

A child is lying on a blue carpet, wearing a red and black plaid shirt and blue and red sneakers. They are holding a green and white Nintendo Switch controller and playing a game on the console. The background is a plain grey wall.

GAME DEV CLUSTER: UNLOCKING OUR POTENTIAL 14th March, 2024

Steve Cuss



UCA University
for the
Creative Arts

Introduction

This trailblazing report is the result of a pivotal industry-led consultancy project jointly commissioned by Surrey County Council, and the University for the Creative Arts (UCA).

With industry and academic collaboration at the forefront, the project recognises the exciting potential of our region's Games Cluster and seeks to harness our collective expertise and resources to capitalise on significant innovation, talent development and economic growth opportunities.

Importantly, in response to feedback collated from across the region's games studios and the wider ecosystem, this report highlights the opportunity for us to collectively shape a regional programme aimed at fostering growth, creativity, and excellence within our game development community. In doing so, we seek to help further grow the sector and ensure that Surrey remains a place where Games businesses look to locate and become part of the strong community of high growth and leading edge businesses.

The potential for growth and innovation within the Surrey games development cluster has never been more promising.

Research England has recently awarded University for the Creative Arts (UCA), University of Surrey and University of Warwick £1.5m in funding to establish the Games and Innovation Nexus project (GAIN). Surrey County Council has committed £240,000 to the programme, with the development of a Games Innovation Zone at the University of Surrey. This is in addition to the £2 million capital UCA invested into its School of Games and Creative Technology in 2022 and includes VICON motion capture and Virtual Production studios that can support industry collaboration, and expansion of its well-established Games Incubator Studio.

We are excited to launch this report and open the opportunity to partners and industry leads to join us in our pursuit of national and international recognition of Surrey's strengths in Gaming.

Professor Sophy Smith
Director of Games & Creative Technology

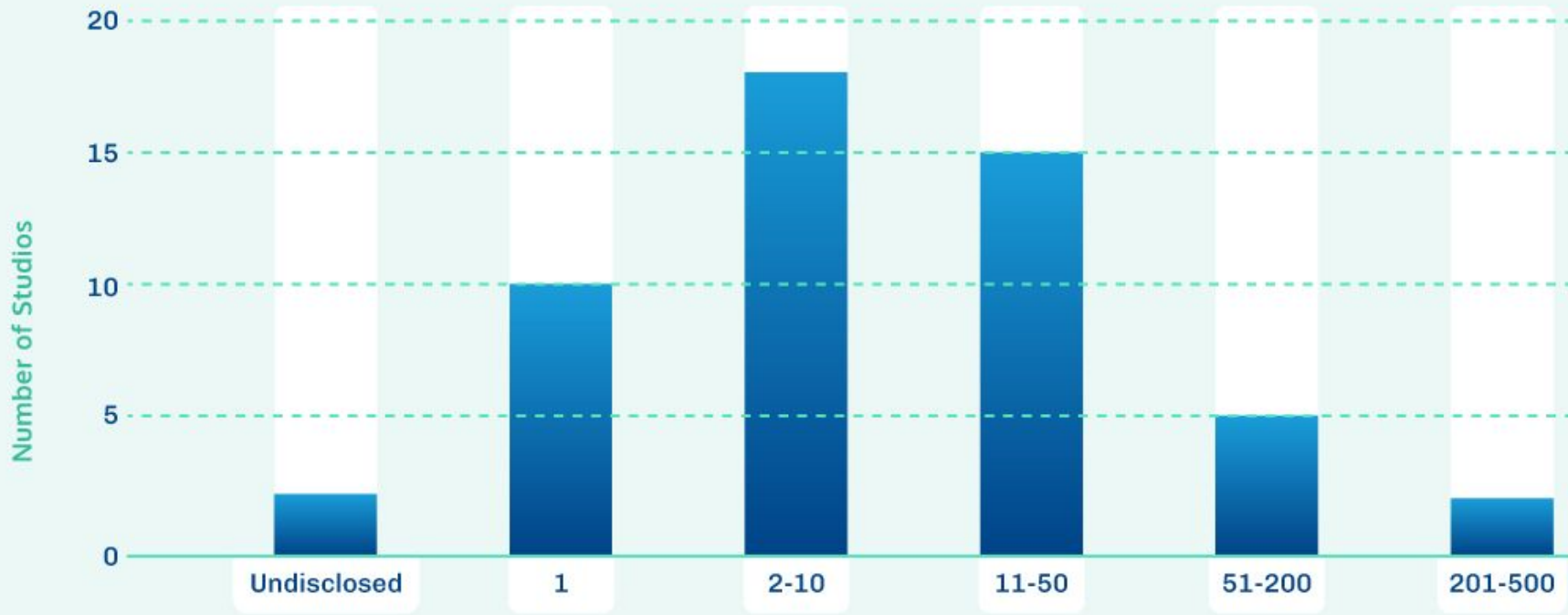


Matt Furniss
Councillor Surrey County Council



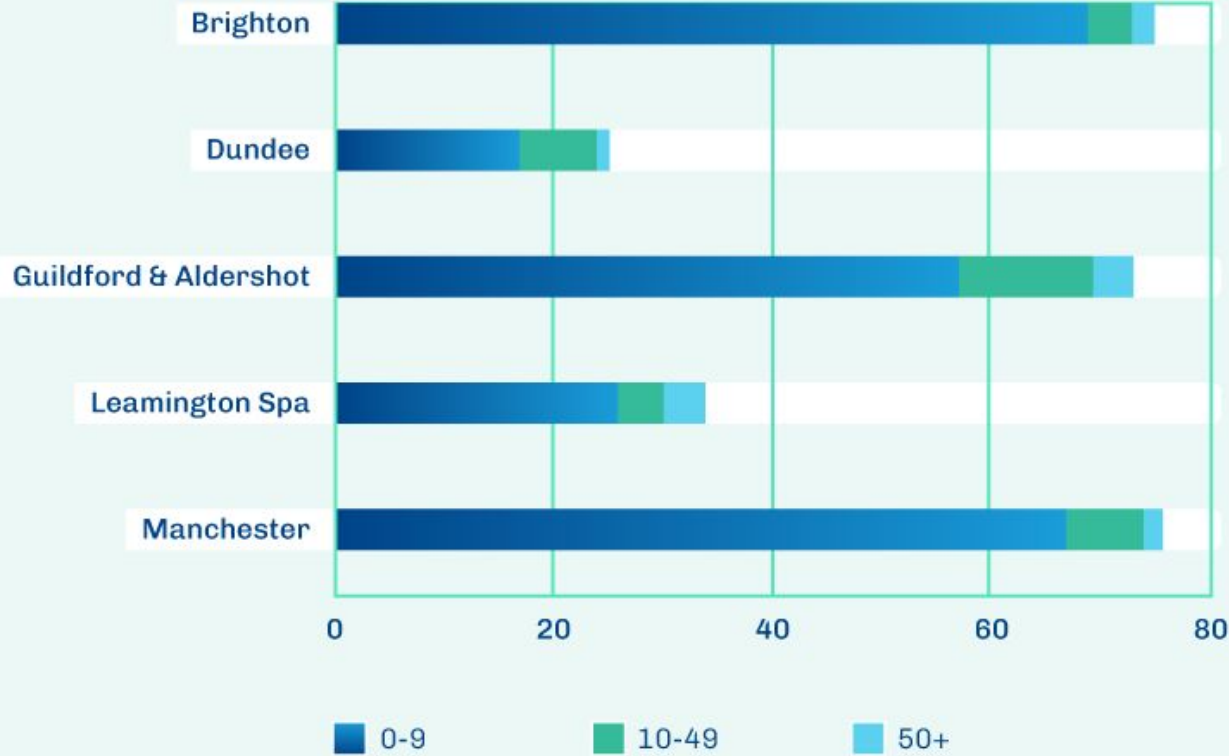


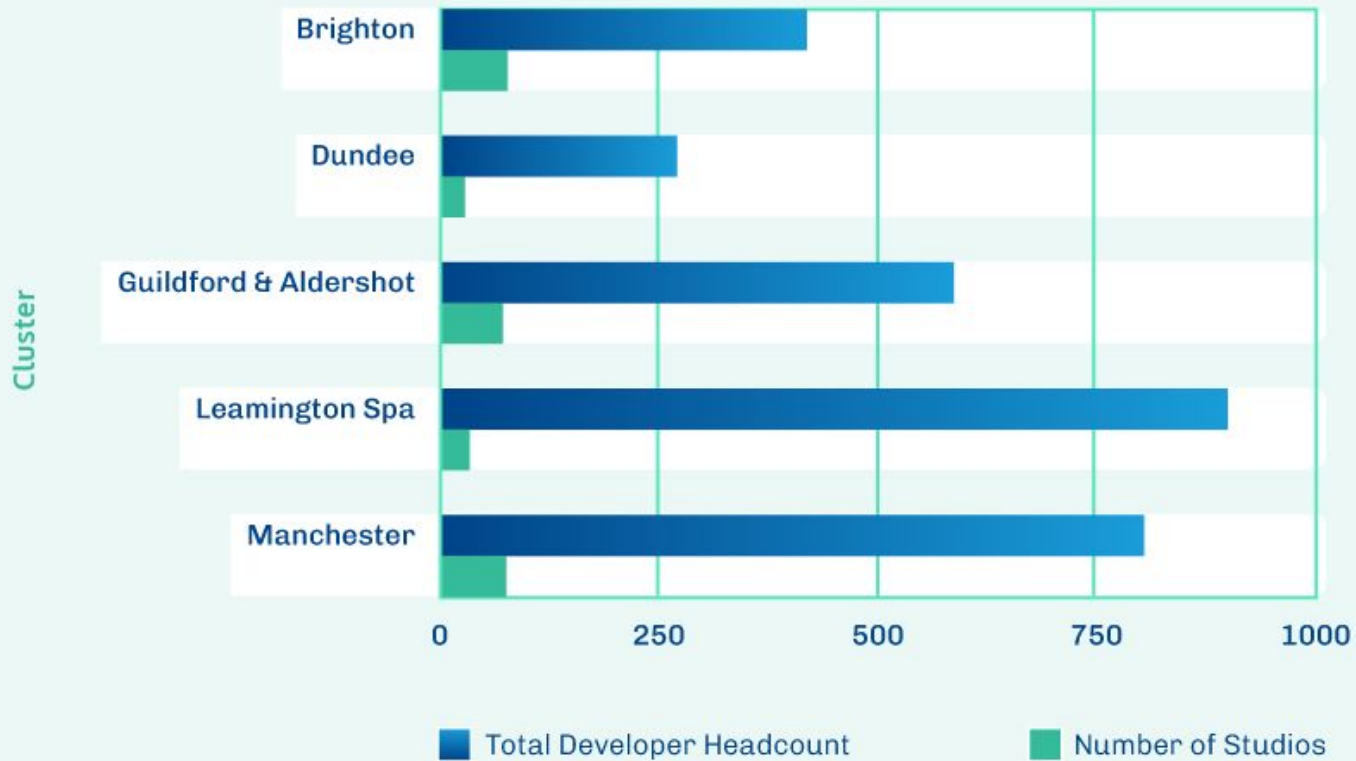
WHO ARE WE?

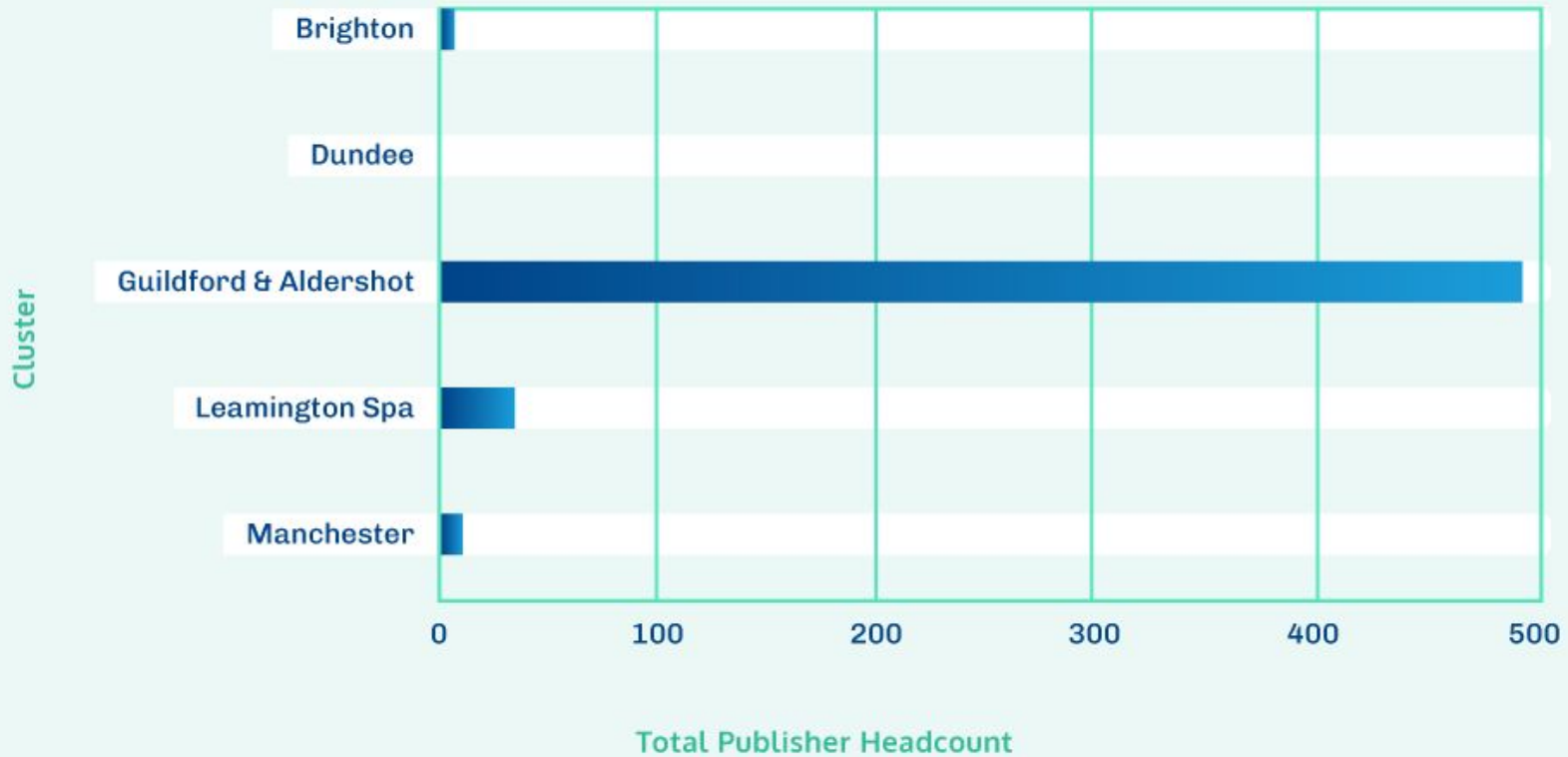


Number of Studios by Size

Size







A blurred map of Europe, centered on Germany. The map shows various countries and cities, with the text 'LOOKING BEYOND UK' overlaid in the center. The text is in a bold, white, sans-serif font. The map is slightly out of focus, with the text being the sharp element.

LOOKING BEYOND UK



Dutch
Game
Garden

AMSTERDAM AND UTRECHT

Dutch Game Garden (DGG) in Utrecht: offers incubation programs, workspace, training, and connections.

Launched over 40 studios, some reaching global acclaim.

Hosts annual INDIGO showcase (now focused on game business too).

Created Game Garden Agency to connect developers with publishers.



GAME
BCN

BARCELONA



Home to successful studios like Social Point & Mango Protocol.
Thriving indie game community, affordable living, and focus on innovation attract talent

GameBCN: Publicly funded incubator supporting local game startups.

Aims to nurture high-potential game projects from local universities and position Barcelona as a leading game hub in Southern Europe.

Financial support & industry training; Mentoring on company creation, fundraising & marketing; Exposure to potential investors & industry professionals.



MALMO

Diverse studios: AAA, indie, mobile, etc., creating various game genres.

Skilled talent pool: Fostered by universities, and industry support

Collaboration & innovation: Incubators, networking events, and shared workspaces.

Success stories: Minecraft, Little Nightmares, Vampire: The Masquerade - Bloodhunt, and more.

Game Habitat. Non-profit fostering the ecosystem. Supports startups, co-working spaces, and training. Contributes to regional growth and employment.



Gamecity Hamburg
Kreativ Gesellschaft

HAMBURG

180 gaming
companies and
2,500 employees

Major international
corporations like
Facebook, Google,
and Capcom have
offices in Hamburg

Germany is Europe's
largest gaming
market, and
Hamburg is a major
player in this industry

Gamecity Hamburg
supports indie game
development
through initiatives
like the Games Lift
Incubator

Key Points on Video Game Clusters' Success and Growth

The European gaming landscape showcases successful game development clusters that thrive on collaboration, innovation, and economic advancement. These clusters exemplify the potency of strategic support and cooperative ecosystems in achieving remarkable outcomes.

These clusters' success and growth are propelled by these factors

- strategic partnerships
- supportive ecosystems
- access to global markets
- incubation programmes
- a strong emphasis on innovation and collaboration.

The success stories of these diverse European clusters underscore the significance of fostering an environment that nurtures creativity and drives economic growth in the gaming industry.

WE HAVE



World class
development
studios



A storied history
in game
development



A supportive
local authority



A spirit of
innovation.



Wealth of
creative talent
from local
academic
institutions

**BUT WE HAVE POTENTIAL TO BE SO
MUCH MORE...**

AJS

American
Journal
of Sociology
Volume 120 Number 4
January 2015

Race, Self-Selection, and Job Search—Pager and Peckulla
Emergent Ghettos, 1880–1940—Logan et al.
Where Do Immigrants Fare Worse?—Tomaskovic-Devey et al.
Game Changer—De Vries et al.
*Family Instability, Genetic Sensitivity, and Child
Well-Being*—Mitchell et al.

GAME CHANGER: THE TOPOLOGY OF CREATIVITY

Cognitive diversity and close teamwork
essential for remarkable outcomes.

Tightly bonded teams with different
backgrounds led to entirely new and
exciting games

Teams with diverse networks, connected
at 'structural folds,' tended to break
apart faster

Key Points

Rather than just sharing ideas between different groups, creative tension between tightly bonded teams with different backgrounds led to entirely new and exciting games.

Cognitive diversity and close teamwork were essential for remarkable outcomes.

However, teams with diverse networks, connected at 'structural folds,' tended to break apart faster due to issues like loyalty or scheduling conflicts. Despite this challenge, these diverse networks were very effective in creating exceptional games.

MIT BUILDING 20: “The Magical Incubator”

Resourceful approach

Constructed as a pragmatic response to the urgency of World War II, made from plywood, cinderblock, and asbestos in just one afternoon.

Intellectually Diverse

MIT intentionally used Building 20 to house quirky, experimental projects, producing remarkable results.

Rapidly Reconfigurable

The lack of a polished design allowed researchers to reshape the space to suit their experiments

Award Winning

The wartime RadLab located in Building 20 produced research that led to nine Nobel Prizes.

Key Points

- 1. Building 20's Unassuming Nature:** Building 20 at MIT was a modest, unpolished structure built during World War II with a simple and unceremonious design.
- 2. Pragmatic Response to Urgency:** Building 20 was constructed as a pragmatic response to the urgency of World War II, made from plywood, cinderblock, and asbestos in just one afternoon.
- 3. Hub of Groundbreaking Innovation:** Despite its unassuming appearance, Building 20 became a hub of groundbreaking ideas and innovations across various fields.
- 4. Notable Achievements from Building 20:**
 - Development of the Whirlwind computer, an early digital computer.
 - Nobel Prize-winning research and radar system development during WWII.
 - Creation of the first commercial atomic clock.
 - Pioneering work on particle accelerators.
 - Iconic high-speed photography by Harold Edgerton.
 - Birthplace of one of the earliest arcade video games, Spacewar.
 - Founding of technology companies like DEC, BBN, and Bose Corporation.
 - Revolution in cognitive science and linguistics by researchers like Jerry Lettvin and Noam Chomsky.
- 5. Functional Imperfections as a Strength:** Building 20's charm lay in its functional imperfections, which encouraged researchers to tap into resources and reshape the space to suit their experiments.
- 6. Freedom to Create:** Building 20's design allowed researchers the freedom to create without concerns about appearance or conventional architecture, fostering an environment where creativity thrived.
- 7. MIT's Deliberate Strategy:** MIT intentionally used Building 20 to house quirky, experimental, or seemingly unimportant projects, recognising that this environment could produce remarkable results.
- 8. Loss of Raw Character:** When Building 20 was replaced by a sleek, architecturally advanced structure, its former residents mourned the loss of its raw character and freedom.
- 9. The Value of Creative Spaces:** Building 20 serves as a reminder that genuine creative spaces are defined by the freedom to explore, make messes, and cultivate unexpected collaborations, attributes that can't be replicated through formal design or glossy aesthetics.

BRIDGING THE

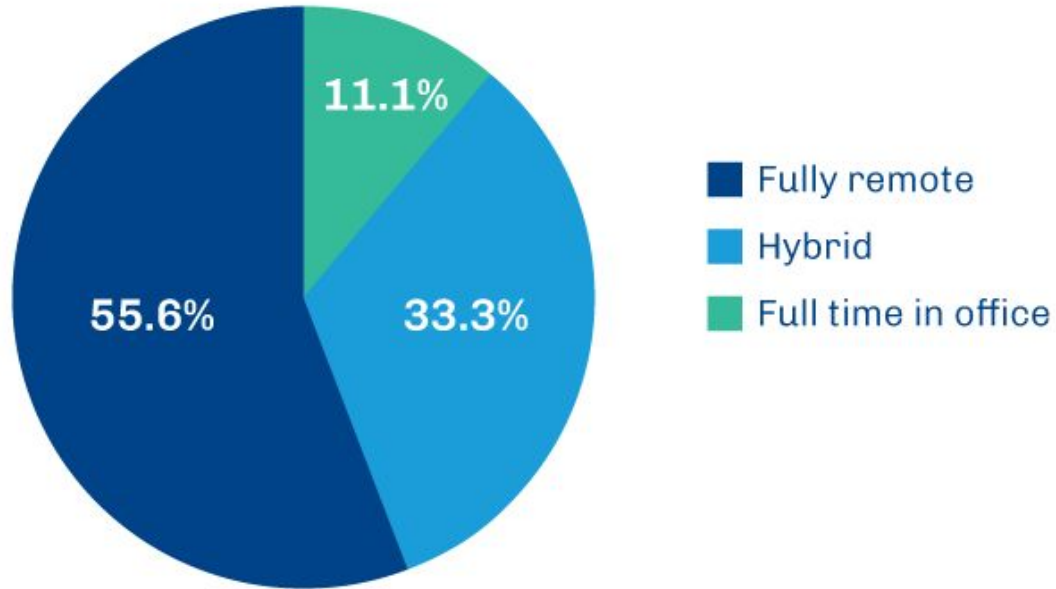
KNOWLEDGE



GAP

A close-up photograph of a person's hand holding a blue ballpoint pen, pointing it at a document. The document features several data visualizations: a stacked bar chart with teal, red, and yellow segments, and a line graph with green and red lines. The text 'ur company' is visible on the left side of the document. The overall scene suggests a professional or analytical context.

WHAT'S ON OUR DEVELOPER'S MINDS?



Principle Working Style

INVESTMENT ENVIRONMENT

Cautious Backing

Investors seek organic growth, caution on prototypes, and team background scrutiny.

Slower Pace

Longer decision-making, slower M&A, and reduced valuations impact funding timelines

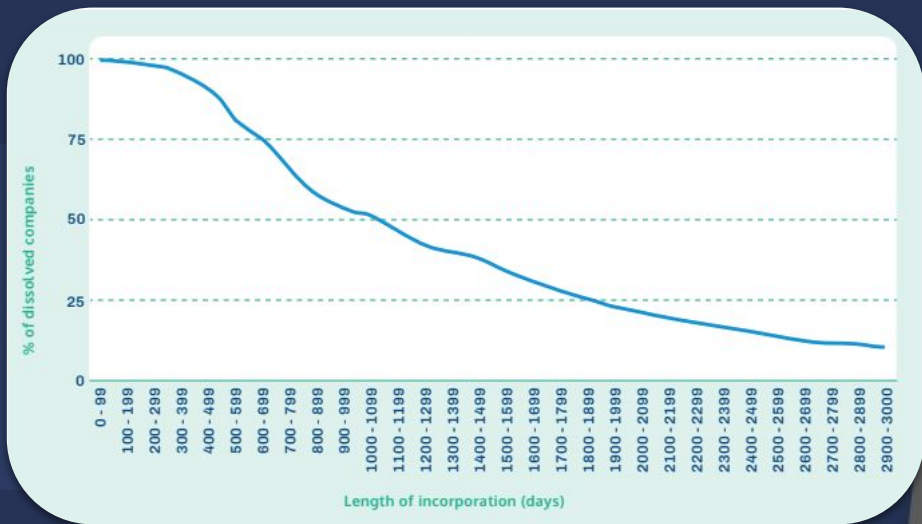
Focus Change

Later stage funding challenges demand proof of community engagement and viability

Industry Realignment

A move toward a sustainable, conservative approach for long-term studio health.

SUCCESS FAILURE RATE



41.7% of all companies are dissolved

Failure rate of 22% within 3 years



UK Games Map



uki

DEVELOPER PRIORITIES

As Of October 2023

1

Skills development

2

Recruitment

3

Access to finance

4

Coaching and Mentoring

5

Business Planning for Scale-Up/Growth

6

Collaboration and Partnerships

7

Inclusivity and Diversity

8

Business support

9

Access to commercial space and
Technology

Key Learnings

Key Learnings from the Developer Survey:

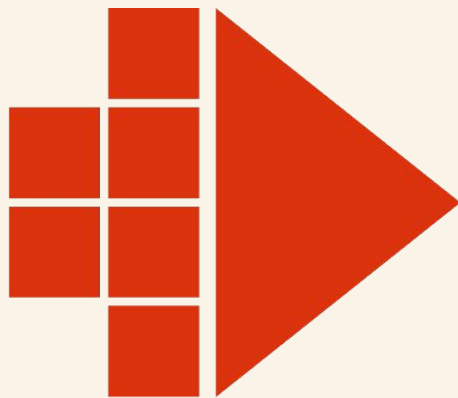
- 1. Diverse Developer Landscape:** The survey revealed a diverse developer landscape, including independent developers, publisher-funded studios, and publisher-owned studios. This diversity suggests the need for tailored support programmes.
- 2. Platform Focus:** PC, console, and mobile platforms dominate the development landscape, with PC being the most popular.
- 3. Remote Work Trends:** A significant number of developers have transitioned to remote or hybrid work setups, influenced by factors like cost savings and work-life balance. Programme flexibility should accommodate remote developers.
- 4. Location Significance:** Developers' choice of location is influenced by factors such as industry credibility, community, talent pool, and origins of founders. Guildford's central role in the UK games industry is noteworthy.
- 5. Occasional Space Demand:** Many developers express a need for occasional space for meetings, workshops, play testing, and user experience testing. Understanding this demand can inform resource allocation.
- 6. Cluster Priorities:** Developers' priority rankings highlight the importance of skills development, recruitment, access to finance, coaching and mentoring, and business planning for scale-up. These areas should be focal points for programme offerings.
- 7. Funding Interest with scepticism :** Funding models, such as grants, are attractive but some developers are sceptical about traditional funding sources due to bureaucracy and conditions.
- 8. Community and Collaboration:** Collaboration, networking, and community-building initiatives are essential for fostering a supportive and connected local game development ecosystem.
- 9. Tailored Business Support:** Developers express concerns about generic business support not meeting industry-specific needs. Tailoring business support services to address gaming industry requirements is crucial.
- 10. Diverse Value Propositions:** The survey highlights varying levels of interest in different value propositions, emphasising the need for a flexible and personalised approach to programme development.
- 11. Programme Engagement Levels:** Developers' likelihood to engage varies, with some highly interested, others moderately interested, and some expressing lower interest. Programme design should cater to these varying levels of engagement.
- 12. Diverse Success Metrics:** Success for developers is measured in diverse ways, including revenue and growth, academic outreach, grant opportunities, community building, talent growth, impact on the game ecosystem, networking, helping others, and diversity improvement.
- 13. Market Education Importance:** Developers see value in programmes that educate them about market dynamics and commercial strategies, highlighting the importance of business and commercial knowledge in the gaming sector.
- 14. Tangible Outcomes Emphasis:** Emphasising tangible outcomes, such as the creation of new games and opportunities, is crucial for demonstrating programme impact.
- 15. Mentorship and Support:** Mentorship and support are highly valued within the programme, with some developers seeing success in helping others in the industry.
- 16. Inclusivity and Diversity:** Promoting inclusivity and diversity within the industry is recognized as important and should be incorporated into programme initiatives.

UNLOCKING OUR POTENTIAL: WHERE INNOVATION MEETS COLLABORATION

Surrey's burgeoning game development scene is brimming with talent, yet faces hurdles in visibility and global reach.

A strategic solution is required in order to foster an environment specifically designed to address these challenges and propel the region to further prominence. By uniting developers, investors, educators, and enthusiasts, we propose a program that creates a collaborative ecosystem that empowers innovation and unlocks our cluster's full potential within the European gaming landscape.

This starts by creating a unified brand that fosters community of local game developers and delivers for them a single point of entry to academic partnership, public money, programmes and facilities.



PixelRise

A central white circle containing the text 'WHAT IS PixelRise' and a red arrow icon. The circle is surrounded by several overlapping, colorful shapes: a yellow triangle at the top, a green square to the right, a red triangle at the bottom right, a purple shape at the bottom, a blue shape at the bottom left, and a pink shape on the left side.

WHAT IS PixelRise

Thriving Ecosystem: This program addresses pain points within the cluster, creating a supportive network that nurtures innovation and excellence.

Growth & Diversity: PixelRise fosters an inclusive environment for developing new talent and established studios, boosting the creative diversity of the local game development scene.

Elevated Recognition: By leveraging existing strengths and opportunities, PixelRise aims to propel the local gaming community to national and international acclaim.



VISION

PixelRise envisions a future where the cluster thrives as a beacon of creativity, innovation, and inclusivity within the game development landscape. This ecosystem will not only attract and retain top-tier talent but also foster an environment that encourages experimentation, collaboration, and sustainable growth. By addressing the identified areas for improvement, the scheme will catalyse the evolution of our game development cluster into a globally recognised hub that sets new industry standards and shapes the future of interactive entertainment.

PixelRise FOCUS AREAS

GAMES FACILITIES

A thriving and connected game development community, empowered by accessible and flexible game dev facilities

SUPPORT SCALING UP

Propel emerging local developers into full-fledged production powerhouses through expert guidance, financial coaching, and valuable service access, fostering a vibrant and successful local gaming ecosystem.

UNIVERSITY INDUSTRY PARTNERSHIP

Cultivate a flourishing local creative industries cluster where universities and industry powerhouses synergistically spark innovation, drive business growth, and leave a lasting societal impact

TOP-TIER TALENT IN SURREY

Cultivate a robust pipeline of top-tier talent within the Surrey game development scene, spanning academia and industry

SUPPORT STARTUPS

Evolve and empower Surrey's next generation of game development champions by providing critical support through key stages of their entrepreneurial journey

COMMUNITY COLLABORATION

A collaborative and supportive community





Provides flexible workspaces for game developers, fostering collaboration and accessibility.



Supporting game development startups through critical phase of the journey.



Empowers game startups and SMEs with expert guidance, financial coaching, and essential services.

Thriving Ecosystem

Growth & Diversity

Elevated Recognition



Attracts, nurtures, and retains top-tier game development talent from youth to professionals.



A collaborative initiative between universities and industry, driving innovation and growth.



Builds a supportive community of game developers in our cluster, facilitating networking and collaboration.



Broadly
focused

Sustainable
pipeline

Academic
industry bridge

Local impact



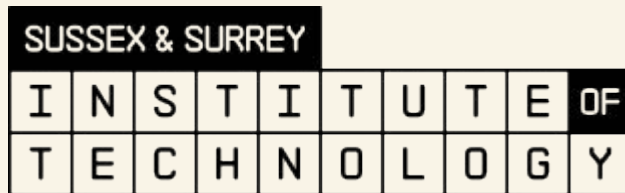
PixelRise Talent aims to nurture, attract, and retain top-tier talent within the game development industry, spanning from schools to universities and the broader industry. Establishing the presence of PixelRise Spaces on Guildford High Street provides an opportunity to directly engage with school-age children and their parents, promoting careers in the games industry.



OUR POTENTIAL



**UNIVERSITY OF
SURREY**



**GAMES
ACADEMY**



Empowering
early-stage
businesses

Financial
Coaching

Expert Support

Prototype to
production



PixelRise is designed to serve as a catalyst for game development startups and small-to-medium enterprises (SMEs), offering essential services to guide them through critical phases of their journey.



OUR POTENTIAL

ukie

THE ASSOCIATION FOR UK INTERACTIVE ENTERTAINMENT

Games Accelerator Programmes



S100 Angel Investment Club

SOUTH EAST ANGELS.



Supporting
critical phases

Empowering
next-gen
champions

Evolving the
ecosystem

Building on
previous success



PixelRise Incubator is an innovative workstream that builds upon the success and addresses the challenges to date of the existing UCA Incubator Studio. It is designed to support game developers and startups through critical phases of their development journey.

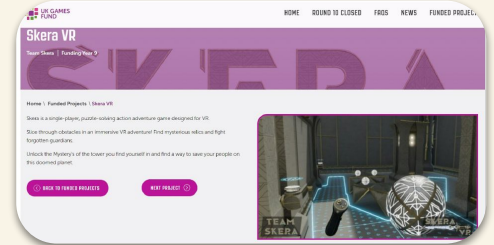


OUR POTENTIAL



LICFA University
for the
Creative Arts

GAMES INCUBATOR STUDIO





UCA GAMES INCUBATOR STUDIO

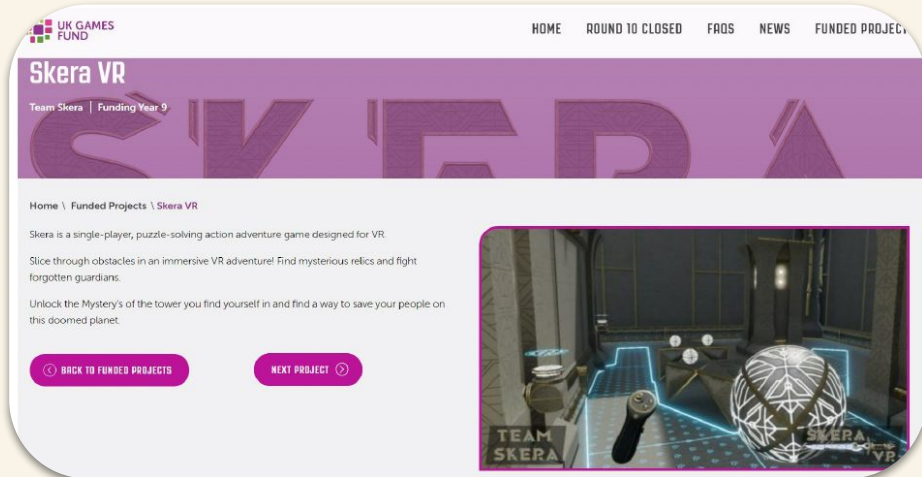
Established 2016

Supporting 25 emerging developers

Launching to PC, VR, Mobile titles to market

2 x Winners of Tranzfuser
(Project SAM 2019, SKERA 2022)

Facilitating In-House Game Jams, Global Game Jam





Community
building

Collaboration

Innovation &
success

Building on
success



PixelRise Connect seeks to elevate the local game development cluster by further investing in the established community. Its goal is to foster a supportive community of game developers and facilitate networking, meetups, and collaborative initiatives within the local games industry.



OUR POTENTIAL

guildford
games



Guildford Game Jammers



Flexible and accessible game development facilities

Strategic locations in high street buildings

User-friendly online booking platform.

Home to PixelRise Connect, fostering community building



PixelRise Spaces provides developers with flexible and accessible meeting, workshop, playtesting, and overflow development desk spaces. Accessed through a user-friendly online booking platform, PixelRise Spaces is also provides hosts PixelRise Connect events.



OUR POTENTIAL



MOTION CAPTURE STUDIO

VIRTUAL PRODUCTION STAGE



VIDEO PRODUCTION FACILITY



Vicon Motion Capture studio



Virtual Production Stage



Partnership
between
universities and
industry

Invention,
Innovation &
growth

Cluster
expansion

Societal impact



PixelRise Trailblazer (Trailblazer) is a collaborative initiative between the regions universities and key industry partners. Enabling funded invention and innovation Trailblazer aims to strengthen and expand the local creative industries cluster, fostering innovation, business growth, and societal impact.

OUR POTENTIAL





BENEFITS OF A UNIFIED BRAND



UNIFIED SUPPORT

Easy navigation, clear program recognition, and cross-promotion boost participation and visibility.



SHARED EXPERTISE & RESOURCES

Resources and knowledge are pooled for collaboration and cost efficiency.



PROGRAM GROWTH & IMPROVEMENT

Continuous feedback and success drive expansion and improvement.



COMMUNITY COLLABORATION

Resource sharing and networking foster a thriving, supportive community.

Sale

COLLECTIVE IMPACT

Collaborative projects and bargaining benefit the entire program ecosystem.



SUSTAINABLE DEVELOPMENT

Success fuels further growth and resource expansion.

**SIGN UP FOR THE
WORKSHOP ON
27th MARCH**



**Fostering growth, diversity
and creative excellence
for games development
in the Surrey region**

pixelrise.co.uk

THANK YOU!