Think Global, Create Local

The regional economic impact of the UK games industry

ukie

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“This report demonstrates how the UK games industry’s regional strength is delivering a hugely positive economic return.

Towns and cities of all sizes share in the high productivity jobs, commercial growth and cultural contribution that our sector offers. While UK games businesses are successful on the global stage, the direct benefits of their pioneering creative work are felt across the country.

The video games industry has an important role to play in rebalancing the economy and creating skilled careers. We look forward to working with government and policy makers to continue to bring the jobs of the future to local communities.”

Stuart Dinsey
Chair, Ukie

Ukie is the trade body for the UK games and interactive entertainment industry. With over 480 members, we represent games business of all sizes, from small start-ups to large multinational developers, publishers, service companies, charities and academic institutions, working across PC, console, mobile, online, esports and immersive technologies.

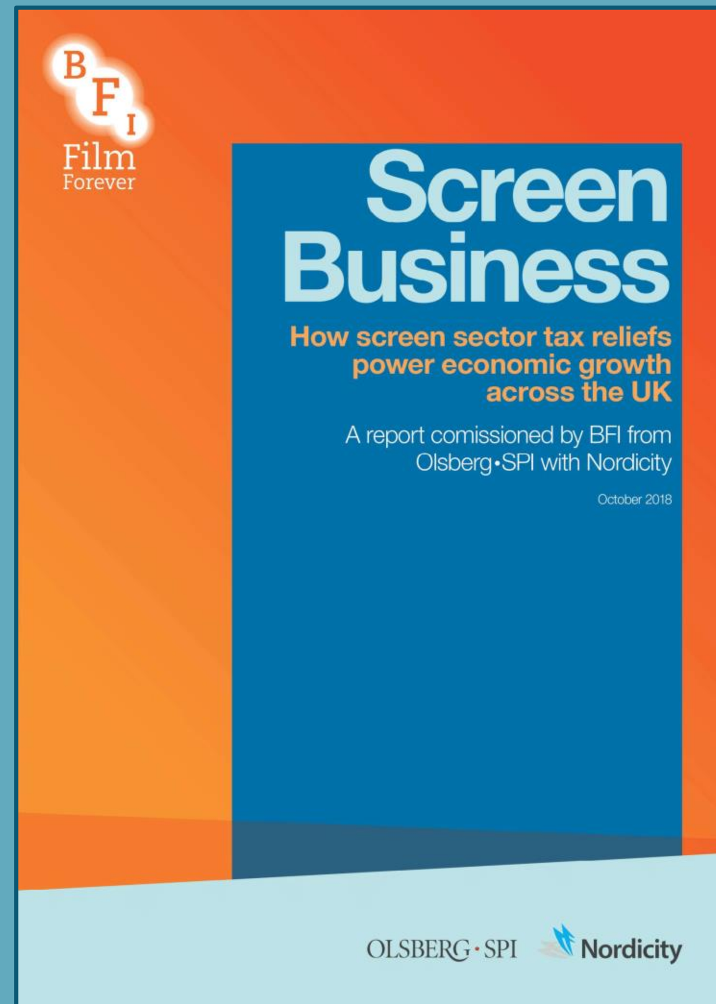
As well as supporting our members by connecting them with one another and promoting their innovative games and services, we keep policy makers informed, ensuring essential support and protective measures are provided by government for games companies and players alike.

About this report

In October 2018, in collaboration with Ukie and other stakeholders[1], the BFI released the ‘Screen Business’ report[2], produced by Olsberg•SPI / Nordicity and commissioned via the BFI’s National Lottery-supported Research and Statistics Fund. The report provided an analysis of the employment and economic contribution of the UK games industry at a national level.

In this report, we will use the underlying data from ‘Screen Business’, comprising information on over 2,100 UK games businesses, to analyse factors such as employment rates, productivity and the economic impact of the UK games industry at a regional level. Where appropriate, these are compared against other available data sets.

All data in this report relates to fiscal year 2016, which was the most recent complete annual dataset available at the time of publication of Screen Business.



1. Animation UK, British Film Commission, Pinewood Studios, Pact and UK Screen Alliance
2. BFI Screen Business - https://www.bfi.org.uk/education-research/film-industry-statistics-research/reports/uk-film-economy

2016 → Present

With 'Screen Business' being a landmark economic analysis, it was subject to a great deal of scrutiny from several UK government departments throughout its authorship. By engaging with the Government in this way, 'Screen Business' applied HM Treasury Green Book 2018 principles and best practice economic modelling and was prefaced by the then Chancellor of the Exchequer. In this regard, it is the single most authoritative economic analysis of the UK games industry ever conducted.

To ensure 'Think Global, Create Local' meets those same standards we are therefore required to use the same, unchanged data. However, we recognise that it is no longer 2016 and should bear in mind that since this time, the UK games industry has continued to grow and evolve. Therefore, it should be understood that the numbers provided in this report represent a particular snapshot in time for the UK games industry and may not reflect the present day picture of certain regions or places in which there as been significant recent investment or growth.

That said, this report does for the first time provide a detailed economic breakdown of the games industry throughout the UK, to the highest standards. We believe it is essential that this data is made available to highlight the tremendous benefits our sector provides to places all around the country and to serve as a robust benchmark from which future growth can be tracked.

Key findings (1)

- In 2016, UK games companies directly employed **16,140 FTE** roles and contributed **£1.35bn in GVA** to the UK economy. Including indirect and induced impacts, this rises to a total impact of **£2.87bn in GVA**.
- **London's** games sector is a billion pound industry, generating **£1.4bn in GVA** for the economy and directly employing **over 5,100 FTE roles**.
- **Eight games hubs** contributed over **£60m in GVA to their local economies**: London, Slough and Heathrow, Leamington Spa, Newcastle upon Tyne, Crawley and Horsham, Edinburgh, Manchester and Guildford.
- **55%** of game development studio roles are based **outside of London and the South East**.
- The North West, East of England, West Midlands and Scotland all employ **over 1,000 FTEs** in development studio roles.
- **23 towns and cities** throughout the UK are home to **over 20 local games companies**.

Key findings (2)

- **Scotland** is home to a thriving games industry, with three major hubs generating **£131m in GVA** for the UK economy.

- The **North East** games industry has the **biggest impact** on the local economy outside of London, at **£1.90 of every £1,000 of regional GVA**.

- **99.5%** of UK games companies are officially **SMEs** (Small to Medium Enterprises), employing less than 250 people, which collectively contributed **£1.6bn in GVA**.

- **£339m** in GVA is generated by **micro-businesses** of less than 10 employees, representing 13.7% of the industry total, and employing **3,664 FTEs**.

- The **very largest games companies**, employing over 250 people, are **hugely important** to the UK economy, alone contributing **£840m in GVA** and employing **over 4,200 FTEs**, or 26% of the industry workforce.

The UK games industry in context

Economic impact in comparison to other sectors

Screen Business: key findings

UK games companies directly employed **16,140 FTE roles** and contributed **£1.35bn in GVA** to the UK economy

Including retail, indirect, induced and spillover effects, this impact rises to **47,620 FTE jobs** and **£2.87bn in GVA**

Each games industry worker brings an average boost of **£83,800 in GVA** to the UK economy, compared to the national average of £62,100

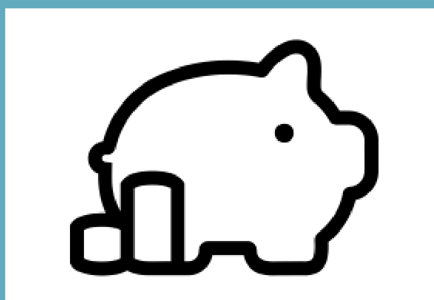
In the period 2015-2017, there was **over £1.75bn of inward investment** into UK games companies

Games development made up 86% of direct employment (13,840 FTEs) and contributed **£826m in GVA**

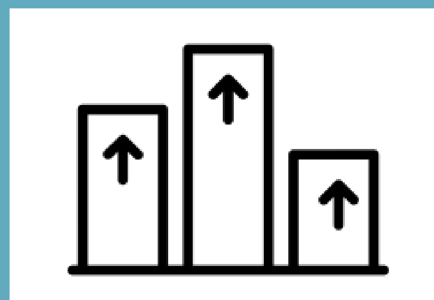
Games publishing made up 14% of direct employment (2,300 FTEs) and contributed **£526.6m in GVA**

This report will further investigate the impacts of game development and publishing in regions and local areas around the UK.

UK games market: key facts

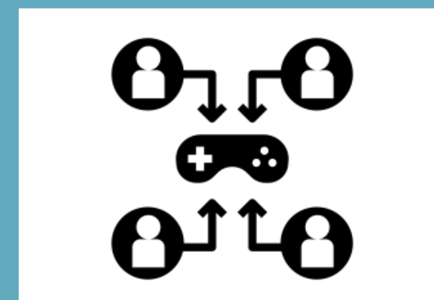


In 2016, UK consumer spend on games reached £4.33bn[1]



By 2018, consumer spend on games had risen to £5.7bn[2]

The UK is the 6th largest video games market in the world[3]



37.3m people in the UK play games[3]

1. Consumer spend valuation 2016, Ukie: https://ukie.org.uk/news/2017/03/uk-games-market-worth-record-%C2%A3433bn-2016
2. Consumer spend valuation 2018, Ukie: https://ukie.org.uk/news/2019/04/uk-consumer-spend-games-grows-10-record-%C2%A357bn-2018
3. UK Games Market 2018, Newzoo: https://newzoo.com/insights/infographics/uk-games-market-2018/

Games in the Creative Industries

In 2016, the combined Creative Industries generated £94.8bn in GVA. The contribution of £1.35bn directly from games companies therefore represents around 1.4% of the overall sector.

In comparison to other sectors, an average productivity estimation from available GVA and employment figures suggest that the games industry exceeds not only the national average, but the average productivity of many other sectors.

Sector	GVA (£bn)	Employment	Avg. Productivity (£)
UK Industrial Average	-	-	62,144
Games	**1.35**	**16,140**	**83,800**
Film	6.10	80,000	76,250
Publishing	11.62	193,000	60,218
Music	4.40	142,208	30,941
Museums & Galleries	1.15	41,000	28,000
Arts	6.08	229,000	26,528

See Appendix 1 for data sources in this table.

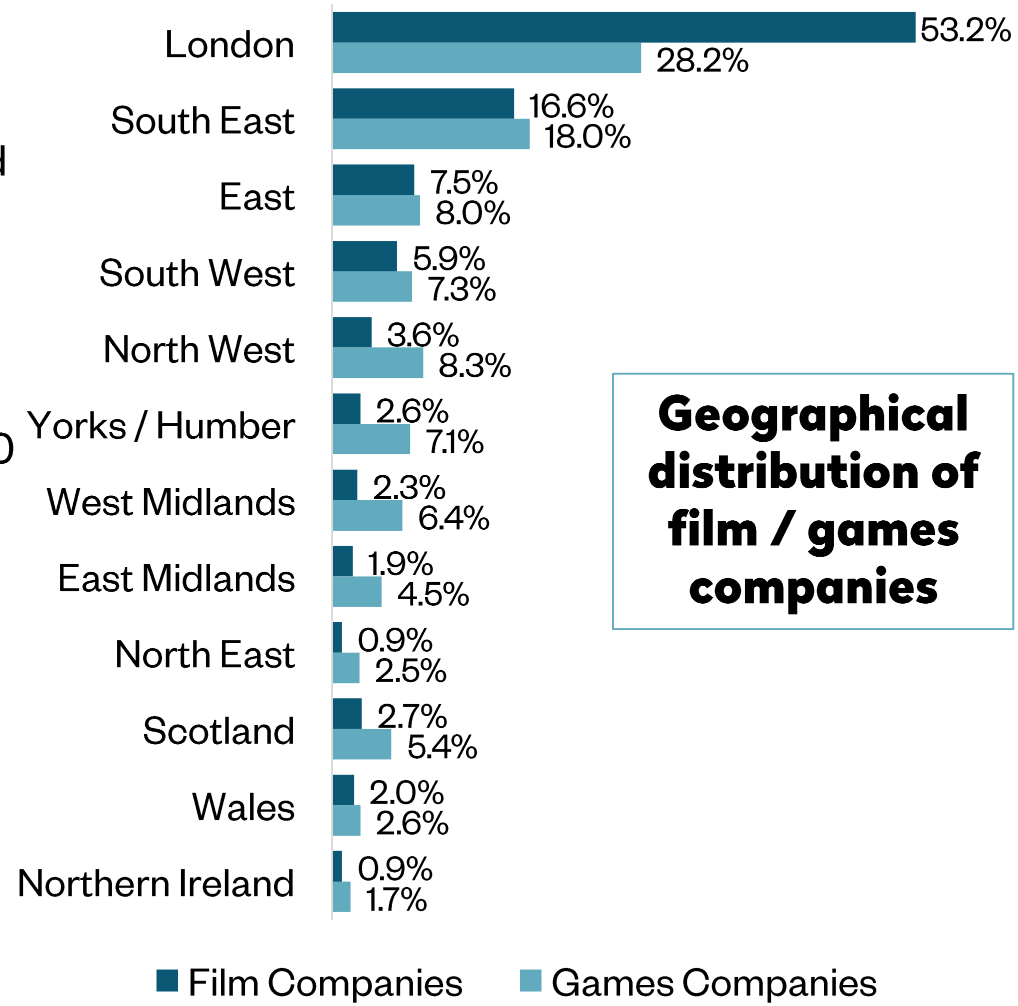
The UK games and film economies

The 2,108 UK games developers and publishers on which this report is based contributed £1.35bn in GVA in 2016, or around £643,000 per company.

In comparison, according to the BFI, in 2017[1] 11,730 film or video companies in the UK generated £6.1bn in GVA, or around £520,000 each.

Geographically, the games industry is less London-centric, with 53% of film / video companies based in the capital, compared to just 28% for games.

All non-London regions feature a higher proportion of the games industry than film.



Geographical distribution of film / games companies

1. 2016 data not available. The UK Film Economy, BFI 2018: https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-uk-film-economy-2018-11-14.pdf

Multinationals to micro-businesses

Economic impact by company size

Games companies by size

The UK games industry comprises companies of all sizes: from solo developers and indie micro-businesses, to startups, scaleups, boutique publishers, large development studios and global multinationals.

It is clear from the data that companies at all scales make significant contributions to the UK economy, both in terms of employment and GVA. The games workforce is spread relatively evenly across business of various sizes and together the smaller businesses generate value comparable to the industry's larger companies.

Company size (employees)	1 - 9	10 - 24	25 - 49	50 - 99	100 - 249	250+
Active companies	1,865	116	52	27	24	9
Employees	3,664	1,668	1,692	1,813	3,089	4,236
Total GVA (£m)	£338.7	£268.5	£472.2	£269.1	£280.3	£840.1

Games companies by size

Super indie

89% of games companies employ less than 10 people, yet these companies make up **23% of industry workforce**. Combined, they have a significant contribution to GVA at £339m, or **13.7%** of the total industry.

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Fifty up

Only **2.9%** of UK games companies employ more than 50 people, yet these companies employ **57%** of the industry workforce (9,554 FTEs). Together they contributed **£1.4bn in GVA** (56% of the industry total).

SMEs

99.5% of UK games companies are officially Small to Medium Enterprises, employing less than 250 people. **74%** of the industry workforce is employed in these businesses, which collectively contributed **£1.6bn in GVA.**

Big players

While only a handful of companies employ more than 250 people, these businesses are hugely important, alone contributing **£840.1m in GVA**, or 34% of industry total, and employ **26%** of the total industry workforce.

Games around the UK

Economic impact by regional distribution

Games companies in the UK

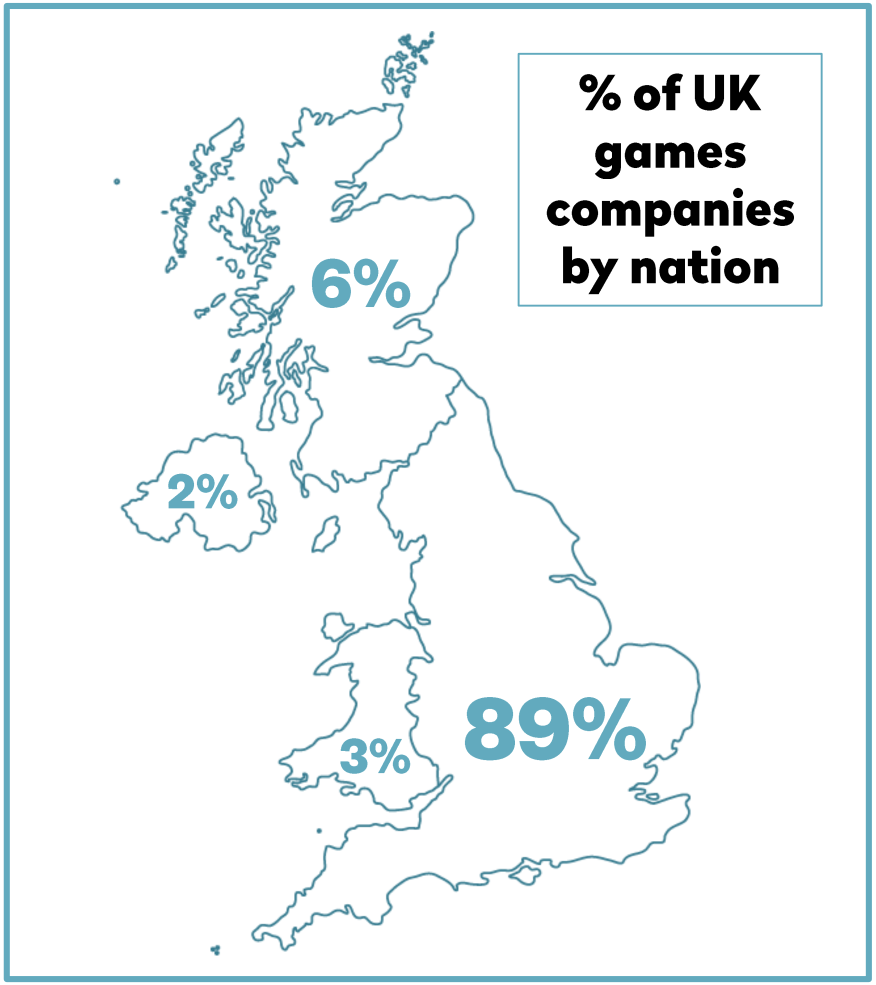
In 2016, there were **2,108** active[1] games companies across the UK.

These include global brands and platforms, major publishers, world-leading development studios, start-ups, scale-ups and a vibrant and creative community of micro-businesses.

89% of games companies are based in **England**

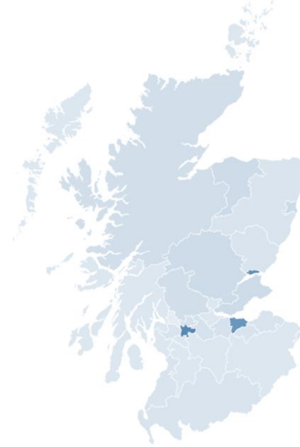
Over half of UK games companies are based **outside of London** or the **South East,** including many larger developers

Scotland, Wales and **Northern Ireland** are all home to internationally successful businesses



1. Companies are considered as active based on their trading status in Companies House.

Scotland



In 2016, Scottish games companies contributed £131.2m in GVA to the UK economy. Large employers in Edinburgh made a significant economic impact, as did the lively indie games community in Dundee.

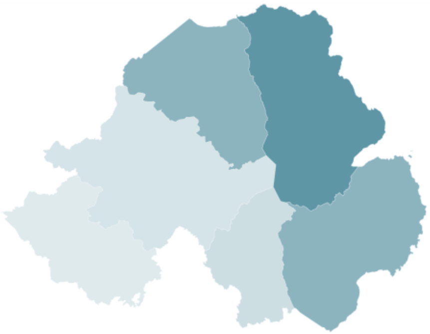
Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Dundee	33	306	17.6	30.9
Edinburgh	32	657	45.9	80.3
Glasgow	38	116	7.2	12.5
Scotland	**133**	**1,156**	**75.0**	**131.2**

Wales

Welsh games businesses contributed £14.4m of GVA to the UK economy in 2016. 48% of Welsh games companies are based in Cardiff, but companies throughout the country play a significant part, including in nearby Bridgend.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Bridgend	5	53	3.0	5.2
Cardiff	26	66	2.7	4.8
Wales	**54**	**172**	**8.2**	**14.4**

Northern Ireland



The games industry in Northern Ireland contributed £5.6m in GVA to the UK economy in 2016. 60% of these games companies were based in or around Belfast and represented the majority of economic impact.

Small development studios were present in five of Northern Ireland's six counties, residing in the likes of Derry, Coleraine and Craigavon.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Belfast	21	48	2.0	3.5
Northern Ireland	35	77	3.2	5.6

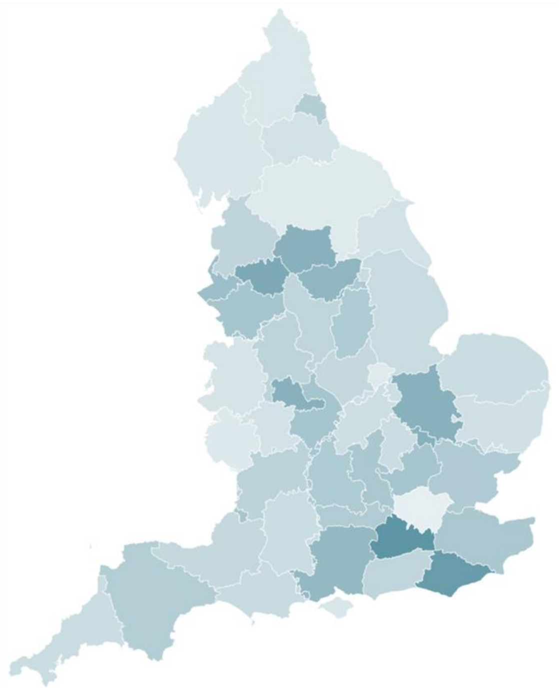
England

As with other entertainment and media sectors, London is central to the games industry in England, with over 500 games companies based in the capital. However, from Newcastle upon Tyne in the north east to Brighton on the south coast, major games companies can be found throughout England.

Top 5 English Counties by Number of Games Companies

1. London (588)
2. Surrey (87)
3. East Sussex (80)
4. Greater Manchester (66)
5. West Midlands (58)

Impact of London



Impact without London

North West

In 2016, the North West games industry contributed £157.3m in GVA to the UK economy, with Manchester alone accounting for £66m. Liverpool's innovative, tech-led games industry also makes a significant economic contribution.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Crewe[1]	8	558	16.4	28.6
Liverpool	35	152	21.7	38.0
Manchester	82	369	37.7	66.1
North West	**174**	**1,315**	**89.9**	**157.3**

1. The inclusion of a large studio in nearby Knutsford, within the official Travel To Work Area of Crewe, significantly boosts the local economic impact.

North East

The North East games industry contributed £99.9m in GVA to the UK economy in 2016. Large employers in Newcastle upon Tyne made up the lion's share of regional GVA at £86m. An emerging sector in Sunderland also had a significant impact.

Since the release of the 2016 data, further investment in the North East, particularly from large businesses, is likely to have increased employment and led to further growth.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Newcastle upon Tyne	20	372	48.6	85.8
Sunderland	12	84	3.0	5.3
North East	52	518	56.7	99.9

Yorkshire and the Humber

The games industry in Yorkshire and the Humber contributed £42.9m in GVA in 2016. With several smaller hubs based around established games businesses and recent screen sector investment into the region, Yorkshire is set for growth.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Leeds	27	187	6.4	11.2
Sheffield	43	331	9.9	17.3
Wakefield and Castleford	7	92	1.6	2.8
York	14	30	1.2	2.0
Yorkshire & the Humber	**149**	**767**	**24.5**	**42.9**

West Midlands

Games companies in the West Midlands contributed £130.9m in GVA in 2016.

While Birmingham and Leamington Spa have around the same number of active companies, Birmingham is mostly home to smaller, newer businesses, whereas major studios in the long-established Leamington games hub generated over ten times the economic impact. At £101m in GVA, Leamington was the largest single economic contribution outside of London and the Slough / Heathrow area.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Birmingham	35	86	4.6	8.0
Leamington Spa	34	907	57.4	100.7
West Midlands	**134**	**1,209**	**74.6**	**130.8**

East Midlands

In 2016, the East Midlands games industry contributed £74.1m in GVA to the UK economy. Several smaller games hubs centred around larger companies had considerable combined economic impact.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Burton upon Trent[1]	8	113	9.7	17.0
Derby	11	46	2.6	4.6
Lincoln	8	328	15.3	26.7
Nottingham	31	194	10.6	18.5
East Midlands	**95**	**906**	**42.3**	**74.1**

1. The inclusion of a large studio in nearby Twycross, within the official Travel To Work Area of Burton upon Trent, significantly boosts the local economic impact.

East of England

The games industry in the East of England generated £54.3m in GVA in 2016.

Cambridge is the most prominent games industry hub in the region, home to several highly successful UK games studios with a significant employment base.

A smaller games cluster in Chelmsford also made a sizeable economic contribution.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Cambridge	47	853	16.4	28.7
Chelmsford	10	26	1.4	2.4
East of England	166	1,209	30.9	54.3

South West

In 2016, the South West games industry contributed £32.5m in GVA to the UK economy.

The games-related output of a major animation studio and their overall impact on the local economy supported a thriving hub of smaller games developers in Bristol, contributing £9.47m in GVA.

Further south, a small hub in Falmouth also stands out.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Falmouth	5	27	1.5	2.6
Bristol	46	139	5.5	9.7
South West	152	423	18.5	32.5

South East (1)

In 2016, there are nine key economic hubs identified in the South East, with the region comprising a substantial part of the overall UK games sector.

Major development studios in the Crawley and Horsham area were a significant boon, contributing £83.7m in GVA to the UK economy. Further south, a multitude of smaller and mid-sized businesses in Brighton also had a considerable combined impact.

While comparatively smaller, the hub in Basingstoke is also notable.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Basingstoke	12	88	1.3	2.2
Brighton	65	277	13.7	24.1
Crawley and Horsham	24	579	47.8	83.7

South East (2)

As home to several world-leading studios, the well-established games development hub of Guildford and Aldershot contributed a substantial £64.0m to the UK economy in 2016.

Despite a comparatively small number of local games businesses, the inclusion of a major studio in the Medway area helped bring a significant £21.6m economic boost to the local area.

In Oxford a mix of larger and mid-sized businesses contributed a further £14.4m in GVA to the UK economy.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Guildford & Aldershot	64	855	36.6	64.0
Oxford	26	312	8.0	14.4
Medway	4	146	12.3	21.6

South East (3)

With several major studios and publishers, the Slough and Heathrow area contributed a considerable £116.2m in GVA in 2016, with the nearby Reading cluster bringing an additional £8.5m. Mid-sized publishers and studios in Milton Keynes added a further £17.7m.

Overall, the South East games industry contributed £356.3m in GVA in 2016.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
Milton Keynes	17	95	9.5	17.7
Reading	14	162	4.8	8.5
Slough and Heathrow	62	595	58.8	116.2
South East	**376**	**3,266**	**197.3**	**356.3**

London

London is the largest hub for the games industry, with 588 games businesses based in the capital in 2016. Together, these companies employed over 5,107 FTE roles and generated a total economic impact of £1.39bn in GVA.

Location	Games Companies	Full-Time Employees	Direct GVA (£m)	Total GVA (£m) (including indirect + induced impacts)
London	588	5,107	729.2	1,390.2

As by far the largest UK games industry hub, London is home to a massive diversity of businesses, from micro-studios to global publishers, operating across all platforms, technologies and genres, creating an enormous wealth of creative and innovative content.

The capital's impact in supporting the wider UK games ecosystem cannot be underestimated, with its international statute as a world-leading city for financial services, creative industries, culture, heritage and diversity drives investment, partnerships and opportunities from around the world.

The national view

Summary of impact by regions and travel to work areas

Regional and local breakdowns

By Region:

The games industry is distributed throughout the UK, with each nation home to internationally-successful games businesses.

In 2016, each UK region had at least 35 active games companies with economic impacts measured in the millions or even billions of pounds in GVA.

These industrial hubs support highly-productive, future-oriented jobs, requiring an advanced set of technical and creative skills.

By Travel to Work Area:

Although London is by far the largest hub for games businesses, major economic contributions are produced by the games sector in towns and cities across the UK.

Slough and Heathrow, Leamington Spa, Newcastle upon Tyne, Crawley, Edinburgh, Manchester and Guildford all contributed over £60m in GVA for their local economies.

UK regions with largest GVA

Region	Games Companies	Full-Time Employees	Direct GVA (£M)	Total GVA (£M) (including indirect + induced impacts)
London	588	5,107	729.2	1,390.2
South East	376	3,266	197.3	356.3
North West	174	1,315	89.9	157.3
Scotland	113	1,156	75.0	131.2
West Midlands	134	1,209	74.6	130.8
North East	52	518	56.7	99.9
East Midlands	95	906	42.3	74.1
East of England	166	1,209	30.9	54.3
Yorkshire & the Humber	149	767	24.5	42.9
South West	152	423	18.5	32.5
Wales	54	172	8.2	14.4
Northern Ireland	35	77	3.2	5.6

Towns / cities with largest GVA

Rank	Travel to Work Area	Games Companies	Full Time Employees	Direct GVA (£M)	Total GVA (£M) (Including indirect and induced)
1	London[1]	573	4,980	715.4	1,362.0
2	Slough and Heathrow	62	595	58.8	116.2
3	Leamington Spa	34	907	57.4	100.7
4	Newcastle upon Tyne	20	372	48.6	85.8
5	Crawley (inc. Horsham)	24	579	47.8	83.7
6	Edinburgh	32	657	45.9	80.3
7	Manchester	82	369	37.7	66.1
8	Guildford and Aldershot	64	855	36.6	64.0
9	Liverpool	35	152	21.7	38.0
10	Dundee	33	306	17.6	30.9
11	Cambridge	47	853	16.4	28.7
12	Crewe (inc. Knutsford)	8	558	16.4	28.6
13	Lincoln	8	328	15.3	26.7
14	Brighton	65	277	13.7	24.1
15	Medway	4	146	12.3	21.6
16	Nottingham	31	194	10.6	18.5
17	Milton Keynes	17	95	9.5	17.7
18	Sheffield	43	331	9.9	17.3
19	Burton upon Trent (inc. Twycross)	8	113	9.7	17.0
20	Oxford	26	312	8.0	14.4

1. Note that in this instance we are referring to the London Travel To Work Area, which covers a slightly different area to the NUTS1 Region definition.

Local impact

Games as part of local economies

Regional economic impact

In five UK regions, the games sector generated £1 or more of every £1,000 of GVA in the local economy in 2016, when compared to the impact from all other sectors[1].

In the vast economy of London, the contribution from games was particularly strong, where for every £1,000 in regional GVA, £3.40 was generated from games companies.

The North East is also notable, with games having the biggest impact on the local economy outside of the capital, at £1.90 of every £1,000 of regional GVA.

Location	GVA from all Industries (£M)	GVA from Games Companies (£M)	Impact of Games per £1,000 Regional GVA
London	405,004	1,390.2	£3.40
North East	51,739	99.9	£1.90
South East	257,982	356.3	£1.40
West Midlands	129,145	130.8	£1.00
Scotland	135,179	131.2	£1.00

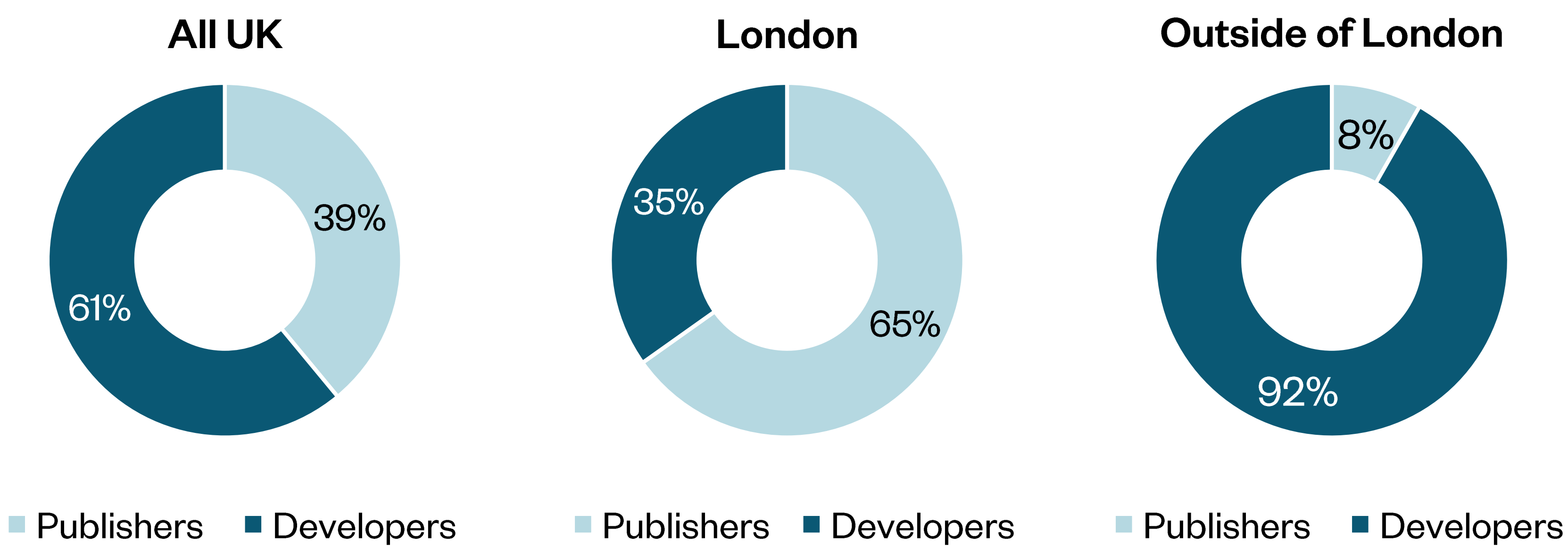
1. All industries data via ONS: https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedincomeapproach

Development and publishing

Overall in the UK, games publishing contributed 39% of all GVA generated by the sector. However, due to the concentration of publishers in London, in the capital publishers account for 65% of total games GVA.

Outside of London, games development is the lead economic driver, making up 92% of GVA.

GVA contribution split between developers and publishers



Working in games

Regional distribution of games jobs

Game jobs: key facts

There were **16,140 FTE** people employed in the UK games industry in 2016

86% of UK games jobs are at **developers** and **14%** are with **publishers**

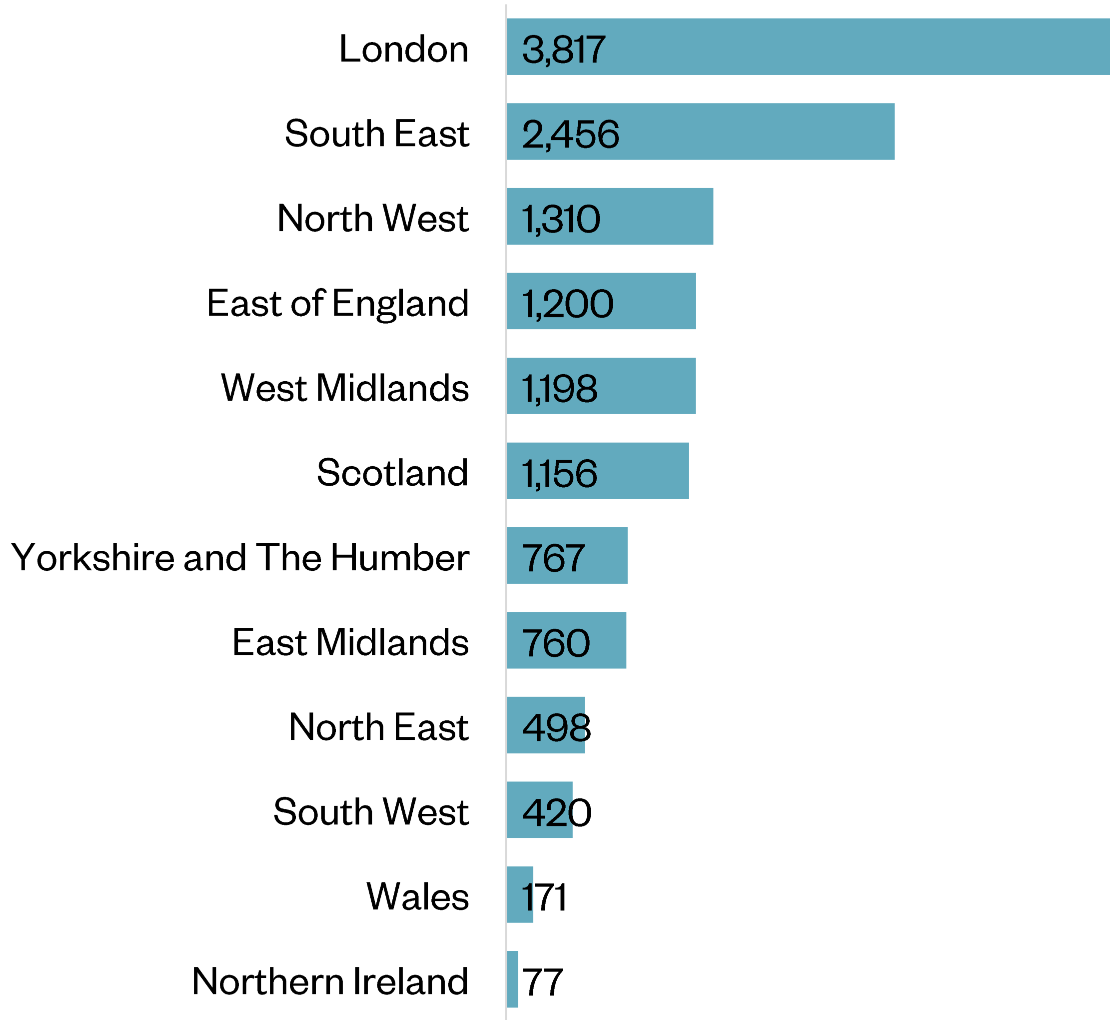
91% of **publishing** roles are in **London or the South East**

More than half (55%) of **development** roles are **outside of London and the South East**

Game development around the UK

There were 3,817 FTE jobs at development studios in London in 2016 and a further 2,456 in the South East, together representing 45% of industry total.

The remaining 55% of development studio roles are based outside of London and the South East, with the North West, East of England, West Midlands and Scotland all employing over 1,000 FTE development studio roles.



Final facts!

With the highest percentage of game employees per working-age population, you're most likely to meet someone who works in the games industry in **Leamington Spa**

At £1.35bn in GVA, the games industry directly generated nearly **twice as much** value for the UK economy as the **fishing** industry[1] (£718m) in 2016

Outside of London, the parliamentary constituency of **Guildford** has the greatest number of games industry employees

In 2016, there were **23 UK towns or cities** that were home to **20 or more** games companies, with every UK nation represented

1. UK Sea Fisheries Statistics 2017: https://www.gov.uk/government/news/fishing-industry-in-2017-statistics-published

Methodology / Appendix

Methodology considerations:

- All data within this report is derived from the same underlying dataset as used in Screen Business, therefore this report uses the exact same methodologies to calculate economic impact.
- The Regions (NUTS1) and Travel To Work Areas used throughout this report are the official Office of National Statistics definitions, as also used on the UK Games Map.
- In this analysis, games companies are considered as active based on their trading status in Companies House.

Sources for 'Games in the Creative Industries' economic estimates:

- **Creative Industries combined value** - DCMS Sectors Economic Estimates 2017: GVA - https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2017-gva
- **UK industrial productivity average** – BFI Screen Business - https://www.bfi.org.uk/education-research/film-industry-statistics-research/reports/uk-film-economy
- **Film**
    - GVA & Employment – BFI Statistical Yearbooks 2018, 2017 - https://www.bfi.org.uk/education-research/film-industry-statistics-research/statistical-yearbook
- **Music** – UK Music, Measuring Music 2017 - https://www.ukmusic.org/research/measuring-music/measuring-music-2017
- **Publishing , Museums & Galleries, Arts**
    - Employment - DCMS Sectors Economic Estimates: Employment (2016) and Trade (2015) - https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2017-employment-and-trade
    - GVA – DCMS Sectors Economic Estimates 2016 - https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2016-gva

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