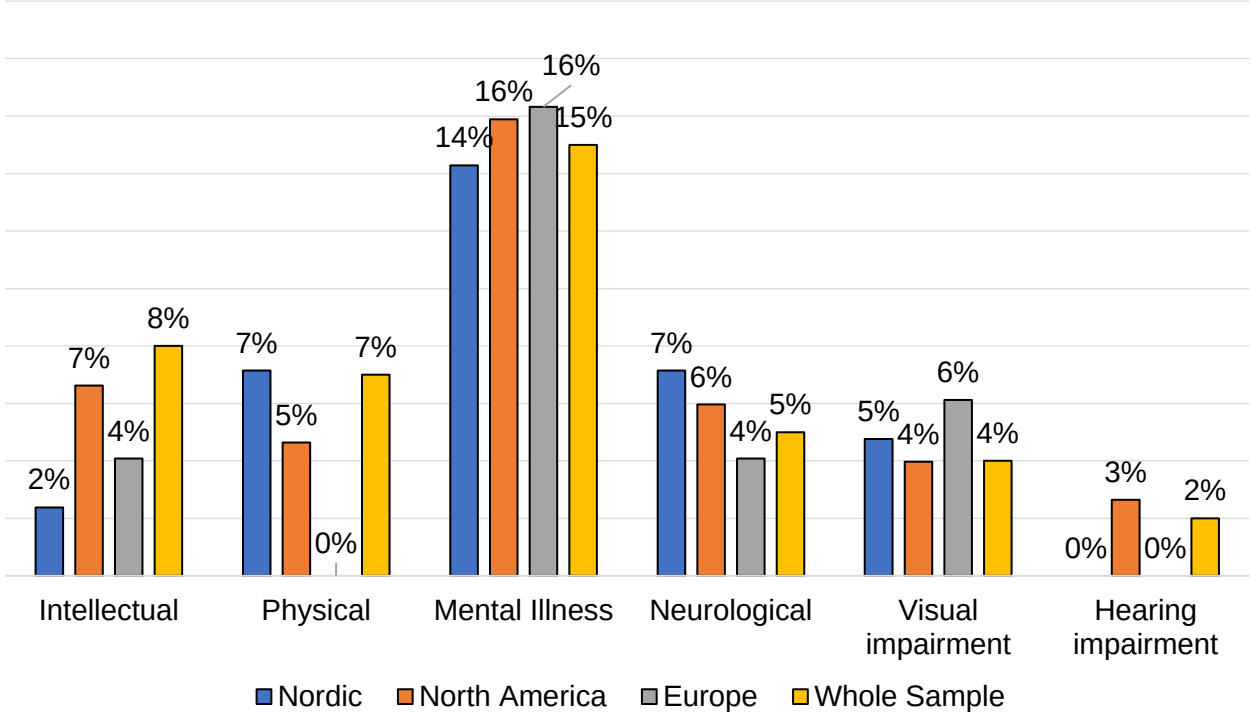
Disability

As discussed in the full Diversity in the Game Industry Report, more DSS respondents report a disability (37%) than the general North American population (22 to 25%; Centers for Disease Control and Prevention, 2020; Statistics Canada, 2018). High numbers of respondents in North America (34%), Europe (33%), and the Nordics (29%) reported having one or more disabilities. Among the Whole Sample, psychological or mental illnesses were reported at the highest rates (15%) followed by neurological disorders (5%) and intellectual or learning disabilities or divergences (8%). These reporting patterns were similar across the regions (Figure 5).

Experienced Inequity of Game Workers with a Disability

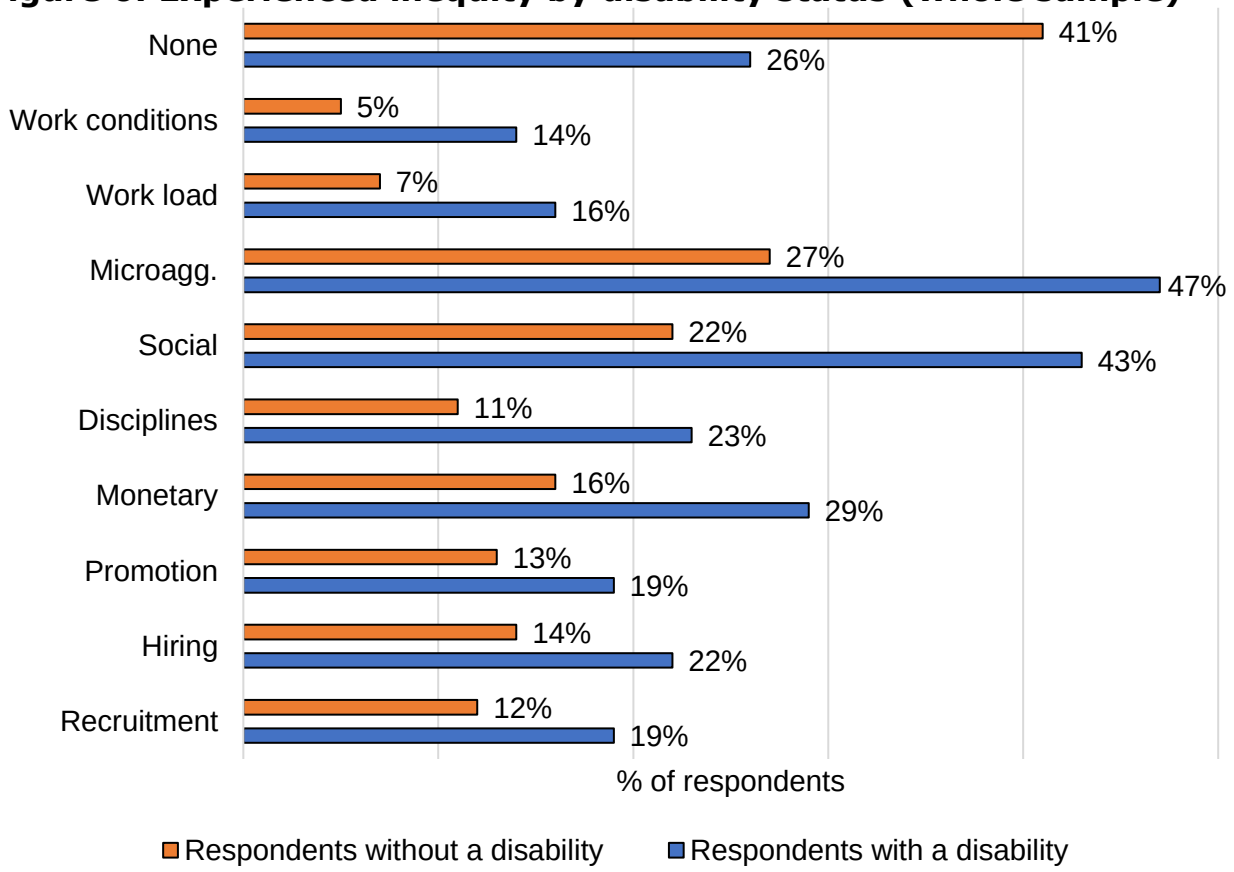
Workers with a disability can face increased rates of social and pay discrimination at work, as well as a lack of reasonable accommodations from employers (Gunderson et al., 2016; Graham et al., 2019; Johnson et al., 2016). Across the Whole Sample, a larger portion of respondents with a disability reported experiencing inequity than those without a disability (Figure 6). Respondents with a disability experienced microaggressions, social inequity and inequity related to compensation were experienced at a much higher rate.

Figure 5: Reported disability types by region



Source: IGDA DSS 2021
Note: Only a subset of the most prevalent disabilities is visualized here.

Figure 6: Experienced inequity by disability status (whole sample)



Source: IGDA DSS 2021
Note: Microagg. = Microaggression.

Experiences of inequity can differ based on region and disability status (Table 5). Across all categories investigated, respondents with a disability from North America or the Nordics reported more inequities compared to those without a disability in those regions. European respondents without a disability reported more microaggressions and personal inequities than those with a disability. Very few respondents with a disability in the Nordics reported monetary inequity (8%) compared to those in North America (33%), Europe (22%) and the Whole Sample (29%).

North American respondents with a disability reported the highest proportion of microaggressions and social and monetary inequity compared to Nordic, European, or Whole Sample respondents, with or without a disability.

Table 5: Experienced inequity by disability status and region

	% of respondents							
	North America		Europe		Nordic		Whole Sample	
	Disability	No disability	Disability	No disability	Disability	No disability	Disability	No disability
Social	48	27	27	31	46	11	43	22
Microag-gression	52	30	33	41	31	7	47	27
Monetary	33	25	22	25	8	4	29	16
None	19	57	47	25	31	85	26	41

Source: IGDA DSS 2021
Note: Figures represent the percent from each group who reported the inequity type. Top categories only.

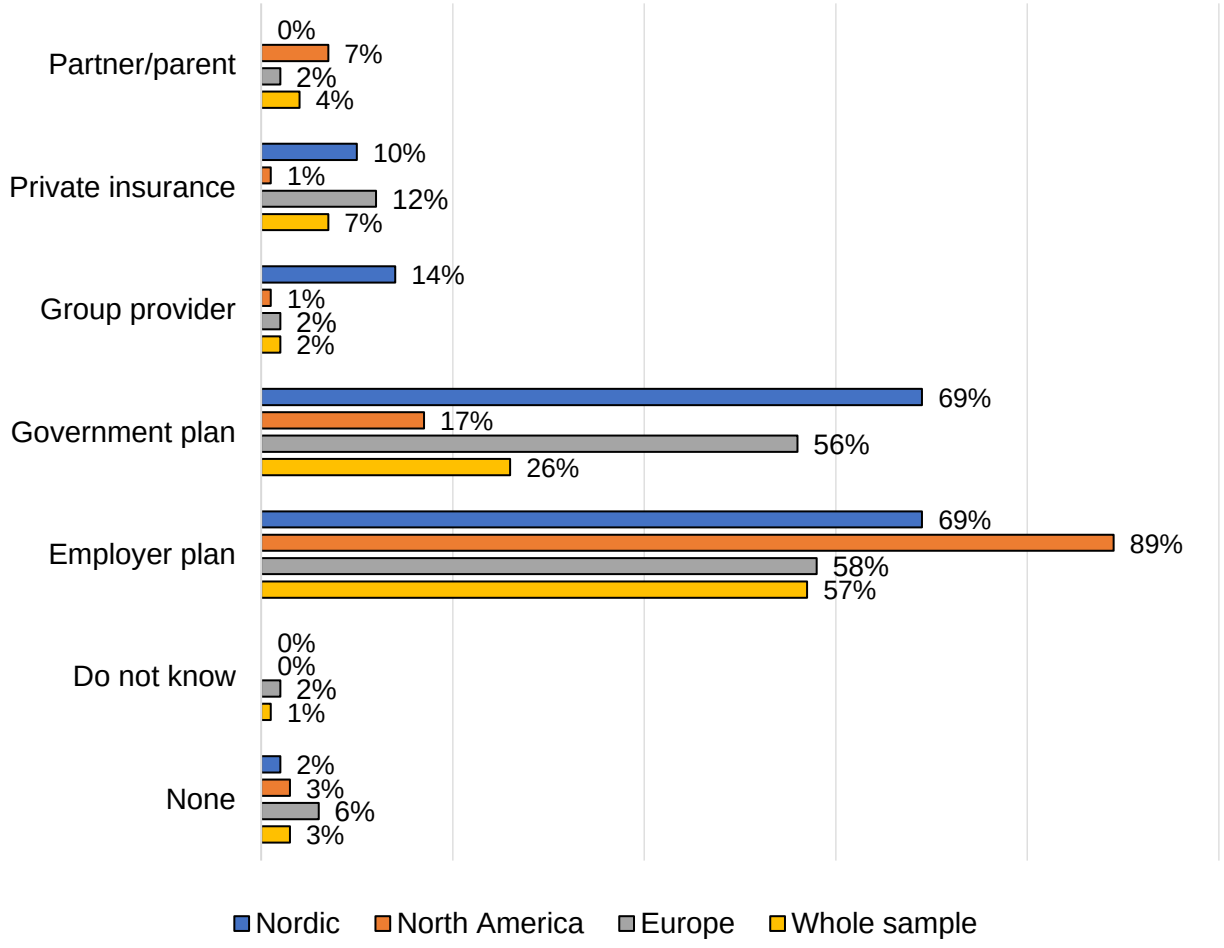
Social Support by Region

Employer Provided Health and Support Resources

DSS respondents are asked about their access to state- and employer-provided health benefits, insurance, leaves and other support resources such as flex time, employee assistance programs, health spending accounts, mental health programs and funds, on-site medical care, daycare, and fitness facilities. These can vary by region due to different social security systems.

Almost all North American (97%), European (94%), Nordic (98%), and Whole Sample (97%) respondents had some form of health care coverage. North American respondents frequently received health coverage through employers (89%), while more European (56%) and Nordic (69%) respondents had health coverage through government plans (Figure 7).

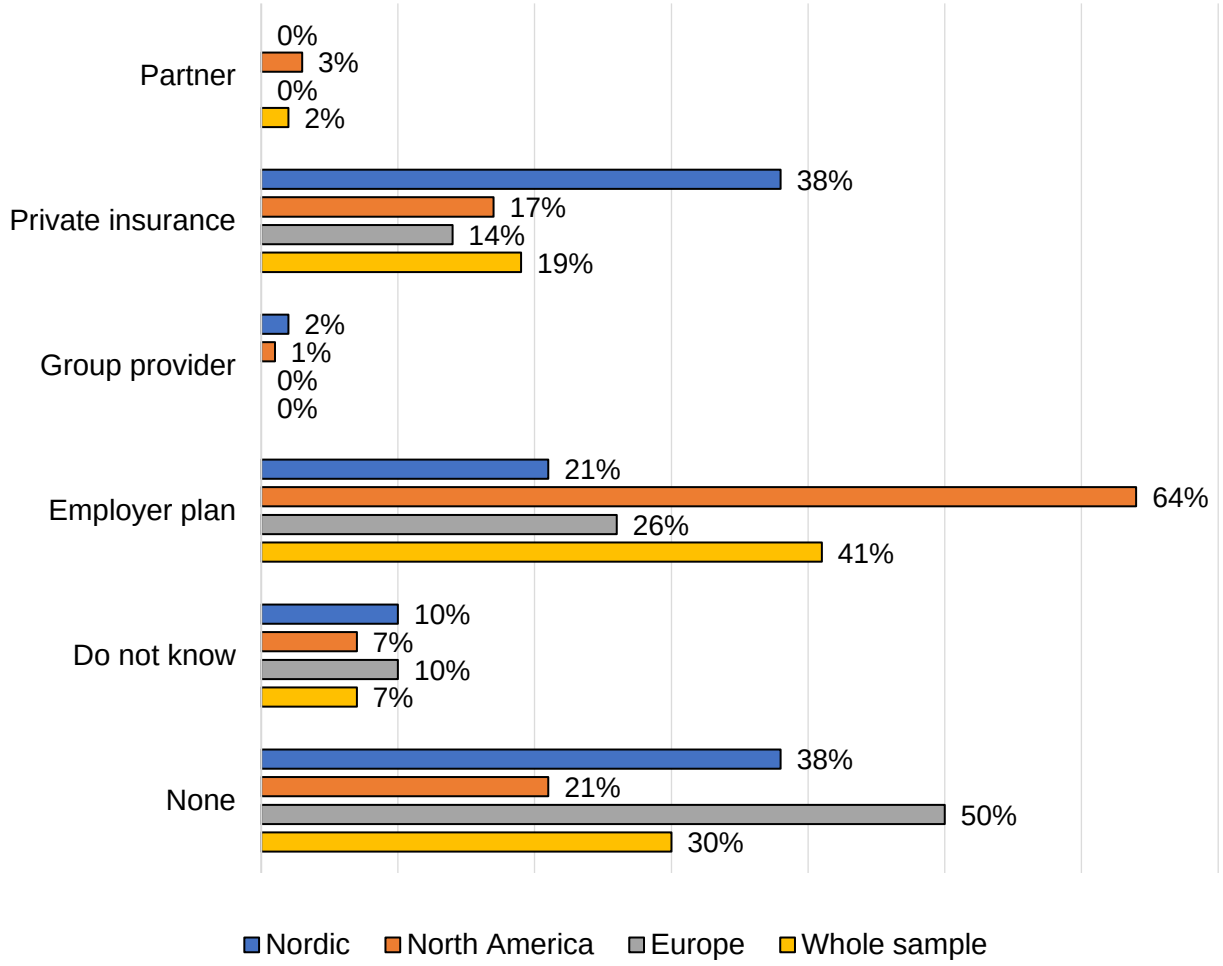
Figure 7: Source of health care coverage by region



Source: IGDA DSS 2021
Note: Multiple responses allowed; Percentages may sum to more than 100%

Access to life insurance varied by region (Figure 8). Most North American (79%), Nordic (62%), and Whole Sample (70%) respondents had access, compared to 50% of European respondents. Most North American (64%) respondents received their life insurance through their employer, while more Nordic respondents paid for their life insurance through private insurers (38%).

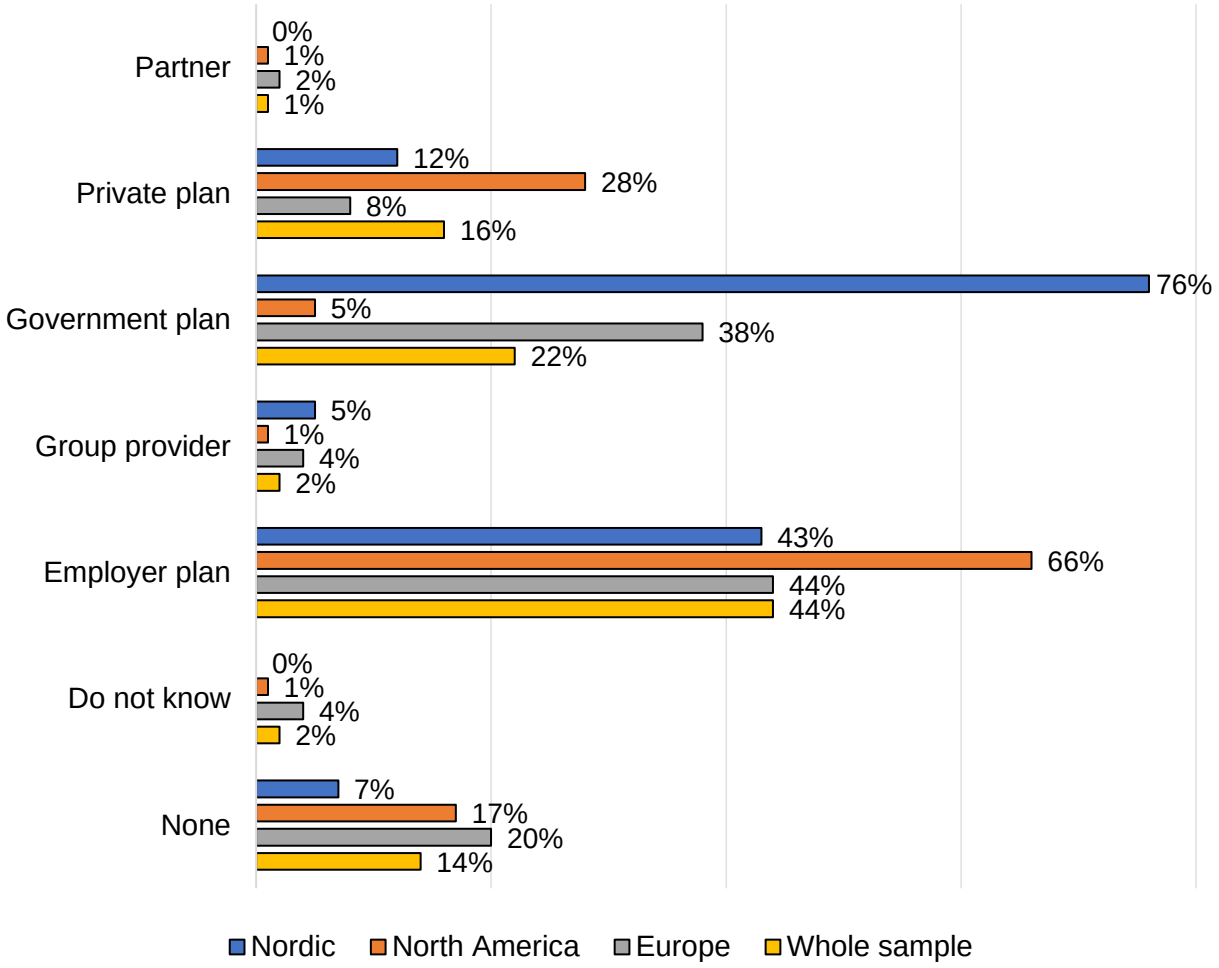
Figure 8: Source of life insurance coverage by region



Source: IGDA DSS 2021
Note: Multiple responses allowed; Percentages may sum to more than 100%

A large portion of respondents from the North American (83%), European (80%), Nordic (93%), and Whole Sample (86%) had a retirement or pension plan. North American respondents more often received these plans through their employer (66%) and/or private plans paid for by themselves (28%) (Figure 9). Conversely, Nordic and European respondents received these plans through their employers (43% and 44%, respectively) and/or government plans (76% and 38%, respectively).

Figure 9: Retirement plan coverage and funding source by region



Source: IGDA DSS 2021
Note: Multiple responses allowed; Percentages may sum to more than 100%

In the Whole Sample, many respondents had flextime (66%) and a good proportion had mental health programs (34%), health care spending accounts (30%), employee assistance programs (26%) and access to some on-site medical care (26%). Fewer had access to mental health funds (21%) and very few had on-site or subsidized daycare (4%).

There were substantial differences in the resources available to respondents across regions (Table 6). For instance, most Nordic (95%) and European respondents (86%) reported flex time compared to 56% of North Americans. Employee assistance plans seemed to be provided more often by North American (40%) workplaces than European (32%) or Nordic (7%) workplaces. Respondents across the three regions had similar rates of provision for on-site medical, daycare, and access to gyms.

Table 6: Access to employer provided resources by region

	% of respondents			
Employer Resource	**Nordics**	**North America**	**Europe**	**Whole Sample**
Flex time	95	56	86	66
Employee Assistance Program	7	40	32	26
Health Care Spending account	21	54	12	30
Mental Health Programs	38	45	38	34
Medical (On-site)	38	34	30	26
Daycare (On-site or subsidized)	2	5	8	4
Mental health fund	21	32	22	21
Gym	31	37	24	25

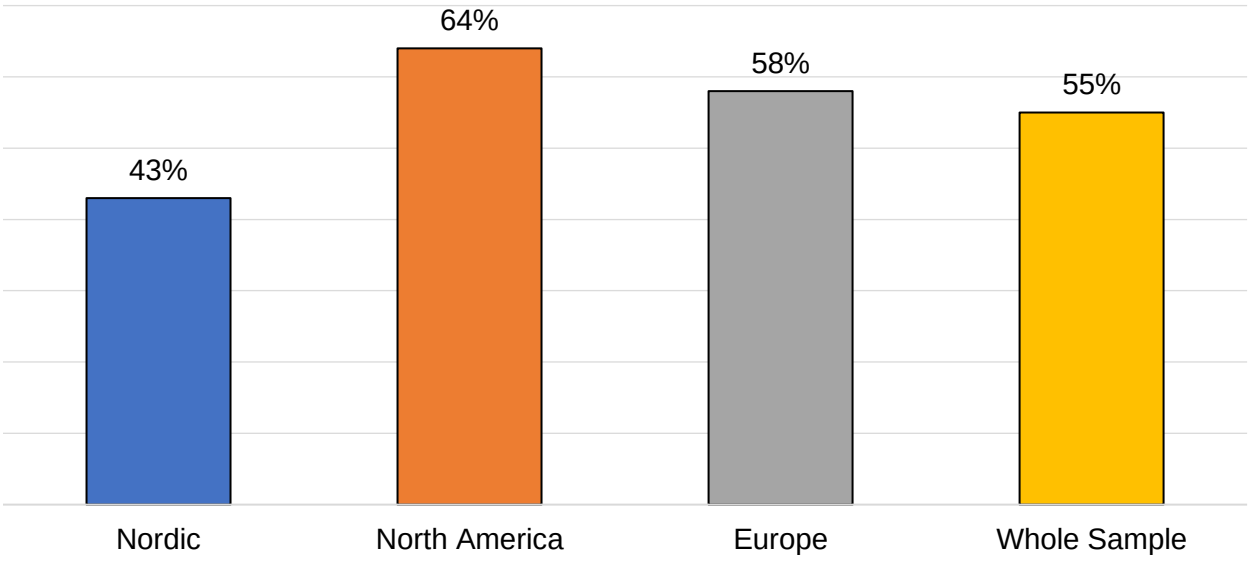
Source: IGDA DSS 2021

Mental Health Assistance

Mental illness was the highest reported disability among DSS respondents, making it a particular area of interest.

Approximately 55% of the Whole Sample had some form of a mental health plan, an employee assistance program, or a mental health fund from their employer. The prevalence of mental health support was similar across the three regions (Figure 10), however, North American respondents reported higher rates of employer-provided mental health programs and funds than European or Nordic respondents. A full comparative analysis of state-provided benefits is out of scope of this report, but the discrepancies could indicate more robust universal health care systems in some countries (see for instance Norway's mental health government resources and an OECD report).

Figure 10: Percentage of respondents with one or more employer-provided mental health supports by region



Source: IGDA DSS 2021

While the prevalence of employer-provided mental health support is promising, the data from the Whole Sample indicates that 45% of respondents did not report any form of employer assistance for mental health. With mental and psychological illness the highest category of disability among respondents, many game industry workers are likely left without adequate support.

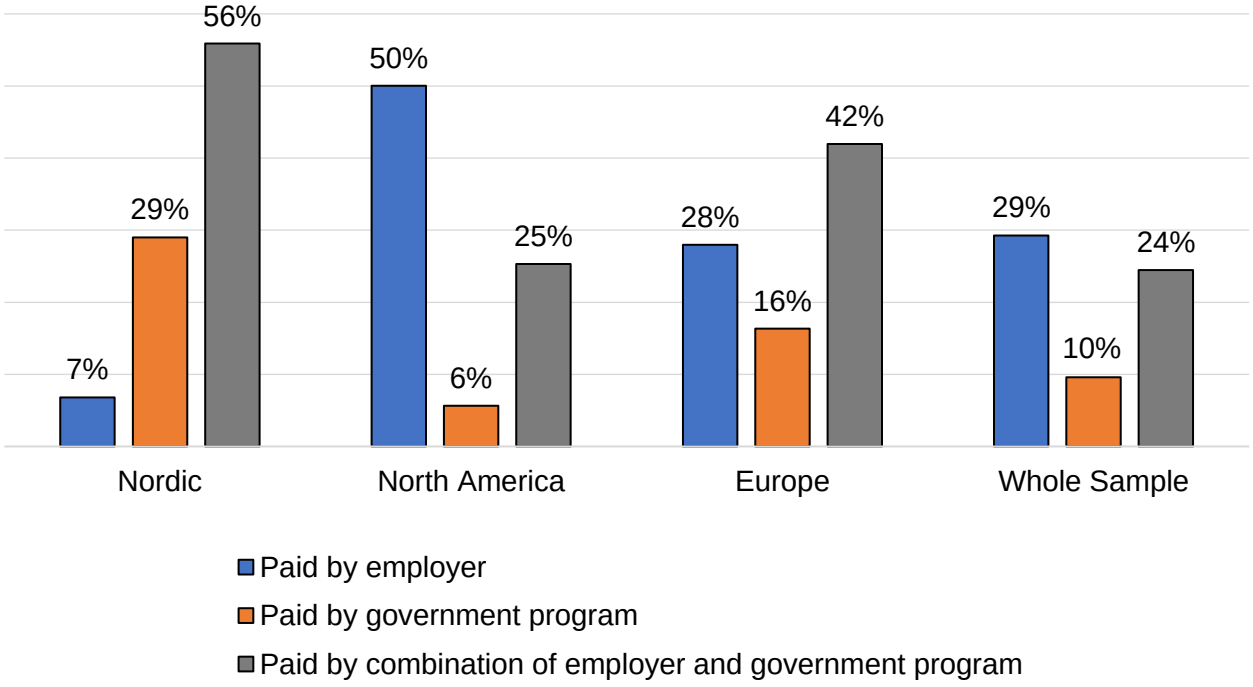
Parental Support

Childcare responsibilities can cause significant conflict with work, however, employer- and state-based childcare supports can significantly reduce this conflict (Michel et al., 2011).

Among the Whole Sample, 66% of respondents had paid maternity/pregnancy leave, 29% did not know about maternity/pregnancy leave support, 3% had unpaid leave, and 2% claimed they did not receive any leave support. Respondents reported similar rates for paternity/parental leave. Among the Whole Sample, 61% of respondents received paid paternity/parental leave through an employer or government program or some combination. However, this left 34% of respondents who did not know about available paternity/parental leave, 3% who received unpaid leave, and 2% who did not receive any leave.

Parental leave provision varied substantially across the regions and the Whole Sample (Figure 11). Combining pregnancy and paternity leave, we see that most Nordic respondents received paid parental leave from a combination of employer and government programs (56%) or through government programs alone (29%). A small number of Nordic respondents received paid parental leave solely from their employer (7%). In contrast, most North American respondents received paid parental leave solely from their employer (50%) or through a combination of employer and government programs (25%). Only 6% of North American respondents received support from government programs alone. European respondents expressed more varied programs and were more like the Whole Sample. Parental leaves were obtained more frequently through a combination of employer and government funding (42%), than through the employer only (28%) or government only (16%).

Figure 11: Source of parental leave support by region



Source: IGDA DSS 2021

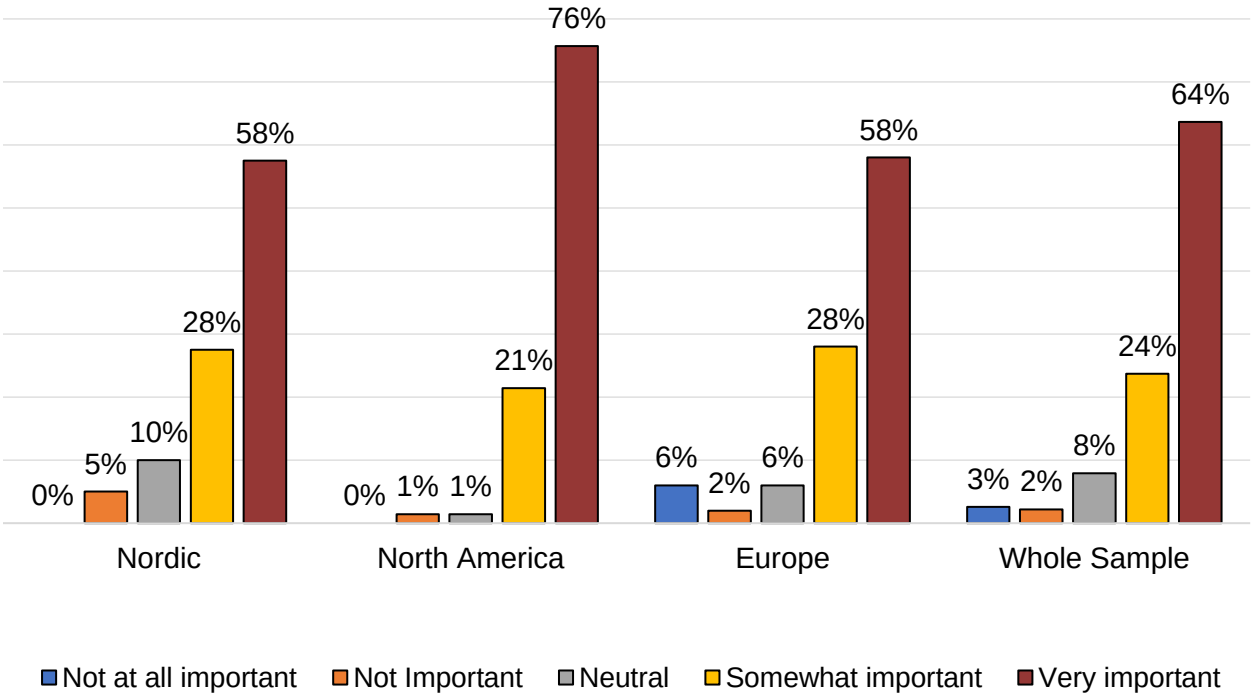
Diversity Perceptions

Importance of Diversity

Respondents were asked about the importance of diversity within workplaces, the industry, and game content. As noted in the full Diversity in the Game Industry Report, approximately 87% said diversity was somewhat or very important to the workplace, 90% said it was somewhat or very important to the game industry, and 89% said it was somewhat or very important to video game content.

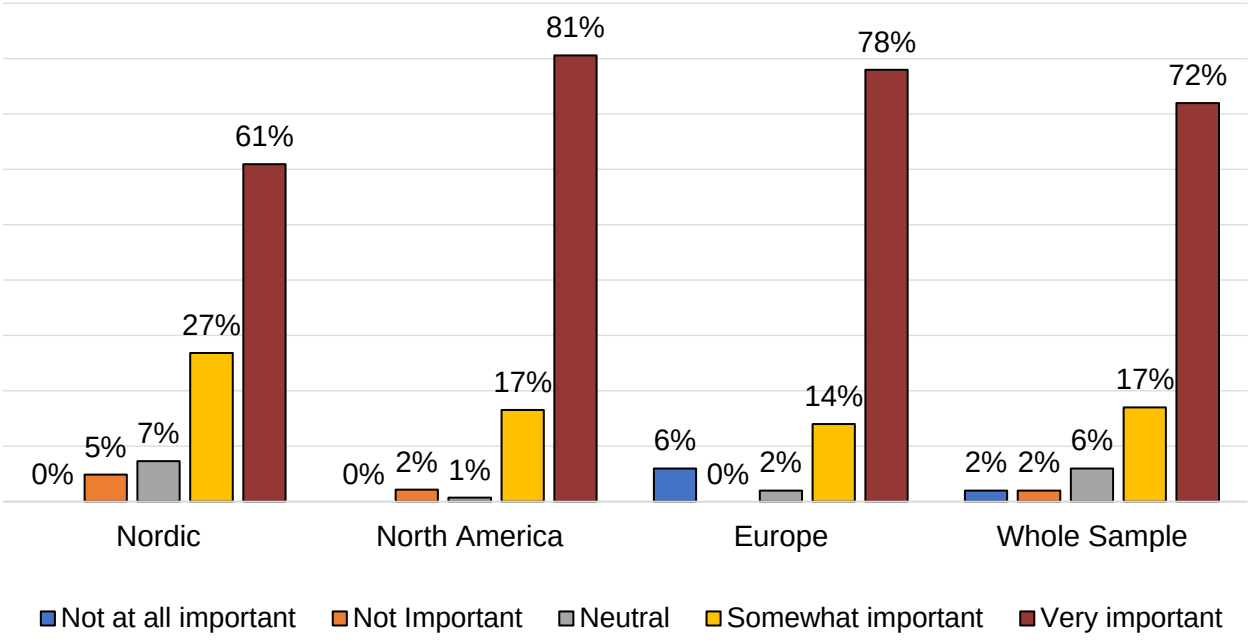
Respondents consistently rated diversity in these three spheres as important, but there was some variation across regions (Figure 12-14). In each case, more North American respondents rated diversity as important than those from Europe, the Nordics or within the Whole Sample. Nordic respondents put more importance on diversity in the game industry and in workplaces while European respondents put more importance on diversity in game content and in the game industry.

Figure 12: Importance of diversity in workplaces by region



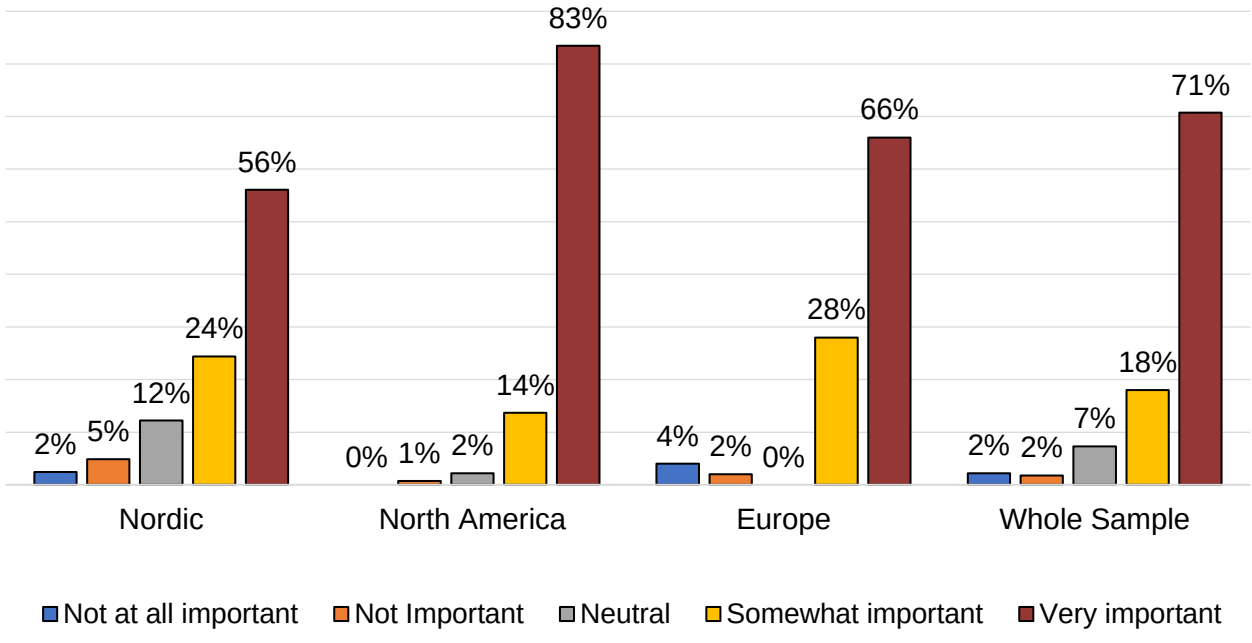
Source: IGDA DSS 2021

Figure 13: Importance of diversity in the game industry by region



Source: IGDA DSS 2021

Figure 14: Importance of diversity in game content by region



Source: IGDA DSS 2021

Equal Treatment and Opportunity in the Game Industry

Respondents were asked whether they felt there was equal treatment and opportunity for all in the game industry. As noted in the full Diversity in the Game Industry Report, in the Whole Sample 74% selected no, 12% selected yes, and 14% were unsure.

There was some regional variation.

- More North Americans thought that there was not equal treatment and opportunity (85%) compared to the Whole Sample (74%), European respondents (78%), and Nordic respondents (62%).

- Only 6% of North Americans thought there was equal treatment and opportunity in the game industry and 9% were unsure.

- More European (14%) and Nordic respondents (18%) thought that there was equal treatment and opportunity in the game industry, but 20% of Nordic respondents were unsure.

Diversity Obstacles in the Game Industry

There are many obstacles to diversifying the game industry. From a list, respondents were asked to select what they thought was the biggest obstacle. We discuss the top six (Table 7).

The top obstacles shifted based upon region.

- Decision-making bias and homogenous workforce/leadership were in the top three for the Whole Sample, North America, Europe, and the Nordics.

- A larger percentage of North Americans thought decision-making bias (51%) was an obstacle to diversity compared to the Whole Sample (39%) and the other regions.

- In Europe, homogenous workforce/leadership (37%) was tied with decision-making bias for the top obstacle

- In Nordic countries, ignorance or indifference (36%) was the most frequently selected obstacle.

Table 7: Obstacles to diversifying the game industry by region

Rank #	Whole Sample	North American	European	Nordic
1	39% Decision-making bias	51% Decision-making bias	37% Homogenous workforce/ Leadership	36% Ignorance or indifference
2	32% Homogenous workforce/ leadership	44% Homogenous workforce/ leadership	37% Decision-making bias	33% Decision-making bias
3	22% Ignorance or indifference	22% Ignorance or indifference	22% Microaggressions	33% Homogenous workforce/ leadership
4	18% Workforce culture	16% Gamer culture	18% Lack of diverse applicants	21% Lack of diverse applicants
5	15% Gamer culture	15% Workforce culture	16% Ignorance or indifference	15% Workforce culture
6	13% Lack of diverse applicants	13% Lack of diverse applicants	10% Education system	15% Education system

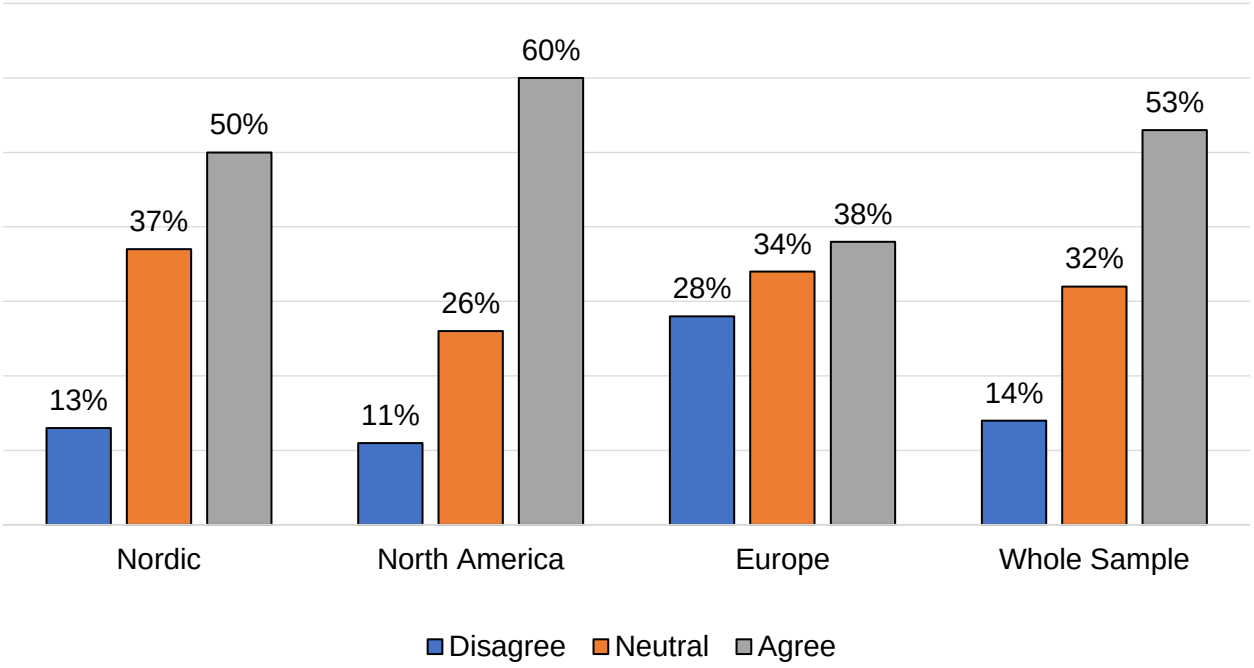
Source: IGDA DSS 2021
Note: Respondents could choose more than 1 option, which means the total percentages per sample can equal more than 100%.

Company Policies and Support of Diversity

Company Pursuit of Diverse Applicants

A lack of diverse applicants was identified as a key obstacle to diversifying the game industry by many respondents (Table 7). When asked whether their company pursues diverse candidates, 53% of the Whole Sample agreed, 32% were neutral and 14% disagreed. There were substantial variations between regions (Figure 15). Approximately 60% of North American respondents said that their company pursued diverse candidates, which is much higher than European (38%) and slightly higher than Nordic (50%) respondents. European respondents were extremely mixed about whether their companies pursued diverse candidates; 28% indicated disagreement and 34% were neutral.

Figure 15: Company pursuit of diverse applicants by region



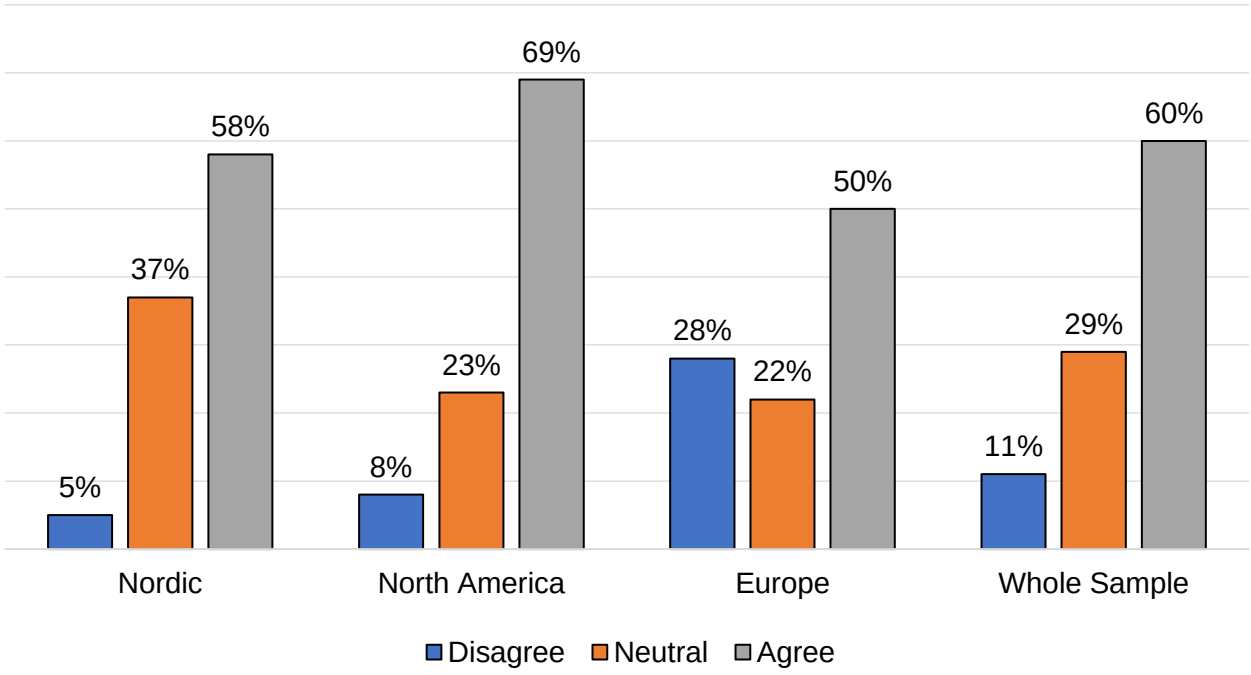
Source: IGDA DSS 2021

Company support for Diversity Initiatives

A majority of the Whole Sample agreed that their company supported diversity initiatives (60%), while less than one-third were neutral (29%) and approximately one-tenth (11%) disagreed. In comparison, a larger proportion of North American respondents (69%) agreed that their company supported diversity initiatives; much higher than among European (50%) and Nordic (58%) respondents (Figure 16). Again, European respondents

were much more varied in their assessment compared to the other regions and the Whole Sample. A larger proportion of European respondents disagreed (28%) that their company supports diversity initiatives compared to the other regions (5 to 11%).

Figure 16: **Company support for diversity initiatives by region**



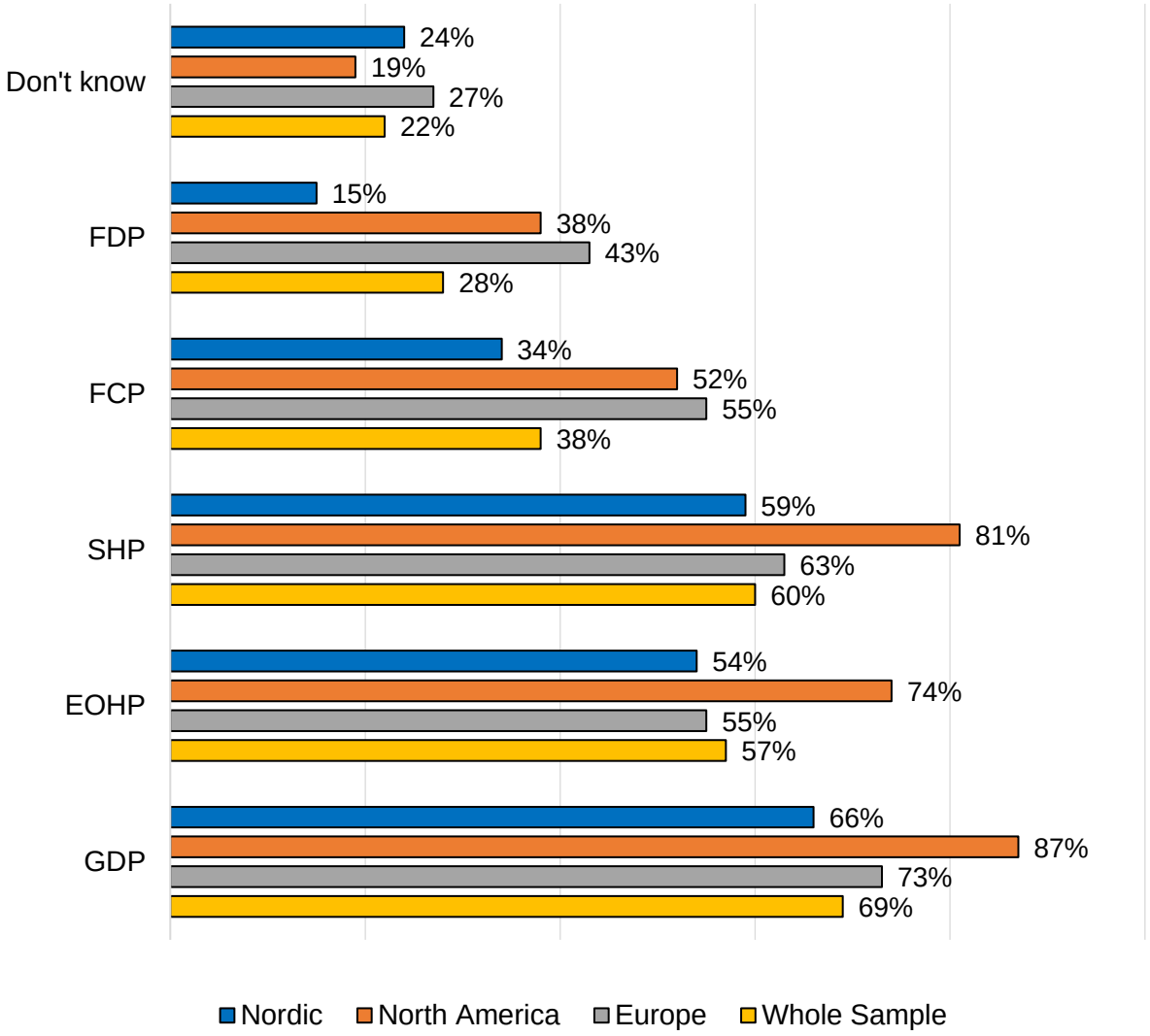
Source: IGDA DSS 2021

Company Equality and Diversity Policies/Procedures

As shown in the full Diversity in the Game Industry Report, most respondents in the Whole Sample reported that their company had general discrimination policies (69%), equal opportunity hiring processes (57%), and sexual harassment policies (60%). In contrast, fewer reported a formal complaint procedure (38%). Surprisingly, 22% of the Whole Sample did not know if they had diversity policies or procedures in their workplaces.

The North American region had the highest proportion of respondents reporting one or more types of diversity policy or procedure at their workplace (99%), followed by the European (98%) and Nordic (93%) regions. General discrimination policies or procedures were reported less frequently by Nordic respondents (66%) than North American (87%) and European (73%) respondents. Nordic respondents were also less likely to report formal complaint or disciplinary processes (Figure 17).

Figure 17: Company equality and diversity policies/procedures by region



Source: IGDA DSS 2021
Note: Participants could select one or more options. GDP = general discrimination policy, EOHP = equal opportunity hiring process, SHP = sexual harassment policy, FCP = formal complaint procedure, FDP = formal disciplinary process.

Regional Experiences of Online Harassment

For the first time, the DSS 2021 asked about online harassment at work.

Across the Whole Sample, 69% of respondents said that they had never experienced personal harassment online while carrying out their work, but that leaves 31% who had. The numbers across the three regions are a little better: North America (74%), Europe and Nordics (each 78%).

- Most reported this as a yearly occurrence, particularly in the Nordic (20%) and European (16%) regions.

- North American respondents reported more frequent experiences; 14% said yearly, 8% monthly, 3% weekly, and 2% daily.

Perhaps related to this frequency, more North American respondents (35%) said that their company had policies or procedures in place to address online harassment experienced by its workers compared to European (27%) and Nordic (25%) respondents.

Conclusion

This report presented select data from the IGDA DSS 2021 to make specific regional comparisons among respondents from the Nordic, North American, and European regions. This report focused on elements of diversity related to demographic representation, experienced inequity at work, availability of social and employer support for health and childcare needs, perceptions of the importance of diversity and the diversity policies of studios. This report has several key findings.

First, the degree of underrepresentation of women in the industry is consistent across regions (approximately one-third are women). Substantially more North American women reported experiencing inequity than men or women from any other region.

Second, there were substantial variations in ethnic diversity across regions. The Nordic and European regions had the highest number of respondents who identified as White (95 and 92%, respectively) compared to the North American region (83%). In particular, the Nordic region had the lowest representation of Asian respondents (2%) and no Black or Indigenous respondents. A larger percentage of North American respondents perceived themselves as ethnic minorities at work (23%) compared to the Nordic (7%) and European (16%) regions or the Whole Sample (19%). Approximately twice the percentage of ethnic minority respondents reported microaggressions and social inequities at work compared to non-minority respondents. The inequities experienced by ethnic minority respondents fluctuated by region. Inequities may be tied to regional characteristics.

Third, there was limited variation in the representation of sexual minorities across regions; the North American region had slightly more bi/pan/demisexual respondents. Across regions, heterosexual respondents were more open about their sexuality at work compared to sexual minority respondents. Sexual minority respondents in Europe were much less open about their sexual orientation at work (58%) than those from the Nordic (78%) and North American (70%) regions or compared to the Whole Sample (62%).

Fourth, there were no regional differences in reported disability. Across all regions, psychological disability or mental illness was reported at nearly

twice the rate of the second most selected disability (neurological and intellectual). A much larger percentage of North American respondents with a disability reported microaggressions, social inequity and inequity related to compensation compared to the Whole Sample and other regions. While approximately 55% of the Whole Sample had access to mental health support through their employer, Nordic respondents had lower employer-provision (43%) than North American (64%) and European (58%) respondents. This may reflect differences in state-level health provision.

Fifth, employer-provided health benefits and support differed across regions. For instance, North American respondents primarily received health care coverage through employers (89%) rather than government plans (17%), whereas Nordic and European respondents received support through both sources. Employee assistance plans were rare in Nordic (7%) and European (32%) workplaces compared to North American (40%) workplaces. Respondents across the three regions reported similar access to pregnancy/parental leave, however, the funding source changed based on region. Nordic and European respondents primarily received parental/pregnancy leave funding from a combination of employer and government programs, whereas North American respondents relied on employer provided funding. The DSS did not collect data on the extent of funding provided to parents or length of leaves.

Sixth, most respondents in each region rated diversity in the workplace, game industry, and game content as either somewhat or very important. However, more North American respondents rated diversity as very important than Nordic or European respondents. A higher percentage of North American respondents (85%) also said that there was not equal treatment and opportunity in the game industry compared to the Whole Sample (74%) or the European (78%) and Nordic (62%) respondents. Respondents across regions were consistent in their views about the top obstacles to diversifying the game industry; decision-making bias and homogenous workforce/leadership and ignorance/indifference were common top obstacles in all regions.

Seventh, while most respondents across the Whole Sample and within each region thought their company pursued diverse applicants and supported diversity initiatives, the views of European respondents were more mixed.

Only 38% of European respondents thought their company pursued diverse applicants compared to North American (60%) and Nordic (50%) respondents and the Whole Sample (53%). North American respondents reported substantially more equality and diversity policies than the other regions investigated. Diversity appears to be a hotter topic in the North American context.

This report supports the need to understand both the global context of the game industry as well as regional differences, particularly when understanding issues of equity, diversity, and inclusion. Historical patterns of migration and immigration are unique to regions and shape the identities and cultural norms of people living in a certain place. They inform how diversity is perceived and problematized. Though the IGDA DSS aims to be relevant to an international audience, there are inherent North American biases in how questions are framed and in the final sample that is obtained. Increased participation from game developers outside of the United States would allow for greater future regional analysis.

This report was one of a three-part series which used the DSS 2021 to analyze diversity. The general Diversity in the Game Industry Report provides the most comprehensive account of the data while the LGBTQA2+ Report focuses on the respondents who identify as gender and/or sexual minorities.

Visit the IGDA website to find reports from past surveys, for the DSS 2021 Summary Report and the DSS 2021 COVID Report.

The next Developer Satisfaction Survey will go live in 2023. If you would like to help with spreading the word or localizing the survey for your region, please contact the IGDA at: info@igda.org

If you wish to sign up for the mailing list for future surveys, please visit: http://www.gameqol.org/

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