Stranger in a Strange Land: A South African Perspective on the Evolution of British Game Development

Adam Jerrett
University of Portsmouth
School of Film, Media, and Creative Technologies
Eldon Building, Winston Churchill Avenue
PO2 1UP
adam.jerrett@port.ac.uk

ABSTRACT

This research examines what "British game development" means to those working in the modern UK sector. Using 17 semi-structured interviews with students, educators, and industry developers, augmented and analysed through reflexive thematic analysis and analytic autoethnography, the study explores how Britishness is something negotiated through practice rather than a specific national identity. Participants described Britishness less as a stable industrial identity and more as an affective texture, citing British dry humour, ambiguity, post-industrial melancholy, or accents and landscapes that are most strongly expressed regionally. They also highlighted how globalised production, UK co-development work, access barriers, and ongoing layoffs contribute to British labour being technically capable but culturally invisible. The findings argue that cultural national identities in games are most likely to survive through smaller studios and regional collectives. Here craft-focused values and local flavour can be celebrated despite broader structural pressures to create homogenised, commercially successful products.

Keywords

British, game development, identity, autoethnography, globalisation

INTRODUCTION

British game development is often discussed as a single industrial context. In planning this research, the term 'British game development' referred to game development in Great Britain (England, Scotland, and Wales). However, in practice it widened to reflect the industrial context and cultural identities of the broader United Kingdom and surrounding areas (e.g., Northern Ireland and the Republic of Ireland, where participants mentioned them), as this was how participants discussed 'Britishness'. This is not intended to effectively conflate 'Britishness' with 'Englishness' (as Welsh, Irish and other individual national identities exist in this frame). Instead, the term is used because it was the label through which participants negotiated various national, regional, industrial, and cultural meanings. The instability of 'Britishness' is part of the problem the paper examines. However, for consistency, the term 'British' is hereafter used to refer to that wider UK-focused industrial context.

'British game development' often conjures images of historical lineage within the medium. British game development helped shape global game development

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practices, with local studios creating globally recognised franchises like *Tomb Raider* and *Grand Theft Auto* (Tsang 2021). However, the "Britishness" of those successful studios and franchises may have since diminished following decades of closures, mergers and acquisitions, and growing game development sectors in other global markets like the United States, China, and Japan (Kerr 2013; Webber 2020). As a result, what remains of 'British game development' – how those working inside the sector feel the heritage and culture of the modern British craft is – is unclear and rarely asked about directly.

This project grew out of that ambiguity. The author (hereafter referred to in first-person) entered the UK industry as an academic and game developer from a similar position within South Africa. While I was familiar with the 'British' games like *Fable 3* (Lionhead Studios 2010), I often felt like I was looking at the ecosystem from outside it. South African game development often comprises small teams developing games on limited funding who need to legitimise the medium to local audiences (Farmer 2021). South Africa's breakout hit, *Broforce* (Free Lives 2015), found global traction borrowing Western action-hero film tropes. Games with clearer local identities, however, such as *Boetfighter* (Califourways 2019), often struggle to reach audiences or translate their humour. At first glance, the UK offered the historical infrastructure, heritage, and a large talent pool, so I often wondered why the industry's cultural footprint did not *feel* as strong as it *looked*. Recent game examples suggested an ongoing identity crisis: while *Thank Goodness You're Here!* (Coal Supper 2024) was praised for leaning unapologetically into British regionality and humour (Pollesel 2024), *Atomfall* (Rebellion Developments 2025) was critiqued as a derivative "British Fallout" (Packwood 2024). My South African positionality is not offered as a neutral outside contrast to Britain, but as a lens shaped partially by the country's status as a former British colony. Additionally, South Africa presents an unevenly resourced game development context (Farmer 2021), in contrast to Britain's historically established one.

Such contradictions form the basis of a deceptively simple research question: **What does 'British game development' mean to those working in/around it?** To answer this research question, I asked people inside the ecosystem – students, educators, industry developers – to answer that question for themselves. The study thus treats identity as negotiated through lived experience and creative practice as much as by economics or cultural policy (O'Donnell 2014). By listening to those imagining, teaching, and making within the sector, I map how Britishness is currently understood, where it is resisted, and how it is threaded through contemporary production practice. The inductive thematic analysis of the results (Braun and Clarke 2019) draws on a reflexive, interview-based case study of the UK industry, with my own insider-outsider positionality used as part of an analytical autoethnographic lens (Anderson 2006; Brown 2015).

BACKGROUND

British Cultural Values and Game Design Ethos

An increasingly prevalent conversation in game studies is the idea that games reflect the values of the people and cultures that make them (Flanagan et al. 2005; Jerrett and Howell 2022; Schrier 2019). Flanagan and Nissenbaum notably created the Values at Play framework, which asserts that design choices are never neutral, instead embedding the social, moral, and creative priorities of their creators

(Flanagan and Nissenbaum 2014). This often informs the design of so-called "empathy games" (Belman and Flanagan 2010), social impact games (Grace 2020), and the increasing discussion of politicisation in/around the medium (Franklin 2013). This is due to how broader work on human values shows that individuals and groups organise meaning around such abstract ideals that guide motivations and behaviours (Shilton 2018). This perspective thus posits that understanding "British game development" first requires recognising the cultural values that shape British designers' assumptions, preferences, and creative decisions.

Accounts of British cultural characteristics, such as Fox (2008) include using humour as a coping mechanism, a tendency toward moderation, and often hypocrisy, all while upholding values like fair play, courtesy, and modesty. These are informed by specific worldviews like empiricism, pessimism, and deep class-consciousness, and overlaid with broader social dis-ease. Together, these perspectives, values, and social instincts inform how British games are written, created, framed, and performed. A particular type of humour (sarcastic, understated, or often absurdist) is an oft-used expressive tool in creative work (Arning 2021). As a result, even early British games like *Manic Miner* (Smith 1983) became famous for such humour, integrating Monty Python-esque absurdities (mutant telephones and deadly toilets) as in-game enemies. Such titles led to similarly absurd sequels and inspired a lineage of similarly surrealist developers (Donovan 2010). This tradition continues in some modern British games, such as *Thank Goodness You're Here!* (Coal Supper 2024), a comedy game set in a bizarre Yorkshire town. The game leans heavily on British cultural references and specific regional quirks of the area, with reviewers noting that "matter-of-fact […] sarcasm […] dryness in delivery […and] absurdity played off as normalcy" that typify British humour are part of the game's appeal (Hermanson 2024; Pollesel 2024).

Additionally, British 'modesty' may account for another recent trend of favouring indirect storytelling and atmospheric design over blunt exposition. Pinchbeck (2008) (through developer The Chinese Room) is often credited with inventing the "walking simulator" genre (Majewski and Siuda 2022). Walking simulators like The Chinese Room's *Dear Esther* (2012) *Everybody's Gone to the Rapture* (2015) and *Still Wakes the Deep* (2024) often lack clear objectives or action-based gameplay. Instead, they invite players to interpret fragmented narrative clues as the primary mode of play (Higgins 2023). This approach is a deliberate divergence from the player-centric, goal-driven design teleology common in American game design pedagogy (Fullerton 2008; Salen and Zimmerman 2003) and the blockbuster-style AAA action games. However, even in big-budget games, British developers will often imbue a satirical British outsider's gaze within them. In *Grand Theft Auto*, for example, developer Rockstar's Scottish origins result in a subversive critique of the "American Dream" (Wills 2021), rather than its glorification.

Origins of the British Video Game Industry

The UK video game industry grew from the "bedroom coder" phenomenon which occurred as a result of the availability of affordable computer hardware in the 1980s. These included home computers like the ZX Spectrum and the BBC Micro, the latter of which was supported by government initiatives to promote computer literacy in schools (Wade 2016). These platforms lowered the barrier to entry for programmers, who became hobbyist "bedroom coders" operating outside traditional corporate structures (Izushi and Aoyama 2006). This fostered an ethos of

creative experimentation that often clashed with the technical limitations of early hardware, forcing developers to create optimisations like procedural generation – most notably in *Elite* (Braben and Bell 1984) – to capitalise on limited memory capacity (Donovan 2010).

By the 1990s, bedroom teams had formed professional studios. In Scotland, DMA Design (later Rockstar North) made seminal puzzle game *Lemmings* before starting the now-global franchise *Grand Theft Auto*. In the Midlands, Ultimate Play The Game (later Rare), created games like *GoldenEye 007* and *Donkey Kong Country* (Donovan 2010). Additionally, Peter Molyneux's Bullfrog Productions (later Lionhead) created the "god game" genre with *Populous* and *Black & White* (Wolf 2021). Many of these studios still operated with the same experimental, inventive ethos that had defined their earlier bedroom origins, notes Molyneux (in Stanton 2016). However, the outsized success of these studios arguably led to an obfuscation of their national identity as their work was exported. For example, while *Tomb Raider* (Core Design 1996) was developed by a Derby-based studio, its multimedia expansion into a Hollywood film (West 2001) dilutes those franchise origins, surviving primarily through the titular character's British accent – despite Lara initially being conceptualised as Latinx in origin (Nguyen and Phillips 2025). Such cultural camouflage was likely an economic necessity in an increasingly globalised world. For British games to succeed beyond its borders, specific markers of nationality, culture, or local nuance had to diminish to allow games to be enjoyed by consumers in other markets (Webber 2020).

The Impact of Globalization

Tsang (2021) defines the period of the late 90s and early 00s British game development through "consolidation and selling out," where the fragmented British industry was largely acquired by US and Japanese multinational corporations. This shifted the sector's structure from a cluster of independent studios and creators to a node within "global value chains" (Tsang 2021). One consequence has been the normalisation of co-development and work-for-hire. British teams now frequently contribute art, engineering, porting, or support work to large international franchises without holding primary authorship or developing original intellectual property (Kerr 2013; Tsang 2021). While such agreements bring capital and stability and are not unique to the UK, they diffuse project 'ownership'. British studios contribute to franchises like *Battlefield* (Criterion Games), *Gears of War* (Splash Damage) and *Call of Duty* (Sumo Digital) – which often read as culturally 'American'. However, this ultimately weakens the sector's ability to project a distinct national identity or "soft power" through its exports (Webber 2020).

The loss of British visibility is compounded by the culture clash often inherent in such acquisitions. Studios are frequently closed or restructured once bought by larger firms. Lionhead's closure by Microsoft in 2016, and the cancellation of the almost-finished *Fable Legends* despite the franchise's success, became a seminal example of how global platform decisions can disrupt a British studio's creative trajectory – even for developers as well-known as Peter Molyneux. It illustrates how values of innovation, quirkiness, and risk-taking that characterises some 'British' output can clash with traditional AAA risk mitigation practices (Herz 2013).

However, during this period, some mid-sized UK-headquartered studios leveraged work-for-hire practice to establish the AA model, which often combines contract work with self-owned IP development (Styhre and Remneland-Wikhamn 2021).

Frontier Developments, Rebellion, and Team17, for example, have all moved from subcontracting and licensed projects towards portfolios where they develop and publish their own management simulators, shooters, and other projects (Tsang 2021). *Atomfall* (Rebellion Developments 2025)– a self-published action game set in a fictionalised, post-war British landscape – is an example that attempts to retain both IP control and a recognisably British cultural texture while still competing in a global market.

The rise of digital distribution platforms such as Steam and console storefronts has further shifted this landscape, as they allow British developers to bypass traditional publisher gatekeeping and reach global audiences directly (Tsang 2021). However, global discoverability on such platforms remains problematic, especially for smaller or independent studios (Vu and Bezemer 2021). While external publishers can help with this, British publishers often do not have the financial ability to match US or Japanese budgets (Gibson et al. 2023). UK policy instruments like the government's tax relief program aims to help bridge this gap by lowering development costs (Webber 2020). Public funding similarly attempts to address this 'missing middle' by supporting early-stage commercial and cultural projects through The UK Games Fund and its graduate pathway Tranzfuser (Alma Economics 2025). However, as later sections discuss, participants often perceived these mechanisms as insufficient relative to the structural pressures of a globalised, risk-averse industry.

RESEARCH METHODOLOGY

Research Design

The research combines semi-structured interviews (Andres 2012), informed by analytic autoethnography (Anderson 2006), analysed using reflexive thematic analysis (Braun and Clarke 2019), where my understanding of the British games industry would expand following each interview. Rather than positioning myself as a neutral interviewer, my own trajectory as a South African developer and educator working in the UK forms part of the analytic lens – common in game studies ethnographies (Brown 2015). As I spoke with participants, my understanding of "British game development" shifted, and those shifts fed back into how I interpreted the data.

Because the research question ("What does British game development mean to you?") is both cultural and personal, the analysis foregrounds reflexivity: participants' self-understandings and my own. My positionality became the instrument that calibrated the study, providing contrast between my experiences of a nascent South African industry (Farmer 2021) and the established heritage of the British one (Tsang 2021). In this way, the study is presented as a single-case study (Yin 2013), wherein the British industry is examined to present insights for other game development locales.

Recruitment

Recruitment targeted three groups within the UK ecosystem: students, educators, and industry professionals. Participants were recruited via purposive sampling (Etikan 2016) through the [author's institution] Games Courses Discord server, and my various social networks (LinkedIn, X, BlueSky, and Facebook). The final cohort consisted of 17 participants: 4 students, 6 educators, and 7 industry developers.

Student recruitment was lower than anticipated, as data collection took place between June and August 2025, outside university term time.

The project received a favourable ethics opinion from the [author institution's] Faculty Ethics Committee (Reference: CCI-FEthC 2025-010). To enable open discussion of employers and industry frustrations, all participants and their companies are anonymised in this article.

Data Collection and Analysis

30–60-minute interviews were conducted and automatically transcribed via Google Meet. Audio was also recorded with consent. Autoethnography often requires navigation of the emotional boundaries and relationships between researcher and participants (Brown 2015). This was relevant here, as my sampling strategy meant I often knew participants. However, focusing on Britishness, rather than myself or my research aided boundary management. My outsider status still occasionally produced the kind of "awkwardness" Brown (2015) describes, like when participants spoke nostalgically about the ZX Spectrum, Jeff Minter, or other microcomputer-era figures I had little context for.

To capture the autoethnographic dimension of this research, I maintained a reflexive journal throughout the data collection process (Anderson 2006). I documented my emotional reactions, surprising moments, and assumption-challenging events throughout the interview and subsequent analysis process. Often, these informed follow-up questions or anecdotal discussions with interviewees, such as my surprise upon discovering *Batman: Arkham Asylum* (Rocksteady Studios 2009) was developed by a British studio. Given the IP it was adapting, and having played it in South Africa, I had always viewed the franchise as hegemonically American, as did some interviewees.

Analysis followed a reflexive thematic approach (Braun and Clarke 2019), combining close reading of transcripts with repeated listening to the audio to correct errors and examine tone. Initial open codes captured recurring references to "Britishness", comparisons with "America" and "Japan", as well as "Storytelling", "Class", and "Craft". These were then grouped into axial categories including "Craft vs Commercialisation", "Global Markets", "Barriers to Access", and "British Cultural Markers" (Saldana 2021). The selective, overarching code "Negotiating British positionality in a global games industry" was used to organise the final themes that structure the Results and Discussion.

RESULTS

Several themes were constructed concerning participants' perceptions of the realities shaping the British games industry – many navigating a tension between a cultural creative identity and increasing commercial pressure. Following discussion of interviewee themes, the final theme provides my autoethnographic reflection detailing how my own understanding of "British game development" changed.

Historical Legacy

Participants often framed British game development as it related to its long, respected legacy. They described the UK and Ireland as having a "strong, well-established […] historic presence" in games (P4) – a sector that "commands a real

sense of pride and nostalgia" (P5) from its legacy and history of innovation (P13). For some, this related specifically to games and studios from the 1990s like Bullfrog or Rockstar's, often as a shorthand for what British game development *used* to be (P8, P11). Peter Molyneux transformed from an early visionary of the "bedroom coder" era to cautionary tale about over-promising in the modern internet age – no longer could developers merely say "you know, it would be cool if we did this" (P8, P10, P11, P13).

Others noted that Britishness was infused through the IP rather than developer location. *GoldenEye 007* (1997) was mentioned as an example that, while developed by British studio Rare, represented Britishness by leveraging a global, quintessentially British cultural export to assert its identity (P15). Similarly, narration from storied British actors like Stephen Fry, David Attenborough, or similarly styled voicework signalled Britishness due to name recognition (P1, P3, P11, P12, P13, P14, P15). Such legacies were strongly linked to feelings of Britishness in games as both a source of pride and pressure for modern developers.

Craft Over Commercialism as a Core Value

Another clear theme was a shared sense that British game development is, at its heart, "uniquely about the craft. It's about creating things" (P4). This was combined with high technical polish and aesthetic ambition (P13) and a focus on the importance of "push[ing] the boundaries [… even] on a smaller level." (P5). Under this ethos, "the purity and the complexity of the game making process itself" was the aim (P4). Even as some individual developers found name recognition – like Greg Mayles ("the father of Banjo-Kazooie") – they were still driven by "immense technical knowledge and deep skill in the process." (P4).

This was often contrasted with a perceived US emphasis on self-promotion and commercial success (P1, P10). P1 noted that this was due to their communication style ("more direct") and incentive structures ("what have you done to succeed first"). In comparison, British developers tend to view excessive self-promotion as "slightly distasteful" or "unnecessary", allowing the work should speak for itself (P4, P10). While this craft-first ethos was a point of pride and a potential cultural unique selling point, several noted that relying on quality alone is "a very risky economic position" in a saturated global market (P1, P4, P5, P10).

Cultural Identity and the Politics of Britishness

When Britishness shifted from legacy or process to identity, things got more awkward. Participants were very wary about pinning down "Britishness" too firmly, often distancing themselves from the label, saying things like "I'm the first to tell you, I'm not British" or identifying as Scottish, Northern Irish, or strongly regional (P3, P4, P5). There was a desire to avoid the "racial connotations" surrounding British pride, colonialism, and other exclusionary definitions of Britishness (P3, P12, P14). Pressure to appear cosmopolitan "erodes the ability to make something and say, like, 'I care about my national identity'", as this is often viewed with suspicion (P8, P11). By contrast, P14 argued that "there isn't a cohesive [modern] British identity", likening current British identity to consumerism as inspired by US culture. American games had a perceived "straightforwardness" or "sincerity", whereas British games instead "often reflect a national mood that is self-questioning and doubtful" (P8), which P11 suggests carries over into a creative affinity for "games of ambiguity." In this sense, Britishness often appeared less as an identity participants

comfortably inhabited and more as a historically loaded shorthand that required qualification, distancing, or regional substitution.

Through the interviews, humour emerged as the most stable cultural marker of Britishness (all participants except P3, P7, P10, P17). P8 described British games as having "that same kind of wry British humour" and "a very bawdy vibe," rooted in traditions of surrealist sketch comedy. It often alluded to "the worst side of life" (P1), class consciousness and innuendo (P8), and a shared cultural context. *Thank Goodness You're Here!* (Coal Supper 2024) was the game that came up most often as a pure expression of this identity. Interviewees praised it for its "celebrating the North [of England]" (P12)" and its relentless Britishisms (P6, P8, P9, P11). *Fable* (Lionhead Studios 2010) was similarly mentioned repeatedly as a big-budget game that feels "infused […] with Britishness" in art, architecture, voice acting and humour (P2, P4, P8, P11, P15). However, participants recognised that this humour "simply doesn't translate" for everyone, with authentically local references making for harder exports (P1, P8, P11).

Regionality as Contemporary Identity

Rather than trying to express Britishness at the national scale, many participants argued that identity is best represented through regions, cities, and specific landscapes. P10 noted that "the north of England has much more of an identity than England." Participants often highlighted games that supported such Northern locality like *Atomfall* (Rebellion Developments 2025), where P12 encountered characters who "had my accent" and others felt it "perfectly captured the old abandoned industrial rundown feel of the Northeast" (P8, P12, P15, P16).

This regional focus wasn't limited to traditional studios. P15 gave the example of a self-employed developer who is "an absolute rail fan" and built a successful *Roblox* game focused solely on the complexities (and frustrations) of the British rail system. This showed a successful case for niche content finding traction on global platforms that may have otherwise been considered too risky for developers. This regional approach offers a way to be specific to a locale without carrying the full political weight of an entire country (P3, P10, P11, P14).

Globalised Production Pipelines

Alongside an increasingly local focus, participants described a feeling sense that British identity gets washed out at the high end of the industry. Several interviewees felt that AAA production is "a little bit too global to really consider [the work] British anymore" (P2, P4, P8, P9). especially when UK teams contribute to ports or asset production with little opportunity to embed cultural values. There was also a sense that global audiences and even other developers "don't know that there is […] game development happening in Britain" at all (P3, P4, P8). Participants with publishing experience linked this to how games are marketed and distributed. P1 described how large publishers tailor products to specific national distribution models and rely on extensive sales and monetisation data. Recounting their experience with a global trading card game, P1 noted that a particular product hated by competitive players was "built specifically for the Italian market" to compete with kiosk sales and synchronise with TV episodes. P1 and P5 also noted work testing in lower-cost markets like the Philippines due to their users' purchasing behaviour being "most like US customers" (P1) while the customer acquisition cost is much lower – a data-driven focus that can, at times, drive homogenisation (P1, P5).

Remote work and outsourcing were seen as amplifying this trend, with fears that roles will "start getting more and more outsourced" to cheaper regions even when local workers are "just as educated" (P1). These anxieties were frequently connected to recent UK layoffs and studio closures (P1, P4, P6). Others pointed to Britain's "melting pot" (P14) culture as a potential strength in creating heterogeneously diverse work that "had appeal beyond the UK's borders"(P5). P1, for example, positioned British developers as useful mediators between US and Japanese teams. Despite this, participants felt that globalisation forces a difficult choice: either lean into the cultural aspiration of making authentic 'British' work, or pursue the commercial imperative of creating homogenised products that are high-quality games, regardless of origin (P1, P2, P4, P10, P13).

Structural Challenges

Funding was widely identified as a persistent, structural barrier (P5, P8, P9, P10, P15). While opportunities like those provided by the UK Games Fund were welcome, they are "simply too small" to support studios through long development cycles or help them genuinely scale (P8, P10). It was often felt that the UK industry "just isn't taken seriously enough" (P8) or is otherwise reliant on foreign investment or domestic private capital for growth (P9, P10). Some linked this directly to how smaller studios think about themselves, with P5 noting that many independents are "focused on […] making a game […for the love of it but] in reality, they are a business at that point". Without early attention to business models and monetisation, studios are "setting [themselves] up to potentially fail" (P1).

Access to both education and work was repeatedly described as "massively influenced by the class system" (P3, P4, P11). P9 summarised it bluntly: "if you're in the middle class or above, your life gets so much easier", with P3 echoing how working-class realistically cannot dedicate the same time to building a portfolio as those who can study full-time. Participants were acutely aware that this creates a pipeline where those with fewer resources are structurally disadvantaged despite equal talent or passion (P3, P11). Some argued that bringing "more working-class people […] in the team" leads to "even more [diverse viewpoints and experiences]" but acknowledged that the current system makes this difficult (P3, P4). Despite these access barriers, increasing university output provides the industry oversupply of junior talent trying to enter a very small jobs market (P6, P8). P8 notes how some UK degree programmes enrol "between 150 and 200 students annually", which P11 connected this to the post-Blair expansion of higher education, where "everyone […going] to university" became a policy goal. However, when there are often "fewer than 800 open jobs in the entire industry" (P8), only some of which are graduate roles, this leads to "impossible competition" for anyone without an exceptional portfolio (P9, P15).

Working Conditions

Experiences of work culture varied, but there was broad agreement that labour conditions are under significant pressure, especially following recent layoffs across the industry (P1, P3, P4, P6, P15, P16). Participants talked about environments where it is "incredibly tough" to secure work (P1, P9). P10 then noted that even in-work, many studios are still "very toxic environments" for graduates, while P14 argued that major publishers are now so focused on short-term profit that they are "completely sabotaging their own opportunities to make sustainable [businesses]".

This sometimes related to discussion of overworking culture ('crunch'), with participants noting demanding timelines (P6) and working in "burnout range" (P9). However, P15 contrasted their older colleagues' crunch stories with their own experience, reported never having to "sleep under [their] desk" and "usually going home around 6PM", which they attributed to a younger workforce less willing to accept exploitative norms and an increase in reporting and quality frameworks. Unionisation also emerged as a thread of hope. P6 highlighted that an unnamed games union had tripled in size in a year, noting how developers should "come together to make sustainable, accessible and inclusive ecosystem not only for our developers but also for the players".

Looking Ahead

Despite the bleakness of layoffs, oversupply, and funding gaps, many participants expressed cautious optimism about the future, particularly around smaller-scale and grassroots development practices (P3, P4, P6, P9, P11, P12, P14, P15). There was a consensus that future stability is more likely to emerge from "small successes" than from attempting to launch straight into "AAA million-dollar project[s]" (P1, P15). Many participants predicted the "shrinking of the industry is going to force people into creating their own companies, creating their own studios"(P4, P9, P10, P11).

The UK was often seen as uniquely positioned to take advantage of this due to their craft-focused ethos, and that leaning into that innovative and/or regional heritage may be a sustainable way forward (P3, P4, P5, P13, P14). New organisations and community initiatives were suggested as ways to approach this, such as groups that help showcase students' work, as well as regional community meetups trying to address geographic inequities and upskill developers (P6, P9, P12, P15). "Next year will be better" seemed to be an anecdotally repeated mantra (P15). Similarly, for P14, hope lies in using the current industry uncertainty to "maybe redefine what British game development means" and treating "game development as the art it should be treated as", though, as P6 notes, doing so requires a reformed, collectively organised framework.

A Stranger's Perspective (Autoethnographic Reflection)

Going into the interviews, I expected some of the awkwardness Brown (2015) associates with autoethnographic vulnerability, but most conversations felt like open peer discussion about games rather than 'formal' data collection. Coming from a South African context, I often found myself explaining, comparing, or contextualising that industry in relation to participants' accounts, which made the research feel like a real-time learning process rather than confirming my pre-existing assumptions.

One of the first major realisations was how misplaced my assumption of a coherent, unified 'British games industry' had been, echoing Keogh's (2023) assertion that the global video game industry is better understood as heterogeneous cultural sites of production. Participants described regional hubs, co-development studios, and fragile routes into work that looked uncomfortably like the patchwork I knew from home. A few participants even questioned whether cultural identity mattered at all, so long as the game was good – something fundamentally at odds with my own culturally foregrounding values-conscious creative practice. Many had simply never thought about "British game development" as a cultural practice at all. Instead, they would

recognise a British 'vibe' in certain titles but struggled to articulate what Britishness meant in their own work or field, which I found unsettling.

For an industry with such a storied legacy, the fragility of the ecosystem still surprises me. People can sense "British game development" but can't quite put their fingers on it as a strong cultural identity that developers consciously draw on, instead often defaulting it to a tone or texture – the same as I had. That misunderstanding, and in some cases the hesitation to define Britishness at all, feels central to how the sector understands itself, and to any future attempt to understand Britishness in games.

DISCUSSION

The findings of this study show that "British game development" is not a fixed culture, but rather a sector shaped by tensions: creative ambition vs. market realities, regional specificity vs. homogenisation, and a labour of love in a system that doesn't always love back. Although the case study is grounded in the UK, this section's insights may be relevant to other national/local industries grappling with globalised production.

From National Identity to Cultural Texture

One of the clearest findings is that Britishness does not function as a stable national identity in game development. This instability does not signal weakness in its (lack of) definition, but becomes a useful finding. 'Britishness' was contested, uncomfortable, and often regionally displaced. It instead showed up instead as an affective texture often through outward traits like setting, music, narration or humour (Fox 2008; Webber 2020). Participants recognised Britain's legacy or modern issues around national identity (e.g., Ashcroft and Bevir 2022). This suggests that Britishness is understood *aesthetically* rather than *industrially*. An aesthetic emphasis means non-British-developed games such as *The Stanley Parable* (Wreden and Pugh 2013) or *Untitled Goose Game* (House House 2019) may be misidentified as British, where narration, tone, or oddness were expressed markers of Britishness rather than developer origin. Conversely, British-made games like *Batman: Arkham Asylum* (Rocksteady Studios 2009) or *SingStar* (London Studio 2004) were assumed to be American/Japanese because of their IP or mechanics, despite championing design innovations that participants associated with the UK's craft ethos.

Such a finding is notable for developers, as it suggests that players will often ascribe local/national identity onto how a game *feels*, rather than onto the studio's origins. While this globalises creative development (e.g., a 'British' game made by Australians), it also highlights structural issues in those countries of origin: who does the labour, how money gets invested, and how (or whether) a national development ethos (e.g., innovation) can flourish.

Regional Identity as the Real Site of Authenticity

Regionality emerged as a form of British identity expression where accents, landscapes, and settings (e.g., Yorkshire or Scotland) carried more meaning than abstract "Britishness". In this way, regionally-grounded titles like *Atomfall*, *Thank Goodness You're Here!*, and the work of developer The Chinese Room feel British because they represent *somewhere specific* in Britain.

This challenges work that treats national game cultures as unified or part of a larger global machine (Kerr 2013). For developers in the UK and other countries with strong regional distinction internal differences, the implication is similar: authenticity in identity comes from situated representations (e.g., regions, histories, stories) rather than trying to represent the nation in the abstract.

Global Pipelines and the Invisibility of Local Labour

The study also showed that globalisation both dilutes Britishness and obscures British labour. Many UK developers spend careers supporting larger projects through technically significant but culturally invisible roles. This results from the British industry's move towards a "semi-peripheral" global role, supplying skilled labour instead of exporting distinctly cultural products (Webber 2020). These concerns are intensified by the global industry downturn since 2023. Post-pandemic financial economic pressures and industry market saturation (with hiring booms during the pandemic) has disproportionately impacted Western markets. Workforce reductions surged from 10,500 in 2023 to over 14,600 in 2024 alongside a stagnation in global revenue growth to just 0.5% (Ma 2025). In the UK specifically, 248 studios closed between 2023 and 2024, even as total development headcount and foreign ownership in the sector rose (TIGA 2024).

Participants often referred to whatever the most recent wave of redundancies or closures was when they were interviewed such as London Studio, Rare, and Ubisoft (Hulst 2024; Phillips 2025; Stanton 2025). This was connected to fears about remote work, outsourcing, and corporate cost-cutting. In this climate, British developers are competing in a global labour market where work is routed to whichever locations minimise risk and expense. Several emphasised that succeeding under these conditions requires not only technical and creative skill but also a clearer understanding of business models, funding, and industry dynamics to be successful (Sikorski and Matulewski 2025), regardless of national identity.

Who Defines British Games

Class, geography, and access were threaded through many accounts: working-class students building portfolios while holding down jobs; regional developers feeling the gravitational pull of London and a handful of major hubs; and stratified access to higher education and job opportunities. This echoes broader critique of the wider UK creative sector as skewed towards the already privileged (O'Brien et al. 2016). In games, this shapes not only who can enter the sector, but who ends up leading studios, setting ethos, and defining how British games are understood. Historically, this meant that risk-taking independents, long-running studios, known-name developers and those in leadership defined the culture the UK sector operates on today (Tsang 2021).

This is being redefined by the resurgence of independent game development within the British landscape, often buoyed by the rise in regional meetups and networks like the Bristol Games Hub (Crogan 2018) and Game Anglia (2019). In these spaces, micro-studios can mutually support one another and leverage collective collaboration to resist the larger commercial pressures of AAA development (Crogan 2018). Games union membership can be one way to organise such support, and is becoming important both within the UK and globally (Keogh and Abraham 2024; Ruffino and Woodcock 2021). However, this shift towards collective bargaining is not without

significant industrial pushback. Notably, the Independent Workers' Union of Great Britain (IWGB) recently alleged that targeted dismissals at Rockstar North were a calculated attempt to dismantle unionisation efforts under the guise of disciplinary action (Bratt and Sayers 2025).

Developers should therefore make a concerted effort to identify where diversity and access can be improved. The narrowing of the identities explored in games is often not a failure of talent, but a symptom of the existing industrial structure where class, access, and regional barriers filter for those who have the time, safety, and stamina to contribute. Without new initiatives that reform it through collective bargaining, regional networks, or policy reform (Webber 2020), British game development risks becoming a reflection of privilege rather than a representation of the nation, locality, or particular ethos.

The Incompatibility of Craft and/at Scale

Finally, the research highlights a tension between a craft-first identity and a business-first industry. Participants consistently described British development as having an ethos of craft, drawing a throughline from its bedroom coding origins to contemporary independent development practices (Tsang 2021; Webber 2020). However, British developers are increasingly working in a global environment defined by data-driven design (Seif El-Nasr and Kleinman 2020), live-service risk (Dubois and Weststar 2022), and rising production costs (Ma 2025). These changes to global development approaches, alongside the current industrial context often means that developers cannot rely good craft *alone*.

The results suggest that these value systems (craft vs. capital) are increasingly incompatible at large scales. Globalised studios and publishers are structurally aligned with risk aversion and globally legible, profitable experiences (Herz 2013; Tsang 2021). The modern industry's reliance on "imitative strategies" to mitigate financial risk (Ma 2025) has created a structural hostility towards the innovative spirit that historically characterised British output. Additionally, British (or other cultural) distinctiveness must often be sanitised to ensure effective reach (Carlson and Corliss 2011).

Despite this, many participants identified the future of meaningful cultural expression as the work of smaller independent studios, regional collectives, and tightly scoped projects, allowing survival from smaller successes rather than romanticising AAA development. Instead, differentiation can occur through "controlling team expansion speed and development cycle length" (Ma 2025). In these smaller contexts, identity expression can be both more readily supported and a unique selling point. However, while the UK funding landscape is slowly improving for independent developers (Alma Economics 2025), national policies often still treat games as a marginal medium within the creative sector (Webber 2020).

Therefore, the survival of a distinct British (or other cultural) game identity should not rely solely on structural support or on the scale provided by the AAA industry. Instead, it should be cultivated through community hubs and small projects. This research suggests that national identity in games survives most strongly in the regional, the odd, and the handcrafted. Its future will be determined less by individual creativity or industrial ethos than by the desire to explore those national values at all (i.e., making cultural games). Only then might the political and economic structures reform to allow such precarious work to exist at all.

LIMITATIONS AND FUTURE RESEARCH

This study has several limitations that shape how its findings should be understood. Most notably, the interviewee sample was small and purposive, drawing from my existing personal and professional networks in UK games education and development. This skews the participant pool to those already comfortable with reflection in, often, a university or university-adjacent context. As a result, the sample does not capture the full breadth of the UK sector, such as freelancers, remote workers working for UK multinational studios, developers from under-represented backgrounds, or those unwilling to participate due to confidentiality issues (e.g., non-disclosure agreements). Secondly, the analysis is also researcher-centric, as is common in autoethnography (Woodward 2018). My positionality as a South African academic in an English institution shaped what themes I constructed and how I interpreted them. Lastly, the research is distinctly time-bound. Interviews were conducted during a period of significant industrial volatility, which may have affected participants' responses, particularly around precarity, outsourcing, and homogenisation. As market conditions and policy frameworks change, perceptions of British game development may shift accordingly.

The limitations provide fruitful avenues for future work. Notably, future work could explicitly disaggregate English, Scottish, Welsh, Northern Irish, and Irish relationships to game development, as this study showed that such patriotic tensions could emerge. Comparative studies could also ask similar questions in other national or regional contexts (e.g., how "Canadian", "Polish", or "South African" game development is understood internally). This would validate the usefulness of the 'texture vs identity' finding and map different relationships to global production pipelines. Within the UK, additional regional research could focus on specific hubs (e.g. Leamington Spa, Dundee, Bristol) to trace how local histories, class dynamics, and support structures shape those local development scenes. There is also scope for player research on how audiences perceive Britishness in games, complementing the 'insider' accounts in this research by exploring how national identities are understood in practice. Finally, the political and economic themes raised by participants merit targeted study. Future work could further explore co-development practices, unionisation efforts, and funding flows. Additionally, collaborative autoethnographies with developers themselves could deepen the account of how national identity and globalisation are navigated in everyday studio life.

CONCLUSION

The research aimed to answer what 'British game development' means to those working in and around the modern sector. The interview data, read through a reflexive, autoethnographic lens, suggests that Britishness in games is not experienced as a stable national-industrial project, but in an often-contradictory set of creative values. Against the backdrop of a thoroughly globalised, capital-focused production system, 'Britishness' persists as an affective and aesthetic texture explored through specific humour, bleak or understated atmospheres, and a commitment to an ethos of innovation.

Importantly, participants repeatedly distinguished between the economic realities of working in the British games industry and the cultural elements that still feel 'British' to them. The *British Games Industry* is, conceptually: studios acquired by global publishers; UK teams hired primarily for co-development and porting; labour routed

wherever costs are lowest; and a funding environment that encourages risk-averse, data-driven production. Here, 'Britishness' is largely irrelevant beyond technical capacity, delivery, and profitability. Contrastingly, *British Game Development* as a cultural practice persists in smaller spaces – most visible in regionally grounded work, AA-scale studios that retain IP control, and independent projects that lean into weirdness, often in service of innovation. Here, 'Britishness' is less a coherent national identity but a set of sensibilities. These can travel – sometimes being misattributed to non-UK studios, or other times being erased when British developers contribute invisible labour to ostensibly 'American' or 'global' titles. The reluctance of many participants to embrace Britishness as a label reflects contemporary discomfort with national pride and the legacies of empire (Ashcroft and Bevir 2022), even while attempting to utilise it for creative expression. Methodologically, my autoethnographic approach revealed that British identity is often negotiated best in conversation with an outsider's perspective.

Ultimately, the future of British (and other cultures') game development seems twofold. Some may choose continued integration into the global AAA machine, where technical excellence is the primary export (Tsang 2021). Others may instead champion weird, regional, and the specific experiences where their "cultural odour" is the export instead (Webber 2020). However, if British game development wishes to retain a distinct cultural texture under globalisation, this will not be achieved by chasing AAA scale or reliance on heritage alone. Instead, it will be through sustained support for and of the specific, regional, eccentric projects and communities where Britishness still feels like something developers actively work with, rather than merely a feeling or a legacy.

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