

# Games Design Report

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Executive  
Summary

NORWICH  
UNIVERSITY  
OF THE ARTS

# 1 The State of Play:



£7.82bn

→ UK Games is an economic powerhouse. The sixth biggest market in the world, it is worth **£7.82 bn** (UKIE)<sup>1</sup> at retail, £6bn GVA. Although games businesses typically experience a long pre-revenue development phase, it is a **highly productive** sector of the UK economy with the average worker generating £83,800 GVA<sup>2</sup> versus the national average of £62,100.

4.8% Growth

→ Even though the global Games workforce has contracted in recent years, the UK has seen **4.8% growth**<sup>3</sup> for the period ending May 2024, bringing the number of UK workers to 28,500. Contrary to many creative industry sectors which are heavily reliant on freelancers, some 25,000 of these jobs are full time development roles, generating tax revenue of 2.2bn<sup>4</sup> across the wider economy. 80% of the workforce is based outside of London.

UK

→ The UK's international strength in Games has put us in pole position in new markets for **emerging technology**<sup>5</sup> that have resulted from a convergence of Games with other screen industries, for example Virtual Production. These are trends which underline the investible nature and export potential of Games compared to other comparable sectors.

5.9%

→ This strong productivity performance makes Games an important **lever in the Norfolk economy**<sup>6</sup> which has historically been less productive than the national average. Some 5.9% (TIGA ) of the UK Games workforce is in Norfolk, compared to 23% in London and 18.7% in the Southeast.

The key to unlocking growth in Norfolk and Suffolk is to understand the unique characteristics of our region and the way that industry has grown here:

- **AAA Games studios** across key locations in the UK – Leamington Spa (Codemasters), Guildford (Super Massive Games), Edinburgh (Rockstar UK) – have historically driven sector growth, attracting talent, investment and spawning start-up culture. However, with the decline of AAA studios<sup>7</sup>, new opportunities are emerging for entrepreneurship and business development that can leverage the region's existing strengths.
- **Access to funding** remains an issue in Norfolk and Suffolk for Games businesses. Angel investors in our region have not identified the Games opportunity and models like the Akcela<sup>8</sup> in Norwich, that understand the shape of the indie Games opportunity and support the long pre-revenue period are too few, and oversubscribed. The new Digital Hub<sup>9</sup> in Norwich should boost visibility of the sector and its financial attractiveness.
- But we have major **strength in higher level games education**, led by Norwich University of the Arts, alongside University of East Anglia (UEA), University of Suffolk and a strong further education players in the region. The region is a **net exporter** of Games talent, in both design and development. Several hundred students each year graduate from our institutions – many more if we include animation, vfx and creative computing. And with each graduate that leaves this region to start their career an opportunity to boost regional productivity leaves with them.
- The region hosts a **distributed network of experienced industry professionals** working on some of the world's biggest titles – Fable, Sea of Thieves, Until Dawn, Fortnite. The GVA they deliver is outside of our region – but they are an untapped talent pool that could be connected to businesses across the Games ecosystem to unlock and catalyse growth.
- There is a well-networked and vibrant **community of game developers** in our region, brought together through Norfolk Game Developers<sup>10</sup> and centrepiece events like Norwich Games Festival. For some, game creation is their passion and hobby – but for others, in increasing numbers, it is a serious commercial endeavour which is starting to bear fruit. The success of Newfangled Games, Moss Monkey and others is evidence that the industry in our region is coming of age. With the right support and interventions Games could become an enviable contributor to our economy.
- Academic research and industry-led R&D in this region, not just in Games but adjacent sectors is pointing to new opportunities beyond creative industry through the **application of creative technology**. UKIE estimate the value of this 'spillover' opportunity at £1.3bn. Our region has nationally important strengths in agritech, clean energy, environmental sustainability – and there are opportunities across these areas to underpin efficiency or develop competitive edge through creative technology.
- Just as our region, through **pioneering innovation** at Norwich University of the Arts, was early to market in higher education for Games, so we are early to market now in virtual production, volumetric asset capture, 360 and immersive and technologies. The region boasts internationally significant assets in these areas, which, if connected effectively to industry need should result in strong growth. These are new ways for our region to be on the UK map.



↑ Norwich Games Festival



## 2 What’s new in Games in 2025?



↑ Norwich Games Festival

- The **Norwich University of the Arts Havers Road Studio**, houses the **Immersive Visualisation and Simulation Lab**, funded by the Arts and Humanities Research Council, as part of the World Class Lab portfolio and a Virtual Production Studio funded by the Office for Students, these unique and specialist facilities combines assets in 360 immersive tech, volumetric capture and the latest in virtual production and connect to other knowledge bases for creative technology across the UK. It will offer businesses from Games, Film and other sectors of the economy the chance to explore new creative possibilities and exploit the opportunity for *spillover tech*.
- The **region’s Games industry saw considerable success**, Newfangled Games demonstrated how indie studios can achieve commercial success by signing a licensing deal on Paper Trail with Netflix. Fairer Games secured multiple funding awards including The Prince’s Trust for their upcoming title, Brewess. BAFTA award winning Kate Killick, CEO at Norwich-based Glowfrog Games achieved an Innovate UK award, and Norwich University of the Arts graduate-formed Moss Monkey<sup>11</sup> have set a 2026 release date for Outclaw, a game supported by Transfuzer, UK Games Fund and Barclays Eagle Labs.



↑ Havers Road Studio  
Immersive Visualisation and Simulation Lab

- The **Creative East** programme ([creativeeast.org.uk](http://creativeeast.org.uk)) led and overseen by the Connected Innovation team in partnership with universities in Norfolk and Suffolk and industry partners from across the wider Eastern region came to the end of its first phase culminating in a celebration at Carrow Road. Recently it was awarded follow-on funding to continue its work, mentoring businesses in creative industry through a structured programme that leads them to investment readiness. Games businesses including MLC Studio, Neblagon, Sketchbook Games, Rubber Ducky Snacks, Skyle Games, Triangle Games and Utopian benefited from the project.
  - Research collaborations in new areas of **Applied Games** have been initiated. Jake Montanarini, course leader for Games at Norwich University, has started work with the Big C to develop a prototype game to support families in coming to terms with a cancer diagnosis. This exploration of Applied Games builds on work developed in our region by UEA through the award-winning Sea Hero Quest project – a mobile game allowing participants to contribute to citizen science in navigation and spatial awareness.
  - Norwich University of the Arts launched a research and knowledge exchange **Institute for Creative Technologies**. The new institute, led by Dr Kirk Wolford has already established a network across the Eastern region and is developing work in creative technology practice, environmental science and data visualisation, creative health innovation and simulation training.
  - The **Connected Innovation** team, together with Norfolk and Suffolk County Councils, have continued to fund The Future Tech Programme ([connectedinnovation.co.uk/ecosystem-partnership-programme-the-future](http://connectedinnovation.co.uk/ecosystem-partnership-programme-the-future)) - Supporting early-stage tech founders in Norfolk & Suffolk - Connected Innovation. Multiple games businesses were supported through to raising investment with £360,000 secured for games companies in the first year’s activity (24/25) alone. This programme will continue to support early-stage founders from underserved backgrounds get to MVP stage and raise investment.
- ↓ Havers Road Studio  
Immersive Visualisation and Simulation Lab





### 3 How could Games grow in the East?



This report sets out the potential for Games in the East, and the assets we could connect:

- a highly skilled, available workforce
- highly productive sector with the potential to enhance the capability and efficiency of other areas of the economy
- world class research assets and a growing knowledge base
- a network of experienced Games professionals whose expertise could join up the business eco-system
- and a vibrant community of indie Games businesses with ideas in development.

And yet commercial growth in our region is slow and hard-won.

→ Norwich University of the Arts



We recommend six interventions critical to unlocking Games growth for the East:



#### Retaining graduate talent

The establishment of a Norwich Games hub would create a central focus for the Games community and nurture new businesses in the pre-revenue phase. It could build on the Creative East mentoring model and offer a programme of events that draws Games professionals from across industry to engage.



#### Develop A Regional Games Fund

Establish an investment case for a dedicated funding vehicle tailored specifically to East Anglia’s model that emphasises sustainability, accessibility, flexibility and which is aligned with regional priorities.



#### Focus on Cross-Sector Opportunities

Identify and catalyse projects showcasing games-technology spillover across healthcare, agriculture, energy and education. Connecting games expertise with business and research opportunities in healthcare, agriculture, energy and education.



#### Strengthen Mid-Career Skills Development

Support regional skills initiatives addressing mid-career development needs, working with local stakeholders and government, focusing on technical disciplines, leadership, cross-sector skills-mapping, and developing commercial and business skills.



#### Establish an Annual Industry Showcase

Launch a high-profile event that raises awareness, creates networking opportunities, and facilitates business development and investment.



#### Mapping Regional Games Infrastructure

Develop a network of resources and facilities throughout the region that complements the central hub while maintaining regional expertise and encouraging collaboration.



Dr Richard Wilson OBE,  
TIGA CEO, said:



“TIGA is the trade association representing the UK video games industry. Our vision is to make the UK the best place in the world to develop video games. Our industry is a huge success story. We employ the largest games industry workforce in Europe, with over 25,000 developers employed in over 1,700 studios across the UK. Our sector provides highly skilled professionals in clusters across the UK. The opportunity to build, grow and expand these clusters is significant.

“I’m delighted therefore that Norwich University of the Arts is exploring ways to strengthen the video games sector in the East of England. The industry is supported by highly respected universities, preparing skilled graduates for a career in our creative industry.

“TIGA has proposed a number of measures to grow regional games clusters, including a games accelerator, £ for £ match funding to improve access to finance for small and early-stage studios and the provision of commercial and business skills for games entrepreneurs. The introduction of TIGA’s Independent Games Tax Credit could also support more small studios in clusters across the UK to scale up and succeed.

“I strongly support the ambition to grow a games development cluster in the East of England. TIGA looks forward to working with universities, colleges and games studios across the region to make this goal a reality.”



Report References

All photos have been supplied by Norwich University of the Arts

<sup>1</sup> Final Report Business Case for an Enhanced Video Games Expenditure Credit. (n.d.). Available at: <https://cms.ukie.org.uk/wp-content/uploads/2025/04/VGEC-Business-Case-Nordicity-Final-Report-to-Ukie.pdf> [Accessed 15 May 2025].

<sup>2</sup> BFI (2018). New report shows UK tax reliefs help fuel boom in UK screen industries. [online] BFI. Available at: <https://www.bfi.org.uk/news/new-report-shows-uk-tax-reliefs-help-fuel-boom-uk-screen-industries> [Accessed 15 May 2025].

<sup>3</sup> TIGA. (2024). WEATHERING THE STORM: TIGA research reveals UK games dev sector continues to grow, despite global sector downturn - TIGA. [online] TIGA. Available at: <https://tiga.org/news/weathering-the-storm-tiga-research-reveals-uk-games-dev-sector-continues-to-grow-despite-global-sector-downturn>.

<sup>4</sup> Data supplied by TIGA, 15th May 2025, based on economic analysis by the University of Portsmouth. Report forthcoming.

<sup>5</sup> Ukie. (2023). The economic impacts of video game technology spillover - Ukie. [online] Available at: <https://ukie.org.uk/publications/the-economic-impacts-of-video-game-technology-spillover/>

<sup>6</sup> TIGA. (2024). WEATHERING THE STORM: TIGA research reveals UK games dev sector continues to grow, despite global sector downturn - TIGA. [online] TIGA. Available at: <https://tiga.org/news/weathering-the-storm-tiga-research-reveals-uk-games-dev-sector-continues-to-grow-despite-global-sector-downturn>

<sup>7</sup> TIGA. (2024). WEATHERING THE STORM: TIGA research reveals UK games dev sector continues to grow, despite global sector downturn - TIGA. [online] TIGA. Available at: <https://tiga.org/news/weathering-the-storm-tiga-research-reveals-uk-games-dev-sector-continues-to-grow-despite-global-sector-downturn>

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<sup>9</sup> Spaces. (2025). Digital Hub - Spaces. [online] Available at: <https://www.spacesworks.com/norwich/digital-hub/> [Accessed 15 May 2025].

<sup>10</sup> Norfolk Game Developers. (2025). Norfolk Game Developers. [online] Available at: <https://norfolkgame devs.carrd.co/> [Accessed 15 May 2025].

<sup>11</sup> Barker, A. (2025). Moss Monkey Games in Norwich to release first game Outclaw in 2026. [online] Eastern Daily Press. Available at: <https://www.edp24.co.uk/news/24936116.moss-monkey-games-norwich-release-first-game-outclaw-2026/> [Accessed 15 May 2025].

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