UK Games Industry Census

Understanding diversity in the UK games industry workforce

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ukie

The University Of Sheffield.

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Foreword

We believe that building a truly equal, diverse and inclusive sector is key to the UK maintaining its position as the best place in the world to make, sell and play games.

Dr Jo Twist OBE
CEO, Ukie

But achieving this goal will be difficult without access to robust data about the people who make up the industry games in the UK. The publication of the second UK Games Industry Census should be seen as another landmark moment for our sector in its mission to foster inclusivity.

When we announced our intention to run the second census, we were overwhelmed by the positive reception from industry to our call to action. Dozens of games businesses of all shapes and sizes took it upon themselves to distribute the census to their teams. Advocacy groups came on board as supporters of the census, encouraging their communities to participate. And we saw people across the sector implore their friends to participate both in person at events like Develop and across social media. As a result, this year's census drew responses from over 3600 people in the sector. This is notably more than the number of people who responded in 2020 and represents approximately 15% of our overall workforce – which is crucial to ensuring it is representative of our industry.

Even more importantly, the census helps us understand where change has happened, and where we need to focus our efforts as an industry. The data from the first census inspired commentary but it also pushed forward positive action.

It provided support to groups seeking to improve representation in games; it encouraged businesses to take sign up to the #RaiseTheGame pledge so they could take steps to create a more to support an equal, diverse and inclusive culture; it helped us found and back schemes like Devices for All and drive through the Kickstart programme with Into Games to tackle societal inequalities such as access to technology, opportunity and employment. The findings of this year's census, as with 2020's, present both areas of positivity for the sector and some real practical challenges for it to consider. But our willingness to engage with open, independent and academically credible research demonstrates that the industry is serious about tackling these issues. We must consider this report's conclusions carefully and retain the census as a long-term part of our reporting for the future. Alongside the Raise the Game pledge, we hope this data provides a way to progress our collective goal of inclusion and representation – a goal that ensures that this art form we call games will be better at speaking to us all, whoever we are.

And in the end, that's why the census matters so much: it helps inspire change. The data from the first census inspired commentary but it also pushed forward positive action. It provided support to groups seeking to improve representation in games; it encouraged businesses to sign up to the #RaiseTheGame pledge so they could take steps to create a more equal, diverse and inclusive culture; it helped us found and back schemes like Devices for All and drive through the Kickstart programme with Into Games to tackle inequalities in society, such as access to technology, opportunity and employment.

The UK games industry census helps our sector lead the world on efforts to build an industry that better reflects our players – now and for the future. We must consider its conclusions carefully but also ensure it remains a long-term part of our reporting for the future.

The UK games industry census helps our sector lead the world on efforts to build an industry that better reflects our players – now and for the future.

DR JO TWIST - CEO UKIE

Foreword

I'm very happy to be writing the second UK Games Industry Census report.

Dr Mark Taylor
Senior Lecturer
University of Sheffield

Since we started this process in 2019 and published a first report in 2020, a huge amount has changed, but the input and support that the games industry has offered in order to make this process a success is still significant.

The challenge of producing accurate statistics about who works in the UK games industry persists. We can't rely on the same techniques as other occupational sectors, because of the way that the games industry is organised, and how this is understood by official classifications and official statistics. The pandemic has had huge impacts on the composition of the national workforce in general, so it's essential to continue to pay attention to the makeup of who's working in games relatively frequently. Even if it turns out that the composition of the games industry looks similar to how it looked two years ago that should be compared with the broader creative industries context where the effects of the pandemic have been unequally experienced, with marginalised people most vulnerable to job losses.

In this census, we've added some additional questions about people's attitudes towards their workplaces and towards the UK games industry. We're very conscious of the time that people offer us in filling out the census, so we wanted to make it explicit that these questions were optional. However, 90% of participants answered these questions, further showing the commitment offered to this exercise by members of the UK games industry. Our next steps are to try to understand some of the patterns that we've uncovered in more detail. None of this work would be possible without people working in games being willing to share things about themselves, and to give up their time in doing so.

We hope that this report helps us to understand the UK games industry, whether the findings come as a surprise or reinforce what was already suspected. Now we need to keep the momentum up and make sure that we can continue to understand diversity in the industry in future.

> **None of this work would be possible without people working in games being willing to share things about themselves, and to give up their time in doing so.**
>
> MARK TAYLOR - SENIOR LECTURER, UNIVERSITY OF SHEFFIELD

Executive summary

The UK Games Industry Census was first conducted in 2019 and published in 2020.

It sought to understand the kinds of work that games industry workers do, their personal characteristics and their backgrounds - comparing against national datasets to understand the make-up of the sector in comparison with the working age population. The 2022 Census, which was conducted during Autumn 2021, builds upon that work in a number of ways.

First, we added several new questions to strengthen our understanding of the sector. These included specific questions on pandemic working practices, promotions and a new section on attitudes towards the workplace and industry.

Second, the 2022 census provides information about how the sector's demographic profile has changed since the first census was published in 2020. And third, it provides a useful re-examination of the sector at a moment where the impact of a global pandemic has occurred and is still being felt.

The overall picture

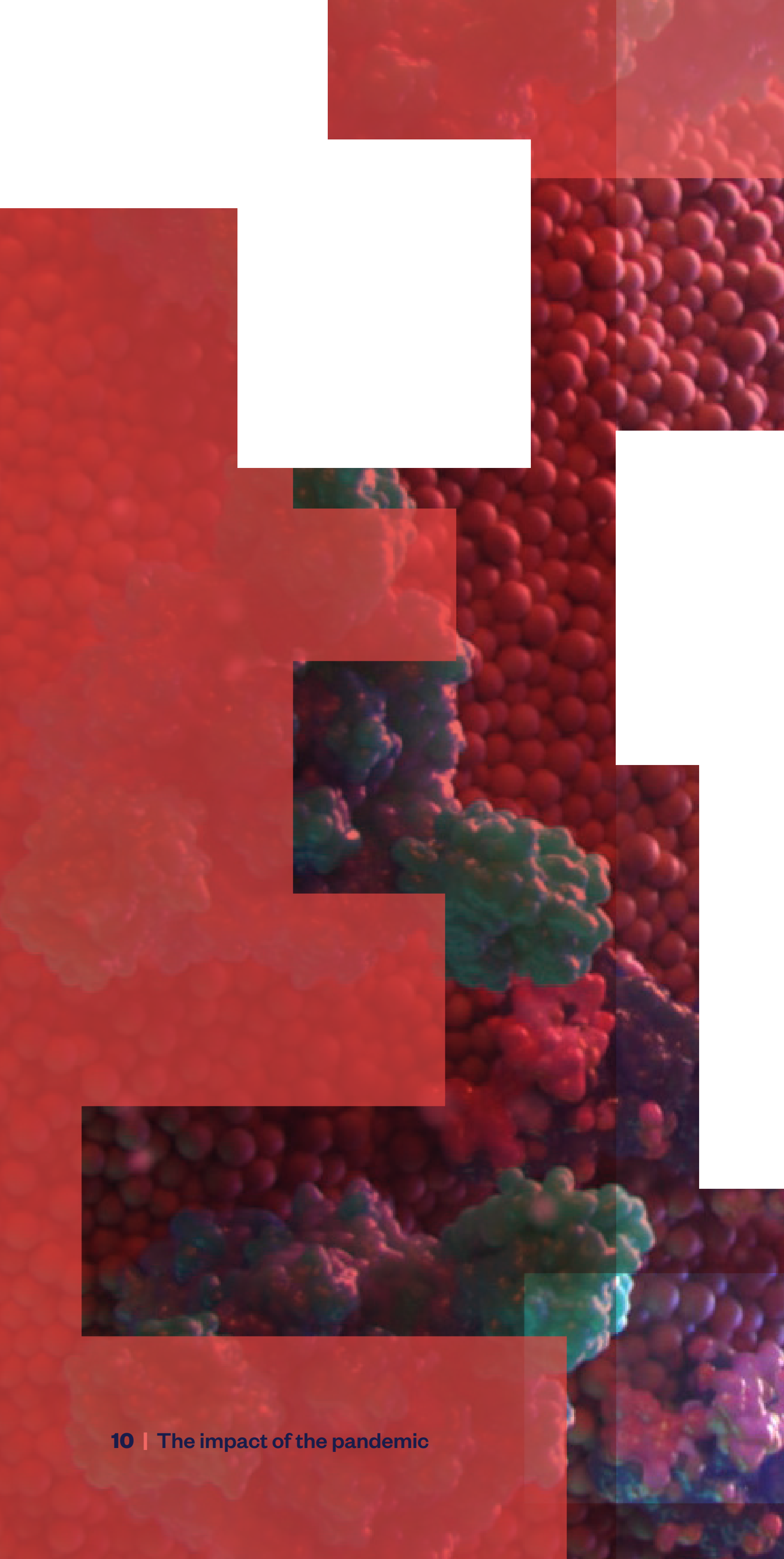
For the most part, the 2022 census has reflected the findings of the 2020 edition rather than indicate significant change in the demographic makeup of the workforce. The games industry remains young compared to the total UK workforce but has aged slightly in the intervening two years.

The ethnic makeup of the UK games industry is unchanged from 2020; 89% of the games workforce is White, meaning that people of colour make up less of the games industry than they do the UK's working age population. The UK games workforce is strongly international; almost 30% of games workers are from outside the UK, similar to the 2020 census. The gender makeup of the industry has diversified slightly with men making up two thirds of workers. Both women and non-binary people have seen small percentage increases in their overall representation. Around three quarters of the UK games workforce is heterosexual or straight, a slight decrease from 2020. The 24% of people who are bisexual, lesbian, gay or another sexuality other than heterosexual/ straight is significantly higher than in the adult population.

The industry's social background and education qualifications remain similar to 2020. Games industry workers are significantly more likely than the general population to have grown up in a household where the main income earner worked in a managerial or professional job or to have attended a state selective school or independent/ fee paying school.

Over four fifths of the games workforce has at least an undergraduate qualification. Fewer people reported physical health conditions than in the 2020 census but the figure of 18% is still higher than the equivalent in the working age population. Eighteen percent of respondents reported a neurodevelopmental condition.

This includes one tenth of the workforce reporting a condition affecting concentration such as ADHD, a marked increase from 2020, though this is likely due to a change in how the question was asked, discussed later in the report. The games industry has more autistic people and more people with ADHD than the adult population.



The impact of the pandemic

While the results of this year's census indicated that there was little change in the demographic profile of games, they did identify a number of potential pandemic impacts.

These can be seen in changing expectations around working locations. Pre-pandemic, four fifths of the industry worked in the office but in Autumn 2021, this had shifted to four fifths working at home.

When asked about working in the future, 90% of the industry stated a preference for working from home or a hybrid approach.

This census saw a significant increase in anxiety and depression in the industry, with nearly two fifths of games workers reporting having experienced either or both.

While findings on the exact effects of the pandemic on adult mental health in the general population are mixed, a consistent insight has been that young people experienced higher rates of depression and anxiety – potentially explaining the change as the games industry includes more young people than the working age population.

Attitudes to workplaces and industry

This year's census contained a new section that allowed individuals to explore their attitudes both towards the company where they work and towards the sector more broadly. Over 90% of census respondents chose to complete this additional section. Most workers feel positively about the companies they work at, tracked by the percentage agreeing or strongly agreeing with positive statements about the company. We saw upwards of four fifths of respondents agree that they were proud to tell others where they work, that they would recommend their company as a great place to work, that their employers were committed to creating a diverse and inclusive workplace and that they felt any bullying and harassment are taken seriously where they work. These results show a more positive attitude to the workplace than equivalent attitudes within the Civil Service in a similar survey.[1] Attitudes towards the wider industry were also positive, but less so. A similar four fifths of people agreed that they were proud to tell others that they worked in the UK games industry, but two thirds agreed that they would recommend the industry as a great place to work. Less than half agreed that the UK games industry is committed to diversity and inclusion and under two fifths of respondents felt that bullying and harassment were taken seriously. For the latter two answers, a significant number of people responded with neutral reactions rather than explicitly disagreeing.

Promotion and progression

We investigated career development in the UK games industry and found that in the three years preceding this census, over two fifths of game workers had been promoted at their company and one fifth had made a diagonal move to a more senior role in a different organisation.

People aged between 26 and 35 are the most likely age group to have been promoted, with those aged 41 and above noticeably less likely to have advanced. Black, Asian and Minority Ethnic people are more likely than White British or White Other to have made a diagonal move, but less likely to have been directly promoted.

Thirty-one percent of autistic people reported being directly promoted in the past three years. This figure is significantly lower than the equivalent figures for people with other neurodevelopmental conditions (including ADHD and dyslexia) and lower again than the figure for people who reported having no neurodevelopmental conditions.

1. Civil Service People Survey 2020: Technical Summary. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/977279/Civil_Service_People_Survey_2020-_Technical_Guide.pdf

Introduction

A total of 3,603 people completed the census, an increase of 12% on the census undertaken in 2019 and reported on in 2020. This compares with an estimate that, in 2019, UK games companies directly employed 20,870 people.[2] This means we estimate that just over 15% of the total games industry workforce completed the census.

The majority of the questions that we asked were worded in exactly the same way as in large, nationally representative surveys of the population.

This means that we can draw comparisons between people working in games and other relevant populations, such as the working-age population, and groups of people working in comparator industries. This was the same approach that we took in 2019 and allows us to identify any ways in which the makeup of the UK games workforce changed over a two-year period.

The survey was launched on 16 September 2021 and was open for eight weeks. Recruitment was handled in two ways. The survey had an open component, wherein anyone working in games who was interested could respond. Recruitment to this open component included publicity through Ukie's own channels, through publicity in the games media, and through dissemination by other bodies working in and around games. Around 36% of

2. Olsberg SPI with Nordicity, December 2021. Screen Business: How screen sector tax reliefs power economic growth across the UK 2017–2019. BFI. https://www.bfi.org.uk/industry-data-insights/reports/uk-screen-sector-economy respondents to the survey were recruited via this route. Secondly, we recruited through a sample of games companies that was as representative as possible. Around 64% of respondents to the survey were recruited via this route. We provide further details of the sampling and recruitment in the methodological appendix.

As with the previous census, there are sections about the kinds of work that people do, about their personal characteristics, and their backgrounds. Most of the questions in these sections are the same as in the previous census. In these cases, we can draw comparisons between the two time points.

However, we made a small number of changes to question phrasing. We also introduced a few additional questions in these sections, which we explain in the relevant parts of this report.

We also introduced a new section in this updated census, asking people about their attitudes towards their workplace and the UK games industry. While this section was explicitly optional, and respondents could click a button to skip all the questions, 90% of people completed it. As with the 2020 report, this report starts by summarising the responses to each question, and then goes into more detail on a smaller number of areas. In 2020, our detailed sections were on job roles, nationality, education, and mental health.

This time round, we retain our focus on mental health, since the impact of the pandemic has been felt unequally. Our analysis of job roles, nationality, and education across the two time points suggests that the patterns we reported on in 2020 were almost identical in 2022. We also report in more detail on two areas that we introduced into the survey questionnaire for the first time this year: promotion and attitudes.

The structure of the report is as follows. The first three chapters consider overall responses to the census.

- Section 1 summarises the work done in the games industry by the people who completed the census.
- Section 2 summarises data on the current makeup of the UK games workforce.
- Section 3 summarises people's responses to questions about their attitudes towards their workplaces and the UK games industry more generally.

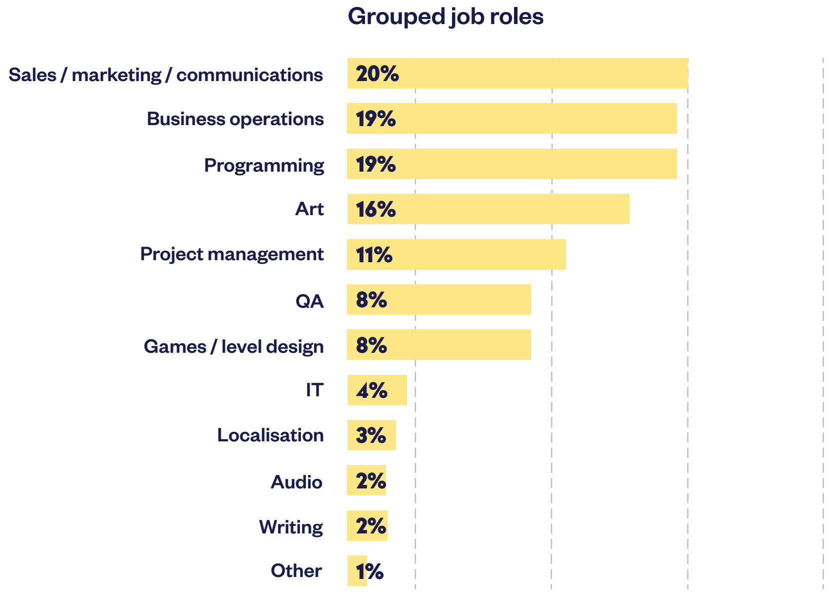
The second half of the report looks at some of the responses in greater detail.

- Section 4 goes into more detail on the attitudes discussed in section 3, investigating how they vary between different groups.
- Section 5 compares different groups' promotion and progression.
- Section 6 focuses on mental health conditions in more detail.

1 Who did the census?

1.1 Job roles

The first question that people were asked was about their job role. They were presented with a large number of different options and asked to select which captured the work that they do. Respondents could select as many categories as they wanted; however, where people selected more than four categories, we've classified them in the "Multiple" category. The first figure shows the overall numbers of people working in each role.



The most common role among people who completed the survey is programming / development, at 19% of respondents. They're followed by people working in production and project management, artists, and people in leadership roles. Compared with the previous wave of data collection, these numbers are fairly stable. The key exception is a decrease in people working in design, down from 11% to 8%. Because several of these categories have very few people in them, for the remainder of the report, we're using a simpler version of the job roles classification, where we've grouped certain categories together. For example, "Animation", "Artist", "Technical art", and "UI/UX" have ben grouped together under the broader category "Art". This is the same grouping as we used in the 2020 report, which means that we can compare across the two periods. As with the more detailed classification, any changes in the numbers of people in each category are small.

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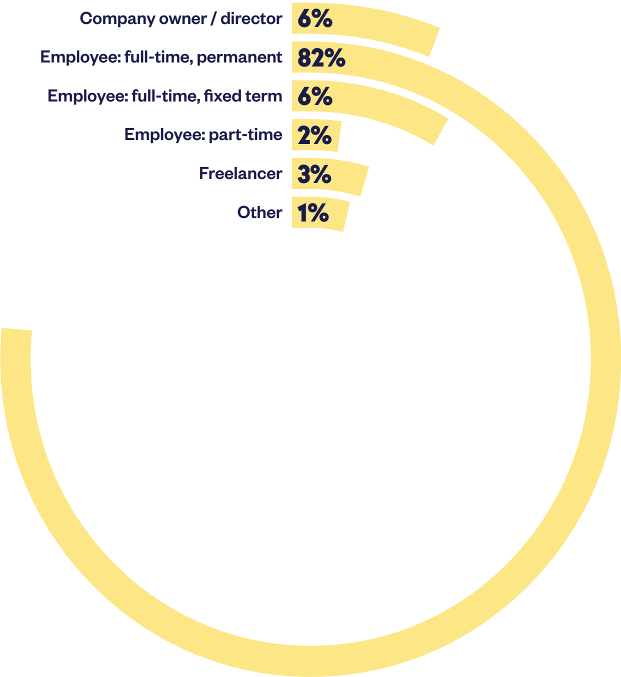
Employment contract type



1.2 Contract type

As in the previous census, we asked people what their relationship was with their place of work – whether they were full-time, freelance, on a fixed-term contract, and so on. This figure shows the percentages of people in each category.

By far the largest group of respondents were people employed as full-time, permanent members of staff. Compared with the data collected in 2019, this group has increased in size slightly, from 78% to 82%.

The numbers of people on fixed-term contracts, freelancers, and people who are otherwise classified have all slightly decreased.

We can compare these figures with the equivalents in the overall workforce. The 6% of people working on fixed-term contracts in games is about the same as in the overall workforce, while the 2% of people working part-time in games is significantly lower than the 25% of part-time workers in the broader workforce[3].

In the previous census, we reported that our recruitment method, which targeted organisations, is likely to have left freelancers underrepresented. As the percentage of freelancers, and those in the "Other" category, have both declined, this is likely to still be the case.

3. Office for National Statistics, 2022. Labour Force Survey table EMP01 SA: Full-time, part-time and temporary workers (seasonally adjusted).https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/fulltimeparttimeandtemporaryworkersseasonallyadjustedemp01sa

1.3 Supervision and seniority

In order to understand people's seniority in their workplace, we asked two questions. First, we asked people if they supervised anyone, to which 41% of respondents said yes - around the same as in our previous census.

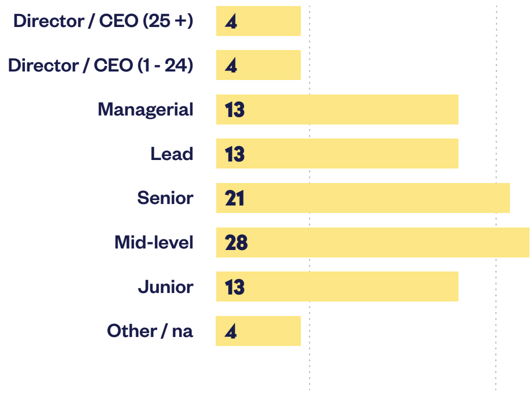
Again, this is a bit higher than the national average of around 37%[4], which may indicate that our data has a larger fraction of people working in supervisory roles than in the overall population of games workers.

Our second question was about people's seniority. We presented people with a set of categories and asked which best described their position in their place of work.

Different organisations may use different terms to describe seniority, while job roles may also differ in the language used: for example, the difference between "Manager" and "Lead". However, we think that these categories are illustrative of broader trends. Within these categories, we broke apart people who selected "Director/CEO" between those working in organisations that employed 25 or more people, and those employing fewer than 25.

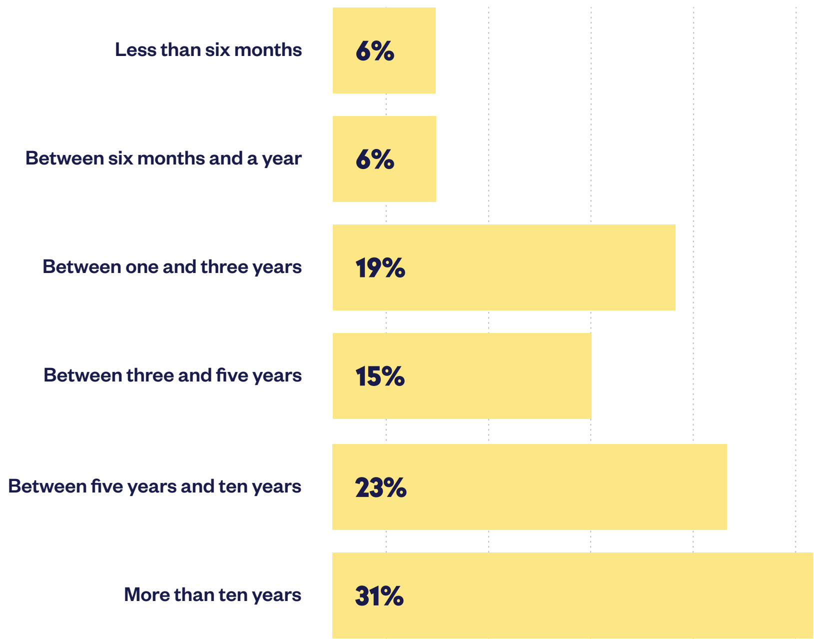
This is because we know that people working in directorial roles in smaller companies are often carrying out different activity on a day-to-day basis than those in similar roles in larger organisations. People who responded with "Other" were mostly those working in freelance roles, or in organisations with low headcount.

Seniority of role



4. Office for National Statistics, Social Survey Division, Northern Ireland Statistics and Research Agency, Central Survey Unit. (2021). Quarterly Labour Force Survey, January - March, 2021. [data collection]. UK Data Service. SN: 8806, http://doi.org/10.5255/UKDA-SN-8806-1

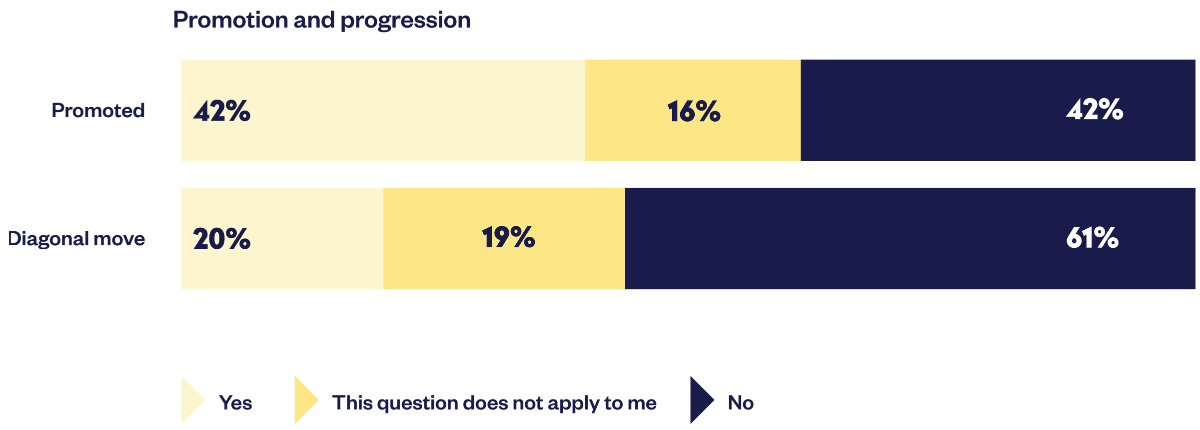
Time worked in the sector



1.4 Time in the sector

We asked people how long they've worked in the games sector. Nearly a third of respondents have worked in games for more than a decade, while more than half have worked in games for at least five years. At the other end, 12% of respondents have worked in games for less than a year.

These results are almost identical to the results in our previous report. They are also consistent with the relatively large percentage of people in the survey working in senior roles, as we expect that most people working in junior roles are newer to games.



1.5 Promotion and progression

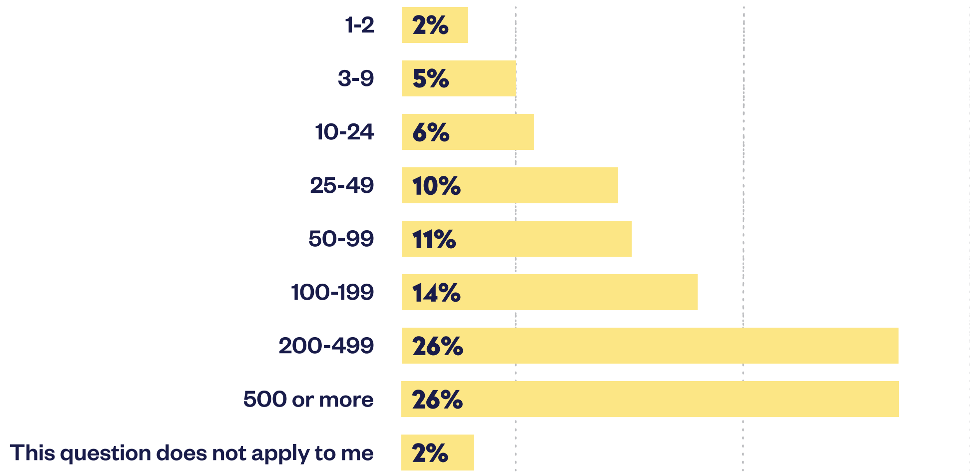
We introduced two new questions about people's career development. We recognise that people progress in their careers in multiple ways. For some, career development comes in the form of being promoted at a given workplace; for others, it comes in the form of attaining a more senior role at another organisation.

We refer to the latter as a "diagonal move", wherein moving to a more senior role constitutes the upward part and moving to another organisation is the lateral part. For this reason, we asked two questions: "In the last three years, have you been promoted?", and "In the last three years, have you moved company into a more senior role?". In both cases, we provided the example of moving to a Junior to a Mid-level role, either within the same organisation or to another workplace.

As well as "Yes" and "No", people could reply "This question does not apply to me". In small organisations, we anticipate this response being particularly relevant. Internal promotion is more common than diagonal moves. 42% of respondents reported having been promoted in the previous three years, while 20% of people reported having made diagonal moves in the same period. A slightly larger proportion of people reported that the question about diagonal moves didn't apply to them relative to internal promotions. It is important to note that these categories are not mutually exclusive.

10% of people had both been promoted and made diagonal moves in the previous three years, meaning that around 32% of people had been promoted but had not made diagonal moves, and 10% of people had made diagonal moves but had not been promoted.

Organisation size by employees



1.6 Organisation size

We asked respondents how many people worked in their organisations. We did so in order to understand how patterns may differ between larger and smaller organisations, but also to benchmark our sample with the broader games industry.

Exactly what constitutes the workplace that someone works at is not always clear. Some people who work at offices that are part of a larger global company may answer on the basis of their individual office, or the overall company. While our measure is not perfect, it is indicative.

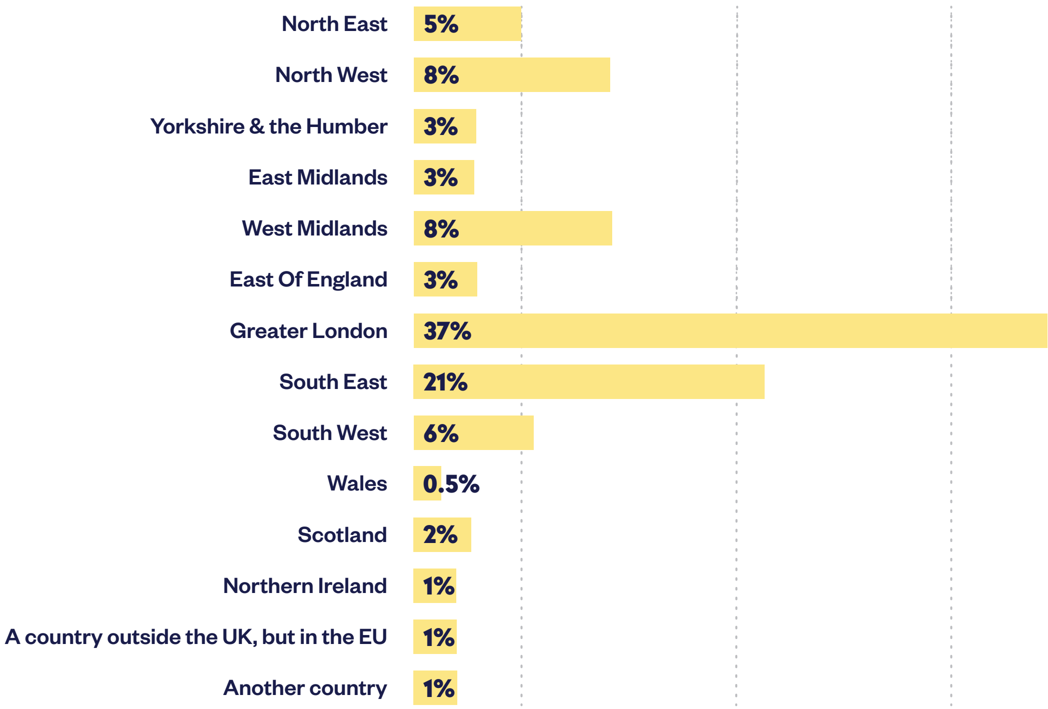
Around half of our respondents work in organisations employing at least 200 people. This is a significant difference from the previous census, particularly in the largest category of organisations employing 500 or more people: in this case, the figure has gone from 15% to 26%.

It is worth noting that between the two time periods a number of organisations in the UK games industry grew considerably. It is possible that this change represents a change in the shape of the industry overall, rather than simply in the responses to this survey.

As with the previous report, we compared these results with weighted results, with weightings derived from estimates of the distribution of the UK games industry by organization size. We found no significant differences.

The results presented throughout this report are unweighted. More information can be found in the methodological appendix.

Organisation location



1.7 Organisation location

We asked about where people worked. Interpretation of this question was more complicated than in the previous census, due to the large numbers of people working remotely at the time this census was conducted.

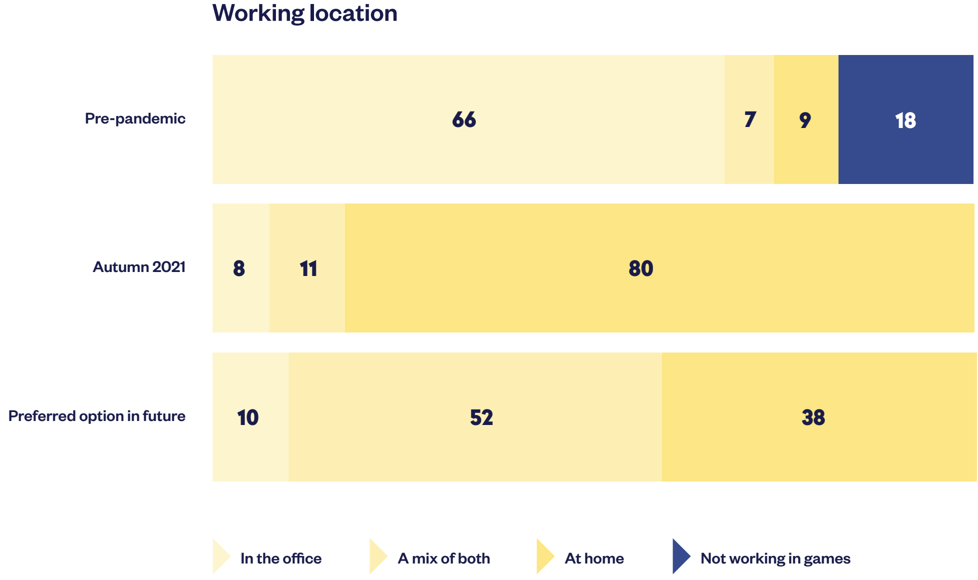
The concentrations of people in certain areas differ from other Ukie data[5] and data collected from the Screen Business report. For example, the percentages of responses from people in Scotland is lower in this data than elsewhere, while the percentages of responses from people in London are higher.

However, the overall response rates in different regions are largely similar to the previous report. There are some differences – there is higher representation in the South West than previously, but lower representation in the East of England – but these differences are not large. There are two additional points to make in comparison with the last census report. First, as with the previous section on organisation size, we used these figures to generate weights for analysis, given the discrepancy between these figures and the others mentioned above, but the results were not significantly different.

Second, two percent of people reported being based outside of the UK. We assume that those people consider themselves part of the UK games industry and so include their responses. Some of those respondents may live in the UK but work for companies in other countries, or vice versa.

The numbers are sufficiently low that the subsequent analysis remains the same whether their responses are included or not.

5. Ukie, Jan 2020. Think Global, Create Local. https://ukie.org.uk/regional-economic-report



1.8 Working locations

While in the previous census we asked people where they usually worked. In this census, we asked three questions. The context of the pandemic meant that a large number of people were working remotely at the time of the survey data collection. We were also interested to learn people's preference for working locations in the future. For this reason, we asked about people's working locations before March 2020 and at the time of the survey, and where they'd like to work in the future.

The survey data was collected at a time when a large number of people were known to be working remotely due to the pandemic.

We wanted to learn how working practices had changed within in the games industry over the period of the pandemic and what preferences respondents had about working in future. As such, we asked three questions in this census rather than the one asked in the previous iteration. We asked participants about their usual working location before March 2020, their usual working location when the census was taken in Autumn 2021, and we asked them to state their preferred mode of work looking ahead. Eighteen percent of respondents were not working in games before the pandemic, which is consistent with the earlier question about how long people had been working in games. Of the remaining 82%, the vast majority mainly worked in the office before the pandemic. At the time of the survey, 80% of people were working from home, and 11% were combining working from home with going into the office. In the UK working population around 23% of people were working entirely from home and another 11% were working partly from home and partly from the office.[6] When asked what people would like to do in the future, 52% said they would prefer a mix of both working in the office and from home, while 38% responded that they would prefer to work from home exclusively. Just 10% responded that they'd prefer to work primarily from the office.

6. Office for National Statistics, 2021. Coronavirus (COVID-19) latest insights: Work. https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/articles/coronaviruscovid19latestinsights/work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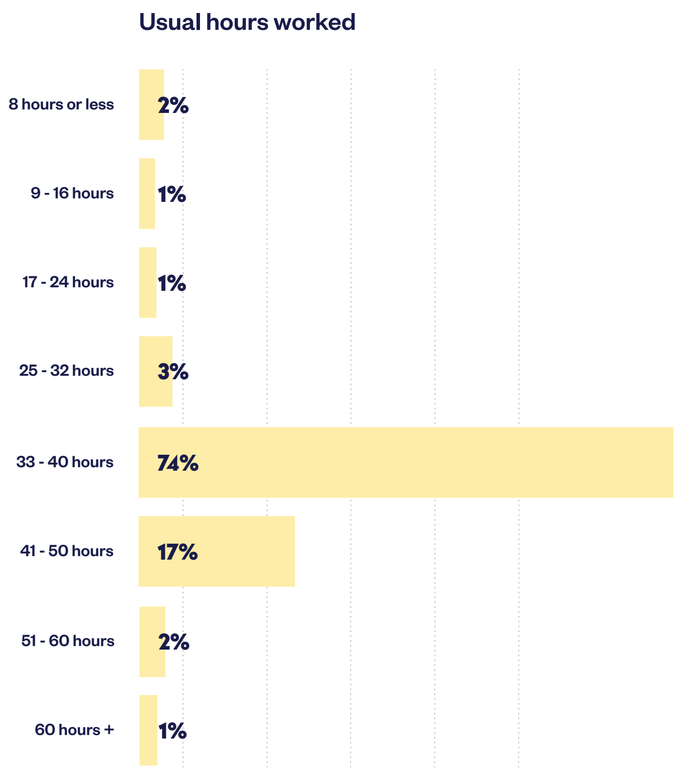
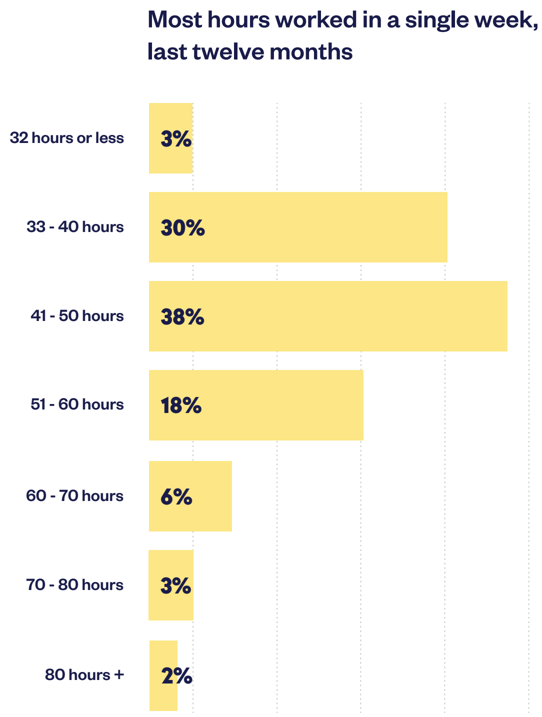




1.9 Hours worked

In this census, we asked two questions about hours worked. First, we asked "How many hours per week do you usually work? Please exclude meal breaks". This figure shows that 74% of the people working in games usually work between 33 and 40 hours as a week, while an additional 17% work between 41 and 50 hours a week. These figures are almost identical to the previous census.

We stated that similar results in the 2020 report were at odds with international games sector research on long working hours, sometimes referred to as "crunch"[7]. However, by only asking about how many hours people usually work, we could not be confident that we were accurately estimating how widespread crunch is.

For this reason, we asked a second question about working hours: "During the last twelve months, what is the largest number of hours you have worked in a single week? Please exclude meal breaks." Answers to this question are shown in the right-hand figure.

While eighty percent of people reported that their average week was 40 hours or less, 67% of people worked over 40 hours in their heaviest week. The most common duration of a heaviest work week was 41-50 hours, with 38% of respondents reporting this as their maximum number of hours worked in a single week in the preceding year.

18% worked at least one 51-60 hour week, while 11% of people had at least one week in which they worked 60 hours or more. Of this, 5% worked beyond 70 hours. These estimates can be compared with those derived from the Independent Game Developers' Association (IGDA) Developer Satisfaction Survey[8].

This survey is not limited to one country: of the 803 respondents, 46% of respondents are from the USA and Canada, and 38% are from Europe. Of the employees responding to the survey, 79% report working 44 hours a week or fewer in a regular week. This suggests that a regular working week for UK games industry workers consists of fewer hours, as 81% of respondents to our survey reported working 40 hours or fewer per week.

The IGDA survey also includes questions about working long hours but differences in approach make direct comparisons difficult.

These estimates can also be compared with a recent report on the UK Film and TV sector[9]. This report estimates that 39% of people working in Film and TV worked more than 50 hours per week, including one in six people working more than 60 hours per week.

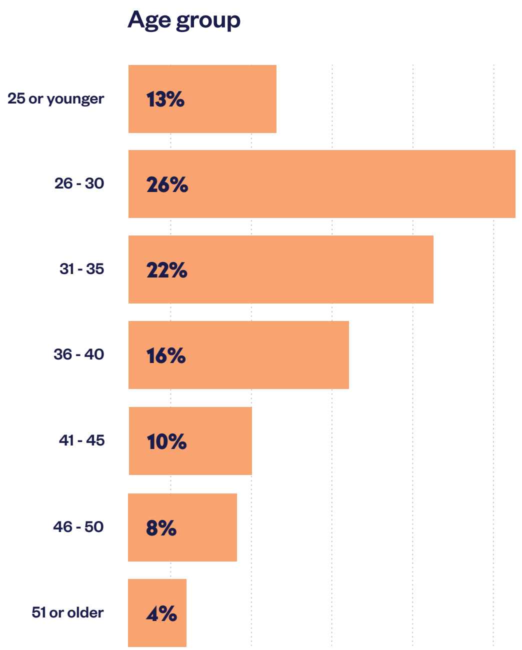
8. International Game Developers' Association (2021). Developer Satisfaction Survey 2021: Summary Report.
https://igda.org/resources-archive/developer-satisfaction-survey-summary-report-2021/

9. Film and TV Charity (2021). Mental health in the Film and TV industry after Covid.
https://filmtvcharity.org.uk/wp-content/uploads/2022/02/LookingGlassReport_2021_Final.pdf

2

Who works in games?

In the census, we asked people about their personal characteristics. In this section, we summarise the answers to those questions. In the subsequent sections, we explore how answers to other question vary based by personal characteristics stated here. Where we can, we'll make comparisons in order to give a sense of whether the numbers that we're reporting are high or low relative to other groups, such as the overall workforce. We'll also summarise where we've found that the makeup of the games industry was similar in 2021 to 2019, and where we've found differences.



2.1 Age

The first question we asked in this section was about how old people were, in five-year categories (such as "31–35"). As in the previous report, we've grouped together the categories where people were 25 or younger, and the categories where people were 51 or older, as some of the categories that we presented to people had few responses.

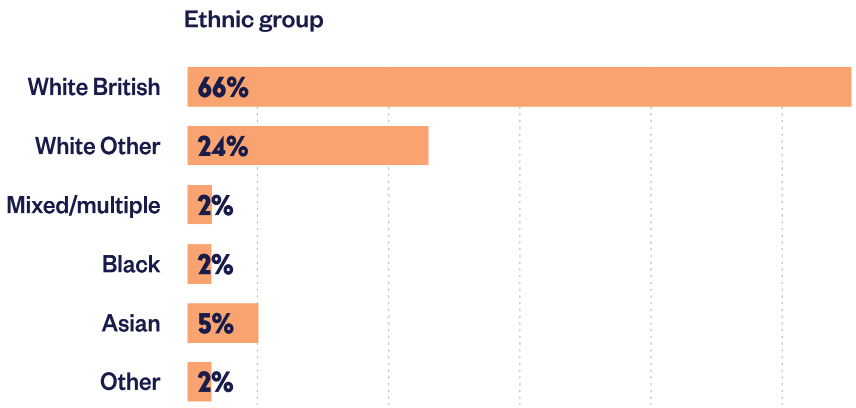
The UK games industry workforce has more younger people working in it than the overall UK workforce. The 13% of people working in games who are 25 or younger can be compared with a figure of 10% in the workforce, while the total of 61% of people working in games who are 35 or younger can be compared with 33% of people in the overall workforce. Similarly, we can compare the 4% of people working in games who are 51 or older with 32% of people in the overall workforce who are 50 or older[10]. While the UK games industry workforce is younger than the overall workforce, it has aged compared to the 2020 census. In this census's fieldwork, 61% of people responded that they were aged 35 or younger, a decrease from 66% two years earlier.

10. Office for National Statistics, 2022. A05 NSA: Employment, unemployment and economic inactivity by age group (not seasonally adjusted). https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/employmentunemploymentandeconomicinactivitybyagegroupnotseasonallyadjusteda05nsa

2.2 Ethnic group

As in our previous census, we asked people the question "What is your ethnic group?", and the same set of options as the Census in England.

Sixty-six percent of people working in the UK games industry selected the White British category, and a further 24% selected a different White category. 2% selected Mixed/multiple ethnic groups, 2% Black, 5% Asian, and 2% other ethnic groups.



Together, this means that the percentage of people working in games whose ethnicity is either Mixed/multiple, Black, Asian, or Other is lower than the equivalent figure in the working-age population, which is 14.4%. This is made up of 8.1% Asian, 3.4% Black, 1.8% Mixed/multiple, and 1.1% Other[11]. Within games, the percentage of people who selected a White ethnicity other than White British is significantly higher than in the working-age population: 24% compared with 6.4%.

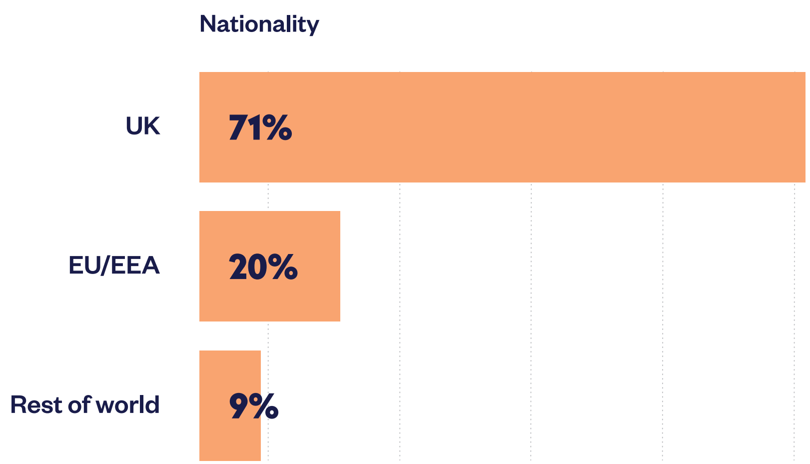
These figures about the ethnic groups of people working in games are very similar to the figures from two years earlier. In the remainder of this document, we group together people in the Mixed/multiple, Black, Asian, and Other groups into a single category: Black, Asian, and Minority Ethnic. This is for reasons of disclosure, because of small numbers of people within each of those categories. We are not using the term to describe any individuals.

The use of language around different ethnic groups, particularly when grouping different ethnic groups together, has been the subject of research both in Britain more generally[12] and within creative industries specifically[13], and we aim to follow the guidance from that research here.

11. Office for National Statistics, 2020: Working age population. Ethnicity facts and figures. https://www.ethnicity-facts-figures.service.gov.uk/uk-population-by-ethnicity/demographics/working-age-population/1.2

12. Katwala, S. (2021) Race and opportunity in Britain: Finding common ground. British Future. https://www.britishfuture.org/wp-content/uploads/2021/03/Race-and-opportunity-in-Britain.Final_.30.3.21.pdf

13. Sarita Malik, Marcus Ryder, Stevie Marsden, Robert Lawson, & Matt Gee, 2021. BAME: A report on the use of the term and responses to it. Terminology for the BBC and Creative Industries. Sir Lenny Henry Centre for Media Diversity. https://bcuassets.blob.core.windows.net/docs/csu2021325-lhc-report-bbchighres231121-1-132828299798280213.pdf



2.3 Nationality

We asked people "What is your nationality?".
We presented three options:

* UK/British national
* National of a European Union/European Economic Area country
* National of a country outside the European Union/ European Economic Area

These categories were not mutually exclusive, as some people may have held multiple nationalities.

This figure shows that 71% of people hold British nationality, 20% the nationality of a country in the EU/ EEA, and 9% the nationality of another country.
The 71% of those working in the UK games industry with British nationality compares with 89% in the working-age population[14], meaning that the UK games workforce is significantly more international. These figures are similar to the equivalent figures from two years earlier.

We also asked people in which country they had spent the majority of their childhood. Across the sample, 81 different countries were represented.

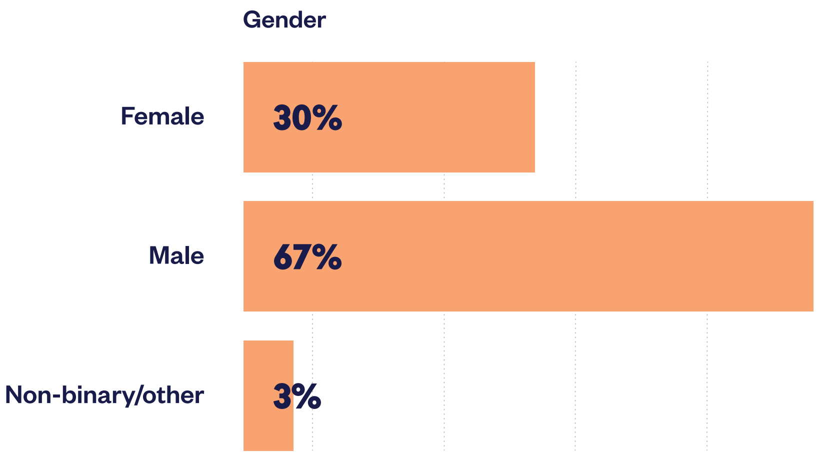
14. Office for National Statistics, 2021. Population of the UK by country of birth and nationality. https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/datasets/populationoftheunitedkingdombycountryofbirthandnationality

2.4 Gender

We asked people "What is your gender?", with four options:

- Male
- Female
- Non-binary
- Other (please specify)

Overall, 67% of people said they were male, 30% female, and 3% non-binary or other. This means that the games workforce has a significantly larger percentage of men and lower percentage of women than the overall workforce, where the percentage of women is around 48%. The percentage of people who selected "non-binary" or "other" is significantly larger than the estimated percentage in the adult population, which is around 0.4%[15]. However, estimates of the number of non-binary people in the adult population are unreliable, due to differences in how the information is collected.



The percentage of female respondents has increased from 28% to 30% since 2020 and of non-binary people from 2% to 3%. The percentage of male respondents has decreased from 70% to 67%. The gender profile of games workers varies with age. In age groups of 36 and older there is a higher proportion of men, while in the under 25 group we see the highest proportion of women and non-binary people. This finding remains unchanged from the 2020 report. Variation with seniority has also remained similar, with a higher percentage of men in the most senior roles. The percentage of women has increased slightly in both Senior and Lead roles, from 18% and 19% respectively to 22% but no similar increase is observed in Director and CEO roles.see changes in the percentages of women in Director and CEO roles.

Gender at birth

Following the question about people's genders, we asked a follow-up question: "Is this the same as the gender you were assigned at birth?". 4% of people answered no to this question, which leads us to conclude that 4% of people working in the UK games industry are trans. After asking "what is your gender?", we asked: "Is this the same as the gender you were assigned at birth?". 4% of people answered no to this question, which leads us to conclude that 4% of people working in the UK games industry are trans.

The majority of these respondents are non-binary: almost all of the 3% who responded that they were non-binary also said this was not the gender they were assigned at birth. This 4% is significantly higher than the estimated 1% of trans adults in the UK [16]. As with non-binary people, there is no robust data on how many trans people there are in the UK, so these comparisons should be treated cautiously. This figure is slightly higher than two years earlier, but as the difference is small, we should not interpret it as definitely representing a change in the percentage of trans people working in games. In our previous report, we fully detailed how gender varied by age and ethnic group. When we investigated this year, we found that the patterns were very similar, with consistent small differences in all categories rather than major changes in any one category.

15. All About Trans, 2014. Non-binary factsheet. https://www.allabouttrans.org.uk/wp-content/uploads/2014/05/non-binary-gender-factsheet.pdf

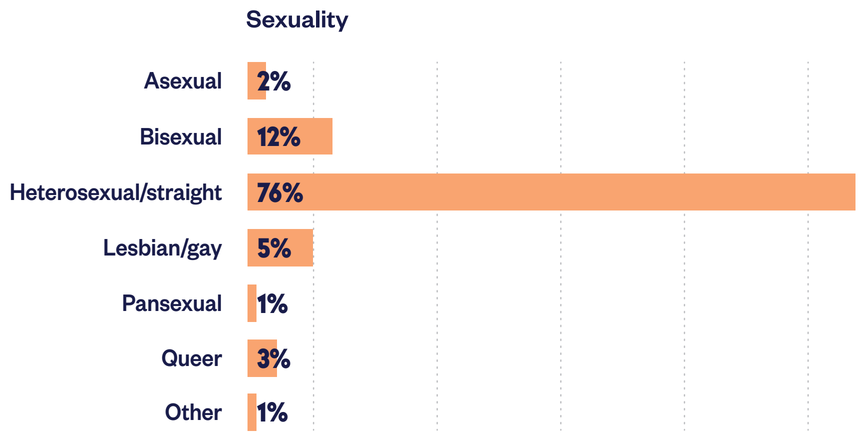
16. Government Equalities Office, 2018. Trans people in the UK. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/721642/GEO-LGBT-factsheet.pdf

2.5 Sexuality

In order to understand people's sexuality, we asked "Which of the following best describes how you think about yourself?". The options were:

- Asexual
- Bisexual
- Heterosexual/straight
- Lesbian/gay
- Queer
- Other (please specify)

While the "Other (please specify)" category was always presented at the end, the other categories were presented to people in a random order.



Seventy-six percent of the those who answered this question told us they were heterosexual/straight. Twelve percent said they were bisexual, 5% lesbian/gay, and 7% another option. Because most of the people who selected "Other" wrote in that they were pansexual, we've made those responses visible here.

This suggests that the games industry has a much larger percentage of people whose sexuality is anything other than straight than in the general population: the most recent estimate of the percentage of heterosexual/straight people in the adult population is 93.7%, compared with 76% of people working in games[17]. The largest difference is among bisexual people, who make up 12% of people working in games but 1.1% of the adult population. These differences can be partly explained by the fact that people working in games are, on average, younger than the adult population. Data from the Office for National Statistics[18] shows that younger people are more likely to state that their sexuality is anything other than heterosexual/straight than older people, and in particular much more likely to state that they are bisexual.

Similarly, games workers are more likely than the general population to live in London, where the percentage of people who state that their sexuality is anything other than heterosexual/straight is the highest of all UK regions[19]. These figures suggest that the percentage of people working in games who are heterosexual/straight has slightly decreased over the last two years, from 79% to 76%. In our previous report, we investigated the relationship between sexuality and gender, showing that men were more likely to state that they were heterosexual than women or non-binary people, although that percentage was still significantly lower than among the adult population.

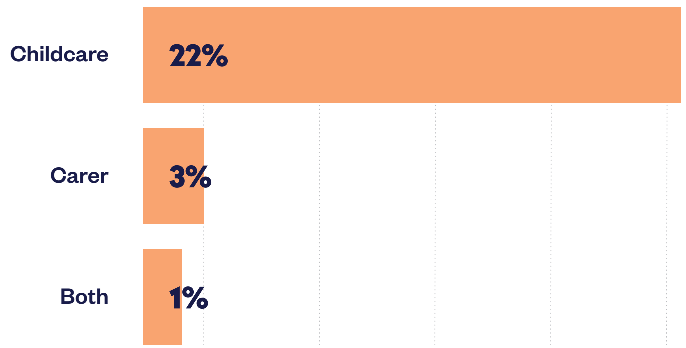
When we tested this relationship, we found that the patterns were almost identical. This suggests that the change in the percentage of people working in games with different sexualities is largely a consequence of the changing gender profile of people working in games.

17. Office for National Statistics, 2021. Sexual orientation, UK: 2017.
https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2019#uk-countries-and-english-regions

18. Office for National Statistics, 2021. Sexual orientation, UK: 2017.
https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2019#uk-countries-and-english-regions

19. Office for National Statistics, 2021. Sexual orientation, UK: 2017.
https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2019#uk-countries-and-english-regions

Caring responsibilities



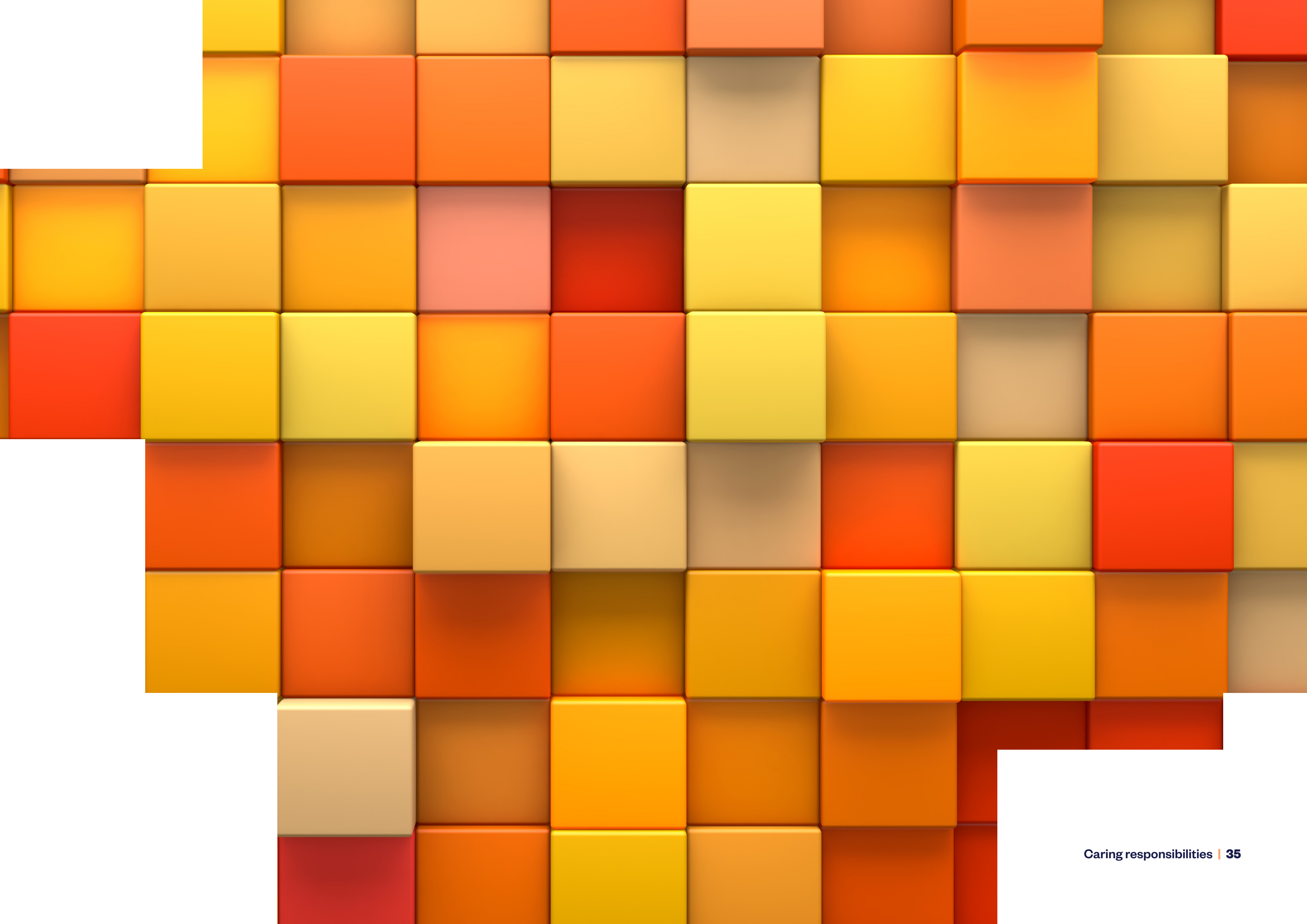
2.6 Caring responsibilities

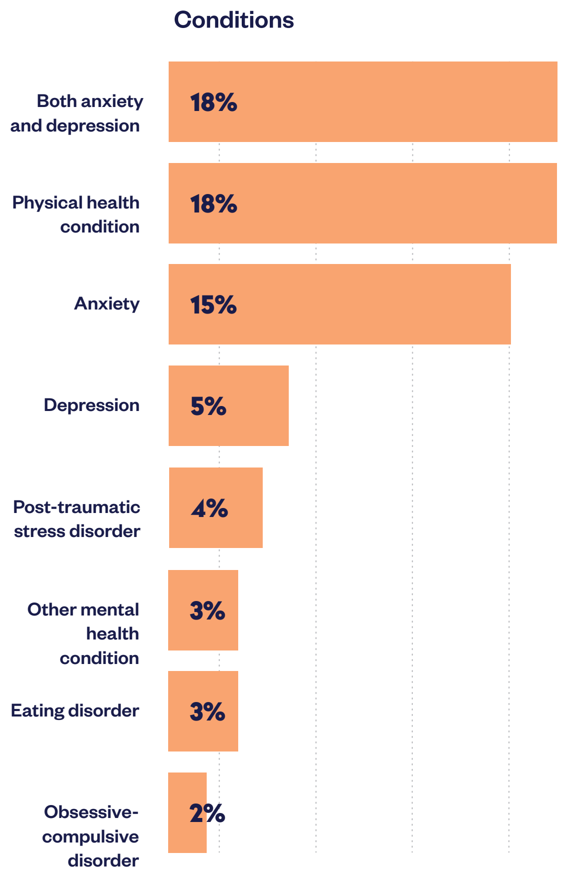
We asked people whether they had any caring responsibilities. The categories that we offered them were:

- Yes - I have childcare responsibilities
- Yes - I have carer responsibilities
- Yes - I have both childcare and carer responsiblities
- No

Overall, 26% of people had caring responsibilities of any kind, of which 22% were childcare responsibilities but not carer responsibilities. This is around the same as two years earlier.

As with the previous census, this compares with around 38% of people in the workforce overall, and around 37% of people working full-time, who have dependent children. This may be at least partly explained by the age profile of the games sector. In our previous report, we investigated the relationship between caring responsibilities, and gender, finding that much larger proportions of people working in games aged 36 or over had children than younger people. We also saw some gender differences in certain age groups. When we investigated whether this relationship persisted for this round of the census, we found that the patterns were the same.





2.7 Conditions

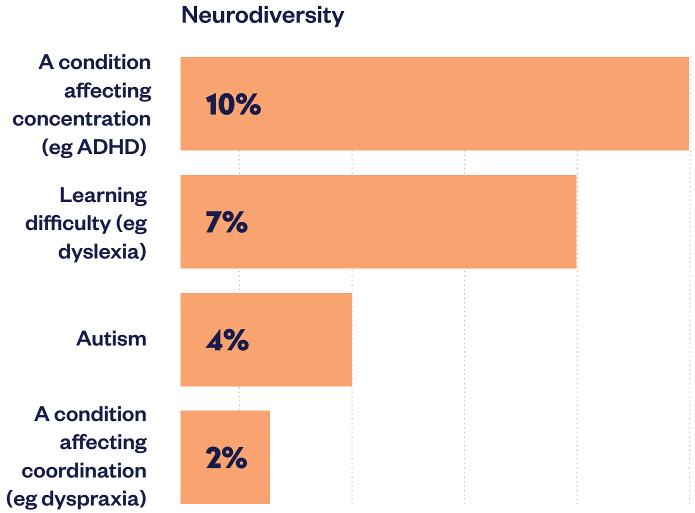
For this census, we changed the way that we asked about people's long-term conditions. This was in response to feedback that we received about the question phrasing in our previous census

We asked about conditions in three groups: in the first group we asked about neurodevelopmental conditions, in the second group we asked about mental health conditions, and in the third group we asked physical health conditions. The way that we asked about physical health conditions changed. In our previous data collection, we presented people with a large number of options. This time, we presented a smaller number of categories each of which captured a number of different conditions, while also offering an "Other" option.

In all three groups, we asked "Do you have any of the following conditions? These might be conditions for which you've received a formal diagnosis, conditions where you're in the diagnostic process, or conditions you're confident you have". In these results, we've grouped together all the different long-term physical conditions together, as the numbers of responses in each individual category were small. We've also distinguished between people who report both anxiety and depression, and people who report one or the other.

The first figure shows the percentage of people reporting physical or mental health conditions. Compared with the previous census, the percentage of people reporting a physical health condition has decreased from 21% to 18%, which is still higher than the equivalent figure of 11% in the working-age population[20], although we should note that the question phrasing makes comparison difficult.

20. Life Opportunities Survey wave one results: Office for Disability Issues
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/180891/los_wave_one_200911.pdf



It is hard to provide robust estimates of the numbers of people with eating disorders, best estimates suggest the rates among games workers are similar to those in the general population.[23]

Overall, 18% of people reported at least one of the four categories that we presented. This can be compared with around 15% of people in the adult population.[24] Some of these figures are significantly different from two years ago. The largest increase is among people who report that they have a condition such as ADHD, which is an increase from 3% to 10%; there is also an increase among people who report that they are autistic, with a change from 2% to 4%. These figures are larger than in the adult population, where the estimate is that 4% of people have ADHD and 1-2% of are autistic.

Thirty-eight percent of people reported either anxiety or depression (or both), compared with a national average of 17%[21]. The largest group is people reporting both, at 18%, followed by those reporting anxiety (15%) and those reporting depression (5%).

This overall 38% is a significant increase on the previous census, where the figure was 31%. However, we should note that these estimates of the rates of anxiety and depression were generated before the pandemic.

While findings on the exact effects of the pandemic on adult mental health are mixed, one consistent findng is that young adults experienced higher rates of depression and anxiety[22], which may explain the change.

Rates of reported PTSD, at 4%, are similar to those in the general population, but are an increase among games workers over two years. Rates of obsessive-compulsive disorder are also similar to the general population.

However, we should draw attention to the change in question phrasing here. Part of our motivation for the change was that some people told us that they were confident that they had certain neurodivergent conditions, but did not have a diagnosis, and so did not feel comfortable ticking the relevant box. In changing the question phrasing, we've aimed to acknowledge people's own expertise. This may explain why some of these differences are significant.

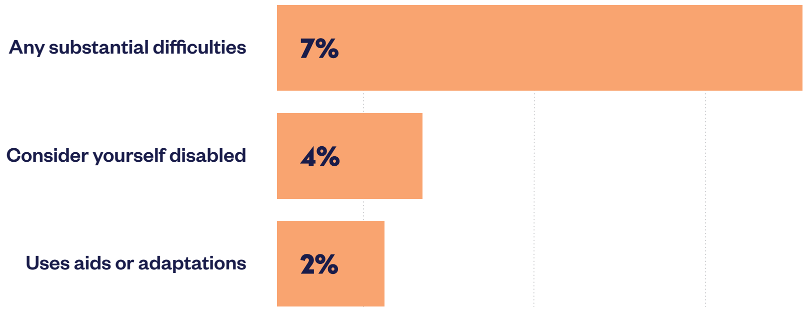
21. Mental health facts and statistics: Mind. https://www.mind.org.uk/information-support/types-of-mental-health-problems/statistics-and-facts-about-mental-health/how-common-are-mental-health-problems/

22. House of Commons Library, 2021. Mental health impacts of the Covid-19 pandemic. https://researchbriefings.files.parliament.uk/documents/POST-PN-0648/POST-PN-0648.pdf

23. Beat Eating Disorders. How many people have an eating disorder in the UK? https://www.beateatingdisorders.org.uk/get-information-and-support/about-eating-disorders/how-many-people-eating-disorder-uk/
ACAS, 2016. Neurodiversity in the workplace. https://webarchive.nationalarchives.gov.uk/ukgwa/20210104113255/https://archive.acas.org.uk/index.aspx?articleid=6676

24. ACAS, 2016. Neurodiversity in the workplace. https://webarchive.nationalarchives.gov.uk/ukgwa/20210104113255/https://archive.acas.org.uk/index.aspx?articleid=6676

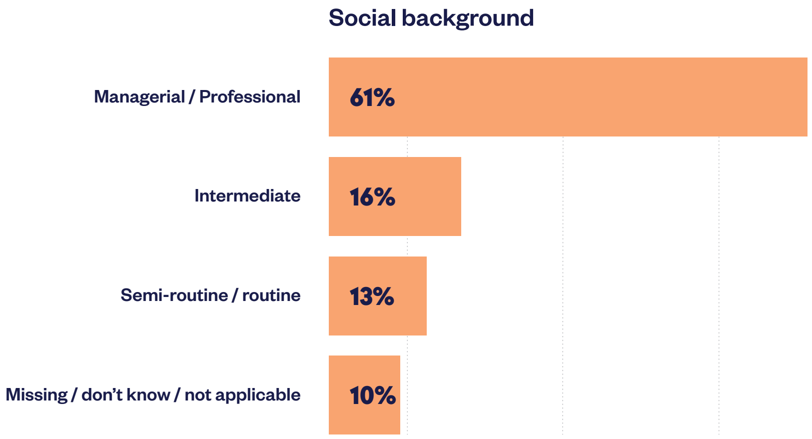
Difficulties, aids and adaptations, and disability



2.8 Difficulties, aids and adaptations, and disability

We introduced some additional questions in this portion of the survey. We first asked people whether they had any substantial difficulties in any areas of their life. Examples of these areas include mobility, sight, and communication. We then asked people whether they used any aids or adaptations for any areas of their life, such as mobility, hearing, and vision. Finally, we asked people whether they consider themselves disabled.

We've grouped these categories together here, as the numbers of people selecting any individual category are small. Overall, 7% of people reported having any substantial difficulties in their lives, 4% consider themselves disabled, and 2% reported using any aids or adaptations..



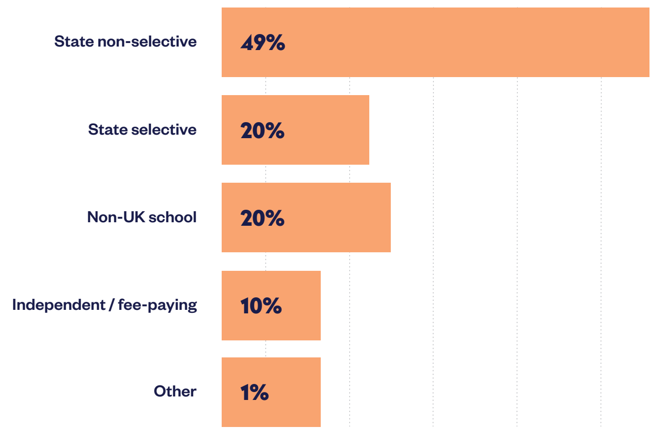
2.9 Social background

We asked a few different questions about people's experiences when they were growing up. The primary measure that we use to understand people's social backgrounds is the occupation of the main income earner in their households when they were about 14. This measure is recommended by the Social Mobility Commission and is used in several other industries and organisations. While we presented people with a wide range of different categories, we've grouped them into these three: "Managerial/professional", "Intermediate", and "Semi-routine/routine". We've also retained a broad category for people who stated that the question didn't apply to them, or who didn't know. Sixty-two percent of people reported that they lived in a household where the main income earner worked in a managerial or professional job. This is a significantly larger proportion than in the general population, where the benchmark is 37%.[25]

If we remove the 10% of people who we are not able to classify, this figure rises to 68%. These figures are similar to the figures from two years earlier. As in 2020, people working as directors or CEOs in larger organisations are the most likely to be from managerial and professional backgrounds, and people in junior roles the least likely.

25. Social Mobility Commission, 2021. Cross-industry toolkit for employers. https://socialmobilityworks.org/toolkit/measurement/

School type



2.10 School type

In addition to asking people about the main income earner in their household, we also asked about the kind of school that they'd spent the most time attending between the ages of 11 and 16.

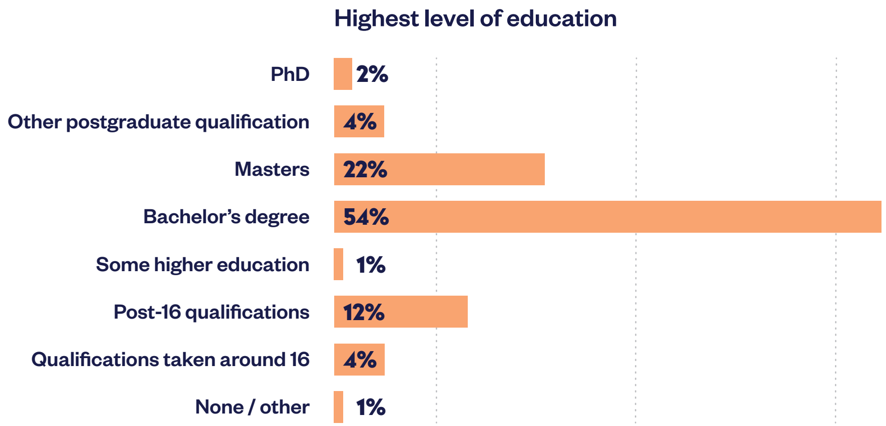
These figures are largely similar to two years earlier, with percentages of people who attended fee-paying schools highest among those in the most senior roles.

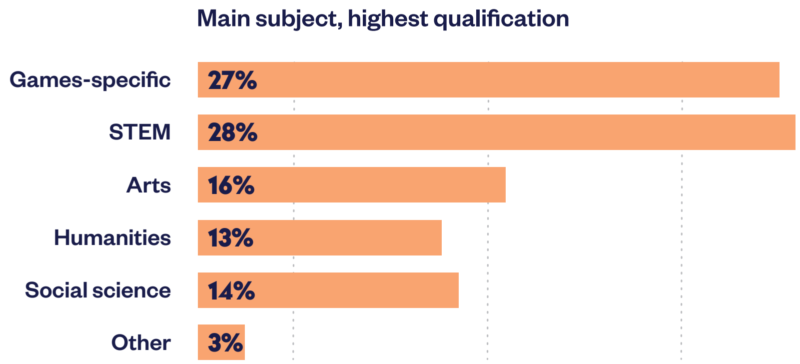
While there has been a slight decrease in the percentage of people who attended fee-paying schools, there has been a corresponding increase in the percentage of people who attended selective state schools, such as grammar schools. Both of these figures are much larger than in the overall adult population. Around 7% of adults attended fee-paying schools.[26]

There has not been a period where more than 5% of schoolchildren have attended grammar schools since the 1970s,[27] although there is more to the "State selective" category than just grammar schools.

26. Social Mobility Commission, 2021. Cross-industry toolkit for employers. https://socialmobilityworks.org/toolkit/measurement/

27. House of Commons Library, 2020. Briefing paper 1398: Grammar school statistics. https://researchbriefings.files.parliament.uk/documents/SN01398/SN01398.pdf





2.11 Education

Our final questions in the section about people's backgrounds also related to their education. We asked both about their highest achieved qualification, and its main subject. Overall, 82% of people working in games have at least an undergraduate degree; 28% have a postgraduate qualification. These proportions are much higher than in the overall working population and are very similar to the proportions from two years earlier.

Fifty-five percent of people working in games studied either a STEM or games-specific subject for their highest qualification, while the remaining 45% is fairly evenly split between arts, humanities, and social sciences, with a small proportion who studied a subject or subjects that do not fit into this framework. Compared with 2020, this represents a slight drop in the fraction of people who studied a STEM subject, from 31% to 28%.

In the previous report, we went into more detail about education, investigating how qualifications and subjects varied by the kind of work that people did. The patterns that we illustrated in our report published in 2020 have persisted in 2022.

3

Attitudes

The major change to the census as delivered in 2021 compared with 2019 was the introduction of a number of questions around people's attitudes. This section was explicitly optional: we asked people "Would you like to answer the questions in the second part of the survey, or finish the survey here?". Ninety percent of people opted to answer the questions.

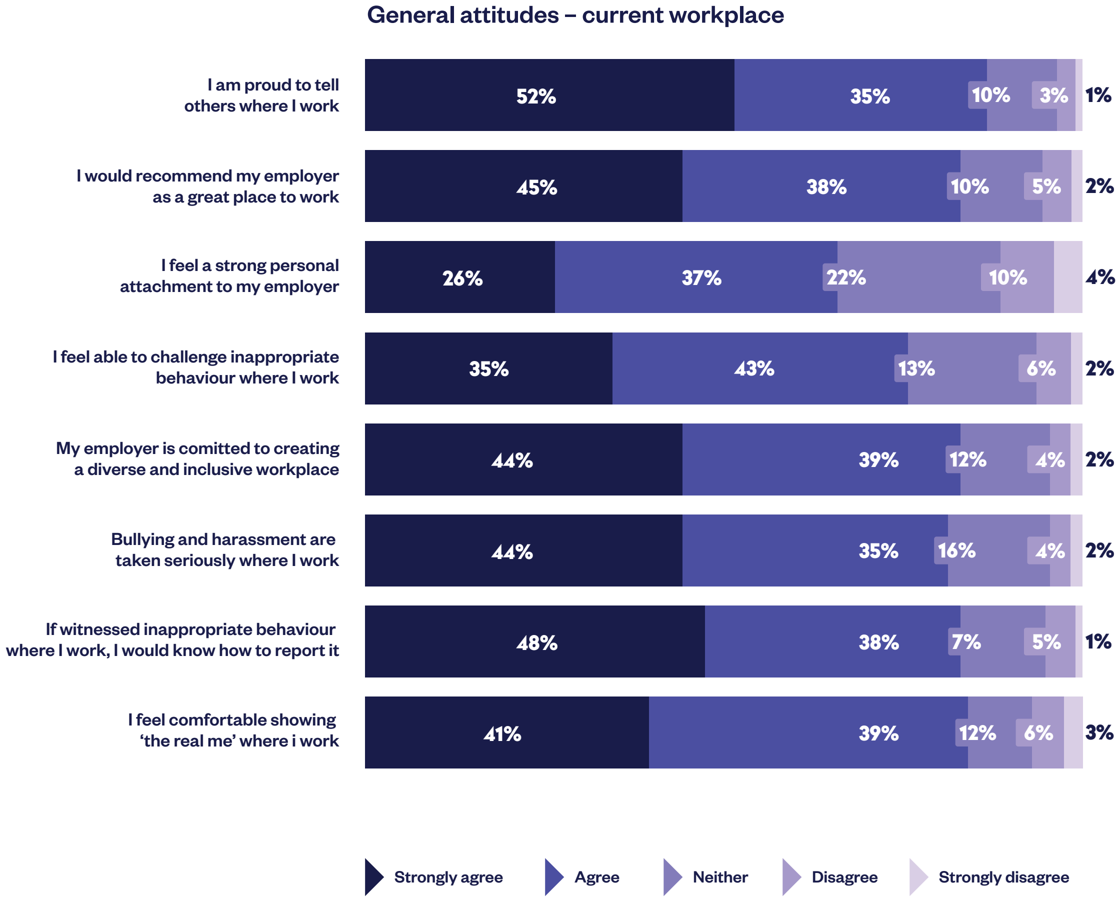
The questions about attitudes covered three broad areas. We first asked about people's general feelings about the sector, the second set of questions asked about how long people wanted to remain in the industry, and finally, we asked about people's attitudes towards raising concerns and inappropriate behaviour. In each set of questions, we asked separately about respondents' attitudes towards their current place of work, and then about the UK games industry more generally.

The questions comprised a series of statements, and we asked participants to tell us how strongly they agreed or disagreed with each. In each case, they saw the questions in the same order. In 2020, the Civil Service People Survey was distributed to 485,903 people and had a response rate of 66%.[28] It is the largest survey of employee attitudes that we are aware of. Several of the questions in our census were derived from it. As these questions are asked throughout the Civil Service, this allows us to make comparisons with large employers, although we cannot draw conclusions about how the attitudes of people working in games differ from the national workforce more broadly. Several other questions were derived from a specialist survey, also run through the Civil Service, about bullying, harassment, and misconduct[29]. This survey was not designed to be representative of the entire Civil Service, and so it is inappropriate to draw comparisons.

28. Civil Service People Survey 2020: Technical Summary. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/977279/Civil_Service_People_Survey_2020-_Technical_Guide.pdf

29. Cabinet Office, 2018. Bullying, harassment and misconduct survey. https://assets.publishing.service.gov.uk/government/uploads/system/up-loads/attachment_data/file/741220/2018-07-20_Sue_Owen_Review_-_Annex_Survey.pdf


nDreams
2021
Katie McFetridge

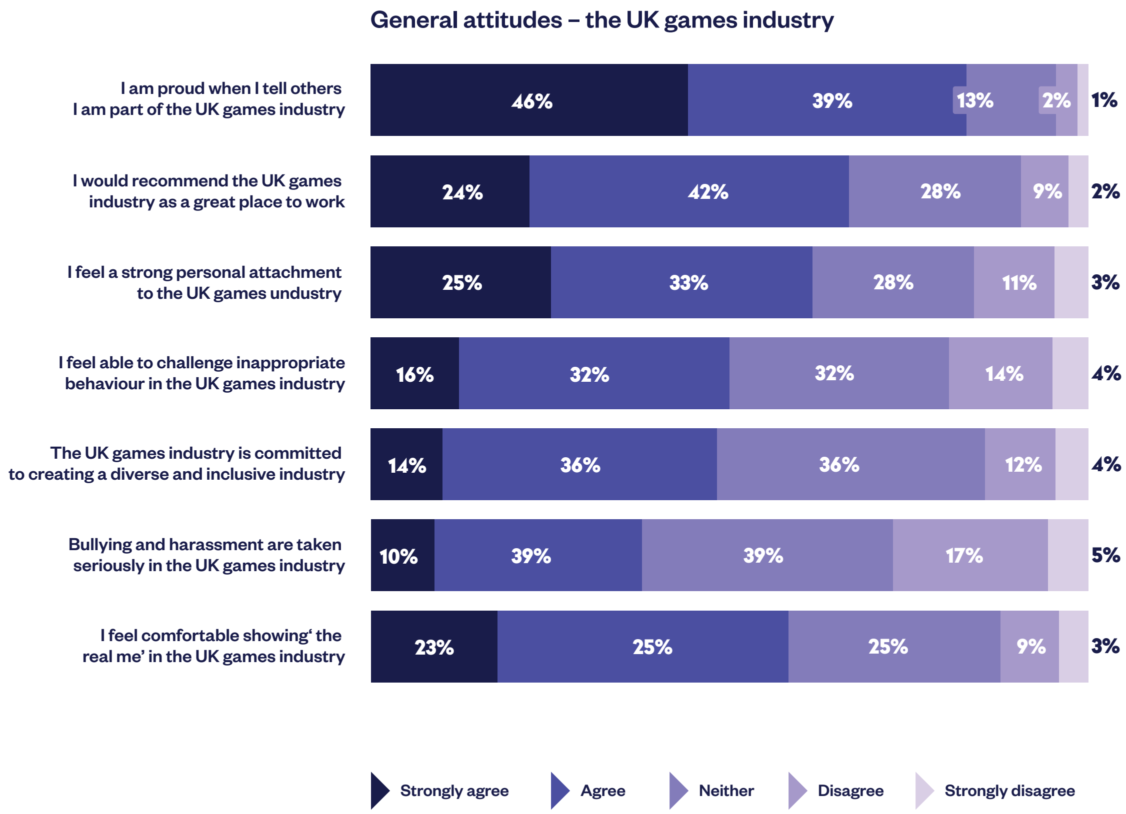


3.1 General attitudes: current workplace

Responses to the first set of questions about individual workplaces are shown in this figure. A majority of people either agreed or strongly agreed with all the statements. Attitudes were most positive about the first statement, "I am proud to tell others where I work", where 52% of respondents strongly agreed, and just 4% either disagreed or strongly disagreed. The statement where attitudes were least positive was "I feel a strong personal attachment to my employer", where 22% were neutral and 10% disagreed. We can compare the games industry's responses to the first five statements above with equivalent responses in the Civil Service People Survey. In each case, a higher percentage of games workers agreed or strongly agreed with the statement than Civil Service workers.

On the statement "I am proud to tell others where I work", 87% of games workers agreed while 70% of Civil Service workers did. On "I would recommend my employer as a great place to work", 83% of games workers agreed compared to 66% of Civil Service workers.

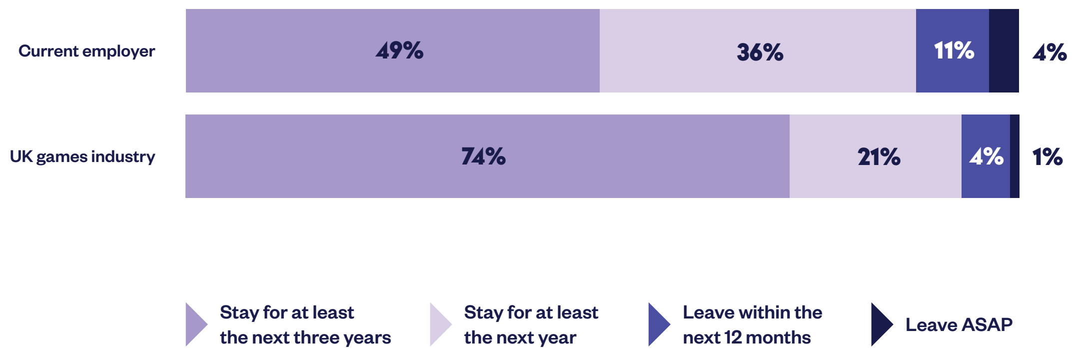
3.2 General attitudes, the UK games industry



Having first presented participants with a series of statements about their place of work, we then presented them with statements about the UK games industry more broadly, Other than changing "your workplace" to "the UK games industry", the statements were identical.

A majority of people either agreed or strongly agreed with most of these statements, which suggests broadly positive attitudes towards the UK games industry. However, responses to these questions suggest that attitudes towards the UK games industry in general are less positive than attitudes to people's specific workplaces within the games industry. The smallest differences relate to whether people are proud to tell others that they are part of the games industry or their workplace, and whether they feel strong personal attachments to the games industry and to their workplace. In these cases, the percentages of people agreeing or strongly agreeing are almost identical. The largest difference relates to bullying and harassment being taken seriously: 79% of people agreed that bullying and harassment are taken seriously at their workplace, but only 38% of people agreed that bullying and harassment are taken seriously in the UK games industry. However, it is notable that the most common category selected in response to this statement was "Neither" at 39%, with a further 22% of people disagreeing with the statement that bullying and harassment are taken seriously in the UK games industry.

Attitudes towards raising concerns
and inappropriate behaviour



3.3 Longer-term goals

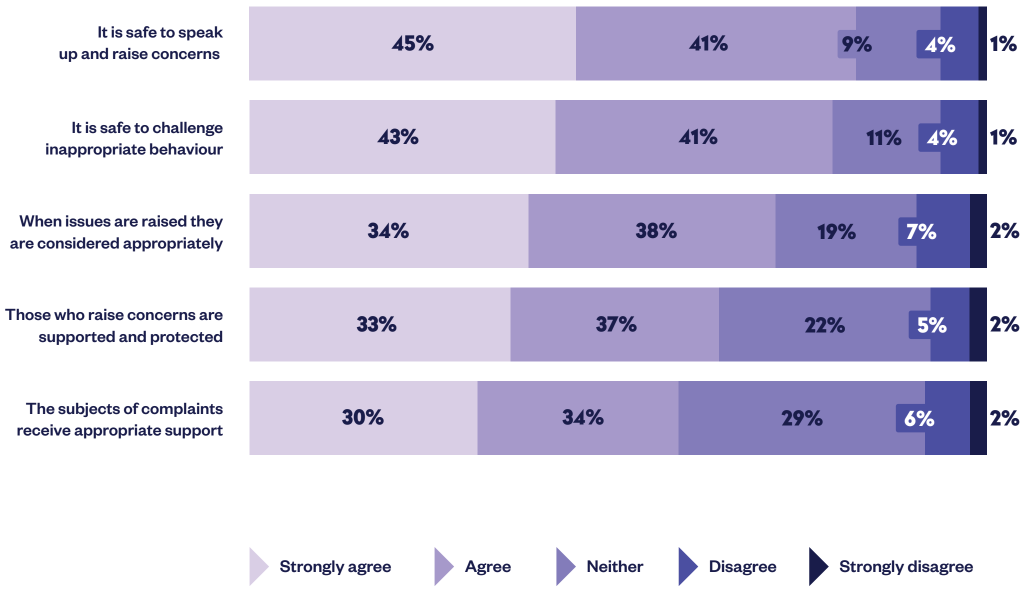
In the next set of questions, we asked people for how long they wanted to work at their current workplace and in the games industry. The options were:

- I want to leave as soon as possible
- I want to leave within the next 12 months
- I want to stay for at least the next year
- I want to stay for at least the next three years

Ninety-five percent of people told us they wanted to continue working in the games industry for at least a year, and 74% for at least three years. The figures are smaller for people's current employers, at 85% and 49% respectively, but these figures are still high.

By comparison, 6% of respondents in the Civil Service People Survey reported that they wanted to leave their current department as soon as possible and 12% within the next 12 months; 33% wanted to stay for at least a year, and 48% for at least three years.

Attitudes towards raising concerns and inappropriate behaviour – current workplace



3.4 Attitudes: raising concerns and inappropriate behaviour

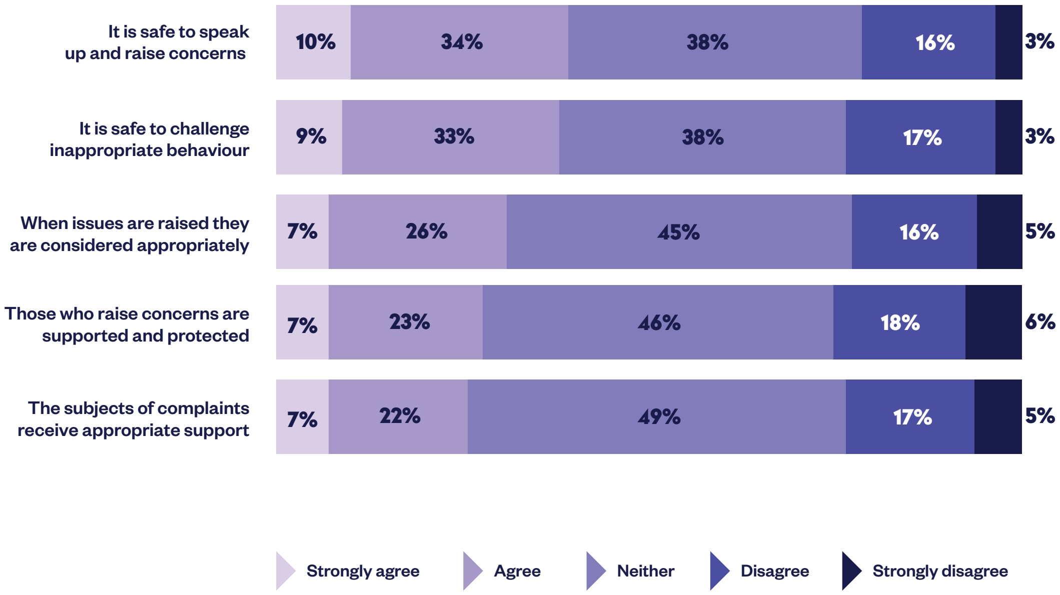
The first set of statements about raising concerns and inappropriate behaviour relates to people's current workplaces. All five statements had majorities of people either agreeing or strongly agreeing, and for most these majorities were very large. The statement that had the fewest people agreeing or strongly agreeing, "The subjects of complaints receive appropriate support", had 64% agreeing or strongly agreeing.

The second figure, which shows responses to the same set of statements but in relation to the UK games industry, shows much smaller percentages either agreeing or strongly agreeing: no statements have more than 50% of people agreeing.

The category selected by the largest percentage of people for every statement is “Neither”. The use of the “Neither” category can reflect a number of different underlying motivations, including being uncertain, having mixed feelings, or having no feelings at all.[30]

However, in this case it is conspicuous that the use of the category is much greater than for our other batches of questions. The use of the “Disagree” category is also much larger throughout, exceeding its use for almost every statement in the other batches.

Attitudes towards raising concerns and inappropriate behaviour – the UK games industry



30. Truebner, M. (2021) ‘The Dynamics of “Neither Agree Nor Disagree” Answers in Attitudinal Questions’, Journal of survey statistics and methodology, 9(1), pp. 51–72. doi:10.1093/jssam/smz029

4

Exploring differences in attitudes

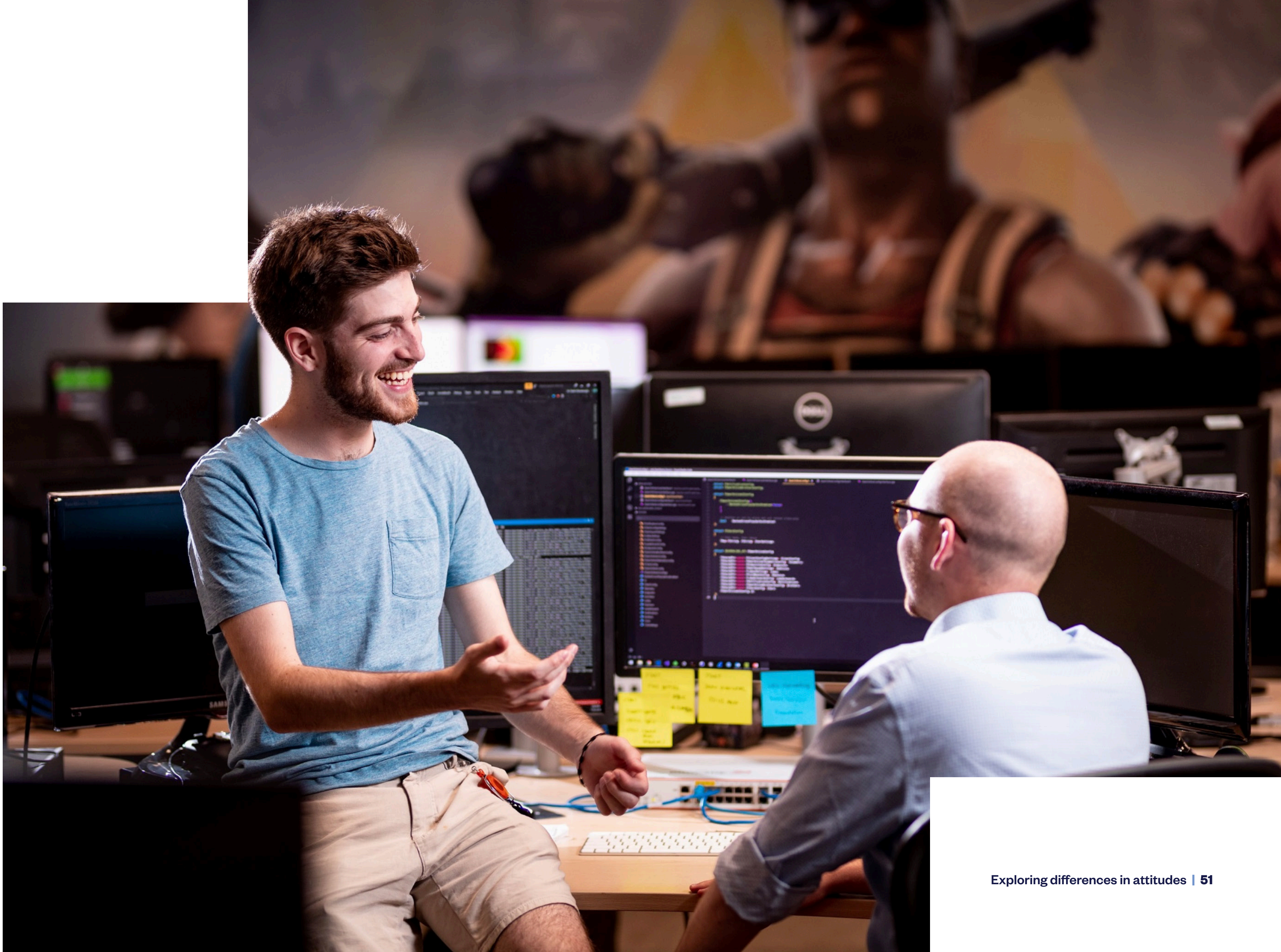
In the previous section, we explained the overall patterns of responses to several questions about attitudes. In this section, we'll explore where there are differences in attitudes. This involves investigating disparities between people whose work is different, such as people who are in more junior or senior roles at their workplaces. It also involves investigating differences between people who have different characteristics, such as background.

We asked a number of different questions about attitudes, which is why we've grouped them into categories in this section for convenience. We combined the questions about (a) general attitudes to people's workplaces, (b) general attitudes to the UK games industry, (c) attitudes to inappropriate behaviour in people's workplaces, and (d) attitudes to inappropriate behaviour in the UK games industry. We used principal component analysis to identify where patterns of responses tended to fit together, to assess whether these groupings made sense. There's more detail about this analysis in the methodological appendix. We've generated scales for each person within each of these four categories of questions. If someone had responded "Strongly agree" to each statement within a category, they'd be classified as 100%.

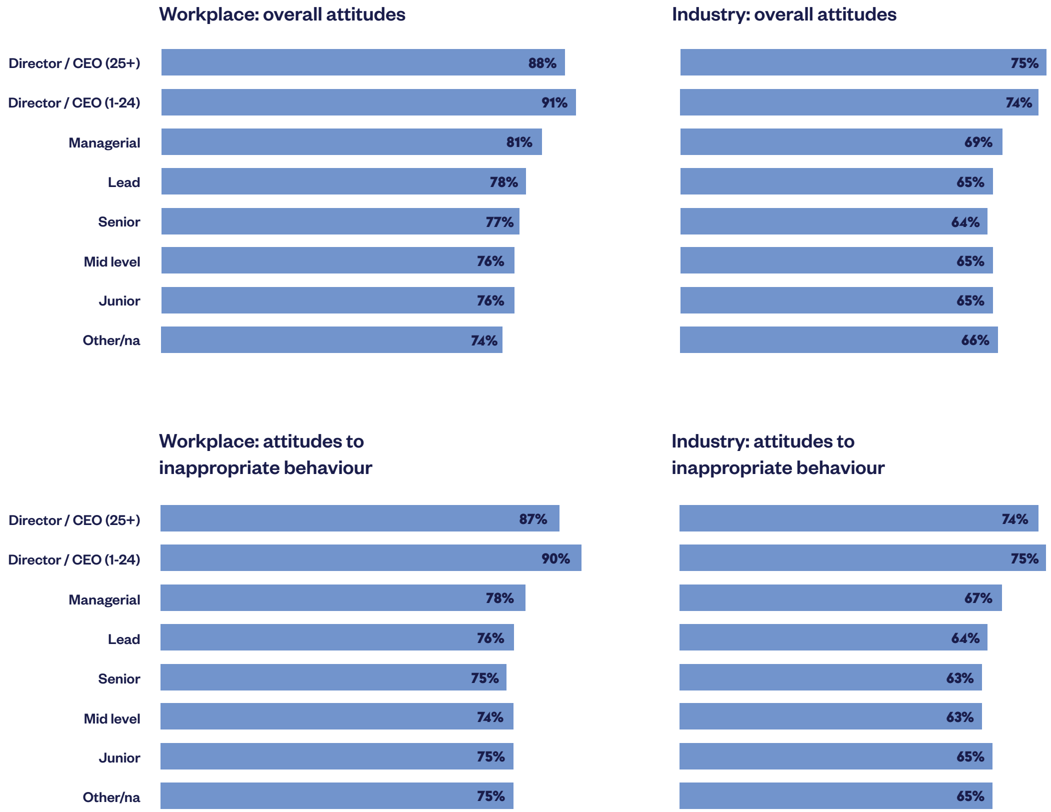
Someone who responded "Strongly agree" to half the questions in a category and "Strongly disagree" to the other half, would be classified as 50%, as would someone who responded "Neither" to all questions in the category. In our analysis, we looked at differences according to all the questions that we asked about. This section presents the results where there were noticeable differences in attitudes between groups of people.

This means that, where we haven't shown how attitudes vary between groups, the differences aren't large. Some of the areas where we did not find differences between groups may be unexpected, and so we draw attention to these here. People who worked different numbers of hours – whether measured by the number of hours they usually work, or the maximum number of hours they had worked in the last 12 months – had broadly similar attitudes to one another.

While people working fewer hours had marginally more positive attitudes, these differences were very small. We also did not see differences in attitudes between different ethnic groups or different nationalities, between people with or without caring responsibilities, or between people from different social backgrounds.



Attitudes and seniority



4.1 Attitudes and seniority

This figure shows how attitudes towards people's workplaces and the broader industry vary by people's seniority within the organisation where they work.

In general terms, people in directorial and C-level roles have the most positive attitudes to their workplaces and towards the industry.

In other roles, differences are generally small: people in managerial roles have slightly more positive attitudes than other groups. This is the case both for attitudes towards workplaces and the industry more broadly, and when comparing overall attitudes with attitudes to inappropriate behaviour.

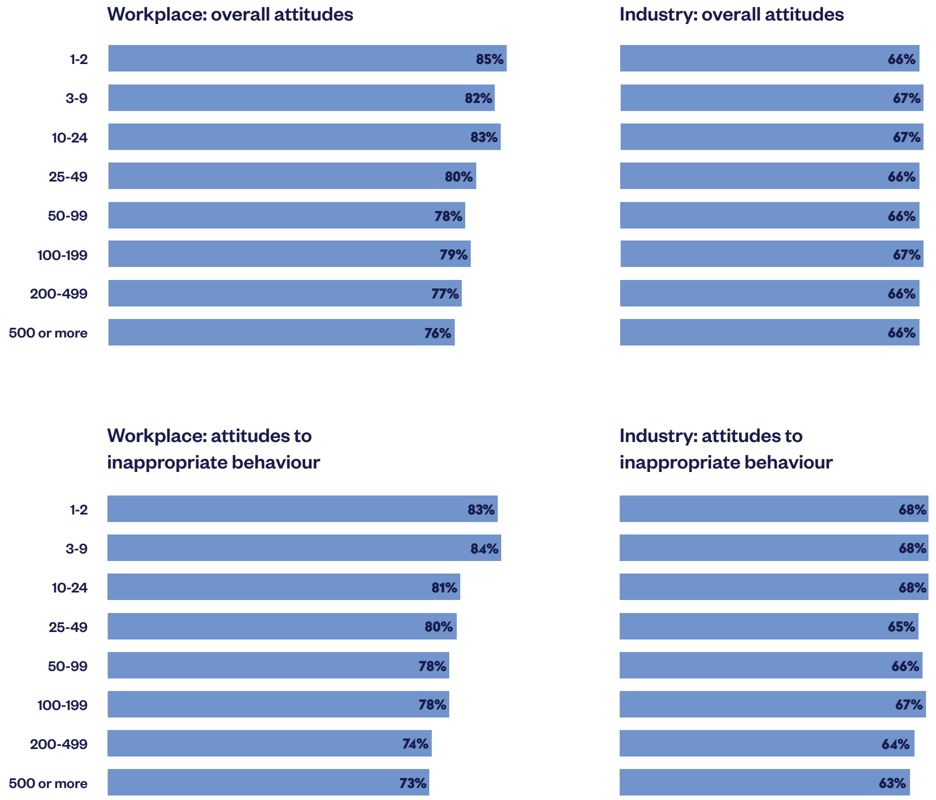
4.2 Attitudes and organisation size

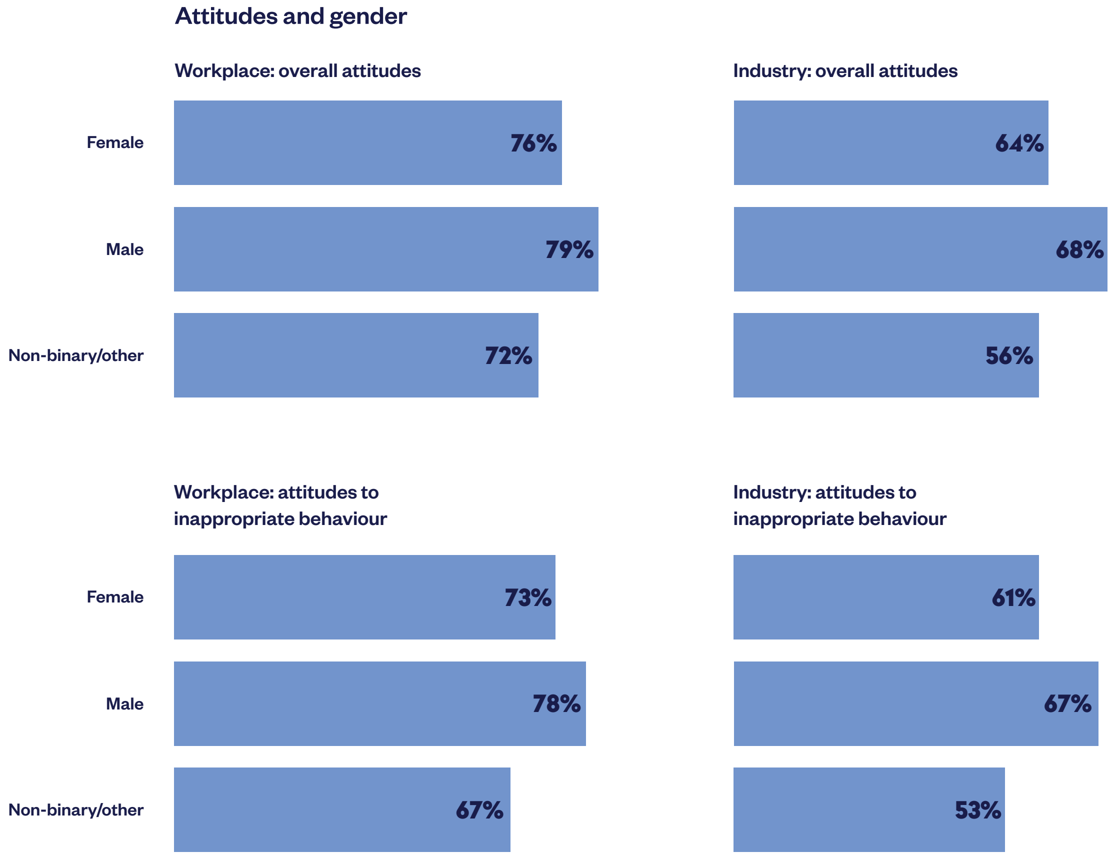
While attitudes towards the industry are similar regardless of the size of organisation someone works in, there are pronounced differences in attitudes towards people's own workplaces. Respondents working in smaller organisations have more positive attitudes towards their workplaces than larger ones.

For example, people working in organisations of 10-24 people have average attitudes scores of 83%, compared with 76% for people in organisations employing 500 or more people. The differences are similar for overall attitudes and attitudes towards inappropriate behaviour.

In this figure, we have omitted people who selected "This question does not apply to me" when we asked about the size of their organisation, as most people who selected this option skipped the questions about their workplaces.

Attitudes and organisation size





4.3 Attitudes and gender

In all four areas, men have the most positive attitudes, followed by women, while non-binary people have the least positive attitudes. These differences are more pronounced for questions that relate to the industry, rather than people's individual workplaces.

The differences between men and women are the reverse of the equivalent figures for the Civil Service, where women's scores on "Engagement and fair treatment" and "Engagement" are higher than men's. Scores on "Discrimination" are similar for men and women. However, the finding that non-binary people's attitudes are the least positive – the Civil Service People Survey uses the category "I identify in another way" – is consistent with the Civil Service's findings. [31]

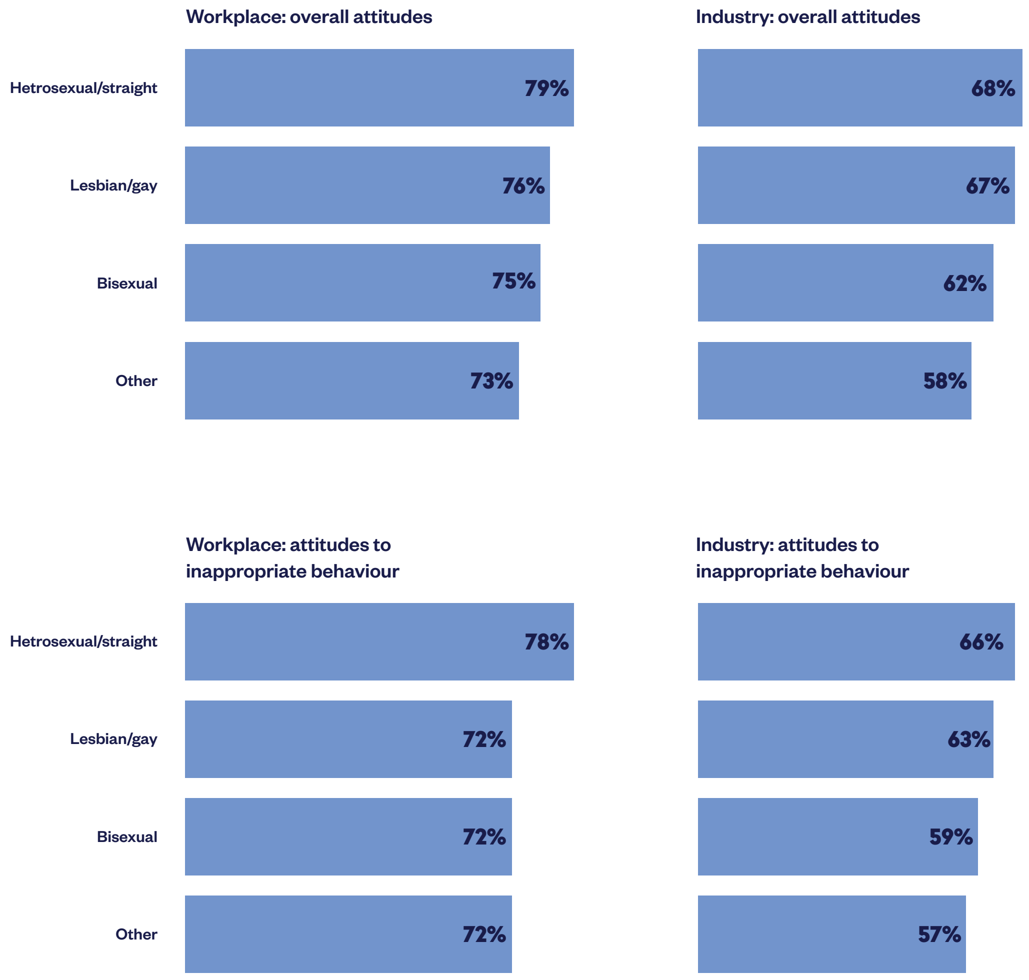
31. Civil Service Diversity and Inclusion Dashboard.
https://public.tableau.com/app/profile/cabinet.office.diversity.and.inclusion/viz/CivilServiceDiversityandInclusiondashboard/Introduction

4.4 Sexuality

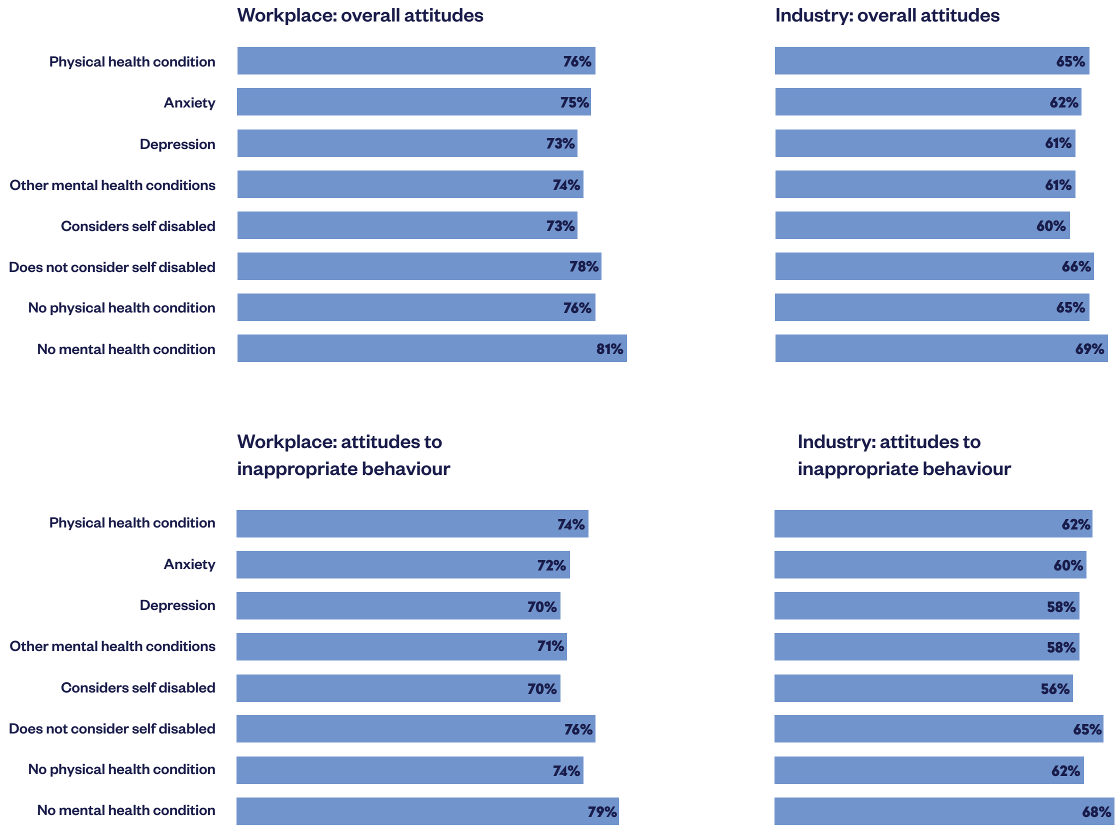
There are some differences in the attitudes of people with different sexualities. Differences are larger in attitudes towards the overall industry: people who selected heterosexual/straight are the most positive in both areas, although people who selected lesbian/gay are only one percentage point lower in overall attitudes towards the industry. People who selected heterosexual/straight were also the most positive about how their workplace handled inappropriate behaviour, at 78%, with all other groups equal at 72%.

These figures can also be compared with the equivalent figures from the Civil Service People Survey. These found that there were no differences between people classified as “Heterosexual” and people classified as "Lesbian, Gay, Bisexual and Other (LGBO)" on “Engagement” and “Inclusion and fair treatment”, but that people classified as “LGBO” had less positive scores on “Bullying and harassment” and “Discrimination”.

Attitudes and sexuality



Attitudes – conditions and disability



4.5 Conditions and disability

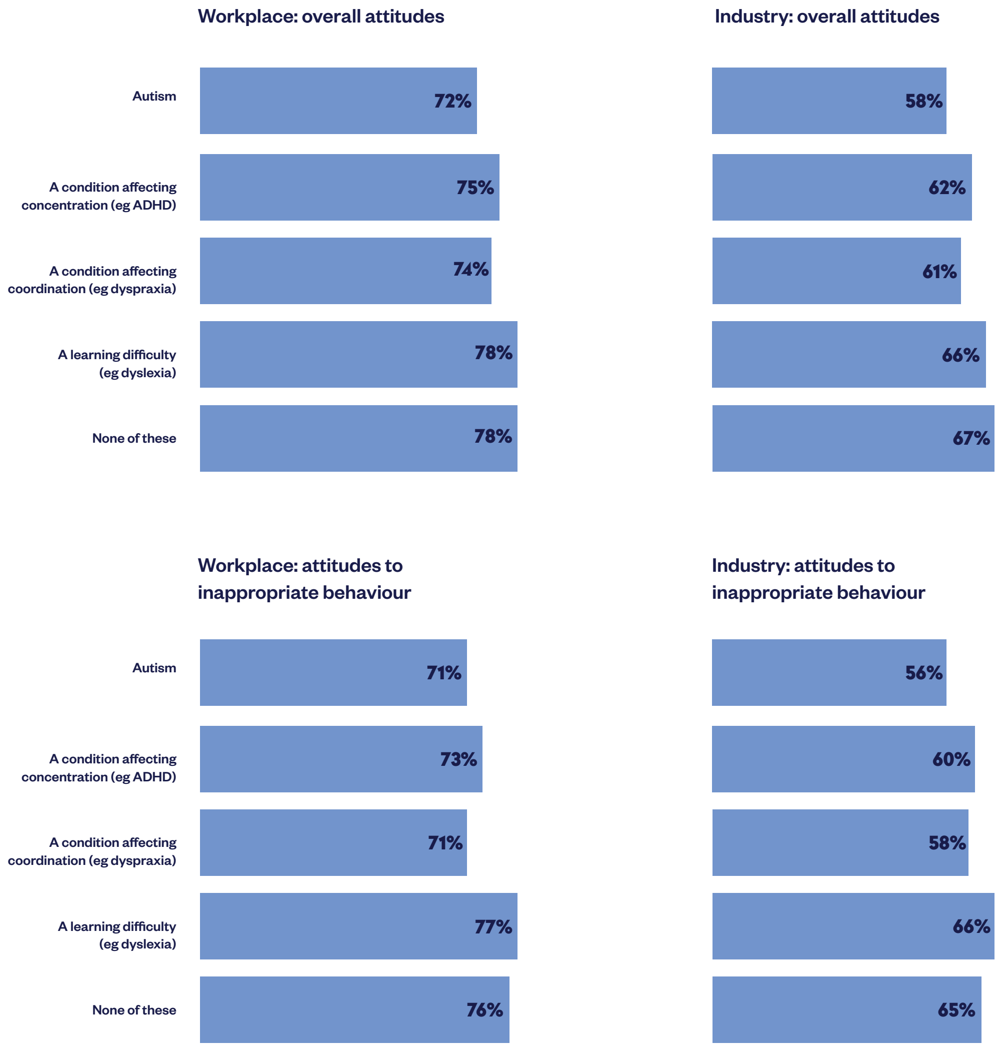
Here, we've grouped all physical health conditions together, and done the same with mental health conditions other than anxiety and depression. People who reported physical health conditions have identical scores on all four areas to people who didn't report physical health conditions.

There are differences between people who reported mental health conditions and those who didn't. In all four areas, people reporting anxiety, depression, and other mental health conditions have similar scores to each other, while people who didn't report any of these have higher scores. The differences are largest in relation to attitudes towards inappropriate behaviour in the industry. People who consider themselves disabled have less positive attitudes than people who don't consider themselves disabled; these differences are again more pronounced in relation to the games industry than in relation to their current workplace.

These figures are consistent with the findings in the Civil Service People Survey, where disabled people have less positive scores on all four of the composite areas: bullying and harassment, discrimination, engagement, and inclusion and fair treatment.

When we compare people with different neurodevelopmental conditions, there are some differences, which are more pronounced in attitudes to the broader games industry than to specific workplaces. People who report that they are autistic have the least positive overall attitudes towards both the industry in general, and in terms of how inappropriate behaviour is handled in the industry.

Attitudes and neurodiversity



5

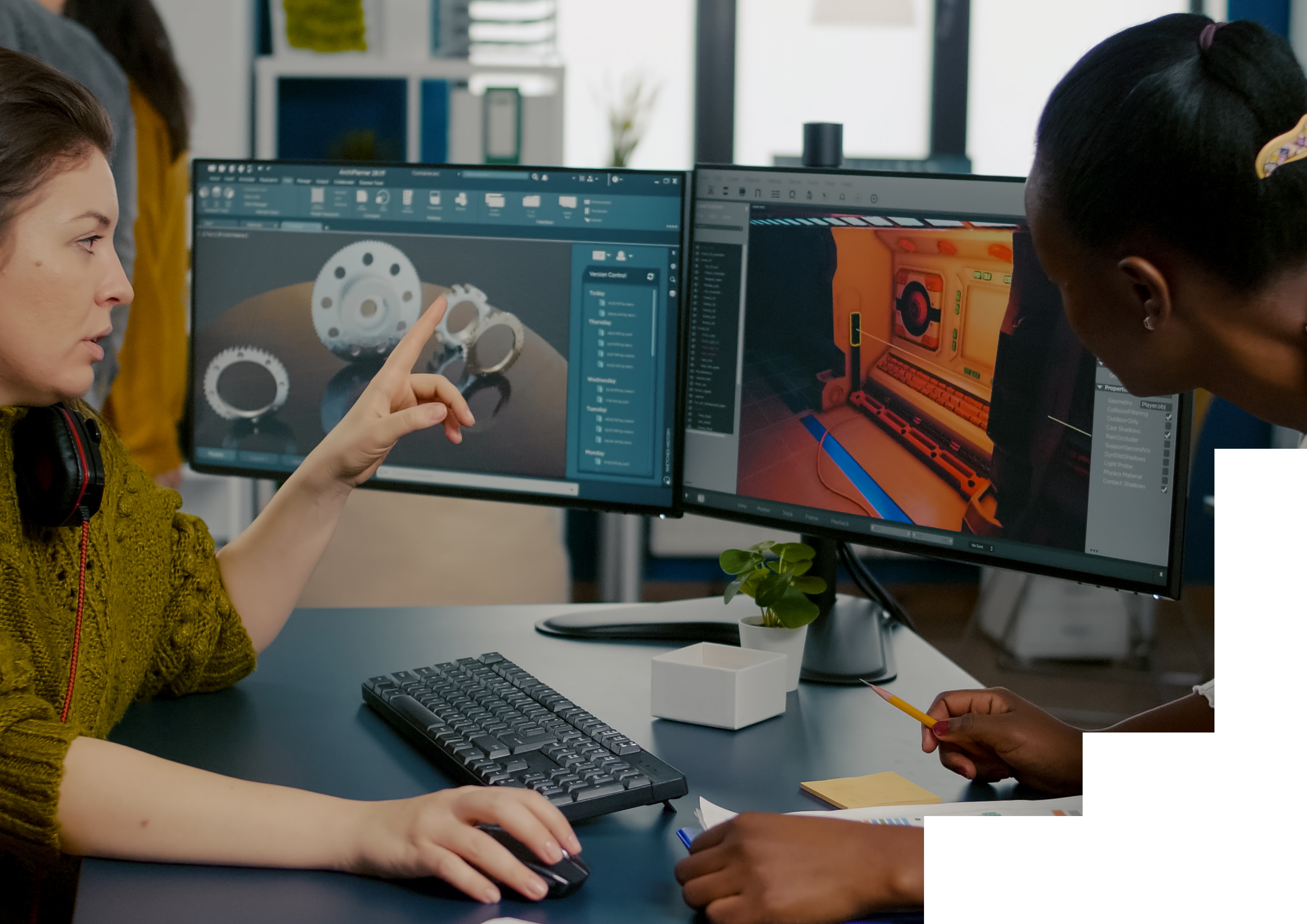
Promotion and progression

In section 1.5, we summarised the responses to our questions about promotion and progression. 42% of people told us that they'd been promoted in the last three years, while 20% had made what we call a "diagonal move": attaining a more senior role at another organisation. The figures for people who told us the question did not apply to them are 16% and 19% respectively.

In this section, we explore these questions in further detail. As in the previous section about attitudes, we're highlighting the characteristics where there are major differences in whether or not people have been promoted or have made diagonal moves. This means that if we don't show those results here, there aren't major differences.

As with our discussion of attitudes, it is important to make explicit when the differences between groups were very small, as in some cases we may have expected differences in promotion and progression that we did not find to be the case.

We did not find differences in promotion and progression between people with and without caring responsibilities, or between people of different genders. We also did not find differences between people from different social backgrounds, measured both through the type of school people attended and the kind of household that they grew up in.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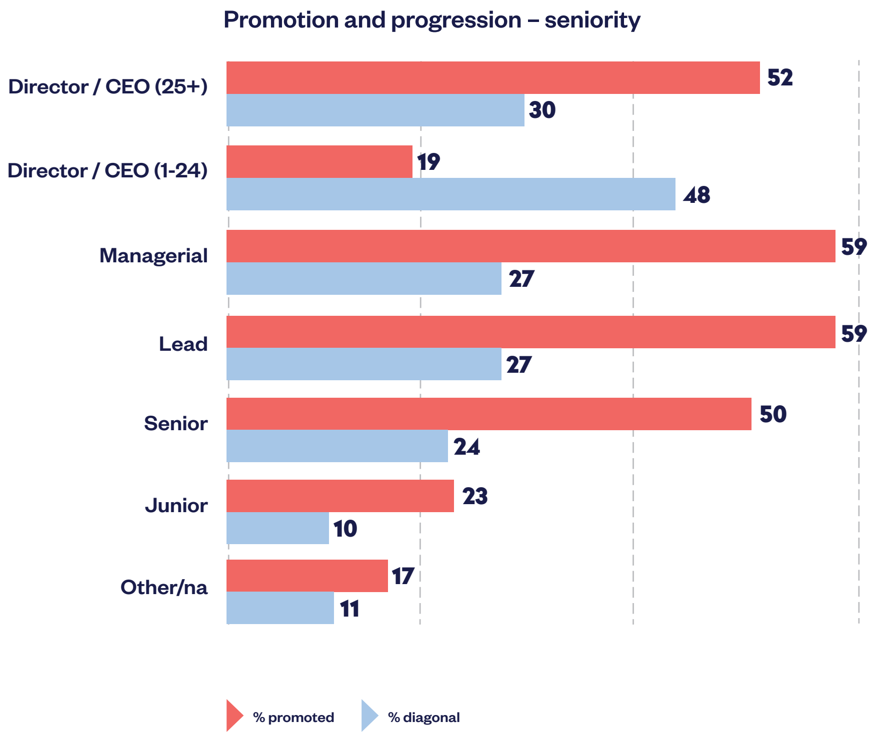
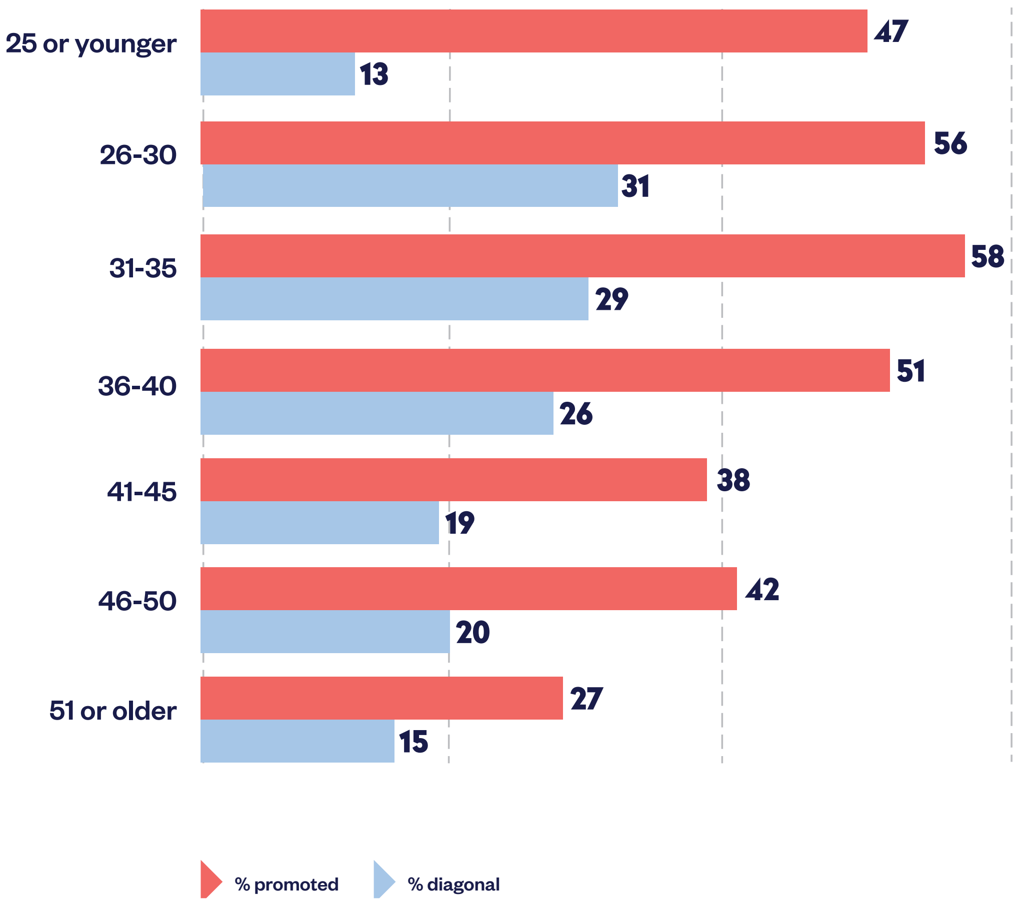


5.1 Promotion and progression: Seniority

We start the section by showing how promotion and progression vary by seniority. It is no surprise that, broadly, people in more senior roles are more likely to have been promoted or made diagonal moves than people in the most junior roles. However, there are a few things here that we'd like to draw attention to. The first is the difference between senior people working in organisations at different scales.

Just over half of the people working as director or CEO in organisations employing 25 or more people have received a promotion, while 30% had made a diagonal move. By contrast, just 19% of people in a similar role had been promoted, while 48% had made a diagonal move. This makes sense: it is likely that a large fraction of those 48% may have founded their own companies or been involved at an early stage of a new company, rather than being promoted internally. Identical percentages of people in managerial, lead, and senior roles had been promoted in the previous three years, but there are differences in diagonal moves, with the highest rates of diagonal moves among people in lead roles. The rates of diagonal moves among people in managerial and senior roles are similar to each other.

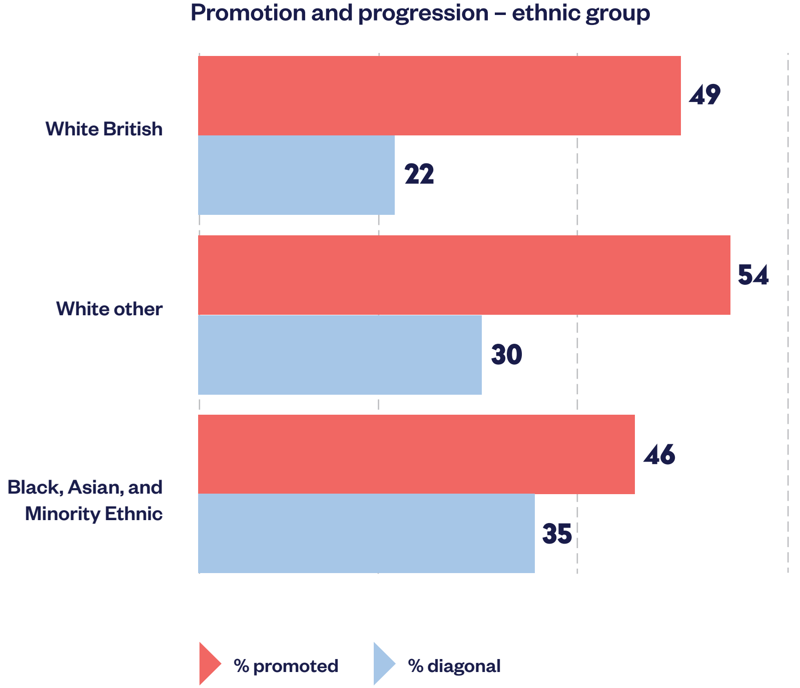
Promotion and progression – age



5.2 Promotion and progression: Age

People aged between 26 and 35 are the most likely to have been promoted, although people in the age groups just younger and older than this are fairly close behind. People aged 41 or older are noticeably less likely to have been promoted, with people aged 51 or older the least likely to have been promoted. There is a similar pattern for diagonal moves as there is for promotions, although with some differences.

Among people aged 25 or younger, 47% had been promoted in the last three years, which is lower than people aged between 26 and 40, but not by a very large margin. However, people in this age group are the least likely to have made a diagonal move, with rates that are less than half of those for people aged between 26 and 40. The group that is most likely to have made a diagonal move is people aged 26–30, although – as with promotion – the rates among people aged 31–35 and 36–40 are fairly similar.



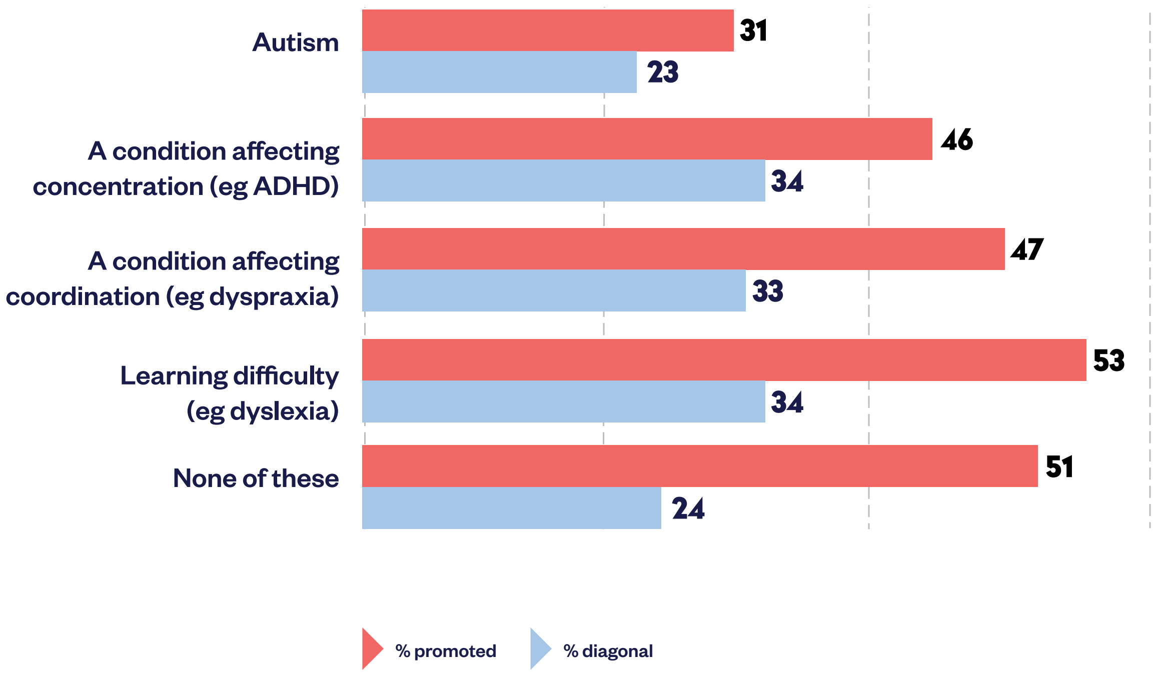
5.3 Promotion and progression: ethnic group

Comparing White British, White Other, and Black, Asian and Minority Ethnic groups, we can see that the percentages who have been promoted during the previous three years are similar. While people in the White Other group are the most likely to have been promoted, this may be partly explained by the fact that this group is slightly more likely to have people in the younger age groups where promotion is more common. Differences between groups are much larger for diagonal moves.

People in the White British category are the least likely to have made diagonal moves, while people in the Black, Asian and Minority Ethnic category are the most likely to have made diagonal moves. What is particularly noticeable is that the difference between promotion and diagonal moves is large for people in the White British category, at 27%, while it is much smaller for people in the Black, Asian and Minority Ethnic category, at 11%.

This discrepancy, where Black, Asian and Minority Ethnic people are less likely to be internally promoted but are much more likely to make diagonal moves, suggests that we should undertake further analysis. It may be that this relationship is partly explained by the fact that people in the Black, Asian and Minority Ethnic category are on average younger, a group that is more likely to progress overall, though this would not explain the discrepancy on its own.

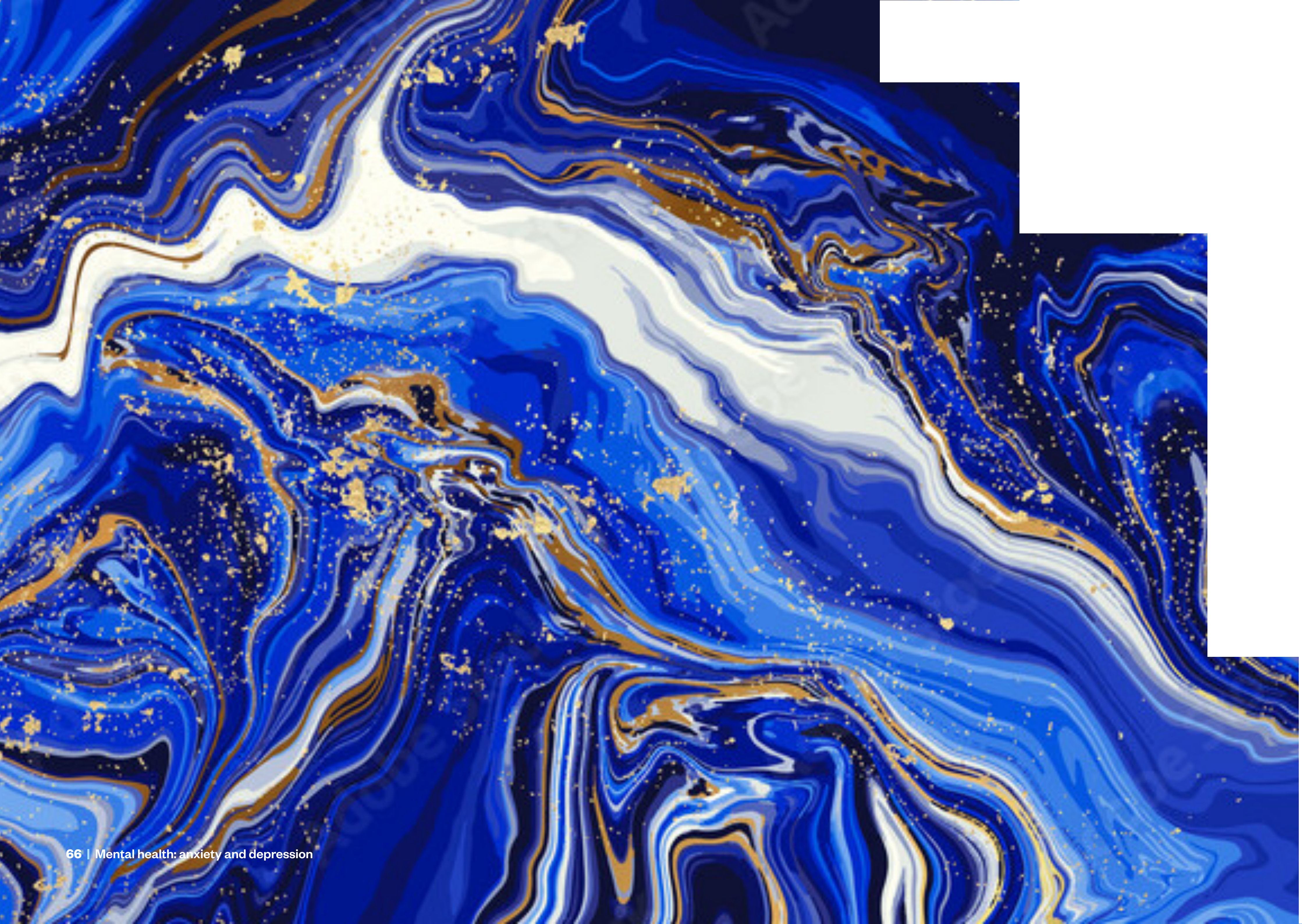
Promotion and progression – neurodiversity



5.4 Promotion and progression:

Thirty-one percent of autistic people reported having been promoted, which is significantly lower than the equivalent figures for people reporting other neurodevelopmental conditions, and for people who did not report any neurodevelopmental conditions. For these other groups, the rates are broadly similar to each other.

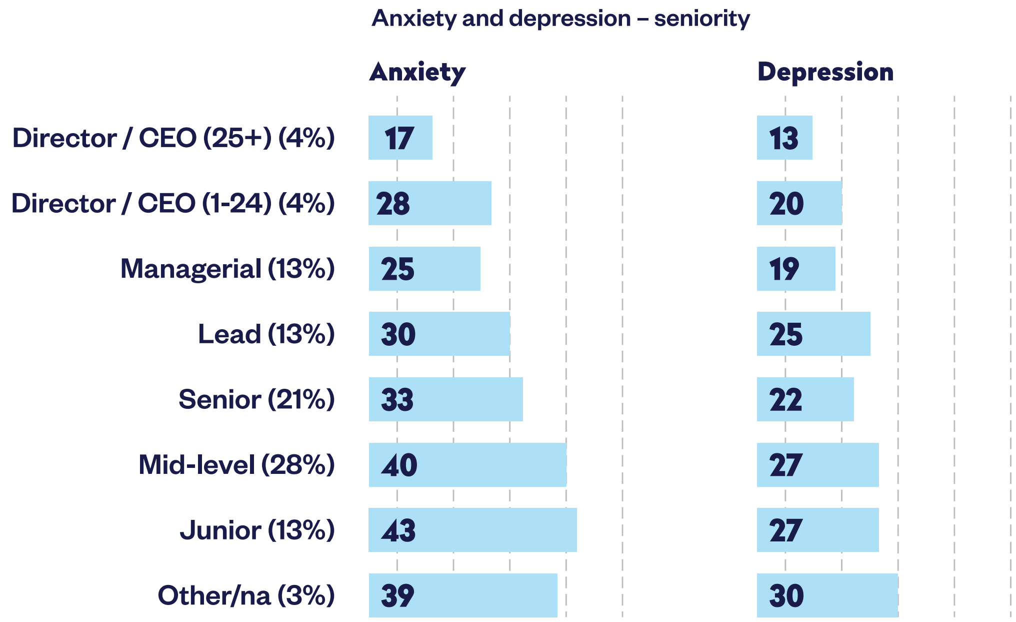
By comparison, the percentage of autistic people who had made diagonal moves is similar to the equivalent figures for people who did not report any neurodevelopmental conditions: 23% and 24% respectively. For people with other neurodevelopmental conditions, such as ADHD, dyspraxia, and dyslexia, rates of diagonal moves are higher: 33% or 34%.



6

Mental health: anxiety and depression

In section 2.7, we showed that the percentages of people reporting each of anxiety and depression were higher than in our previous report. This may be due to the change in the question phrasing, an overall increase in rates of anxiety and depression as a consequence of the pandemic, or something else. Because of this, we're revisiting the analysis we undertook in our previous report, where we investigated how rates of reporting anxiety and depression vary between different groups.



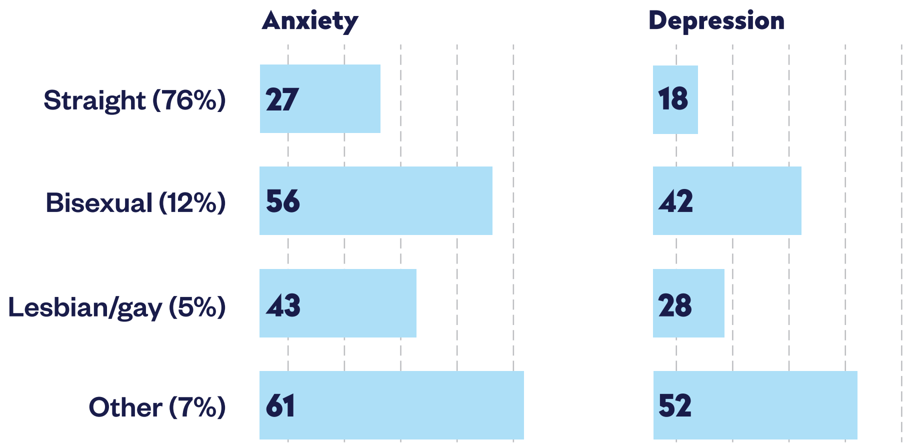
6.1 Anxiety and depression by seniority

This figure shows that the rates of anxiety and depression are larger among people in more junior roles than among people in more senior roles. However, we should note that this figure shows an increase in reporting both anxiety and depression at all levels of seniority. For example, the rates of people in Lead roles reporting anxiety have increased from 23% to 30%, while the rates of people in Junior roles reporting anxiety have increased from 32% to 43%. The one exception to this is a slight decrease in the percentage of people working in Director/CEO roles in organisations employing fewer than 25 people, but as this is a category with relatively few people, we should not interpret this as definitely representing a change in the overall group.

In our previous report, we stated that rates of mental ill health tend to be higher among older people,[32] and so these differences are unlikely to be due to the age profile of people working in games. However, we are also aware that younger people may be more willing to disclose anxiety and depression. This qualification continues to apply.

32. Bell, A., 2014. Life-course and cohort trajectories of mental health in the UK, 1991–2008–a multilevel age–period–cohort analysis. Social Science & Medicine, 120, pp.21-30.

Anxiety and depression – sexuality



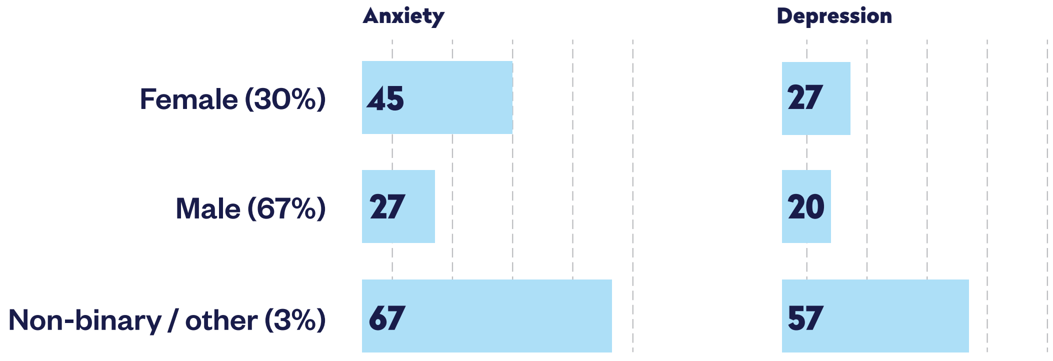
6.2 Anxiety and depression by gender and LGBTQ+ status

There are major differences in the rates of reporting anxiety and depression between people of different sexualities. People who selected a category other than straight, lesbian/gay, and bisexual are the most likely to report both, followed by bisexual people; the rates are lowest among straight people.

The percentage of people reporting anxiety has increased by a roughly similar amount over all four groups. The largest proportional increase in reporting depression is among straight people, from 15% to 18%.As with our previous report, we should note that the rates of mental ill health are greater among LGBTQ+ people, and so these results should be interpreted in that context.[33]

33. Stonewall, 2018. LGBT in Britain: Health Report. https://www.stonewall.org.uk/system/files/lgbt_in_britain_health.pdf

Anxiety and depression – gender



Non-binary people are the most likely to report anxiety and depression, followed by women, and then men. While the overall rates of anxiety and depression are higher among people working in games than in the general population, these differences are consistent with more general gender differences.[34]

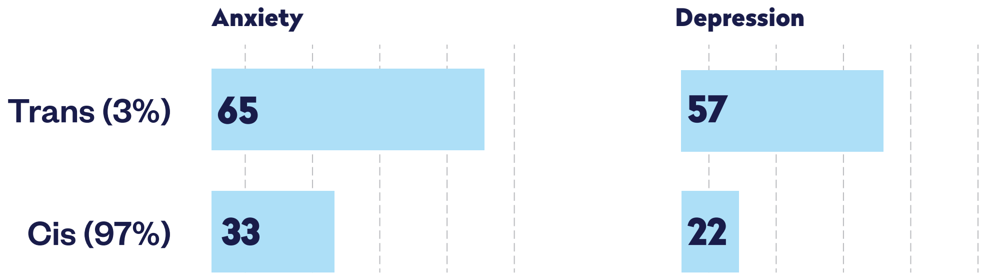
Compared with two years earlier, the percentages of women and men reporting anxiety increased substantially: for women, from 35% to 45%; for men, from 20% to 27%. The percentage of non-binary people reporting anxiety increased by a much smaller amount, from 65% to 67%.

The percentage of men reporting depression increased from 17% to 20%, while for women the increase was less pronounced, from 26% to 27%. For non-binary people, the figure decreased from 61% to 57%.

We should again reiterate that the percentage of non-binary people is very small, and so changes of this size may be due to sampling issues rather than representing changes among all non-binary people working in games.

34. Remes, O., Brayne, C., Van Der Linde, R. and Lafortune, L., 2016. A sysreview of reviews on the prevalence of anxiety disorders in adult populations. temic Brain and behavior, 6(7), https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4951626

Anxiety and depression – trans status



Rates of anxiety and depression are much higher among trans people than cis people. As we showed in section 2.4, a very large fraction of the trans people working in games are non-binary, and so we would expect similar percentages reporting anxiety and depression among trans and non-binary people.

The percentage of trans people reporting anxiety has increased from 55% to 65%, while the percentage of trans people reporting depression has increased by a smaller amount, from 55% to 57%.

Among cis people, the increases are from 24% to 33% and from 19% to 22% respectively. Taken together, these results are consistent with research that shows higher rates of anxiety and depression among trans people than among cis people.

7

Areas for further consideration

Adjusting for new expectations around work

According to the Games Jobs Live February 2022 report[35] – a resource which compiles open vacancies in the UK games industry – the sector had over 2,600 open roles that needed to be filled. In this context, it is particularly important for the industry to think about how it adapts to new expectations around how work should be structured.

With only 10% of employees looking to return full time to the office, compared with the 66% who were working full time in an office pre-pandemic, it is highly likely that companies will need to think about inclusivity in a way that accounts for a much more flexible way of working. To some extent, a shift towards a hybrid model could support the creation of a more inclusive sector.

Adopting a flexible approach to returning to the office may better support people with caring responsibilities, encourage further geographical distribution of staff (including bringing in staff based abroad) and reduce barriers to work for those with physical conditions. However, it could also introduce challenges - such as striking a balance between those present in the office and those who operate remotely - that may need to be carefully considered.

The industry has adapted well to the changing nature of work throughout the challenges of the pandemic. It must now consider how to foster an inclusive environment in a world reshaped by the practicalities, and challenges, of working from home.

35. UK Games Jobs Live Report, February 2022: https://gamesjobs.live/wp-content/uploads/2022/02/Games-Jobs-Live-Report-February-2022.pdf

Further work on mitigating mental health concerns

One of the main findings from the first UK Games Industry Census was that people working in games were more likely to declare mental health concerns than the working age population.

The 2022 census reinforces the initial findings of the 2020 report, once again identifying a higher percentage of individuals reporting conditions in comparison to the figures for the wider population. Structural and methodological points may account for these high numbers in part. Intersectional considerations, such as higher prevalence of mental health conditions among LGBTQ+ people, and changes to our approach to questionnaire design to encourage reporting of lived experiences are likely to have increased the figures.

However, across-the-board increases in reporting of conditions over the past two years – likely a result of the strains of the pandemic – reinforce the need for the industry to continue its work to support positive mental health in the workplace. The industry has responded to this need. Support for mental health charities inside and outside of the industry has helped foster conversation about the topic; Mental Health First Aid training is becoming increasingly normal within games businesses; the industry backs campaigns and activities aimed at tackling issues such as loneliness, demonstrating how games themselves can play a positive role in addressing issues. But the findings indicate the need to continue and develop this work, particularly following the burden that the pandemic appears to have placed on mental health across the sector.

Opening paths to promotion to all

Promotion is one of the key mechanics for diversifying the industry. While programmes that diversify the entrants to games are essential to change, it is also important that junior people from a wide range of backgrounds have a pathway to progressing through the sector. With this in mind, the findings of this year's census pose three particularly important questions for the industry to consider.

First, the promotion or progression paths of senior figures in the industry means that we must think carefully about how we support leaders from a wide range of backgrounds. Forty-eight percent of Directors and CEOs of games companies with fewer than 25 employees achieve seniority by making a diagonal move – likely to found their own business or to move to a start-up – in comparison to 30% at companies with more than 25 employees. This means that there needs to be the right funding and support to ensure that a range of leaders currently in small businesses can make their own diagonal move successfully.

Second, the industry needs to think carefully about how it supports autistic people to achieve direct promotion. While people with other neurodivergent conditions such as ADHD, dyspraxia or dyslexia are promoted largely in line with those without these conditions, autistic people are significantly less likely to be promoted – suggesting a requirement to consider their needs particularly.

Finally, it remains important to consider what more can be done to support Black, Asian and Minority Ethnic people to ensure they progress in their career.

While individuals from these backgrounds are moving up the scale, the larger proportion of diagonal moves and the smaller proportion of promotions compared to White people could indicate barriers to advancement that require them to move elsewhere to achieve seniority – a possible area for the industry and workplaces to explore more closely in the future.

Working hours

In response to feedback on the 2020 census, this year we asked respondents about their heaviest week of work alongside their typical working week. We learned that 80% of people in the in the UK games industry have an average week of 40 hours or less, which appears to be fewer hours than in an international sample of games workers or in the UK Film and TV industries in the UK.

We also learned that 67% of people have worked at least one week of over 40 hours in the past year, while 11% have worked at least one week in excess of 60 hours. Further work is required to fully interpret these numbers: for example, to understand how working hours vary in the games industry in different countries, and how people's heaviest weeks in games compare to people's heaviest weeks in other industries. The results of this census serve as a starting point for the UK games industry and beyond. More granular questions could be asked to create a more detailed profile of the frequency and extent of work done both in and beyond a typical week.

Analysis could be undertaken to identify if particular job roles or people are more impacted. A standard approach for collecting data about working hours in the games industry – both usual and extended – could be established internationally so that meaningful comparisons can be made. Alongside this, further work could be done to establish a baseline understanding of working practices across the creative industries, potentially enabling the sector to understand and define levels and patterns of work that may be unhealthy, damaging, or exclusionary.

There is a tremendous opportunity to characterise these working practices and understand their effects, allowing the industry to make informed decisions about work in the future within a landscape that is shifting due to new ideas in the wake of the pandemic.

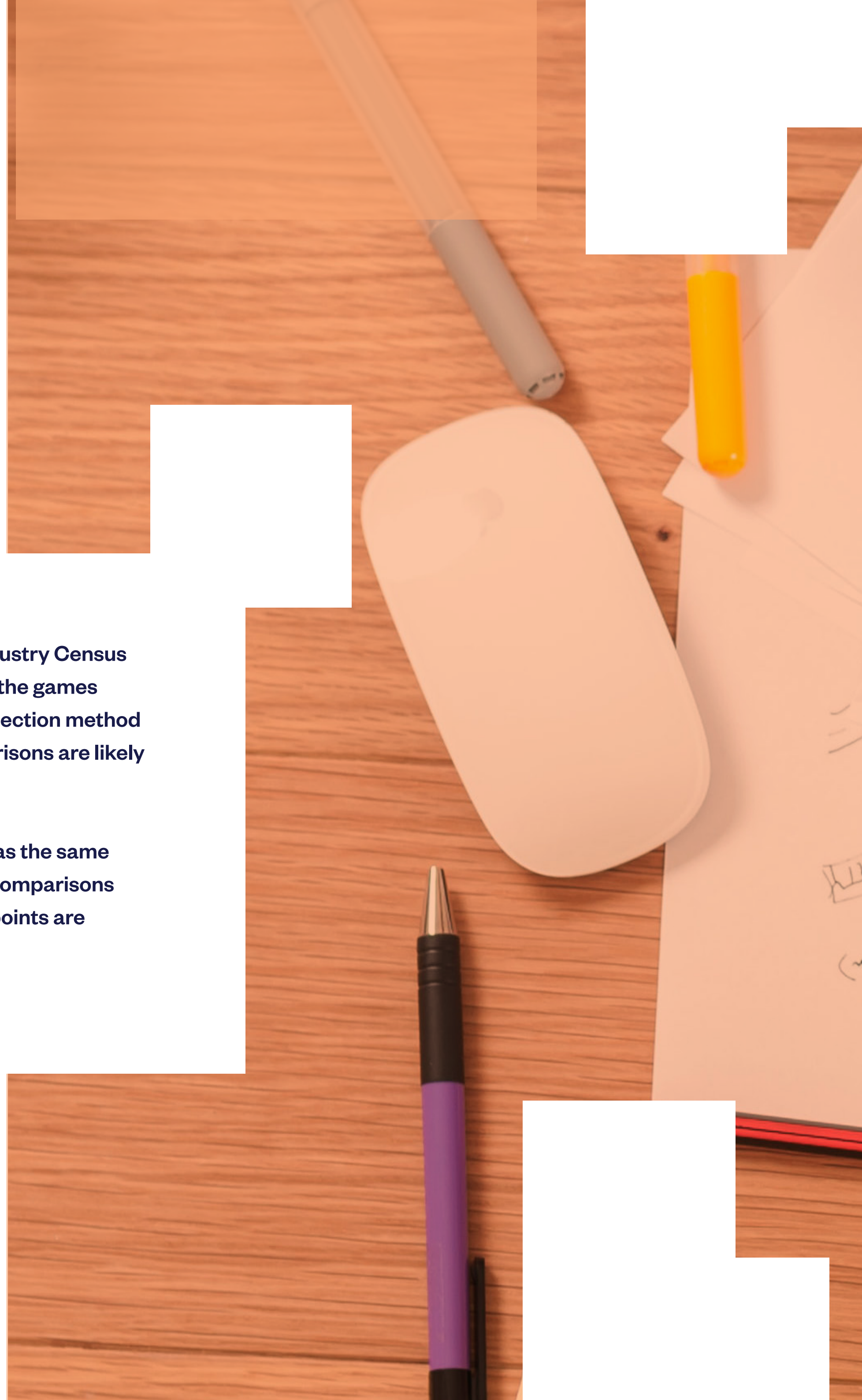
8

Methodological appendix

This section summarises how the survey was designed, implemented, and analysed. The overall project was granted ethical approval by the University of Sheffield (ethics application 043205).

Data were collected via surveys of people working in the UK games industry. Specifically, data were collected through the online survey platform Qualtrics, through the institutional account of the Sheffield Methods Institute, University of Sheffield. This method was the same as the method used in the first UK Games Industry Census (2019) and differs from other estimates of the games workforce in the UK. Because the data collection method differed from that in other reports, comparisons are likely to be misleading.

However, as the data collection method was the same as two years earlier, it is possible to draw comparisons between the two time points. These time points are highlighted throughout this document.



8.1 Questionnaire design

As with the previous census, the two key goals of the survey questionnaire were to ask questions so that we could draw meaningful comparisons, and so that the experience of answering the questions would feel non-invasive and light-touch for people to answer. We also wanted the process of answering all these questions to be quick, so that it would not take up much of the time of the people participating.

The majority of the questions asked were phrased in exactly the same way as in the previous census two years earlier. However, there were some changes to individual questions, and some new questions were introduced.

Most of the questions that remained the same use identical question phrasing to other sources where national comparisons can be drawn. For example, we use the same question phrasing about ethnic group as in the Census in England, presenting people with the same categories. There is more detail about this question phrasing in the report on the previous census.

We undertook a consultation exercise in the spring and summer of 2021, in advance of launching the census in September 2021. The purpose of this consultation was to receive input from a wide range of people about the areas that the survey questionnaire covered, specific question phrasing within those areas, and anything else that people may have thought was relevant. The consultation involved presenting to the Ukie equality, diversity, and inclusion (EDI) group. As a part of this presentation, our contact details were shared for anyone who wanted to discuss these in more detail. It also involved a series of one-to-one conversations about these questions.

Following the consultation, we made some changes to the content of the survey questionnaire. The primary change was the introduction of a set of questions about people's attitudes.

The 2021 questionnaire therefore comprises four main sections, while the 2019 questionnaire comprises three. These sections address:

- people's jobs, including the jobs they do, the length of time they've worked in the sector, and their seniority
- people's personal characteristics, including their gender, ethnic group, and any conditions they have
- people's backgrounds, including the kinds of households they grew up in, the type of school they want to, and their qualifications
- people's attitudes, in relation to both their current workplace and the broader UK games industry, and in relation to a number of different dimensions

The final section was the new one introduced in 2021. The only compulsory question, without which people were not able to click through to the following questions, was the one asking people to confirm they had read the participant information sheet and were willing to consent to the use of their data.

All following questions could be skipped, although in most cases almost all people answered them. The final section was introduced by explicitly asking people whether they wished to answer questions about their attitudes, or whether they wished to finish the survey at that point. 90% of people chose to answer those questions, while 10% chose to finish the survey there.

8.2 Recruitment

The data collection process was launched at Ukie's 2021 Annual General Meeting. The recruitment for this survey came in two parts. The first part comprised what we described as an "open link". Anyone who clicked this link would be taken to the questionnaire as described above. This link was first shared at the AGM and subsequently repeatedly shared through Ukie's channels.

It was also shared through a number of key industry sources including PocketGamer.biz[36], gamesindustry.biz[37], and MCV/Develop.[38] It was also shared via a number of other key channels, such as the UKGI Slack, and through relevant bodies working across the games industry. This approach to recruiting participants for projects about workforce diversity is common across the creative industries.

One challenge associated with recruitment is biased estimates. In this case, results exclusively derived from an open link would be likely to be biased for a number of reasons. First, not everyone working in the games industry is engaged with these sources on a day-to-day basis, and those people who are may be more likely likely to work in roles that address EDI. Second, promotion through bodies across the industry that represent particular groups may lead to overrepresentation of people within those groups. As well as these issues, a well-publicised open link can be identified by malicious actors who seek to undermine the legitimacy of the data collection process and the estimation of diversity of the games industry more generally.

These challenges reinforce the importance of the second component of the recruitment strategy. Ukie recruited a number of games organisations at a range of different scales. Each of these organisations was given an individual link to disseminate internally.

The academic team had generated the individual links but were not aware of which link corresponded to which organisation, nor which organisations had been recruited to have individual links at all: from their perspective, organisations only had anonymous identifiers, which were numbers from 2001 upwards.

uring the data collection period, the academic team was able to monitor response rates and share these with the Ukie team. Other than diagnostics for weighting (see section 8.2), no analysis took place of any individual organisation: data were combined as a broader "organisational link" category. The survey was open for an eight-week period starting on the 16th of September 2021.

Following the period in which the survey data collection was open, we undertook a period of data cleaning, in which we removed any irrelevant or unusable responses, including suspected trolls. The eventual sample size - on which estimates throughout are based - is 3,603 people working in games. The sample size of people answering the questions in the final part of the survey, about attitudes, is 3,240.

36. https://www.pocketgamer.biz/news/77210/ukie-launches-uk-games-industry-census/

37. https://www.gamesindustry.biz/articles/2021-09-16-ukie-announces-games-industry-census-2022

38. https://www.mcvuk.com/business-news/take-part-in-the-games-industry-census-2022-to-help-survey-the-diversity-of-the-uk-industry-workforce/

8.5 Weighting

Options for weighting the data to adjust for sampling bias were limited. This was particularly pronounced as estimates of the sizes of different organisations may have dated since our weight construction in the 2020 report, where we incorporated this as a measure. However, we were able to draw on estimates of the numbers of people working in the games industry in different regions.[39] We were also able to compare the patterns of responses to individual questions across the two major recruitment channels: the open link and the organisational links.

In relation to adjusting for weights based on geographical region, marginal frequencies for individual questions were within a percentage point of unweighted estimates, save for the question about region itself. There are some larger discrepancies between the samples through the two main recruitment channels, but these are within the range that we see in between-organisation variation, rather than the open link being substantially different from all organisations, whether or not we adjust for the response rate from those organisations. For this reason, we present the results based on the unweighted data.

39. Olsberg SPI with Nordicity, December 2021. Screen Business: How screen sector tax reliefs power economic growth across the UK 2017–2019. BFI. https://www.bfi.org.uk/industry-data-insights/reports/uk-screen-sector-economy

8.4 Principal component analysis

In section 4 of the report, we present scores on a 0-100% scale based on four combined measures, which we call “Workplace: overall attitudes”, “Industry: overall attitudes”, “Workplace: attitudes to inappropriate behaviour”, and “Industry: attitudes to inappropriate behaviour”. We combined people’s responses to statements together to generate these measures. However, in order to validate that it made empirical sense to combine them, we used principal component analysis.

Principal component analysis is a technique for dimension reduction, and in this case, we chose to use it to identify whether people tend to provide similar answers to the statements that we’ve grouped together. We made the relatively strong assumption that we could treat these Likert scales as linear: to put it another way, that the difference between “Strongly agree” and “Agree” could be treated similarly to the difference between “Neither” and “Disagree”.

Having extracted the rotation matrix, 43% of the variance in all of these statements could be explained by a single principal component. All eigenvectors were positive, varying from 0.138 (“I feel a strong personal attachment to the UK games industry”) to 0.242 (“Those who raise concerns are supported and protected”, in relation to one’s current workplace). The second principal component explained a further 16% of the variance. In this case, statements relating to the UK games industry had positive eigenvectors, and statements relating to people’s current workplaces had negative eigenvalue.

The negative eigenvalue with the largest absolute value was -0.214 (“I would recommend my workplace as a great place to work”), while the positive eigenvalue with the largest absolute value was 0.288 (“The subjects of complaints receive appropriate support”, in relation to the broader industry). The third principal component explained a further 7% of the variance. In this case, the general statements had positive eigenvalues and the statements about attitudes to inappropriate had negative eigenvalues, although statements that related to bullying and harassment in the general section had absolute values closer to zero.

The negative eigenvalue with the largest absolute value was -0.182 (“The subjects of complaints receive appropriate support”, in relation to the broader industry), while the positive eigenvalue with the largest absolute value was 0.482 (“I feel a strong personal attachment to the UK games industry”).

These three principal components therefore explain around two thirds of the variance in these statements. Subsequent principal components explained 4% of the variance or less. On this basis, we were satisfied that the grouping of statements that we used is a sound basis for analysis.

8.5 Job classification

In several figures, we've combined job categories together to ease comparison. The grouping of jobs into larger categories is explained in the table here.

Job Title	Category
Animation	Art
Artist (2D or 3D)	Art
Technical art	Art
UI / UX (user interface / user experience)	Art
VFX	Art
Audio / sound design	Audio
Composer / music	Audio
Admin / general	Business operations
Finance	Business operations
HR (human resources)	Business operations
Legal	Business operations
Office management	Business operations
Operations	Business operations
Senior management / leadership	Business operations
Programming / developments	Programming
Designer (games / level)	Design
IT / technical support / infrastructure	IT
Localisation	Localisation
Other	Other
Production / project management	Project management
QA (quality assurance)	QA
Community Management	Sales / marketing / communications
Marketing	Sales / marketing / communications
PR (public relations) / communications	Sales / marketing / communications
Consumer / customer services	Sales / marketing / communications
Business development / commercial	Sales / marketing / communications
Data / analytics	Sales / marketing / communications
Distribution	Sales / marketing / communications
Sales	Sales / marketing / communications
User research	Sales / marketing / communications
Writer / narrative	Writing

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- Anisa Sanusi from Limit Break
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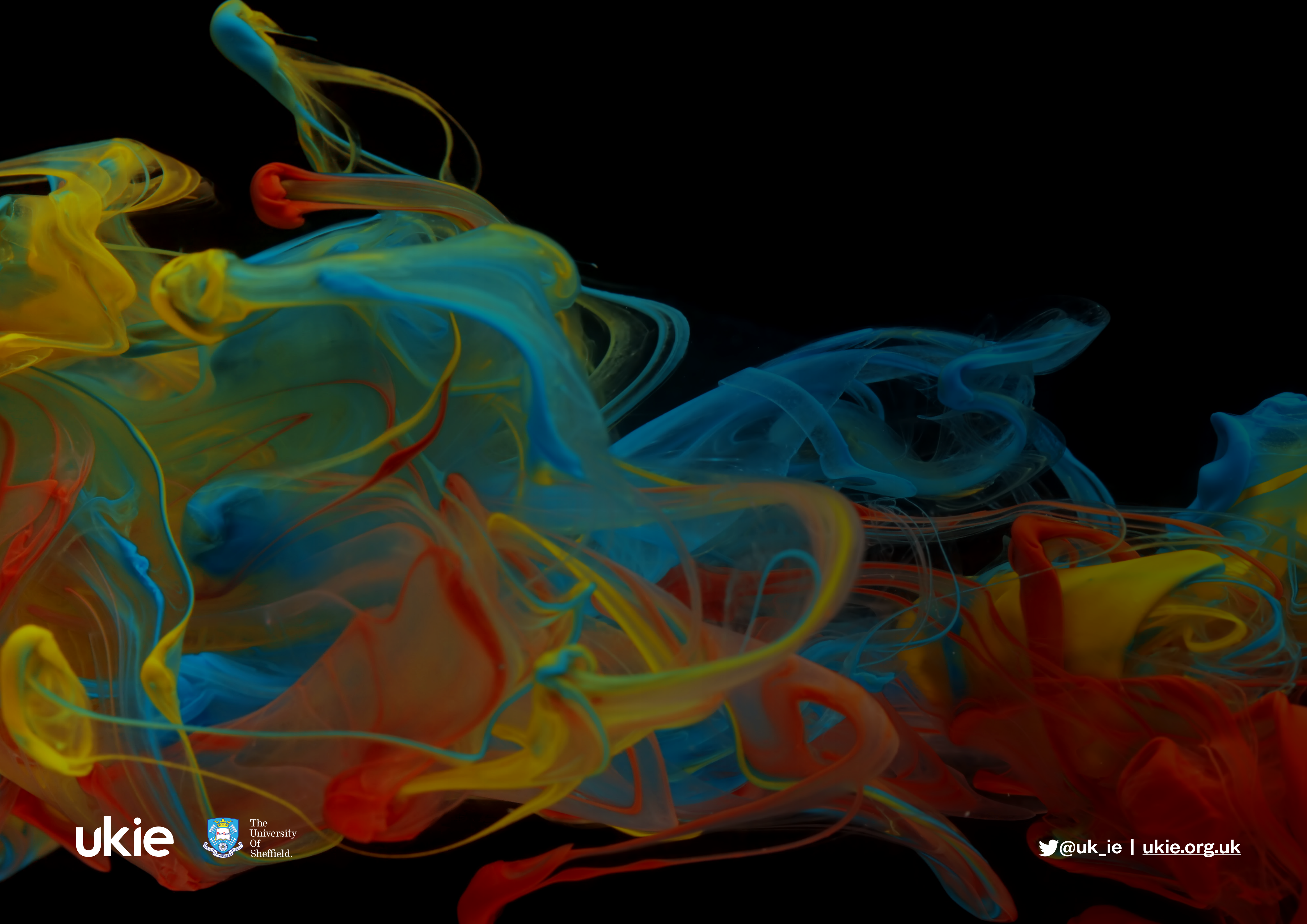
Most importantly, all of the 3,603 people who took the time to answer our questions. We wouldn't have been able to produce this work without you.



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