# Beyond enter-tainment

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Games Growth
Plan for the East

Connected Innovation

Norwich University of the Arts

For the last twenty years, and during a period of rapid growth in the $190 billion international Games market, Norwich University of the Arts has been at the centre of the development of a large but dispersed community of Games professionals in the East of England.

# Intro-duction

A pioneer in Games education since 2004, the University's role in exporting talent is well established, with graduates working in globally important studios on some of the most commercially successful games of recent years, such as *Grand Theft Auto V*, *Red Dead Redemption 2* (Rockstar Games), *Star Wars: Jedi Survivor* (Respawn Entertainment) and *The Matrix Awakens* (Epic Games).

Throughout this time, the Games industry in the East has been slower to grow than in other places. The absence of an AAA studio has meant that Norwich has not developed an industry cluster like Edinburgh or Leamington Spa – and the lack of appropriate funding has inhibited growth.

But the industry is changing. Indie Games studios are on the rise[i], remote working has become established and new routes to market have opened – all of which point to an opportunity for the East to take its fair share of a market that shows no sign of slowing down.

This report, written by Games academics and industry professionals from the East (with a special mention to Robin Milton, founder of Fairer Games), collates unique insights from our global network of graduates, colleagues, industry contacts, and policymakers. It takes stock of contemporary practice, charting a course for growth **and pointing to practical interventions from regional government that would unlock innovation and growth.**

Associate Professor Mark Wickham
Director of Computer Arts and Technology,
Norwich University of the Arts
TIGA Education Advisor

# FOREWORD

TIGA (The Independent Games Developers' Association) is the trade association representing the UK video games industry. Our ambition is to make the UK the best place in the world to develop video games. We champion the industry's interests, promote best practices, and drive forward excellence in education and skills.

The market for video games is substantial and growing rapidly. Globally, the video games sector is estimated to be worth nearly $190 billion, supported by over three billion players worldwide. The consumer games market is forecast to grow to $227 billion this year, underlining the scale and potential of this dynamic industry.

The UK is already one of the largest centres for games development globally and is home to the largest games development workforce in Europe. The UK games sector contributes significantly to national economic success by delivering:

→ Highly skilled employment

**80%** of developers are degree-qualified.

→ Regional growth

**80%** of the industry's workforce is based outside of London.

→ Export strength

**95%** of UK games studios export their products.

TIGA plays a pivotal role in supporting this success. We are the leading voice for developers, digital publishers, and the broader games industry in the UK. Our vision is to strengthen and grow the UK's position as a global leader in video game development.

**We deliver on this ambition by:**

- Advocating for the industry to government and policymakers.
- Promoting excellence in education through initiatives like the TIGA Accreditation Programme, TIGA Games Education Awards, and sector-wide conferences.
- Supporting new and established studios through resources, guidance and events such as the Start-Up, Scale-Up & Grow Conference.
- Celebrating the achievements of the UK Games industry and games education via the prestigious TIGA Games Industry Awards.

TIGA is also a strong advocate for regional games development hubs. We recognise that thriving local clusters are essential for the industry's long-term health and growth. To highlight this, TIGA publishes its annual *Making Games in the UK* report, which provides in-depth analysis of the UK's games development clusters, underlining their economic impact and strategic importance.

TIGA welcomes this report by Norwich University of the Arts and Connected Innovation which showcases the success and future potential of the games sector in the East of England, and we look forward to actively supporting the activities of this games development hub.

Dr Richard Wilson OBE
CEO, TIGA

# EXECUTIVE SUMMARY

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## UK and International Markets

- The international market for Games is worth $190 billion, with 3 billion active gamers worldwide.[ii]
- UK Games is an economic powerhouse. The sixth biggest market in the world, it is worth **£7.82 billion** (Ukie[iii]) at retail, £6 billion 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[iv] versus the national average of £62,100.
- Even though the global Games workforce has contracted in recent years, the UK has seen **4.8% growth**[v] for the period ending May 2024, bringing the number of UK workers to **28,500**. Atypical for creative industry which is heavily reliant on freelancers, some 25,000 of these jobs are full time development roles, generating tax revenue of £2.2 billion[vi] across the wider economy. 80% of the workforce is based outside of London.
- The UK's international strength in Games has put us in pole position in new markets for **emerging technology**[vii] that have resulted from a convergence of Games with other screen industries, for example Virtual Production. These trends underline the investible nature and export potential of Games compared to other comparable sectors.



## Growth in Games in the East

This strong productivity performance makes Games an important **lever in the Norfolk economy** which has historically been less productive than the national average. Some 5.9% (TIGA[viii]) of the UK Games workforce is in the East, compared to 23% in London and 18.7% in the South East.

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[ix], 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 incubation models like Akcela Ventures[x] 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[xi] 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.

← The Digital Futures Institute,
University of Suffolk

continued →

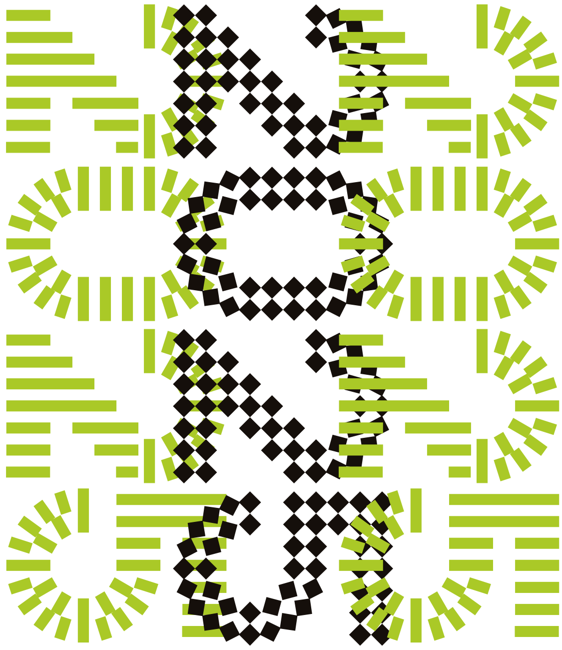
- There is a well-networked and vibrant **community of game developers** in our region, brought together through Norfolk Game Developers[xii] and centrepiece events like Norwich Games Festival. For some, game creation is their passion and hobby – but for others, in increasing numbers, it is a serious 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 £1.3 billion. Our region has *nationally important* strengths in agritech, biological sciences, 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 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.

↑ Paper Trail,
Newfangled Games

## What's new for Games in the East 2025?

- 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 technology, 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 technology.
- 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 support from the Prince's Trust Enterpirse Programme 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[xiii] have set a 2026 release date for *Outclaw*, a game supported by Transfuzer, UK Games Fund and Barclays Eagle Labs.
- Funded by DCMS the **Creative East** programme www.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.
- The **Connected Innovation** team, together with Norfolk and Suffolk County Councils, have continued to fund The Future Tech Programme - supporting early-stage tech founders in Norfolk and Suffolk. 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.

- Research collaborations in new areas of **Applied Games** have been initiated. Jake Montanarini, course leader for Games at Norwich University of the Arts, 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* – 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 Professor Kirk Woolford 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.
- In June 2025, as part of the Creative Industries Sector Plan, the UK government set out its plans and expectations for Games at a national level, signalling its commitment to the sector as an engine for growth.

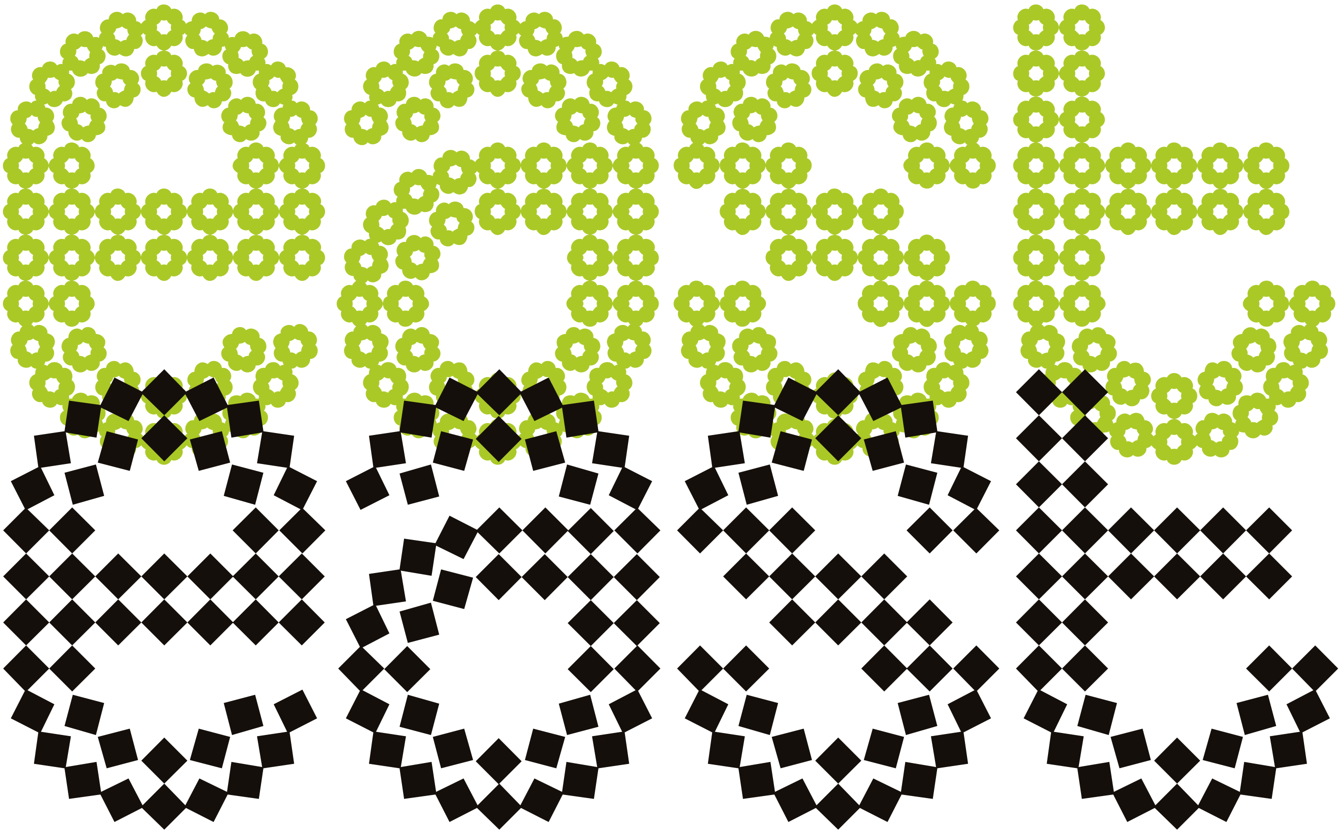


← Piece Together,
Glowfrog Games


↑ Project C,
Norwich University of the Arts and The Big C


↑ Brewess,
Fairer Games

# 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.
- a 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.
- 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:

## 1 Retaining graduate talent

Establish a Norwich Games hub as a central focus for the early-career Games community. The hub would support and connect new businesses in the pre-revenue phase, creating access to academic research and facilities. The hub would build on the Creative East mentoring model and offer a programme of events that draws Games professionals from across industry to engage.

## 2 Develop a regional Games fund

Establish an investment case for dedicated funding to support early-stage Games development in the East. This would complement the UK Games Fund and existing Video Games Tax Relief (VGTR) programmes by targeting start-ups in the pre-revenue phase.

## 3 Focus on cross-sector opportunities

Identify and catalyse projects showcasing games-technology spillover across healthcare, biological sciences, agriculture and energy.

## 4 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.

## 5 Map 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. The UK Games Growth Plan will see the introduction of a UK Games Council that presents a unified voice for Games in government. Within this intervention we would see the creation of a **Games Council for the East**.

## 6 Establish an annual industry showcase for the East

Launch a high-profile event, linked to the Norwich Games Festival, to raise awareness, create networking opportunities, and facilitate business development and investment.

# THE STATE OF PLAY

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## Introduction

The worldwide market for games is worth $190 billion with 3 billion active gamers.[xiv] Games is a major contributor to the East of England economy, creating revenue, jobs and unlocking innovation in other high-growth areas. Spurred on by the COVID-19 pandemic, it is a market that shows no sign of slowing down. Entertainment gaming, once identified as a youth activity is enjoyed by almost everyone, as the early adopters reach retirement age. Furthermore, we believe the potential for games-based innovation beyond entertainment is only just getting started.

Having grown organically for the last 20 years, the opportunity now in the East is to make structural interventions which harness regional strengths and enable the region to realise its true share of the global industry growth still to come.

We have significant assets to work with; world-class educators and capital assets, a skilled talent base and evidence of high-potential start-ups. And as a region experiencing relatively low productivity, **Games is an attractive lever for growth**.

This report, developed by Norwich University of the Arts and Connected Innovation brings together national and regional data to describe those assets and set out the opportunities for accelerated growth. It draws together data from DCMS, ONS, Statista, TIGA, Skillful, and Ukie.

↑ Nikki Rose,
MA Games
Norwich University of the Arts

# THE MARKET FOR GAMES

## Sustained growth with no end in sight.

**£7.8b**

**The UK Games industry** is the sixth biggest in the world and the biggest in Europe, contributing over £7.8 billion GVA (Ukie 2023), which has doubled since 2013.

**73k**

It generates more than 73,000 jobs chiefly clustered in London, the South East and North West. Despite worldwide market contraction, TIGA estimated jobs growth in the UK of 4.8% in 2023-4.

**£83,800**

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[xv] versus the national average of £62,100.

**160k**

The Games industry is a big part of the CreaTech sector identified in the UK government's Creative Industries Sector Plan in June 2025 – forecast to create £18 billion GVA and 160,000 new jobs over the next decade.

**55%**

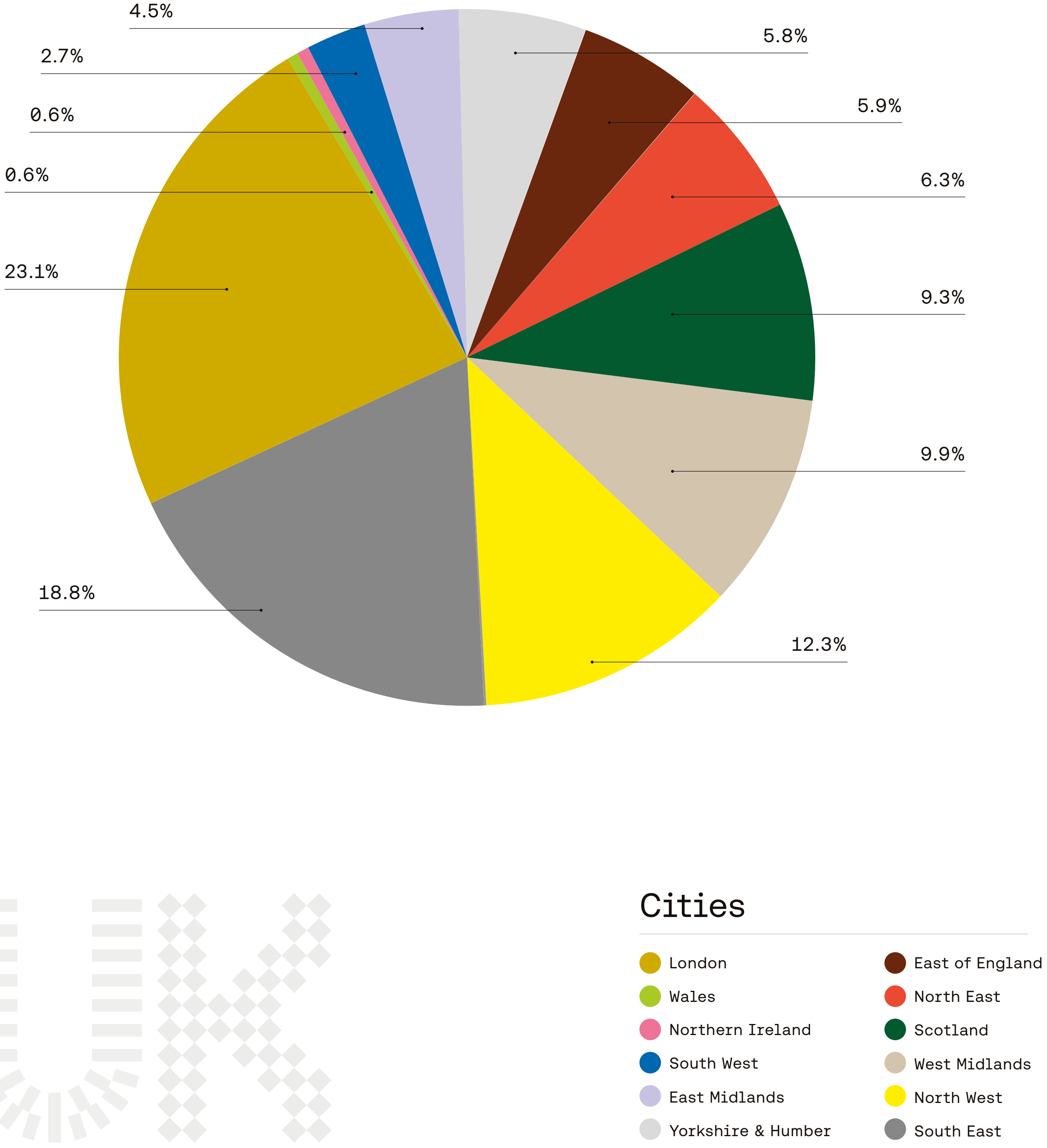
Historically, regional hubs like Leamington Spa (Codemasters), Guildford (Super Massive Games), Edinburgh (Rockstar UK) and Dundee have grown as mini-clusters around established studios. Around 55% of development jobs are now based outside London and the South East, demonstrating the industry's growing geographic diversification, driven by remote working and the growth in Indie Games.

The market splits into AAA and Indie Games. While GVA data is not available by subsector, AAA Games – the big titles – have traditionally dominated the market, both in terms of revenue performance and job creation.

Historically having struggled to find viable routes to market, there is evidence that Indie Games growth is hitting its stride, gaining a strong foothold through ambitious creativity and the community they create. 2024 saw a 24% increase in the number of Games SMEs (Ukie).

Additional revenue streams associated with Games – in-game purchases, spin-off films like *Sonic the Hedgehog 3*, books, toys, merchandise and Games events – show strong growth too. This is a market with a long way to go as our national habit becomes ever more established across a broad demographic.

# Regional Distribution of Games Industry Employment in the UK



# Who plays Games?

Who plays Games?

**53%** Approximately 53% of the 16+ population (Statista, 2024) in the UK are active gamers.

**25%** The audience for Games is more diverse than people think, with 25% active gamers over 35.

**47%** Gender split is almost even: 53% male and 47% female.

The UK's international strength in Games has put us in pole position in new markets for emerging technology that have resulted from a convergence of Games with other screen industries, for example Virtual Production.[xvi]

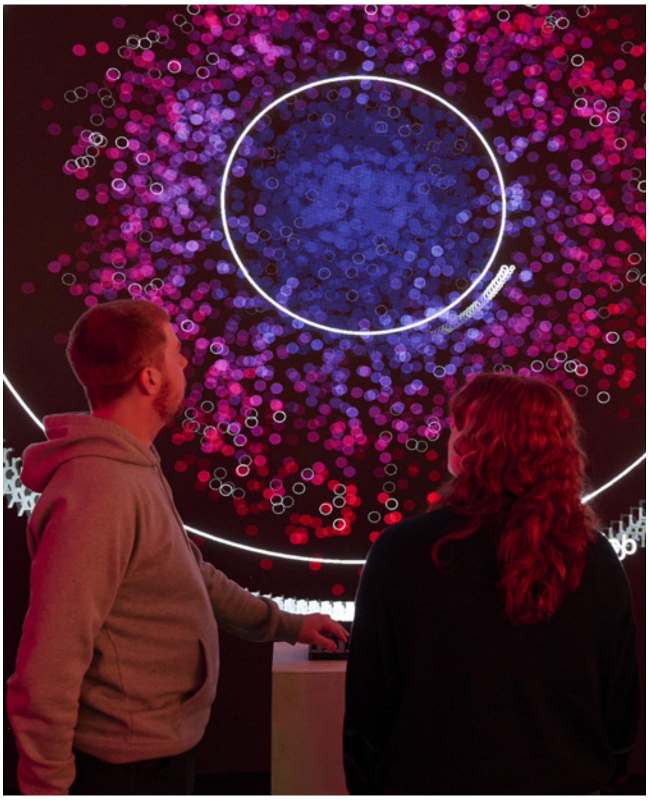
Expertise in LED screen technology, volumetric and motion capture and real-time render engines has offered new and often cost-effective creative possibilities in moving image content. Norwich University of the Arts has just opened the Sony Virtual Production Teaching Studio; a landmark facility with cutting edge technology – and the first of its type in the world.

These are trends which underline the investible nature and export potential of Games compared to other comparable sectors.

Potential for Games industry growth is highlighted by the *UK Games Growth Plan* (June 2025) which will accelerate innovation through the next iteration of the UK Games Fund, the creation of the UK Games Council and the UK Games Skills network.

**The East of England** accounts for 5.9% of the UK's total Games workforce, including full-time remote employees, freelancers, and indie studios. In Norwich alone, 1,065 people work in Creative IT and Software – the biggest of all the creative industry subsectors (DCMS 2023).

Norwich University of the Arts has been an engine of this community since the launch of its pioneering undergraduate course in 2004. The community in the East is structured as a distributed working model – agile, resilient, community-focused, and globally connected – positioning us well for market growth.



↑ Norwich University of the Arts, Immersive Visualisation and Simulation Lab

The East of England accounts for 5.9% of the UK's total Games workforce, including full-time remote employees, freelancers, and indie studios.

The East is home to an **established Indie Games community** represented by Norfolk Game Developers and Game Anglia and a growing number of start-ups, including Newfangled Games, Fairer Games, Glowfrog Games, Rubber Duck Games, Moss Monkey, Lyrelark Games, Xist, and Odd Bug Studios. The annual Norwich Games Festival attracted more than 40,000 visitors in 2025.

Many experienced Games professionals work remotely in the East for leading national and international studios such as RARE LTD., d3t, Dambuster Studios, People Can Fly, Industrial Light and Magic (ILM), and Epic Games. This means that talent in the East spans the whole commercial games opportunity.

CASE STUDY //

## Moss Monkey

Starting with a grant from Tranzfuser, a scheme that supports graduates in the UK to build video game development studios, Moss Monkey have received additional funding from the UK Games Fund's Prototype Fund and Barclays Eagle Labs. This support has helped develop their debut title *Outclaw*, due for release in 2026.

↓ Outclaw,
Moss Monkey

CASE STUDY //

## Newfangled Games

Newfangled Games are the creators of the acclaimed puzzle game *Paper Trail*, later licensed by Netflix Games. Now, with support from the UK Games Fund's Content Fund, they are developing a highly anticipated follow-up and have been able to scale up their development team.

↓ Paper Trail,
Newfangled Games

Our region boasts **world-class games education assets** centred on **Norwich University of the Arts**, whose Games Art and Design degree, pioneered HE in Games in 2004.

Since then, it has received international recognition. Norwich has been ranked in the World Top 10 in The Rookies and was Best Educational Institute at the 2023 TIGA Awards. The Computer Arts and Technology programme at Norwich includes Games Design, Games Development, Animation, VFX, Creative Computing, Computer Science, Creative Technology and Robotics. The University's Institute of Creative Technology is home to the Immersive Visualisation and Simulation Lab (IVSL), a base for research in Applied Games, and part of the Arts and Humanities Research Council's (AHRC's) World Class Labs (WCL) programme.

CASE STUDY //

## Norwich University of the Arts, Immersive Visualisation and Simulation Lab (IVSL)

The IVSL is a state-of-the-art Research Lab and Studio. Purpose-built to support experimentation and cross-industry innovation, the Lab features a volumetric capture system and LED volume to explore, develop, and commercialise next-generation immersive media and virtual production technologies.

← Immersive Visualisation and Simulation Lab

**University of Suffolk** has developed strength in Games Development which led to the establishment of the DigiTech Centre – a joint venture with BT at Adastral Park - and **UEA**'s Computer Science faculty has consistently generated highly skilled technical expertise in this area.

Our region is a net exporter of Games industry talent, in both design and development. Norwich University of the Arts alone delivers approximately 150 graduates to the industry each year.

The region's further education colleges have developed strength in creative technology – particularly City College Norwich, East Coast College and West Suffolk College – and this sector has pioneered education in esports, with degree courses now available at University of Suffolk and Norwich University of the Arts for students who want to develop their competency further.

→ University of Suffolk, Waterfront Building

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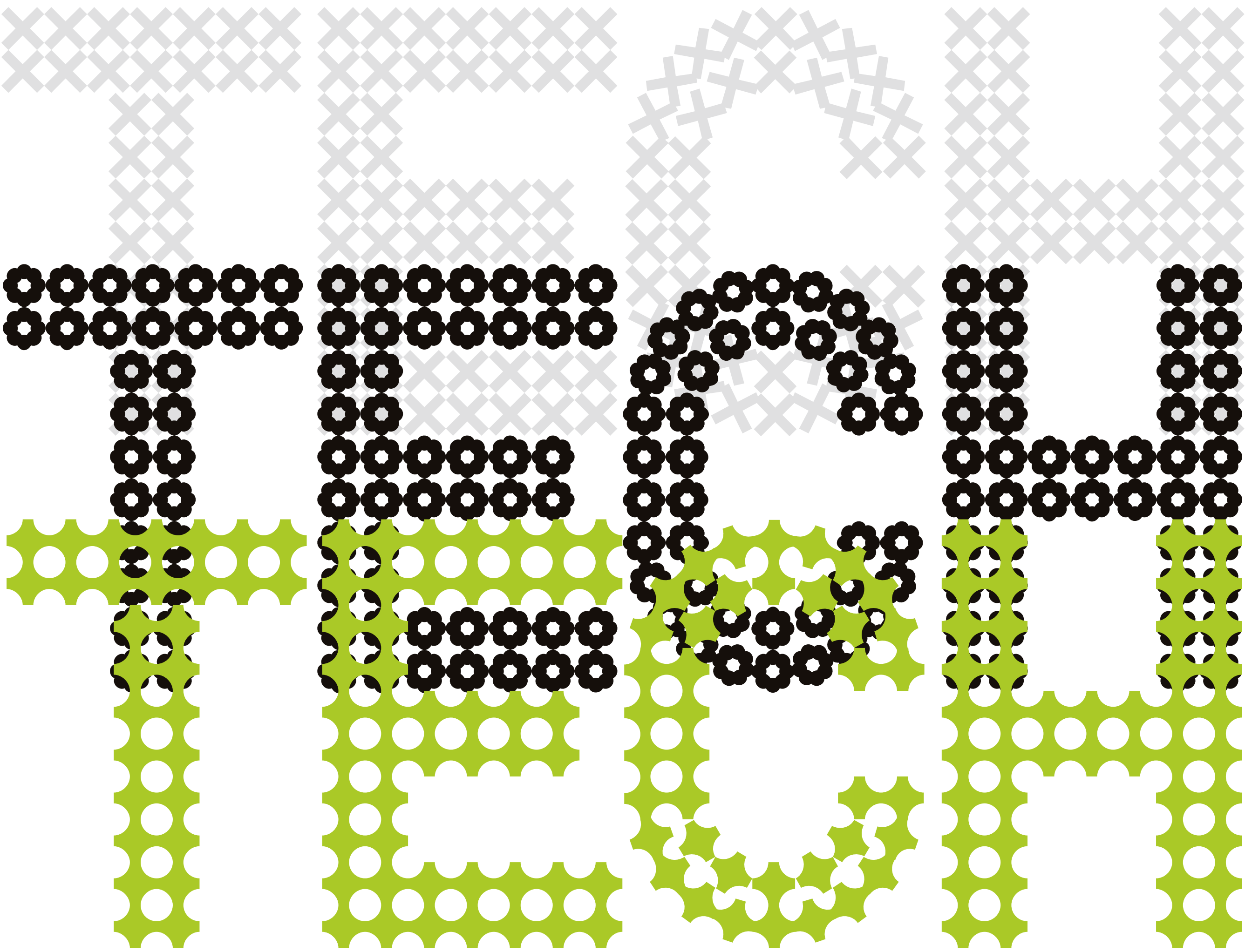
# Games Technology Spillover: An opportunity for the East

**Technology spillover**, where Applied Games and Gamification are unlocking innovation in other economic sectors generates £1.3 billion in value annually across the broader UK economy. It is a key example of 'cross-sectoral R&D' as set out in the Industrial Strategy.

The East is uniquely positioned to lead this transformation, through research, training and adoption of AI technology. Our strengths in healthcare, biological sciences, agriculture, energy, and education align directly with high-impact applications of Games technology. From dementia research breakthroughs at UEA to XR training in offshore energy, the region is already demonstrating what's possible.

Whether visualising complex systems, enhancing training, or simulating rising sea levels, the East is bringing together scientific and creative technology research to benefit innovative business like Artlist and Infinite Form. We have the talent, infrastructure, and sectoral depth to lead the UK in applied Games innovation.



### Healthcare and Biological Sciences

Our region's internationally recognised assets in healthcare innovation and biological sciences create immediate opportunities for game technology applications. Co-led by UEA, the *Sea Hero Quest*[xvii] project has transformed dementia research through a custom-designed game that collected data equivalent to hundreds of years of laboratory research. And Norwich University of the Arts is developing a game with The Big C that will support families of people living with cancer to come to terms with their diagnosis.

### Agricultural Innovation

The East has natural alignment with Game technology applications in farming, land management, and food production. New creative visualisation technology can connect people to big data sets, enabling them to plan for efficient, productive use of resources that safeguard our landscape.

CASE STUDY //

## Sea Hero Quest

*Sea Hero Quest* is a multi-award-winning citizen science project originally led by Deutsche Telecom, alongside GLITCHERS, UCL, UEA and Alzheimer's Research UK. The project was launched to help scientists understand navigational abilities and accelerating early disease detection. It exemplifies how gaming can meaningfully contribute to solving real-world health challenges.

↓ Sea Hero Quest,
Deutsche Telecom, GLITCHERS, UCL, UEA, Alzheimer's Research UK

CASE STUDY //

## Water Restoration Fund

The Broads Authority and Norwich University of Arts have partnered to create virtual environments depicting future climate change impacts on the Norfolk Broads.

This technology will immerse stakeholders in simulations of their existing landscapes. Instead of analysing charts, stakeholders can virtually stand on a simulated riverbank to understand future scenarios more tangibly.

↓ Water Restoration Fund,
The Broads Authority and Norwich University of the Arts

continued →

### Energy Sector Applications

Our established North Sea energy infrastructure, Sizewell nuclear facilities, and rapidly expanding offshore wind sector create ideal conditions for using Game technologies. Neptune Energy are implementing XR training applications that allow offshore workers to interact with realistic 3D models of platforms remotely, reducing physical visits while improving safety outcomes.[xviii]

### Visualisation and Simulation

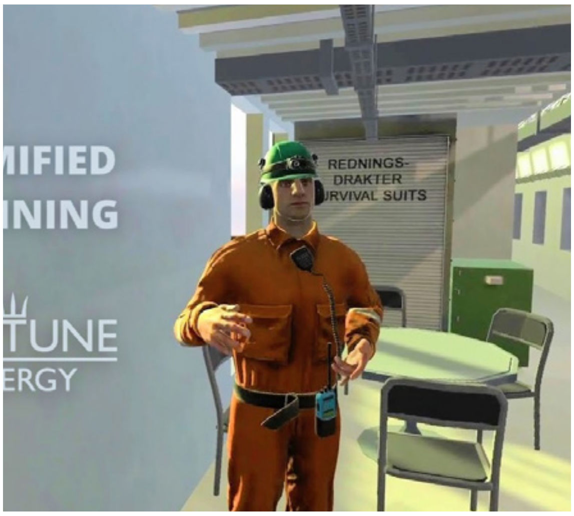
Commercial applications of Games technology for visualisation already create economic impact. Norwich-based Infinite Form applies games technologies to create visualisation solutions for clients including Porsche, IKEA, NHS, and Dr. Martens, translating games-derived expertise into business solutions across multiple sectors.

CASE STUDY //

## Neptune Energy

Neptune Energy has applied 3D gaming-based visualisation and XR technology to its North Sea platforms to improve drilling efficiency, safety measures and environmental impacts. The technology creates digital twins and enables real-time monitoring to support offshore planning and operations from onshore.

↓ 3D visualisation and XR Technology,
Neptune Energy




CASE STUDY //

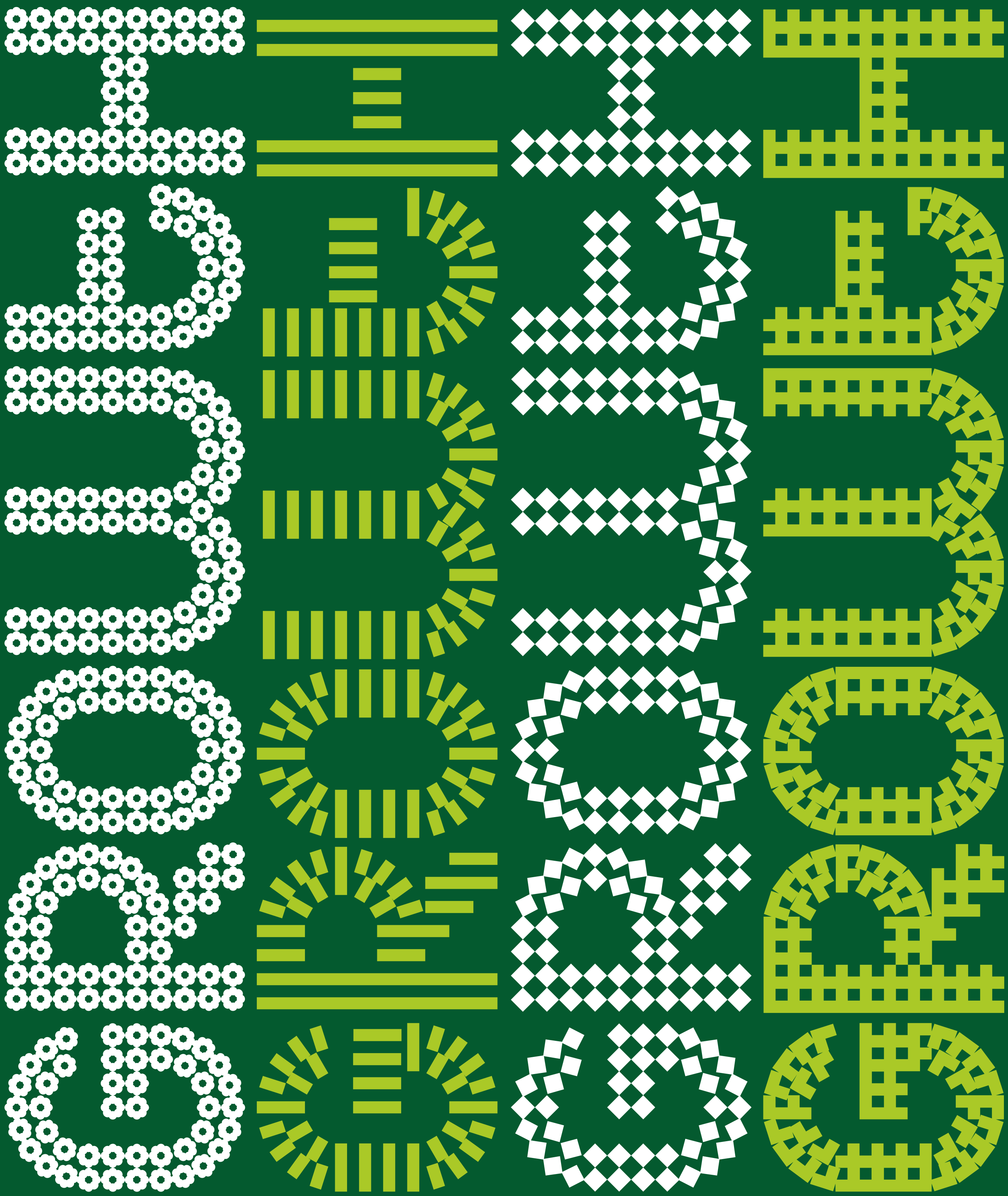
## The Digital Futures Institute

The Digital Futures Institute is the University of Suffolk's centre for computing-related research and knowledge exchange activities, with a focus on developing sustainable and responsible digital solutions that address real-world issues. Projects include research into improving gameplay, gamification, VR applications and AI for esports, with links to the university's Games degree.

↓ The Digital Futures Institute,
University of Suffolk


↑ Norwich Games Festival,
The Forum

# Barriers to Growth: Funding



## Games in our region is highly investible with the potential for high return. With world-class assets, talent, education and R&D there is a real opportunity to ‘accelerate innovation-led growth’ as set out in the Industrial Strategy. But growth has been frustratingly slow and hard-won, and there are barriers to success.

Historically, government has struggled to invest in a fragmented sector made up of SMEs and micro-SMEs, where the return on investment has not been clear. Nationally, 78% of Games studios employ less than four people (TIGA September 2025). The characteristics of Games business have not been well understood, with the consequence that the support available has not been tailored to Games sector needs.

The **funding landscape** for UK Games businesses is misaligned with the realities of the distributed development model in our region. While a wide array of mechanisms – ranging from investment, tax relief and grants to fellowships and publishing deals – are theoretically available, the system is built around traditional studio structures, creating a barrier to engagement for the region’s independent developers and remote professionals.

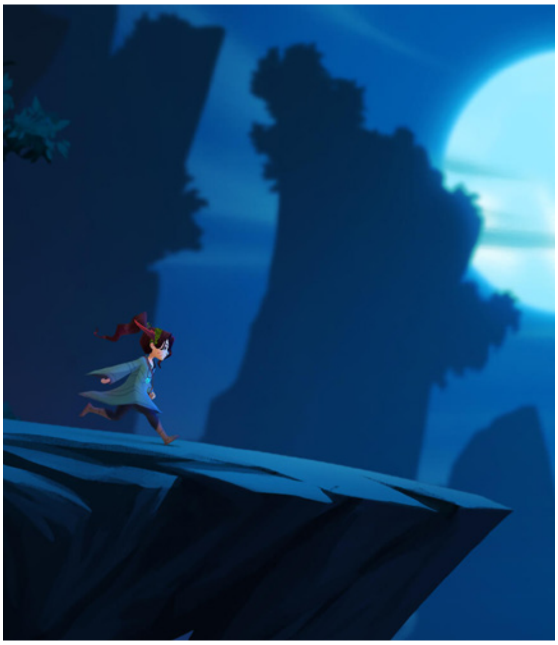
Of the 25 funding vehicles analysed for this report: only 16% offer non-repayable grants, with the majority requiring repayment, equity, or upfront capital.[xix] These conditions often exclude start-up games businesses most in need of support. Reimbursement-based schemes, such as the UK Games Fund, exacerbate the issue by demanding initial outlay; problematic in a sector which typically sees a long pre-revenue phase prior to publication. The 2025 Creative Industries Sector Plan acknowledges this problem, but still focuses investment on scale-up, not start-up.

At an international level, TIGA’s 2025 Video Games Expenditure Credit (VGEC) report found that UK tax relief mechanisms are not competitive, with effective tax relief at 21% versus 30% in France and 31% in Quebec.

Moreover, few funding schemes provide continuity, forcing developers to repeatedly re-enter competitive funding rounds rather than building on proven success.

In the East, many indie studios lack the infrastructure or capital reserves of larger studios yet possess expertise and innovation capacity to deliver high-impact projects. Without targeted reform, the current funding landscape risks stifling regional growth and missing a significant opportunity to diversify and future-proof the UK’s games economy.

> “Compared to other industries, video games are newer and less understood by investors, so they’re a bit more reluctant to put money into it. This lack of investor familiarity compounds the challenge.”
>
> Mark Backler, Sketchbook Games



↑ Lost Words,
Sketchbook Games

# Barriers to Growth: Talent Pipeline & Remote Workers

Games in our region faces a significant **entry-level employment gap**. Nationally, only 7% of advertised roles are graduate entry (Skilful), and since these roles are usually with AAA studios, the challenge is particularly acute in the East. With few established studios offering junior positions, skilled graduates are often forced to relocate or pivot to adjacent industries, despite having the skills and ambition to contribute meaningfully to the sector.

The challenge extends beyond entry-level jobs. Remote work has enabled many professionals to remain in our region while contributing to national and international projects. But mid-career professionals in the East encounter **limited opportunities for career development** due to the lack of mid-sized studios. We risk losing experienced talent at the point where their expertise is most valuable, undermining the region's ability to retain and grow its creative and technical leadership.

Nationally, programming and technical roles account for 43% of hard-to-fill vacancies.[xx] The East mirrors this trend, with acute shortages in technical art and specialised development disciplines. These gaps not only reflect a broader industry issue but also present specific regional constraints that hinder productivity and limit the sector's growth potential.

Our region's Games community aligns with the sector's future: distributed, flexible, and innovation driven. However, this model also introduces challenges. Poor in-person collaboration can restrict access to mentorship, peer learning, and the informal knowledge exchange that is critical to professional development – particularly for early- and mid-career professionals.

↑ Tanje Kelesh,
3D Design and Animation graduate
Norwich University of the Arts

# The East: Realising the Opportunity

The East already has many of the components needed to become a distinctive force in the UK Games Industry.

The UK Games Growth Plan, announced in June 2025, will see £30 million investment over the next three years, focussed on early stage investment support, access to finance and skills development. This report recommends a six point plan for the East, to connect our assets, catalyse revenue growth and secure our share in future games prosperity:

## 1 Retaining graduate talent

Establish a Norwich Games hub as a central focus for the early career Games community. The hub would support and connect new businesses in the pre-revenue phase, creating access to academic research and facilities. It would build on the Creative East mentoring model and offer a programme of events that draws Games professionals from across industry to engage. It could build cross sector knowledge of high-growth sectors in the East, so that Games start-ups can capitalise on the opportunities in Applied Games and Gamification from the outset, rather than limiting their focus to entertainment gaming.

## 2 Develop a regional Games Fund

Establish an investment case for dedicated funding to support early stage Games development in the East. This would complement the UK Games Fund and existing Video Games Tax Relief (VGTR) programmes by targeting start ups in the pre-revenue phase.

## 3 Focus on cross-sector opportunities

Identify and catalyse projects showcasing games technology spillover across healthcare, biological sciences, agriculture and energy. By expanding understanding of interactive technologies across high-growth economic sectors we will unlock new opportunities for games professionals and businesses alike. The Norfolk and Suffolk Innovation Board and Connected Innovation would design structured collaboration pathways that accelerate partnerships and innovation across sectors.

## 4 Strengthen mid-career skills

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.

## 5 Map 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. The UK Games Growth Plan will see the introduction of a UK Games Council that presents a unified voice for Games in government. Within this intervention we would see the creation of a **Games Council for the East**.

## 6 Establish an annual industry showcase for the East

Launch a high-profile event, linked to the Norwich Games Festival, that raises awareness, creates networking opportunities, and facilitates business development and investment. This would create visibility and focus for a large but disparate creative community, celebrating innovation, creativity and commercial potential.

# What's next for Games in the East?

"At Connected Innovation, we are excited to see the huge array of talent within our ecosystem – from the students at our TIGA accredited universities to the indie games companies that have set up across our network of innovation hubs in the region. We have been delighted to play our part in supporting games companies through landing the Create Growth Programme, working with our Future Tech Programme delivery partners to support games founders to establish their business model and raise investment, and taking delegations of games and immersive tech businesses to national and international events to put them in front of investors and publishers (with successes such as Tilki from the 2024 Slush delegation recently closing their $2.1m investment round). This is an exciting time for the games sector in the East of England, and we look forward to continuing to support the growth of the sector and exploring the exciting opportunities through the cross-sector application of games technologies linked to the region's other key sectors including health, manufacturing, agri-tech and energy."

James Allen, Connected Innovation,
Programme Manager

→ William Karenga,
MA Games
Norwich University of the Arts

This report will be used to highlight the opportunity for Games in the East with industry partners, regional Games networks and economic strategy partners in regional and national governments.

We hope it will be the start point for a coordinated planning process that sees our region take full advantage of the opportunities set out in the national Games Growth plan and the wider Creative Industries Sector Plan. But that it will also inform additional interventions for the Eastern region that enable the growth ambitions of the Norfolk and Suffolk Business Boards.

↑ Norwich Games Festival,
The Forum


Fact
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## $190b

The international market for Games is worth $190 billion (TIGA).

## 3 billion

3 billion people are active gamers across the world (TIGA).

## £7.8b

UK Games is worth £7.8 billion (Ukie) retail, £6 billion GVA.

## £83,800

The average Games worker generates £83,800 versus a national average of £62,100.

## 25%

The audience for Games is more diverse than people think, with 25% active gamers over 35.

## 1,065

1,065 people work in the Creative IT and Software in greater Norwich (DCMS).

Gamers are a diverse community with people of colour and those with a disability over represented.

## 28,500

UK Games workforce grew by 4.8% (May 2024) bringing number to 28,500.

## 80%

80% of the Games workforce is outside of London.

## 5.9%

5.9% of the workforce is in the East (TIGA).

## 53%

Approximately 53% of the 16+ population (Statista, 2024) in the UK are active gamers.

## 47%

Gender split is almost even: 53% male and 47% female.

## £1.3b

The UK market for Games Tech spillover is estimated at £1.3 billion.

# Appendix

## Support for Games in the East

→ DCMS Create Growth Programme (£1.7million secured since 2022), which has fully-funded the Creative East investment readiness programme across Norfolk, Suffolk and Cambridgeshire and delivered locked-off Innovate UK Create Growth funding competitions which to date has funded +£1million into creative industries businesses in this geography (NB: two competitions currently open to 29th May 2025).

→ The Innovation Grant Mentoring Project run by Norfolk and Suffolk County Councils has secured more than £3.1 million through innovation funding competitions, including Innovate UK, for businesses across Norfolk and Suffolk, helping regional companies overcome knowledge barriers to innovation funding.

→ Connected Innovation joins up Norfolk and Suffolk's innovation ecosystem and has secured multiple innovation programmes for the region with over £10 million of locked off support programmes in Creative Industries (including Create Growth Programme), Agri Tech, Manufacturing and Digital Technology (including support for early-stage founders from underserved backgrounds). To date, Connected Innovation has supported 91 events with over 4000+ attendees, focused on driving cluster growth and cross-sector innovation. Connected Innovation has funded delegations to Barclays Games Frenzy and Slush in Helsinki – a founder-focused startup event – supporting the region's games sector.

→ TIGA held the 'Start-up, Scale-up and Grow' conference in April 2025, launching the accompanying 'START-UP, SCALE-UP AND GROW: A GUIDE TO SOURCES OF FINANCE FOR VIDEO GAMES DEVELOPERS 2025'. One of many initiatives to support the expansion of the UK games industry.

↓ Norwich Games Festival,
The Forum

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# Beyond Entertainment: Games Growth Plan for the East

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