

MAPPING THE **GAMES** **INDUSTRY**

IN THE SOLENT REGION

An analysis of skills, opportunities and emerging trends.

Antivenin Games & Creative Network South January 2025

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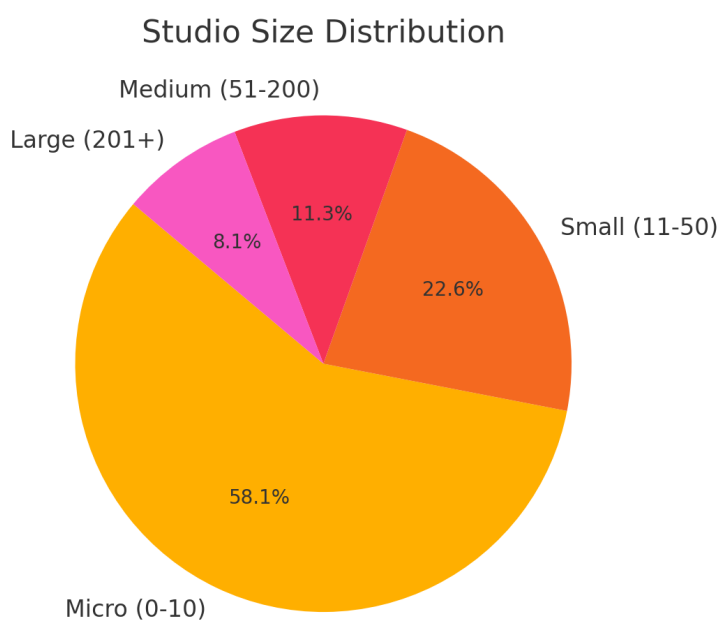
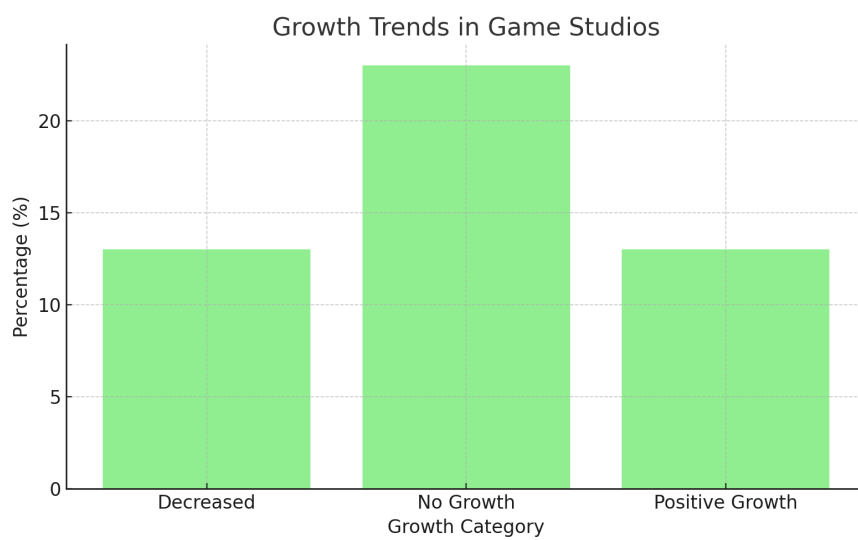
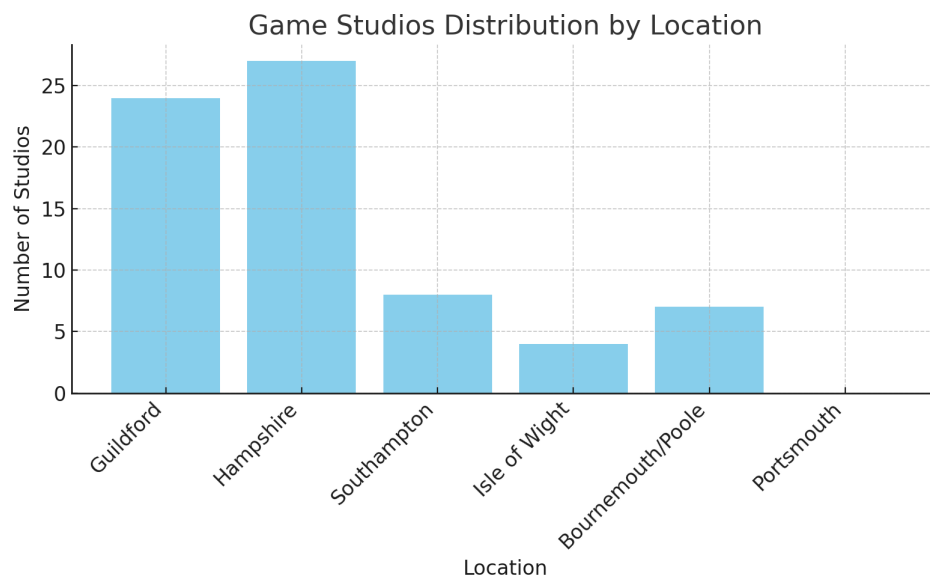
Introduction

The Solent region, encompassing the Isle of Wight, Portsmouth, Southampton, Hampshire, and nearby areas such as Bournemouth, Poole, Christchurch, and Guildford, has long been recognised for its contribution to the UK's video game industry. This report presents the findings of a mapping project aimed at understanding the current state of the industry, including the distribution of game studios, workforce skills, and education and training providers in the region. These insights highlight both the strengths of the industry and areas for future development.

Game Studios

The Solent region is home to a diverse range of game studios, predominantly small, independent enterprises. The data reveals:

- **Studio Distribution:**
 - Total Studios: 70
 - Guildford: 24 (the largest hub)
 - Hampshire: 27
 - Southampton: 8
 - Isle of Wight: 4
 - Bournemouth/Poole: 7
 - Portsmouth: Limited representation
- **Studio Size:**
 - Micro Studios (0-10 employees): 36
 - Small Studios (11-50 employees): 14
 - Medium Studios (51-200 employees): 7
 - Large Studios (201+ employees): 5
- **Age of Studios:**
 - 49 studios have been founded within the last decade.
 - 15 of these were established in the past five years in Southampton and Hampshire.
- **Output:**
 - Many studios (44%) have shipped three or fewer games, reflecting the early-stage nature of much of the industry.
- **Growth Trends:**
 - 13% of studios reported a decrease in size over the last six months.
 - 23% experienced no growth, while another 13% saw positive growth during this period.



Workforce Skills

The industry demonstrates a robust demand for traditional game development skills but also highlights critical gaps:

- **Core Skills:**
 - Programming: C++, C#, Python
 - Game Design: Unity, Unreal Engine
 - Art & Design: Adobe Suite, Maya/Blender, 3D Modelling, Animation
- **Emerging Needs:**
 - Marketing and digital media skills
 - Audio engineering

Detailed Skills Gap Analysis

While the Solent region's workforce demonstrates strong technical proficiency, there are notable gaps that could hinder long-term growth:

1. **Business and Management Skills:**
 - Smaller studios lack expertise in production management, business development, and financial planning.
 - Larger conglomerates dominate this area, leaving independent studios at a disadvantage when scaling.
2. **Project Management:**
 - Many studios struggle with efficient project workflows and team coordination.
 - Tools like Agile methodologies and project management software (e.g., Jira, Trello) are underutilized.
3. **Marketing and Community Engagement:**
 - Limited in-house expertise in digital marketing and audience engagement is evident in smaller studios.
 - Skills in branding, social media strategy, and community management are increasingly crucial for indie studios seeking visibility.
4. **Cross-disciplinary Expertise:**
 - Skills that bridge creative and technical domains, such as UI/UX design, are in demand but underrepresented.
 - A growing need for professionals who can integrate gameplay mechanics with compelling user experiences.
5. **Audio and Sound Design:**
 - Audio engineering and sound design expertise are often outsourced, highlighting a lack of local talent in this area.
 - Training programs specific to game audio design are limited in the region.
6. **Diversity in Skills Application:**
 - While technical skills like programming and design are strong, there is a need to diversify applications to include emerging fields like VR/AR development and gamification for non-entertainment sectors.

Addressing these gaps will require targeted training initiatives and partnerships between education providers and industry stakeholders.

Education and Training Providers

The Solent region boasts a rich educational ecosystem supporting the games industry:

- **Academic Offerings:**
 - 29 university degrees (University of Portsmouth and University for the Creative Arts leading the way)
 - 19 college-level programs, including esports-focused courses
- **Independent Providers:**
 - 9 independent or non-accredited training providers, such as NextGen Skills Academy and Code Coven
- **Esports Training:**
 - Esports programs are growing, with nine of the 19 college programs focusing on this emerging field.

Despite this abundance, most training focuses on technical skills, with limited options for business and management training.

Regional Insights

Portsmouth

Portsmouth is underrepresented in the dataset, suggesting untapped potential for game development. This highlights a need for investment and targeted support to foster growth.

Southampton

Southampton emerges as a growing hub with eight studios. Its strong academic presence and industry connections position it for continued development.

Guildford

Guildford remains the largest cluster, solidifying its reputation as the "Hollywood of Gaming."

Solent's Impact on the UK's Gaming Industry

The Solent region contributes significantly to the UK's gaming industry, with its unique blend of talent, innovation, and regional hubs:

1. **Emerging Indie Scene:**
 - With 49 studios founded in the last decade, the Solent region is a breeding ground for indie developers. This infusion of new talent is vital for sustaining the UK's position as a global leader in gaming.

2. **Guildford's Leadership:**
 - As the "Hollywood of Gaming," Guildford's influence extends beyond the Solent region, driving innovation and attracting global investment.
3. **Educational Ecosystem:**
 - The Solent region's universities and training providers play a crucial role in supplying skilled professionals to the UK's gaming workforce. Programs in Portsmouth and Southampton bolster the national talent pipeline.
4. **Esports and Diversification:**
 - The rise of esports programs in the region contributes to the diversification of the gaming industry, aligning with emerging trends globally.
5. **Geographic Diversity:**
 - The presence of studios across urban and rural settings (e.g., Isle of Wight and Bournemouth) enriches the UK's gaming landscape, providing opportunities for a range of creative perspectives.
6. **Challenges and Opportunities:**
 - Addressing skills gaps in business and project management locally can enhance the UK's competitiveness by enabling smaller studios to scale.

The Solent region, while still growing, is a vital cog in the UK's gaming ecosystem, blending grassroots innovation with academic excellence and industry leadership.

Opportunities for Growth

The mapping project identifies several opportunities to strengthen the Solent games industry:

1. **Developing Business Skills:** Initiatives like the Solent Partners' bootcamp, focusing on business and production skills, are essential for empowering smaller studios to scale sustainably.
2. **Fostering Regional Collaboration:** Building stronger connections between studios, training providers, and local councils can address skill gaps and promote innovation.
3. **Supporting Portsmouth's Growth:** Targeted programs to attract and support studios in Portsmouth could unlock its potential.
4. **Enhancing Multidisciplinary Training:** Expanding training programs to include marketing, audio engineering, and project management would diversify the skillsets available to studios.
5. **Addressing Growth Disparities:** Tailored support for studios experiencing stagnation or decline could revitalize their potential.

Conclusion

The Solent region's games industry is thriving, with a strong foundation of indie studios, an active educational ecosystem, and growing regional hubs like Southampton. However, addressing the gaps in business and management skills, and fostering collaboration across the region, will be key to unlocking its full potential. By leveraging targeted initiatives and supporting emerging hubs like Portsmouth, the Solent region can solidify its position as a major player in the UK's gaming landscape.

Data Sources and Further Reading

This report is based on data from publicly accessible sources, including*:

- Ukie Map
- Companies House
- LinkedIn

* Only trading bodies were included. Any organisations listed as “dormant” or “dissolved” were not added. Studios also had to be physically based in the specified geographic areas to be included (registered address not always the same as office/studio address). Not all companies had data available. All data/information was obtained via publicly accessed means (i.e., Ukie map, Companies House, LinkedIn, etc).

** A small number of studios are conglomerates, and their local studio numbers could not be found. Global numbers are used in these instances.

*** Degrees with application to gaming or mentioned as being applied to gaming are included.

Further insights can be found in:

- "Cheap money and bad bets: How the games industry turned pandemic success into disaster" (<https://www.gamesindustry.biz/cheap-money-and-bad-bets-how-the-games-industry-turned-pandemic-success-into-disaster>)
- "1010 Games head of publishing says UK has become hostile to new game studios" (<https://www.gamedeveloper.com/business/10-10-games-head-of-publishing-says-uk-has-become-hostile-to-new-game-studios>)

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