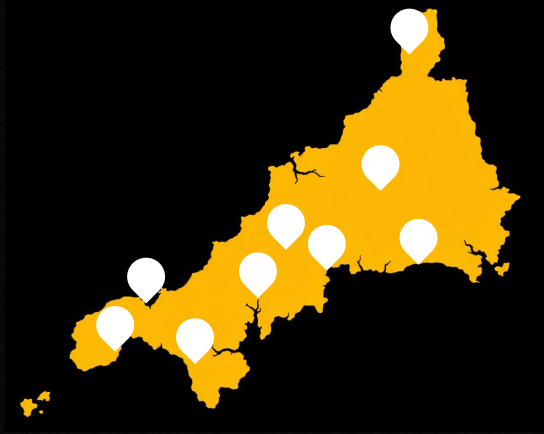


# The Cornish Games Industry Report (2025)

Small Region. Global Impact. High-Return Potential.



Analysis by

gamesinvestor  
CONSULTING LTD



Funded by



FALMOUTH  
UNIVERSITY

{01}

Independent analyst report covers the scale, employment and economic impact of Cornwall's video games development sector, including a brief analysis, GVA estimates and historic data.

{02}

Data derives from Games Investor Consulting (GIC) games development company databases, backed up by a survey of 54 video games development and education staff based in Cornwall in December 2025.

{03}

The survey included 13 studios employing 60 Full Time Equivalent (FTE) staff. The Cornwall survey is a representative sample that accounts for 61% of FTE games development employees.

**With secured research funding, our own industry can follow it's progress year by year to track results of any actions to support the industry with evidence.**

**Any future digital or creative papers to specifically separate games, not bundle it.**

>>DATA SOURCES

**£19.6m GVA** Sep 24-25 generated by Cornish games development, 10% of the South West's (£199m)

**29** Cornwall-based companies

102 FTE creative staff, 164 jobs in the supply chain, equating to **267 FTE** jobs

Cornish games development companies spent **£3.5m** on video games development staff's salaries and overheads in 12 months

**The Cornish games industry already punches above its weight.  
This is an emerging IP creating, export industry in a high value field.**

# WHY CORNWALL MATTERS

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# PEOPLE POWERED

54.6% cannot drive or don't own a car →  
remote & transport matter

{01}

31.7% have caring responsibilities

{04}

26.1% neurodiverse

{02}

39% not straight; 13% non-binary

{05}

**Cornwall has a modern, inclusive games workforce  
optimised for flexible, remote-first creative work.**



640+ games students in Cornwall

£17.7m estimated **additional economic impact**

Falmouth >> one of the UK's largest games education hubs

**Cornish Games talent supply is strong - but without funded studios, graduates leave the region.**

EDUCATION PIPELINE

# UK REALITY/ TALENT IS NOT THE BOTTLENECK

**Producing more graduates without funding  
studios simply exports talent.**

25,419 total filled  
UK industry roles

14,000-15,000 open games  
roles open worldwide

Only **696** open game  
industry roles in **UK**

**15,450** UK game  
undergraduates  
enrol per year

**This is not a workforce waiting for jobs -  
it's a workforce ready to build companies.**

**Robust IP protection is vital for commercial success.  
Developers can maximize their retail rewards by  
safeguarding distinctive elements such as game  
titles, characters, and design. This, in turn, makes  
them more attractive to potential investors and  
establishes a solid foundation for revenue generation.**

**ENTREPRENEURIAL  
BY DESIGN**

**84.6%** want to start their own studio

**23.1%** actively trying right now

**10.3%** have done it before and want to again

# GAMES POWER INDUSTRY/



**This value exists because of the games industry - not separately from it.**



{01}

Education & training

{02}

Health & wellbeing

{03}

Defence & Security Simulation

{04}

Manufacturing & Digital Twins

{05}

TV & Film Pre Production, Procedural Tech and Virtual Production

{06}

Tourism, culture & immersive heritage

**Local games studios are supporting other industries.  
The saturation of highly technical and creative graduate games talent  
can be retrained for other industries.**

# STRONG RETURNS/LOWER COSTS



**£34,125**

Cornish Avg salary + overheads



**55%**

below UK average burn rate.  
Lower than the national  
average (£76,421)



**45%**

of Full Time development  
headcount is freelance vs.  
15.5% national average

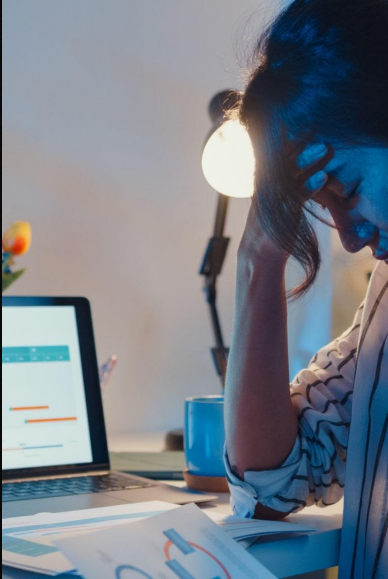


**20%**

of freelance talent in local  
studios is based locally,  
preferring local staff when they  
can

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**Cornwall delivers comparable quality at significantly lower cost.**



## THE CORE PROBLEM<<<

- Lack of accessible project finance >>
  - Not able to hire or retain local talent
  - Not able to risk developing new products
- Production gaps between contracts >>
  - Teams unable to keep hold of staff FT
  - Susceptible to micro changes in industry & economy
- Too much work-for-hire, not enough IP ownership >>
  - Not able to be make local stories, those not being exported
  - Susceptible to changes in industry & economy

**Cornwall's contraction mirrors the UK downturn  
- but driven by finance, not talent.**

# HOW TO HELP/

Grants>>  
Investment>>  
Networking>>  
Showcase>>  
Export Support>>  
Procurement>>

Studio continuity &  
production-gap  
funding

IP & prototype  
investment

Export & publisher  
access support

Engaged with,  
listened to and  
respected on a  
political level

Cornish studios  
first procurement  
for public & public  
funded projects

Graduate/Hobby  
-to-studio Business  
education & accelerator

National events access &  
Cornish Showcase  
Conference for Games

**£300k stabilises the ecosystem.**  
**£1.5m enables growth, IP ownership, and exports.**

# REMEMBER/

Cornwall's games industry is:

Proven	{01}	Entrepreneurial	{04}
Cost-efficient	{02}	Export-focused	{05}
Talent-rich	{03}	Culturally significant	{06}

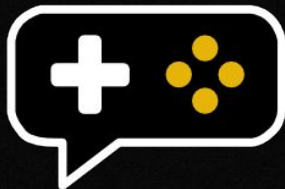
**Fund studios and IP - not just education -  
and Cornwall delivers outsized returns, fast.**

THANK YOU/

Cornwall

Gwariow Kernow

Games



Do you have any questions?

[contact@cornwall.games](mailto:contact@cornwall.games)

<http://cornwall.games>

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