GAMING
PERFECT PLAY FOR GROWTH

A Robert Walters Group Company

VACANCYSOFT
Data Publishers for the Recruitment Industry

ROBERT WALTERS

INTRODUCTION

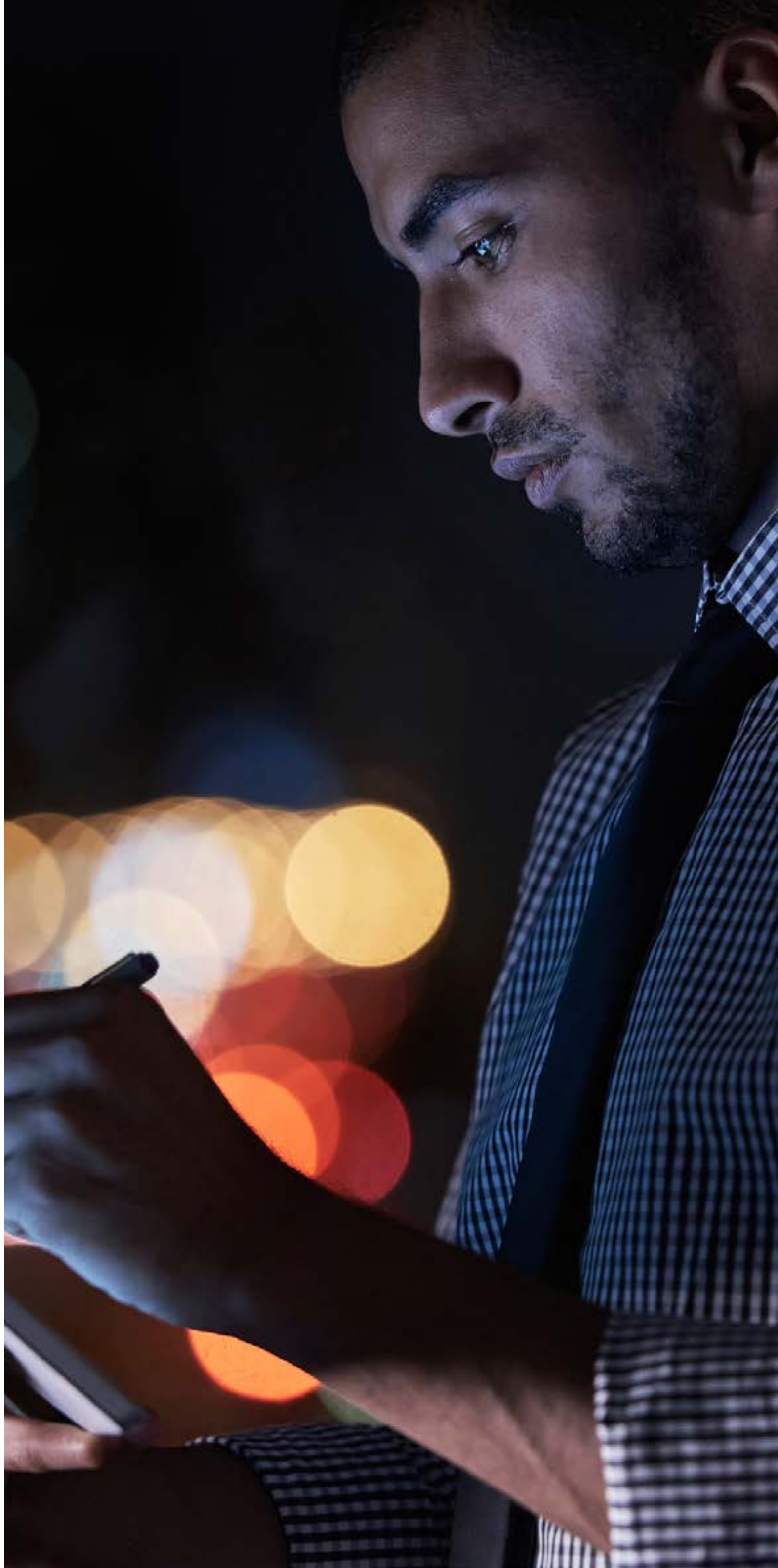
Since the dawn of the digital age, the gaming industry - encompassing the development and delivery of games for video console, PC and mobile applications - has been taking the world by storm – not least during Covid-19 where all around the world, citizens were asked to stay at home for months on end. In a world where blockbuster premiers, national sporting events, and hospitality and leisure were all vetoed – gaming further infiltrated the daily lives of multiple generations as one of the only accessible lockdown past-times.

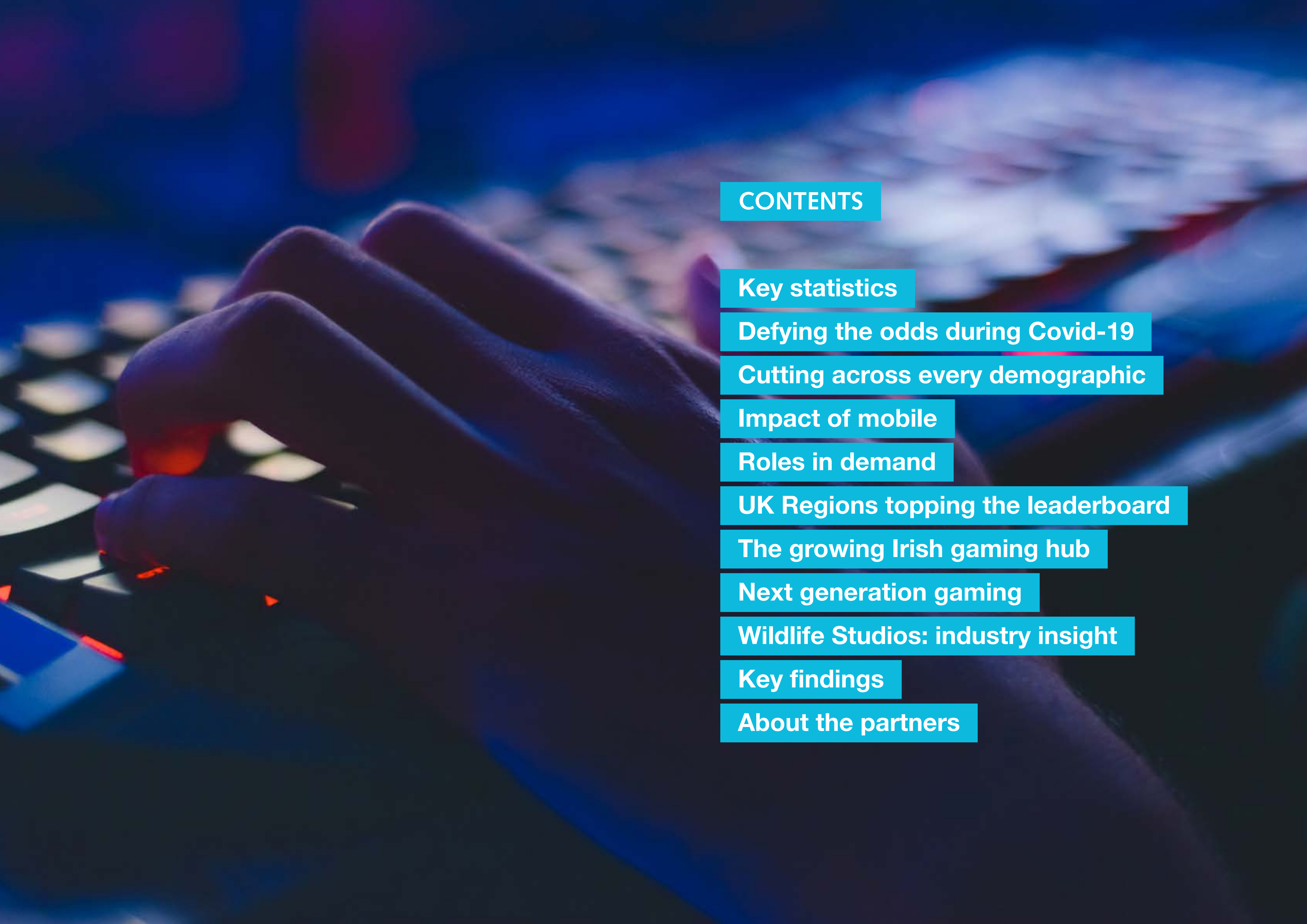
A number of countries have firmly cemented their reputation as big players in the gaming market – in particular largely populated and tech proficient countries such as Japan, South Korea, China, and the US – who have all led the way in online gaming.

The UK now sits fifth in the list of the largest gaming markets in the world. While it may still be considered a young sector, it already generates almost £4 billion in revenue - evidencing its high potential in helping to uphold the UK economy.

One of the biggest indicators of the success of video game development and sales in the UK is the speed at which the jobs market has grown. Although the UK may not boast the huge populations of other countries, it has always remained competitive at developing technology – as well as housing some of the best gaming talent in the world.

The Robert Walters Tech Series, in partnership with VacancySoft, tracks the tech sectors that are driving UK and Irish job growth. As changing demographics and increased publicity encourage new generations of video game fanatics, accessing the latest products across multiple platforms, we analyse how the gaming industry has anchored the UK economy and unlocked job growth in a period of uncertainty.





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KEY STATISTICS

EMPLOYMENT IN GAMING

27,000
employed within the gaming sector

3x
more people will be employed in gaming in 5 years

68%
of gaming vacancies are tech related

+20%
increase in overall vacancies

+45%
increase in tech vacancies

+25%
increase in marketing vacancies

VALUATION OF UK GAMING SECTOR

£4bn
value of the UK gaming sector

£10bn
predicted value of UK gaming by 2023

£159m
projected revenue of eSports by 2021

£80,000
contribution per employee to the economy

GAMING PROFILES

16-25 yrs
45% of gamers are Gen Z

35-44 yrs
75% 'frequently' pick up a controller

55+
1 in 5 grandparents game with grandchildren

FACTORS DRIVING DEMAND

Mobile Apps

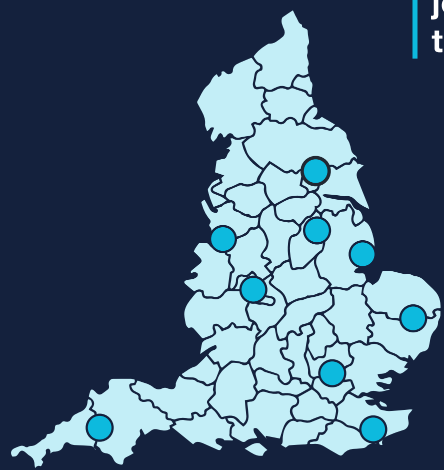
5G

eSports

Augmented Reality

REGIONAL HOTSPOTS

55% – of game development jobs based outside London & the South East



% of job vacancies in gaming

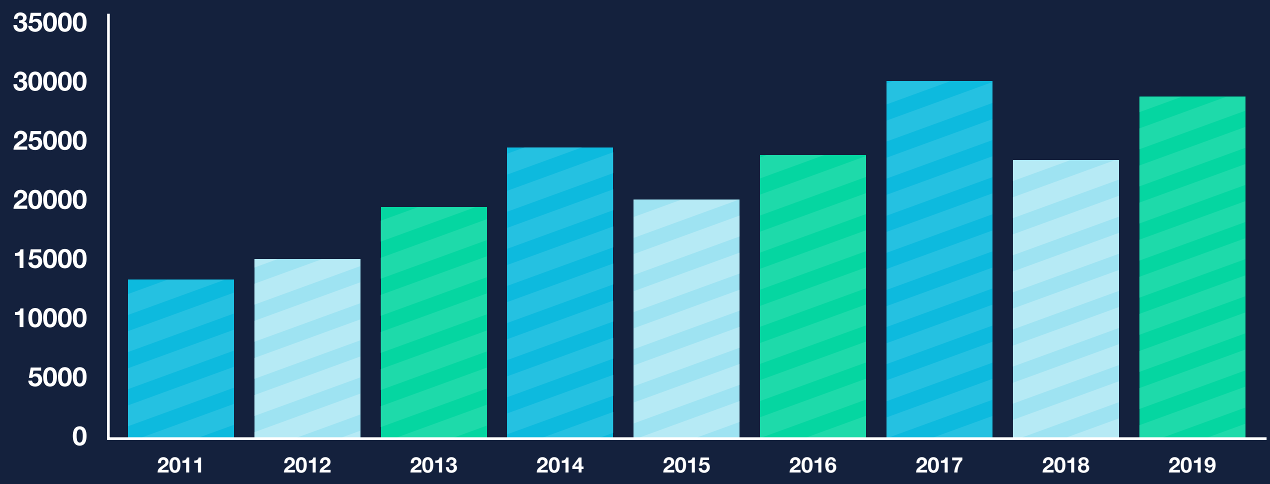
Greater London	28%
South East England	23%
North East England	18%
West Midlands	16%
Yorkshire and the Humber	6%
East of England	5%
North West England	3%
East Midlands	1%
South West England	1%

DEFYING THE ODDS DURING COVID-19

Growth within the UK gaming industry continues unabated, driven by a combination of demographic changes and technological advances taking effect. Already, the sector is estimated to be worth nearly £4bn - more than the video and music sectors combined - and accounts for 27,000 jobs, with a further 20,000 people employed in related industries such as merchandising and eSports.

In fact, according to a recent report published by Liberum, it is estimated that the value of the UK gaming sector could exceed £10bn by 2023.

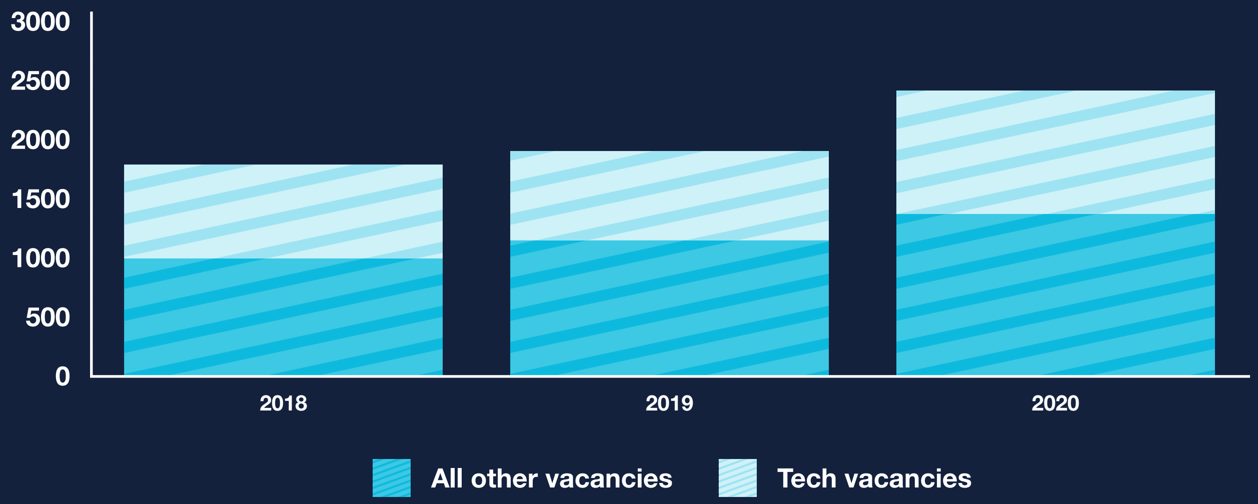
NO. OF EMPLOYEES IN THE UK COMPUTER GAMES INDUSTRY



Despite the Covid-19 crisis this year, gaming companies have continued to show an increase in vacancies of 20% year-on-year across all areas - with IT roles specifically up by 43%.

This is not surprising to see given that just as lockdown measures hit at the end of Q1 2020, digital downloading increased by 67% week-on-week, and physical game sales increased by 218%.

ALL JOB VACANCIES VS TECH JOB VACANCIES IN UK GAMING COMPANIES



20%
increase in overall job vacancies in gaming

43%
increase in technology roles in gaming

CUTTING ACROSS EVERY DEMOGRAPHIC

Changing behaviour amongst different demographic groups has a significant part to play in the increase in demand within the gaming sector.

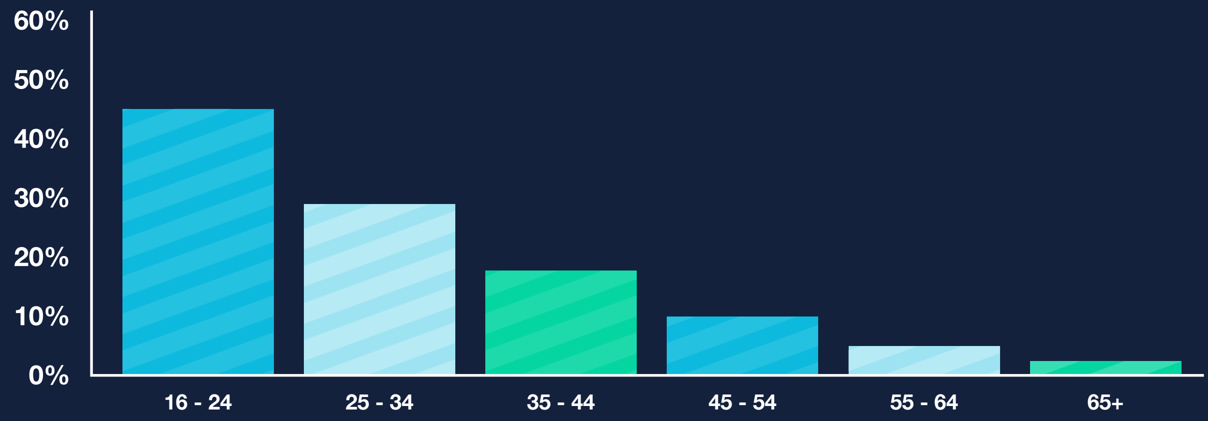
Recent research by UKIE and the Entertainment Retailers Association revealed that 42% of British people aged between 55 and 64 - and 27% of the 65+ population – have played video games in the last five years, with most drawn to classic puzzle, logic, card and tile games.

According to the report there are “record numbers” of the 55+ population “regularly playing games” – increasing from 38% in 2016 to 44% in 2019 - with one in five grandparents sitting down to play with grandchildren and 40% reporting that they play regularly with their own kids.

While it’s anecdotally still thought that gaming chiefly appeals to younger people; 85% of under 35s state they frequently pick up a controller, as well as 75% of 35-44 year olds.

As these Millennials mature (now aged between 25 and 38 years), so too does the proportion of people gaming above the age of 40, meaning there is an abundance of untapped growth potential amongst older audiences. However by and large, it is Generation Z (16-24yrs) where usage is the highest proportionately out of all demographic age ranges.

UK GAME CONSOLE USAGE PENETRATION BY AGE



20%
of gamers are Gen Z (16-24 yrs)

43%
increase in over 55s who are gaming

Segmentation of Gaming

As different demographics engage with gaming at different stages in their life, the way in which people interact with online gaming is becoming increasingly segmented.

For example, 40% of 60+ year-old players reportedly play strategy games “to keep the brain in tip-top shape” – with their preference being classics ported to a digital format online, such as Sudoku, Chess or Bridge.

For Millennials (25-38 years), a third state that their main reason for gaming is to ‘relax’ and 40% of Generation X (39-54 years) use online games to engage with their children.

In contrast, the newest generation (7-24 years) are the most likely to be involved in competitive gaming, where E-gaming is making it possible – for the first time – to have a career as a gamer, with individual prizes in tournaments exceeding $1m at the elite tournaments.

“The segmentation of gaming has been underway for a number of years now, led by the various ways in which people access media – be it online, streaming, or smartphone apps. Covid-19 has drastically sped up the segmentation of the sector, with consumers now thinking of video games as more of a social activity. While online multiplayer has been a mainstay of the console gaming world since XBox LIVE first launch in 2002, it wasn’t something that every console player participated in. However due to lockdown measures worldwide, we’ve seen multiplayer used in a variety of ways – from staying in touch with loved-ones, playing competitively for prizes, or developing a new pass time.

The behaviour changes bought on by the pandemic, coupled with the recession-proof nature of the industry – with games considered a relatively cheap form of entertainment on a cost per hour basis, with an exceptionally loyal fan base – will cause a natural explosion of gaming companies growing and subsequently hiring. Where the UK is considered to be one of the top markets for attracting and retaining tech talent, the number of people employed in the sector could easily triple within the next five years.”

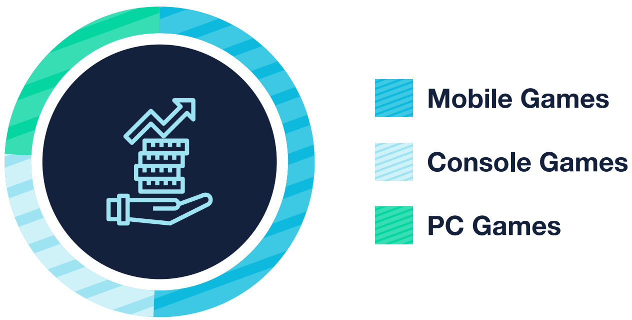
Tom Chambers, Head of Technology (London), Robert Walters

IMPACT OF MOBILE

The impact of mobile phones on the gaming industry has been profound. Whereas traditionally gaming was restricted to people who bought specific hardware or software for that purpose, mobile phones have made gaming accessible to all.

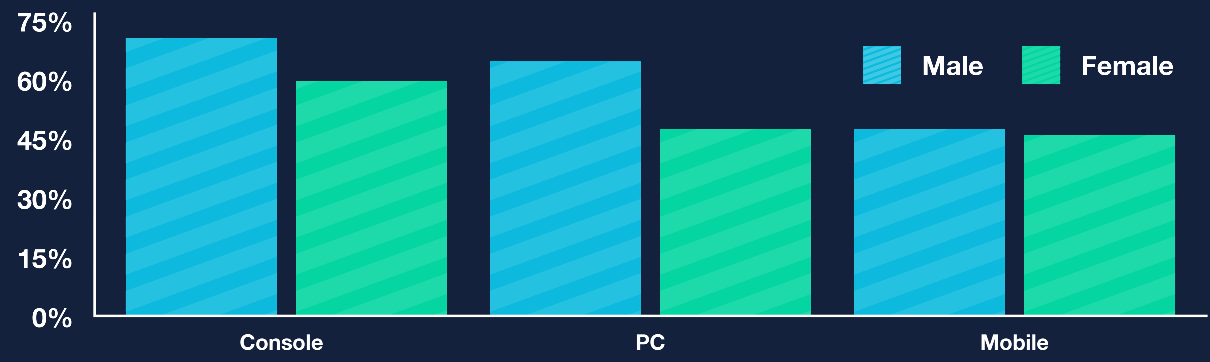
With that, the number of mobile gamers has been growing, so much so that by 2025, it is estimated nearly 2 billion people worldwide will be playing mobile games.

TOTAL GLOBAL GAMING REVENUE DISTRIBUTION 2020



Already over 50% of people playing games are doing so from Mobile devices - with women preferring a mobile platform more so than consoles or PC.

SPLIT OF GAMERS IN THE UK BY GENDER



"The combination of high-quality devices reaching people around the globe and increased access to high speed connections have made gaming more available than it has ever been. This ever-increasing accessibility allows the industry to continue to grow at a rapid pace."

Thomas Shibley, Global Head of Player Support, Wildlife Studios

Rise of Social Gaming

The integration of social media has also led to the rise of 'social gaming' and the freemium model – whereby apps or online services are provided free of charge, with advanced features offered at an 'add-on' cost - leading to a wider level of accessibility and engagement than previously.

This combined with app stores both on Apple and Android has given studios an instant marketplace to sell into. As a result, there has been a mass proliferation of gaming companies specialising in mobile devices, with King.com (famous for the Candy Crush Saga) being one of the most successful in this genre.

Given the number of people playing games on mobile devices is estimated to increase by over 50% over the next five years, the UK is well placed as one of the leading countries in the world for gaming studios.

That being the case, it is expected that mobile gaming will become a critical area in which gaming companies will aggressively hire for - where demand for Android developers will particularly rise.

Competitive gaming growing in popularity

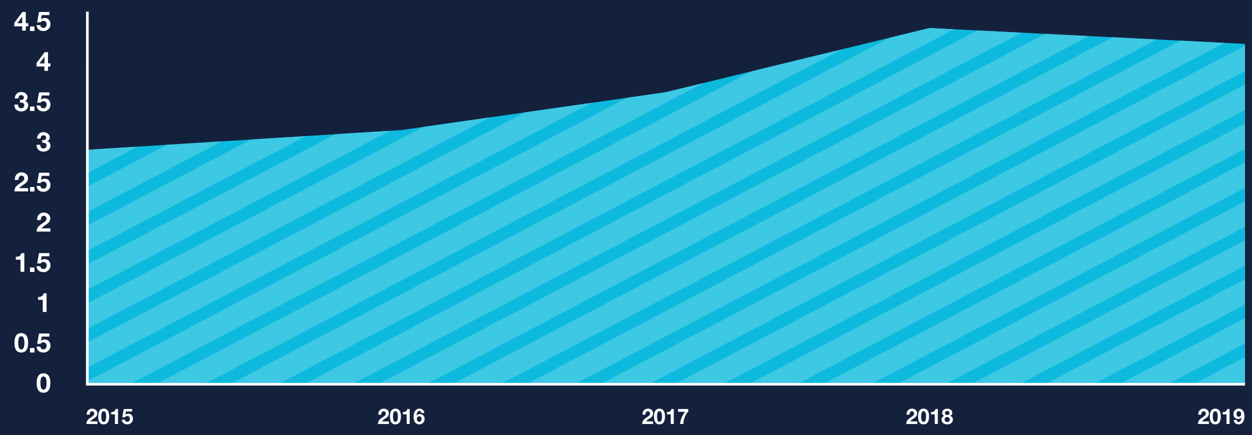
The increasing convenience of gaming on mobile phones and other handheld devices has helped bring gaming enthusiasts together, while tournaments are also adding an exciting new dimension.

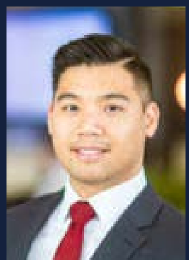
As professional video gaming starts to gain recognition from the sporting world, more people are moving away from being mere spectators to actual participants. This competitive gaming, usually done by professional players for prize money, is becoming a big business.

The Premier League has also started to capitalise on the popularity of football to launch eSports tournaments for FIFA players across the country.

While the UK may be some way behind other counties when it comes to eSports, it is a clear indication of how the younger generation is shifting away from passive activities like listening to music and watching videos, and more towards active participation by playing video games online.

GAMING SOFTWARE SALES UK (£M)





"With a widening demographic of gamers, companies are speeding up their efforts to launch new products to capitalise on the expanding gaming consumer base.

For example, the upcoming releases of the PS5 and new Xbox are anxiously awaited by gaming studios, and could potentially trigger record sales going into 2021 – in particular for long awaited games which will finally be released such as Cyberpunk 2077 or the latest Halo."

Kar Yau, Manager - London Technology, Robert Walters

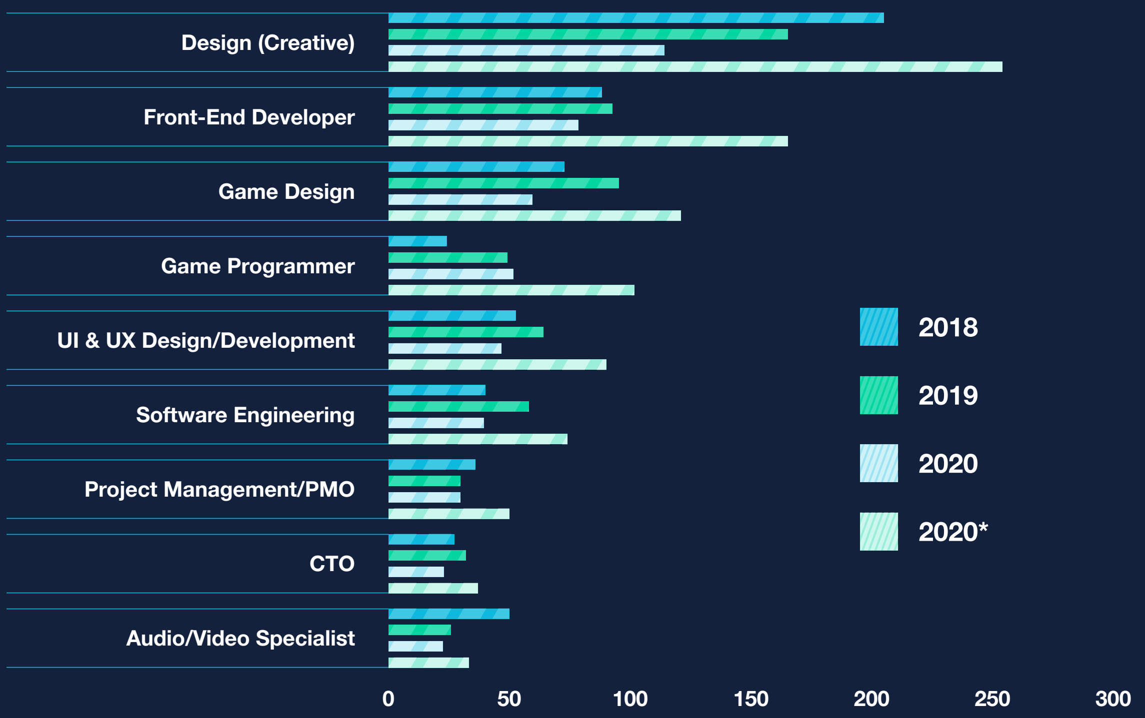
ROLES IN DEMAND

As a result of the growing demand for gaming, there is likely to be a surge in hiring - specifically in C++ and Golang, (programming languages used for games on both the Xbox and Playstation engines.)

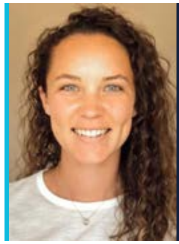
Assuming there is a doubling of employment in the sector over the next five years, this would translate specifically to thousands of development jobs in this language alone.

The explosive three year growth trajectory for roles in game programming (+154%), project management (+140%), front-end developers (+91%), audio/video specialists (+76%), and Design (+59%) is set to continue, as the race continues to keep up with global demand.

TECHNOLOGY AND DESIGN VACANCIES WITHIN GAMING COMPANIES BY ROLE, 2018-2020*



"The gaming industry has changed drastically in the last decade. Not just as a result of the influx of investment, but as a result of some hard-learned lessons from its formative years. It has moved from the basement to the boardroom, becoming more professional but holding onto the elements of fun and creativity that made it a success in the first place. As a result, the sector has been able to pull in a more diverse range of developers from a diverse background – from creative industries such as film & media, to financial services and tech. This growth and competition for talent makes recruitment and retention more important than ever before; and where the games industry begins to take on its own unique identity."



Lucy Cova,
Front End Development & Design Consultant
Robert Walters

Gaming Salaries in UK

Roles	Salary Range GBP	Average GBP	Rate per Day Range GBP	Rate per Day Average GBP	YOY Growth in Demand
Software Engineer/Developer	45 - 70k	**60k**	425 - 475	**450**	39.50%
Artist (Environment/Concept/3D)	40 - 50k	**45k**	225 - 300	**260**	58.90%
QA Tester/Analyst	40 - 60k	**50k**	225 - 275	**275**	11.20%
Game Designer	50 – 65k	**55k**	350 - 400	**375**	33.30%
Game Developer/Programmer	50 - 65k	**55k**	325 - 375	**350**	91.30%
Animator	35 - 55k	**42k**	225 - 270	**255**	7.10%
Audio/Visual Designer	40 - 50k	**45k**	300 - 350	**325**	74.50%
UI/UX Designer/Developer	45 - 65k	**55k**	450 - 550	**500**	53.60%
CTO	250 - 300k	**270k**	600 - 800	**700**	20%
Project Manager/PMO	60 - 90k	**80k**	575 - 625	**600**	140%
AI Engineer	55-85k	**75k**	550 - 650	**600**	10.4%

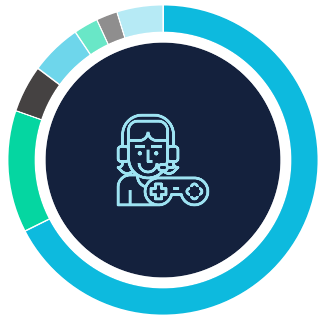
Industry shows signs of maturing

In a sign of the increasing maturity of the sector, gaming companies are rapidly increasing recruitment into the sales and marketing space in order to better monetise their products. In fact, in 2019 there was a 25% increase in marketing vacancies compared to the previous year.

Whereas historically technology has dominated the hiring agenda within gaming – previously representing 75% of all roles advertised - this has now dropped to 68%. Instead, back office and support function roles have grown in prominence - with 13% of all roles advertised being within marketing or PR – followed by office/business support (5%), HR (5%), accounting (3%), and procurement & supply chain (2%).

+25%
increase in marketing vacancies

ALL VACANCIES WITHIN GAMING COMPANIES BY PROFESSIONAL AREA 2019



- Technology
- Marketing/PR
- HR
- Office/Business Support
- Accounting
- Procurement/ Supply Chain
- Other

68%
of gaming vacancies are tech-related

"As gaming companies in the country grow, business processes have to evolve too. Back-office support functions might not be front of mind when thinking of jobs at a gaming studio – than say product development for example - but if games studios want to scale, effectively deliver their products to market and compete on a global stage, then it is important to understand what technical back office support you will need and to get it right from day one – and that starts with the people you hire.

Acting as the engine room for growth, a back office function will facilitate everything from marketing campaign delivery, monitoring tax and payroll obligations, HR and employment law to managing the logistics of office moves as businesses grow, researching the complexities of taking a business into overseas markets and maintaining good supplier relations."

Phill Westcott, Director of Walters People
Professional staffing for accounting & finance and business support

UK REGIONS TOPPING THE LEADERBOARD

With the gaming sector employing upwards of 20,000 professionals - with each individual employee contributing more than £80,000 to the national economy – according to UKIE,this makes the sector the most productive of all the nation's creative industries.

In addition, the regional contribution is significantly more widespread than many other creative industries. For context, where more than half vacancies in the film industry are based in London, the figure is 28% for games, with significant sectoral hubs based in more than 20 towns and cities nationwide.

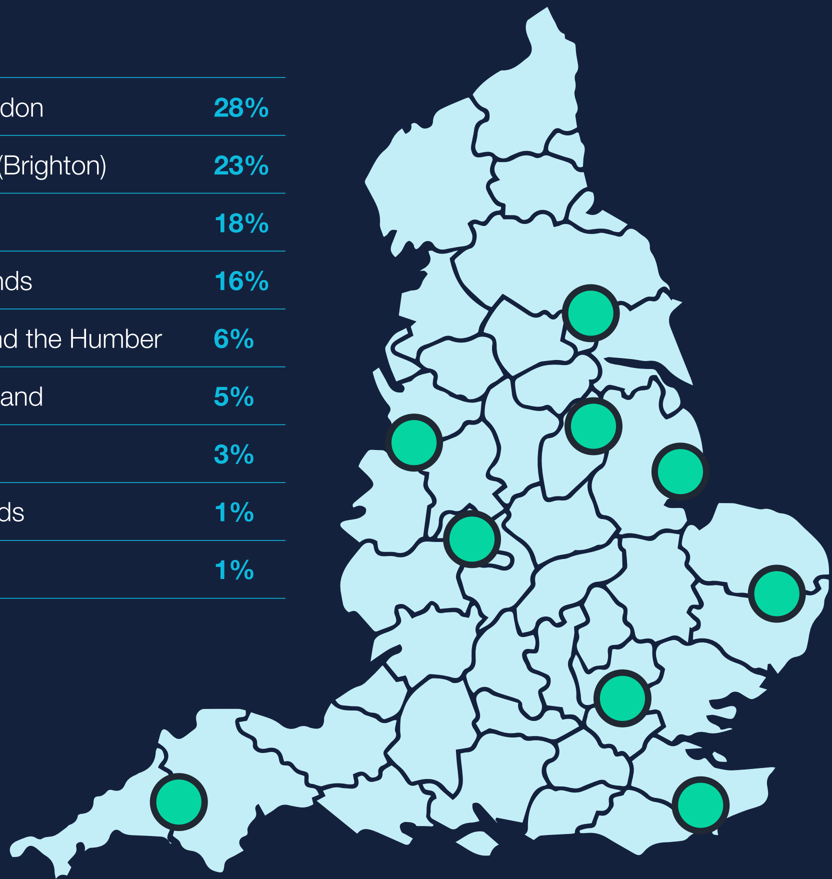
With 23% of roles based in the South East, more attention is being bought to the games production industry based in Brighton. The city is home to a booming group of video game developers, and we're seeing this trend mirrored in Leamington Spa, Newcastle-Upon Tyne, Edinburgh and Manchester.

Such is the pull of the tech hubs outside of London, that a recent report found that 78% of game development jobs in the UK are based outside of the capital, with an almost equal measure of vacancies based in Brighton (South East).

Where in 2018, 36% of gaming roles were based in London, and just 10% in the West Midlands and 7% in the North East – this has changed drastically in the past 2 years. Now less than a third (28%) of gaming roles are based in London, and 18% are based in the North East and 16% in the West Midlands.

% OF GAMING VACANCIES BY REGION (2020)

Greater London	**28%**
South East (Brighton)	**23%**
North East	**18%**
West Midlands	**16%**
Yorkshire and the Humber	**6%**
East of England	**5%**
North West	**3%**
East Midlands	**1%**
South West	**1%**



"Within the UK, the gaming sector is unlike most in that it is relatively location neutral. With the industry capitalising on regional resource, games companies are experiencing success on a global level.

Whilst other sectors are just waking up to the exceptional tech infrastructure and talent available in The Midlands and The North – games companies have been strategic in setting up their offices, ensuring that recruitment can happen nationwide and en masse."

James Perry, Head of Technology (UK Regions), Robert Walters

Key Regional Statistics*

London generates £1.4bn in GVA, supporting over 5,000 full-time roles across the capital

As well as London and Brighton, the games industry provides over 1,000 full-time positions in development studio roles outside of the South East, across the North West, East of England, West Midlands and Scotland

There are eight towns and cities in the country where the games industry generates over £60m in GVA into the local economy: Brighton, Edinburgh, Newcastle Upon Tyne, Leamington Spa, Crawley and Horsham, Manchester, Guildford, and London

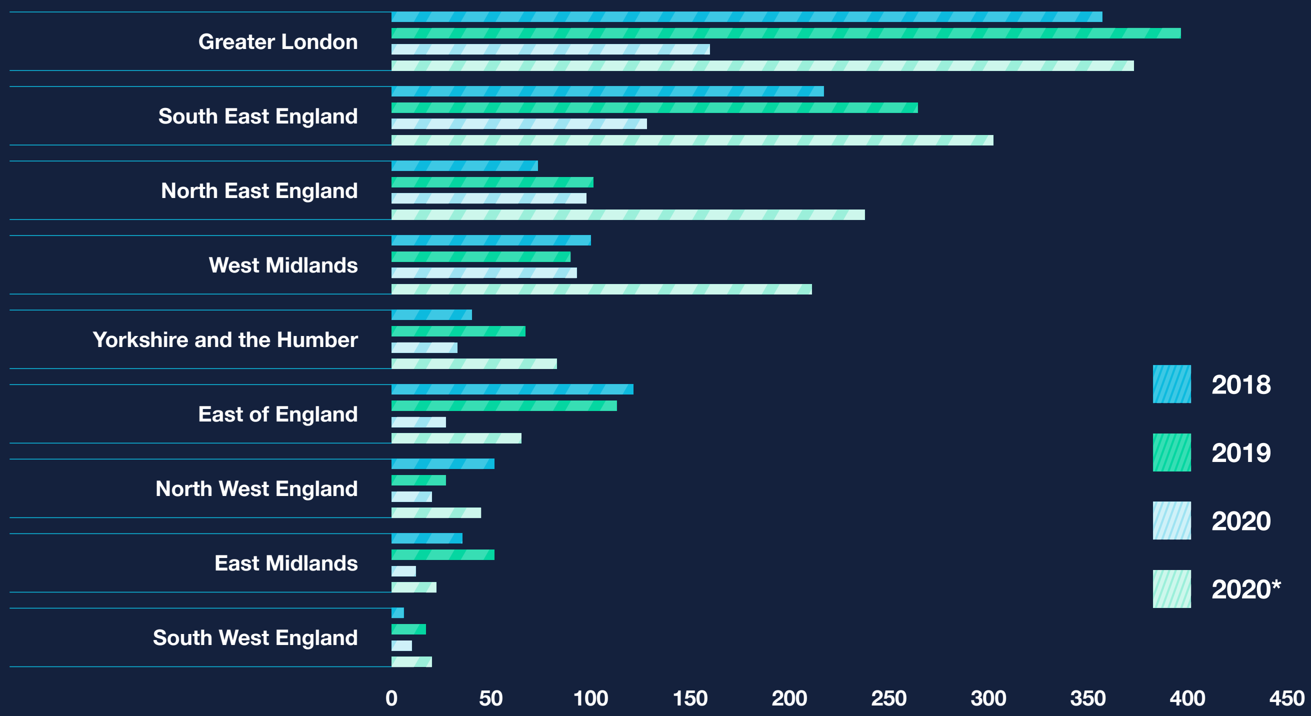
There are 23 towns and cities across the UK that are home to more than 20 local game companies

The Scottish video games industry generates £131m in GVA - making it the most economically productive of the devolved nations

£339m in GVA is generated by micro-businesses of less than 10 employees, representing 13.7% of the industry total, and employing 4,000 full-time roles.

*UKIE

ALL VACANCIES WITHIN GAMING COMPANIES BY REGION, 2018-2020*



55%

of game development jobs based outside London & the South East

THE GROWING IRISH GAMING HUB

The Irish are spending an increasing amount on video games. According to Statista, gaming revenue in the country is expected to reach €91 million in 2020 and grow by 5.2% annually to each €112 million by 2024.

Of this, the market's largest segment is by far Download Games - with a projected market volume of €42m in 2020, almost half of all gaming revenue for the country.

During the same period, the percentage of the population that plays video games is expected to increase from 26% today to almost 50% in 2024.

And it seems this demand is reflected in the job market, currently employing over 2,500 people – job volumes in the Irish games market is poised to grow by 8% in the coming year.

Current trends contributing to the growth of the Irish gaming sector include:

- the popularity of smartphones which is accelerating the growth of mobile gaming
- data analytics which are used to enhance games and improve engagement
- artificial intelligence which is making games less predictable and more interesting
- the Government's Audio-Visual Action Plan increasing marketing measures to attract major computer games studios to Ireland
- established industry players looking for independent developers in Ireland to make games available for consoles like Playstation and Nintendo.

Top 9 highest earning gaming companies		
1	Tencent	$5.2 billion
2	Sony	$3.9 billion
3	Apple	$2.9 billion
4	Microsoft	$2.8 billion
5	Nintendo	$2.3 billion
6	Google	$1.9 billion
7	Activision Blizzard	$1.7 billion
8	Electronic Arts	$1.5 billion
9	Take-Two Interactive	$930 million

8%
year-on-year vacancy growth

2,500
More than 2,500 professionals employed in the Irish gaming sector

“Ireland already has a number of strengths on which it can build success for the future of its gaming sector. For example, we have a strong track record in software engineering, wireless and internet technologies, global customer relationship management, localisation and analytics.

As a result, employment has increased five-fold since 2004, and over 25 new gaming players, both foreign and Irish, have set up here over recent years.”

Suzanne Feeney, Director at Robert Walters Ireland

e-Sports leading the way

The rise of eSports can be tied directly into mobile gaming. In 2020, there are now around 3.6 million smartphone users in Ireland representing 74% of the population.

The increased exposure to mobile phones and the internet has resulted in more people accessing games on their smartphone – resulting in the eSports industry in Ireland growing at a phenomenal rate. In fact, 22% of Irish adults now either participate in or watch eSports.

In addition to this, Ireland is one of the few countries to have an eSports governing body, a famed eSports festival, a college eSports League, and several professional teams that compete at international events.
The opportunities are there for the latest up-and-coming talent to develop. Companies like communications giant Three are pushing the eSports envelope helping bring the local game to new heights. Three’s EStars tournament is Ireland’s biggest eSports event and has seen the industry catapulted into mainstream media.

As the industry gains more traction, the opportunities to play at a professional level will only increase – further pushing Ireland into the international spotlight at both developer and consumer level.

Skillsets in Demand

Tech skills in demand in Ireland Gaming sector (YoY increase)	
Python (Programming Language)	39%
Engineering	27%
Computer Science	27%
C++	26%
Linux	24%
SQL	23%
Game/Software Development	21%
MySQL	19%
Git	12%
Java/JavaScript	11%
Scripting	10%
Mobile Games	9%
Cloud Computing	9%

General skills in demand in Ireland Gaming sector (YoY increase)	
Analytical Skills	23%
Agile Methodologies	15%
Databases	6%
Customer Experience	3%
Digital Marketing	2%
Product Management	2%
Community Management	2%
E-commerce	2%
Search Engine Optimization (SEO)	2%
Social Media Marketing	1%
Finance	1%

"One of Ireland's key advantages at the moment is that it has an abundance of tech talent and a strong funding ecosystem for tech start-ups. As more start-ups take advantage of the low barriers to entry in Ireland, larger established gaming companies will have more competition when it comes to obtaining the right talent and skills."

Louise Campbell, Managing Director at Robert Walters Ireland

NEXT GENERATION GAMING

When Pokemon Go was released, the world caught a glimpse of the future of gaming, combining augmented reality (AR) and mobile devices. At the peak of the craze to ‘catch them all’, there were cases of trespassing resulting in lawsuits, along with traffic accidents which in some cases led to deaths.

Now with the rise of 5G, what will be interesting to see is the level of innovation possible in augmented and virtual reality (VR) gaming as it goes live – with eSports likely to be a big winner.

> “As studios redesign their games portfolios to ensure they are adopted at tournament, those that utilise the next generation tech available now will be in prime position to compete.
>
> For example, the competition between Halo and Call of Duty to be the leading games for first person shooter e-tournaments has been rife - the innovation that has come out of that has been revolutionary as a result.”
>
> **Kar Yau, Manager - London Technology, Robert Walters**

AR/VR and gaming in many ways go hand in hand, with 59% of all AR/VR projects under development designed for the gaming sector.

Similarly, the rise of 5G and AR is likely to trigger a new wave of hardware (e.g. Google Glass 2), where as that happens, gaming studios will have opportunities to create virtual worlds - previously unimaginable.

As a result, Venture Capital (VC) firms are earmarking funds specifically for gaming. For example, last year, London-based Hiro Capital launched a €100 million fund to back leaders in gaming and eSports; where the focus will specifically centre on sector-specific applications of cloud, mobile, streaming, big data, AI, wearables, AR and VR technologies.

AR/VR PROJECTS UNDER DEVELOPMENT

WILDLIFE STUDIOS: INDUSTRY INSIGHT

Gaming unicorn Wildlife Studios is one of the 10 largest mobile gaming companies in the world, with over 100 million monthly users across its portfolio and a 70% organic growth rate in profitability. Its most recent Series B funding valued the firm at £2.3bn.

Founded just 9 years ago in Brazil in 2011, Wildlife Studios has grown to become a truly global organisation employing over 800 people, with offices located in the United States, Brazil, Argentina and Ireland – and still expanding. Today, the brand's portfolio of over 60 games engages billions of players around the world.

1. What is driving demand within gaming?

The demand for gaming has always existed, so I don't think it is ever an issue of demand per say. Accessibility and availability have always been the bottlenecks.

The combination of high-quality devices reaching people around the globe and increased access to high speed connections have made gaming more available than it has ever been. This ever-increasing accessibility allows the industry to continue to grow at a rapid pace.

2. Did Covid-19 have any impact on the gaming market?

Absolutely! Covid-19 has been devastating to people all over the globe. All of us have either been personally affected by loss related to Covid-19, or know someone who has been personally affected.

Through the awfulness that is this pandemic, the gaming industry has done well. We always say this solemnly, as we would rather see such boosts under better circumstances. The reality is that more people are staying inside and don't have access to the same traditional methods of relieving stress that they normally would. This means more time to game and more frequent usage of games to bridge the social limitations that are presented to those who act responsibly and with care (through social distancing).

Not only are core gamers playing more, but there are many people trying out games for the first time, or people who were casual gamers who have made this their main hobby.

3. What will be the key drivers for gaming in the next 5 years?

Over the next 5 years, we will see a continuation of some big trends that exist today. The expansion of 5G will increase accessibility, as mentioned earlier.

Games will become accessible to even larger audiences, with mobile gaming reaching markets nearly everywhere.

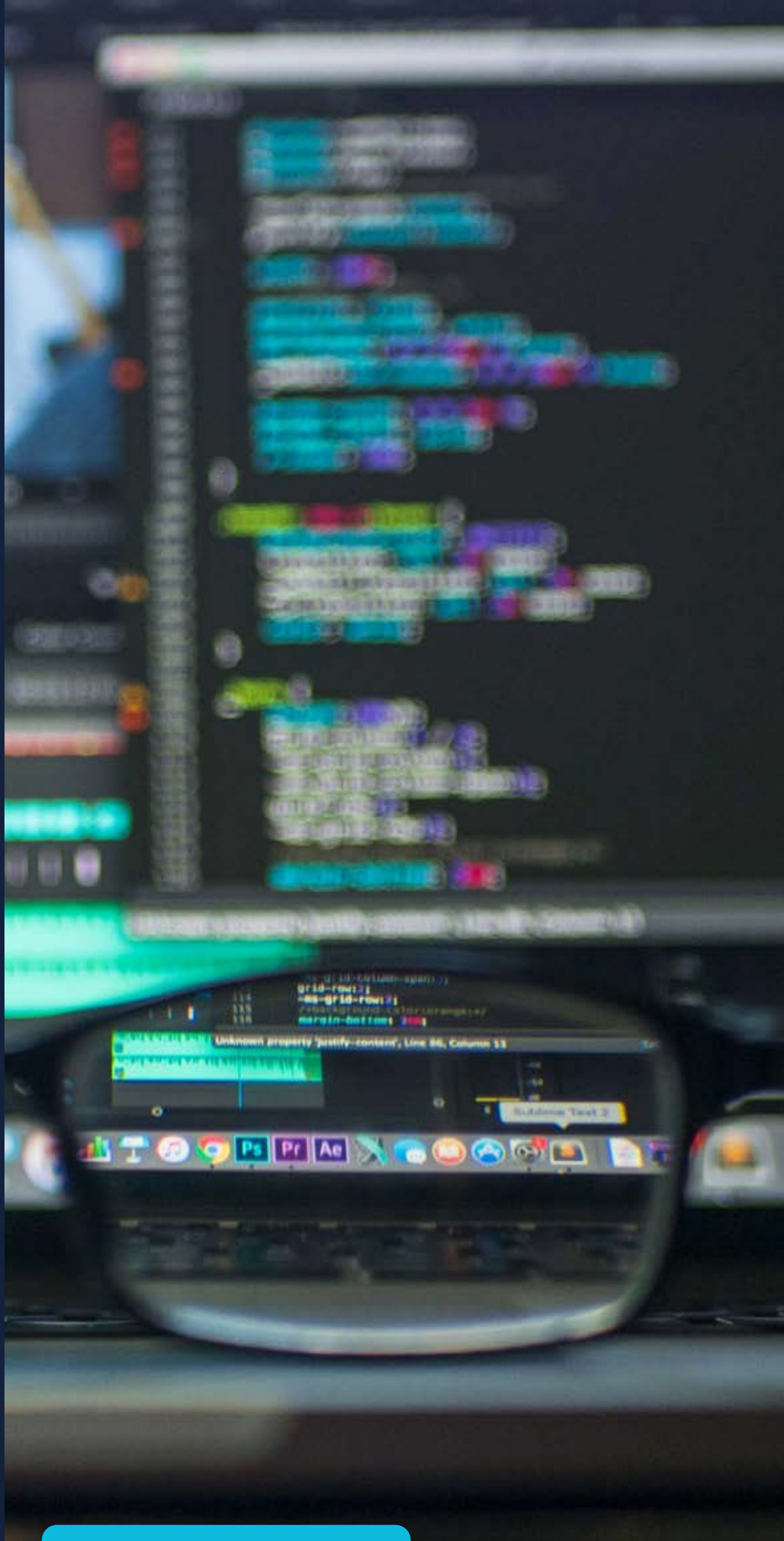
Content Creators will continue to play a huge role in the success of new titles and will remain a focal point for entertainment at large - more and more people are abandoning traditional "watch" entertainment and moving to YouTube, Twitch, and similar platforms.

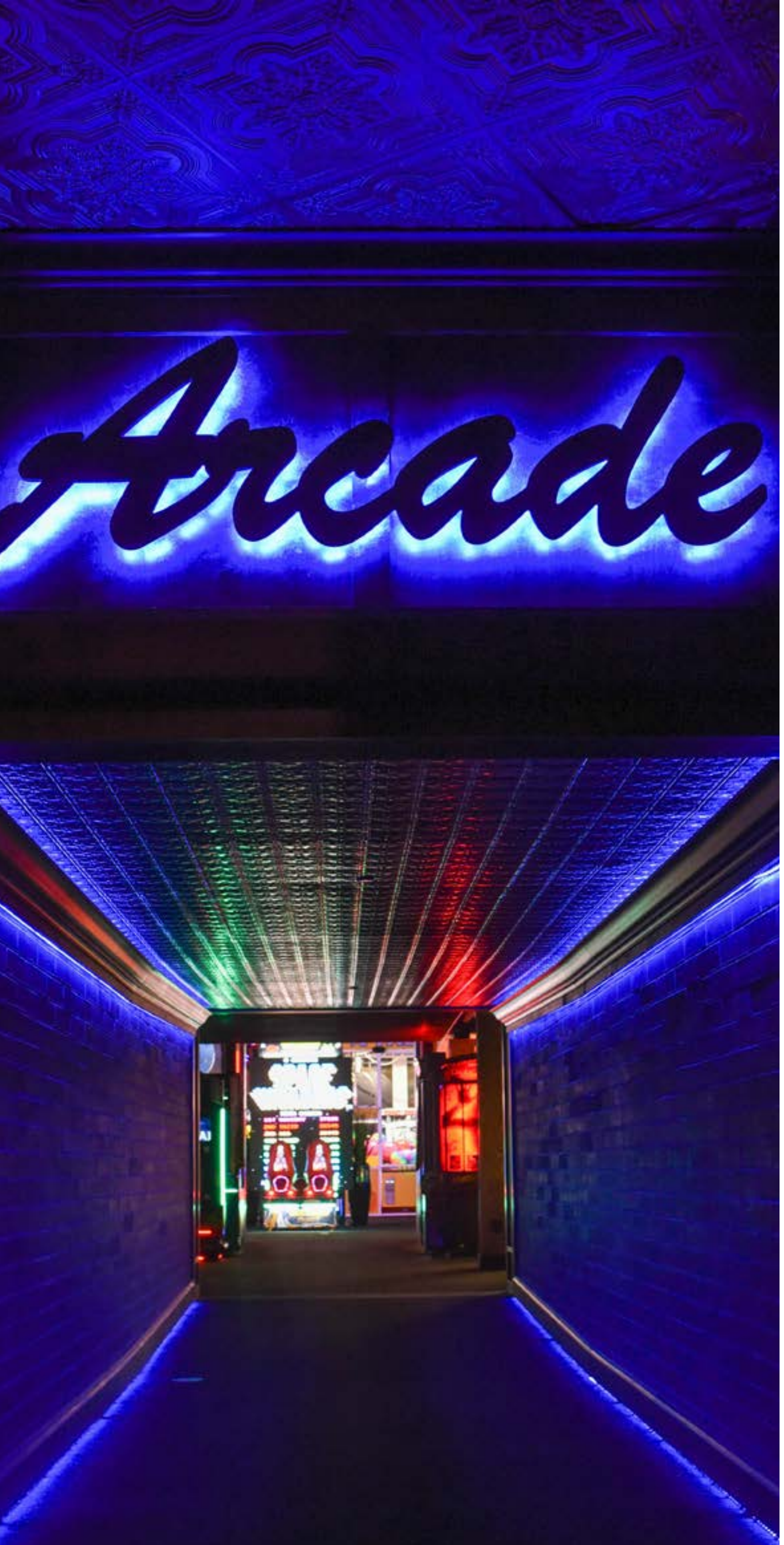
Cross-Play will continue to grow in popularity and become a differentiator for more games (today it is still fairly rare). As the lines are blurred between PC, Console, and Mobile - it will be much easier to merge these audiences, allowing friends and family to play together regardless of their preferred platform. For me, this is of particular interest. I have gamer friends spread across so many different platforms and more cross-play allows us to all play together - which is so important, especially in a year like 2020 where we can't see our friends and family in the same ways we typically would.

4. Where do you predict hiring to be focused in the next year?

The gaming sector will continue to hire aggressively for the next year. This is a great market to hire in and that will likely be the case for the perceivable future. There are many talented people looking for work across a variety of disciplines.

For example, for Wildlife Studios in Ireland, we're continuing to build our community management org along with SRE and Data Science teams. It's all moving really quickly and it's very exciting. There are challenges but one advantage of being in Dublin is the access to great talent locally and in Europe.





5. Do you think more needs to be done to increase diversity in the sector?

Some progress has been made in the industry, but I wouldn't say the progress has been "good" or significant - much more must be done.

The industry must embrace inclusion by building diverse leadership teams. We must build products that appeal to a diverse set of players and we must make sure there is equal representation in the stories that we tell. We must invest in underprivileged areas to give those folks the opportunity to work hard and live their dream of making games.

Those in positions of power, who choose to abuse that power, are still toxic forces within the industry at large. Recent news stories from top gaming companies likely only scrape the surface of these deep-seeded cultural issues. The industry must continue to work to bring to light these abuses (and abusers), remove employment contract clauses that protect abusers and work to improve the overall culture.

At Wildlife, we're big advocates of diversity and inclusion. Our Dublin office is the most diverse of our locations. Some fun statistics - the Player Experience department is made up of employees from 14 different nationalities, is nearly 50% women, and 75% of our management roles are women. Across the company there is still an imbalance in some areas (as is the case throughout the industry), and we have launched several initiatives to drive meaningful and ongoing improvements.

I have been really happy to see the **COMMITMENT** put into these initiatives across Wildlife. Folks seem to truly understand the importance of these initiatives for the industry and for our society as a whole.

6. What are the advantages of being based in and hiring in Dublin?

Dublin is a growing tech hub. Being here allows us to attract top talent from all over Europe and channel those resources to create amazing products and to provide stellar support for our players.

As well as this, there is a huge amount of engineering and data talent focused in Dublin. We have already attracted amazing talent from some of the top technical brands based in Dublin and across Europe. We look forward to seeing the contribution these people can make in WildLife and what the next chapter holds for them and us.

Dublin is also just an overall good place to live. We have healthy air, clean streets, decent weather (I guess this is debatable depending on where you're from), a tasty and diverse food scene, and fun nightlife. Ireland is a beautiful island to explore and having easy access to travel around Europe is a nice perk, especially for someone from the US (like myself).

7. What is Wildlife's approach to working culture?

Culture is incredibly important within Wildlife. We believe the culture is a big part of our success and we work to make sure the Wildlife culture is consistent across all office locations.

- We think **BIG** - we like big ideas and big aspirations.
- We are **FAST** - we like to move quickly when we have an opportunity.
- We are **CANDID** - we say it how it is, with directness and with respect.
- We are **COMMITTED** - to each other and to our work.
- We **CARE** for each other.
- We innovate with **RESEARCH**.

8. What is Wildlife's approach to interviewing & onboarding?

Interviewing is one of the most important things we do. We have high expectations of ourselves and everyone who we plan to work with, so we have to be strong as hiring managers and get this critical task right. We spend all the necessary time with our interviewees and we try to look at as many candidates as possible. We have intake meetings where we align our key review points for each phase and even compare questions and provide feedback to each other. We want to ensure that each interviewer is as effective as they can possibly be. For any management level positions, I always make sure that one or more direct reports of that role are involved in the process whenever possible.

We also try to make sure that the candidate experience is of high quality. We work to set clear expectations, provide early details of the timeline for the interview phases, and explain what to expect from phase to phase. We only move candidates forward to the next phase if we think they have a high chance of success.

For onboarding, we're adding standard practices. As a fairly new office, this is something that was somewhat "organic" to start with. We're now adding solid process and discipline to our onboarding. We want all new 'Wilders' to quickly get a feel for the culture, understand the history of the organisation, and feel welcomed and supported. We provide training and start to include new hires in our rituals right away. I think this is an area that we will continue to work to improve. We have been successful in onboarding virtually during lockdown. Across the organisation, we have successfully hired and onboarded a huge number of people at a rapid rate over lockdown, with many of these roles residing in Dublin. As with everything this year, virtual onboarding was a learning experience. We were able to quickly adapt and make this onboarding as close to "normal" as possible.

"Some of Thomas Shibley most earliest childhood memories involve gaming, and he feels very fortunate to have turned a lifelong passion into a career.

Thomas first entered into the industry in 2006, providing tier-1 technical support during the launch of Dungeons and Dragons Online for Turbine Entertainment. Since then he has steadily progressed; taking on supervisory tasks, training and leading teams, and eventually becoming responsible for all support functions across the WB Games catalogue – eventually he held the title of Director of Customer Service for many years based Boston, USA.

After a visit to Wildlife's São Paulo office, Thomas was sold on the culture of the business and the opportunity to build something from the ground-up and so made the move to their Dublin office. Over a year into the business and Thomas still finds the challenge at Wildlife energising and the culture infectious."

Thomas Shibley
Global Head of Player Support Wildlife Studios

"We've made a ton of progress within the first year, but as I always say - we're just getting started. There is so much more we plan to build and do. With Wildlife the sky is the limit!"

KEY FINDINGS

1 THE DIGITAL SECTOR WITH CROSS-GENERATIONAL IMPACT

Covid-19 has increased the reach of online gaming, impacting new consumer segments outside of the stereotypical Gen-Z demographic. With mobile gaming on the rise and the ability to access products across multiple platforms, access to the gaming industry will be further democratised.

2 A DRIVING FORCE FOR UK ECONOMIC GROWTH

At a time of economic hardship, individual employees working in the gaming sector are contributing more than £80,000 to the national economy. The appetite for online gaming is drawing further attention from the VC-market, as the industry is tipped to drive returns threefold of the current £4bn revenue.

3 A YOUNG MARKET MATURES

The phenomenal growth of the industry has translated to aggressive hiring in the technology, product, design and digital marketing areas. We expect this to continue as game makers battle to drive customer acquisition, build and deliver new products that engage an active audience, and take advantage of new technologies that deliver competitive advantage.

4 CHALLENGER GAMING HUBS OUTSIDE OF THE CAPITAL

The gaming sector is like no other in tech when analysing its vacancy outreach. In 2019, London only accounted for 28% of jobswith Brighton leading the way to matching the capital's talent pool of games development professionals. Beyond the South East, we're seeing a sizeable presence of companies based in regional tech hubs, including the South East, North West and Midlands. This will be an interesting trend to watch as the nature of Covid-19 has led to a growing number of remote or location-neutral vacancies.

5 5G THE TRIGGER FOR NEXT GENERATION GAMING

5G will give way to a new era of mobile gaming. Allowing for the introduction of more cloud-based services, with the speed to support AR/VR technologies, we expect this trend to spur a wave of innovation. This will undoubtedly drive technology hiring, as companies compete to build immersive online games that alter the user experience.

6 DUBLIN JOINS THE GAME AS GROWING TECH HUB

With ease of entry for talent all over Europe, Dublin is fast becoming a hub for engineering, data and tech talent. Home to some of the largest tech companies in the world, there has been an explosion as of late in regards to gaming companies setting up a base in the Irish capital. As cross-industry collaboration grows, so too will the number of gaming companies moving to or setting up in Dublin.

ABOUT THE PARTNERS

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Robert Walters is a global, specialist professional recruitment consultancy. Operating across 31 countries, with offices in technology hubs in London, the North West, Midlands and South East. Organisations rely on us to find high quality professionals for a range of specialist roles.

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