POLICY AREA FOR INNOVATION #6

Inclusivity in the Gaming Industry

#game design #game development #indie gaming #diversity #gender gap #minorities #DEI quotas #counterculture #underrepresentation #safe space #accessibility #cognitive accessibility #biases

01 BACKGROUND

The video game industry has evolved from early arcade games to a **multi-billion-dollar market driven by technological advancements.** Innovations such as real-time 3D graphics, online multiplayer, and mobile gaming have expanded its reach[1]. Europe alone is home to **5,300 game development studios**, contributing to a turnover of **€19 billion** within the EU (in 2022)[2]. Despite its growth, the industry faces **significant challenges regarding inclusivity.** Women represent only 24.4% of the workforce in the sector[3], pointing to an imbalance in **gender representation.** Furthermore, the industry has struggled with broader issues of **diversity and accessibility,** with limited representation of diversity both in **game content and behind the scenes.** These disparities are compounded by a wave of **layoffs** following the market saturation caused by the COVID-19 pandemic, reflecting a need for greater **equity and diversity** within the sector[2].

"Inclusive" gaming treat people equitably regardless of personal qualities, properly addressing issues of equality, diversity and inclusion (EDI).

> *"Any discrimination based on any ground such as sex, race, colour, ethnic or social origin, genetic features, language, religion or belief, political or any other opinion, membership of a national minority, property, birth, disability, age or sexual orientation shall be prohibited.*
> - *Within the scope of application of the Treaties and without prejudice to any of their specific provisions, any discrimination on grounds of nationality shall be prohibited."*
>
> European Union Agency for Fundamental Rights [4]

Why are EDI relevant for the Gaming Industry?

The relation between EDI and the European gaming industry is two-way:

Equality, diversity, and inclusion (EDI) → strengthen it by driving innovation, accessibility, and social relevance → European Gaming Industry

European Gaming Industry → advances them by offering a powerful medium for representation, empowerment, and cultural transformation. → Equality, diversity, and inclusion (EDI)

02 CHALLENGES

- **Social dimension:** persistent underrepresentation in content and leadership creates barriers for marginalized groups and reduces visibility of indie and community projects, as commercial priorities prevail.
- **Sustainable competitiveness:** Weak coordination between incubators, networks, and creative industries limits SME growth and inclusive cross-sector collaboration.
- **Infrastructures:** Indie studios face barriers to major platforms due to licensing, exclusivity, and lack of publisher support, while missing standards and interoperability reduce accessibility.
- **Investment and funding:** few mechanisms reward inclusion and accessibility in design, while diversity-focused projects are often dismissed as high-risk.

03 OPPORTUNITIES

- **Diverse teams enhance creativity and innovation,** helping gaming businesses grow and evolve.
- **Improved community dynamics and social interactions,** enhancing both virtual and real-world environments, and promoting social cohesion.
- **Mental health benefits** by promoting empathy and reducing toxic behaviors.
- **Performance improvement through diversity:** diverse teams produce better outcomes in both the creative process and business results.
- **Ethical game design to promote positive behaviors**, helping players develop empathy and promote cooperation among diverse groups.

04 EMERGING CONVERSATIONS AMONG PRACTITIONERS

Video game inclusivity requires balancing creative freedom with industry mandates, emphasizing the need for culturally sensitive representation and accessibility, achieved through genuine engagement, diverse collaboration, and design ensuring consistent and enriching gameplay experiences.

Most affected CCIs

- *Gaming & IT*
- *Audiovisual*
- *Adv & Marketing*
- *Education*

Rising conversation in the last 6 months

+50% Intense Emotions in Media & Entertainment

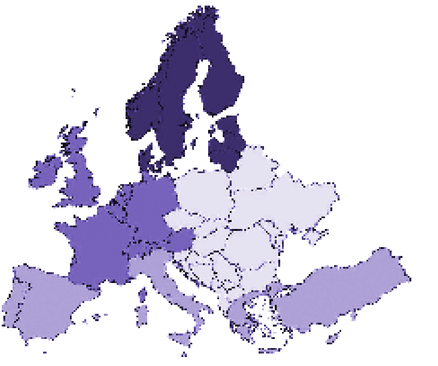
Cozy Games +47%

> *"Video games are a medium, a way to pass on ideas, and conveying goodwill and inclusiveness through a video game while still having fun, well I think that's beautiful!"*
>
> Game Designer, Western Europe

> *"It's crazy how in any field (video games, film, at work etc) if you find women or queer people for many people it's necessarily for a quota. We don't have the right to be represented?? [...] It's crazy to try to find excuses at all costs to not see women."*
>
> Illustrator, Western Europe

> *"Games are a wonderful medium for people with disabilities to find joy in their lives. I find video games far more accessible than [...] a concert or going to the cinema. We all deserve to play."*
>
> Content Creator Western Europe

In which countries are creatives mostly talking about Inclusivity in the Gaming Industry?



less discussed — more discussed

Regional relevance of conversations regarding work culture in the video game industry. Data regarding the analysed ***ekip*** community over the past six months through a social media listening, which maps conversations on platforms available for research access only, does not aim for statistical representativeness, and is part of a broader data collection framework that includes other methods.

05 EXISTING POLICY RECOMMENDATIONS

Core Values & Code of Ethics | IGDA, the International Game Developers Association[5]

IGDA enforces inclusivity through its core values, emphasizing respect for diverse individuals regardless of gender, race, or background. It advocates for creating a safe and supportive environment within the gaming industry, ensuring that all voices are heard and valued. This includes a commitment to non-discrimination, equal opportunities, and promoting diversity in the development and creation of games. Through its **Ethics Violation & Harassment Investigation Process**, IGDA promotes inclusive communities where everyone can thrive without harassment or exclusion.

Understanding the value of a European Video Games Society - Final Report | Ecorys & KEA[6]

In the Conclusions and Policy Framing, KEA advises that, while there have been developments and improvements over recent years, diversity and inclusion within the sector may benefit from continued development. Despite its growing popularity, the industry remains unattractive to many groups, especially those with protected characteristics. The industry (with public sector support) should diversify its workforce to better represent its consumers. This will guarantee that a wider spectrum of skills, insights, and experiences boosts its competitiveness, creativity, and innovation.

Code of Ethics and Professional Conduct | ACM, the Association for Computing Machinery[7]

According to rule 1.4, "The use of information and technology may cause new, or enhance existing, inequities. Technologies and practices should be as inclusive and accessible as possible and computing professionals should take action to avoid creating systems or technologies that disenfranchise or oppress people. Failure to design for inclusiveness and accessibility may constitute unfair discrimination."

06 CASE STUDIES AND RELATED INITIATIVES

iGAME | EU[8]

iGame is a Horizon Europe-funded project aiming to create an accessible platform for the design and development of open-source games. This platform facilitates the co-creation of games by different interested parties in ecosystems of CCIs, to enhance innovation with a positive impact on social cohesion and sustainability. The platform facilitates the participation of a diverse group of parties, enriching the community and allowing the creation of new alliances, solutions, unveiling new opportunities.

Gamehearts | EU[9]

Gamehearts is a Horizon Europe-funded project seeking to **enhance the value of the European videogame industry ecosystems within the wider social context of CCIs.** This considers the importance of the industry in contributing to economic growth, job creation, physical and mental wellbeing, and social and cultural cohesion, by focusing on how a stronger and closer working relationship between traditional and emergent cultural sectors can better work to **create more inclusive and socially responsible cultural experiences.**

EPIC-WE| EU[10]

EPIC-WE is a Horizon Europe-funded project aiming to empower young people to participate in shaping European Culture and their own future by imagining, creating and exchanging cultural values and heritage through game-making. It focuses on **exploring and developing new models for cultural collaboration, empowered participation, cultural processes and design kits** for games **through and for culture** which can help establish culture hubs across Europe.

References:

[1] Conti, E., Travasi, A., Musso, F., & Brunaccioni, N. (2024). Navigating pricing strategies in the video game industry: Evidence from passionate gamers. In *Proceedings of the XXI SIM Conference "Brands and Purpose in a Changing Era"* (pp. 1-12). IULM, Milano.

[2] Cappello M. (Ed.) (2024). *Legal challenges and market dynamics in the video games sector.* IRIS, European Audiovisual Observatory, Strasbourg.

[3] European Game Developers Federation, & Video Games Europe (2023). *Video Games Europe Key Facts Report 2023.* 15. Retrieved 23 February 2025, from www.videogameseurope.eu/publication/2023-video-games-european-key-facts/

[4] European Union Agency for Fundamental Rights (2007). *Official Journal of the European Union C 303/17 - 14.12.2007.* Retrieved 23 February 2025, from fra.europa.eu/en/eu-charter/article/21-non-discrimination.

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ekip — EUROPEAN CULTURAL AND CREATIVE INDUSTRIES INNOVATION POLICY PLATFORM