



JUNE 1ST 2023 – 31ST MAY 2024



TIGA

**ANNUAL REPORT
2023-2024**

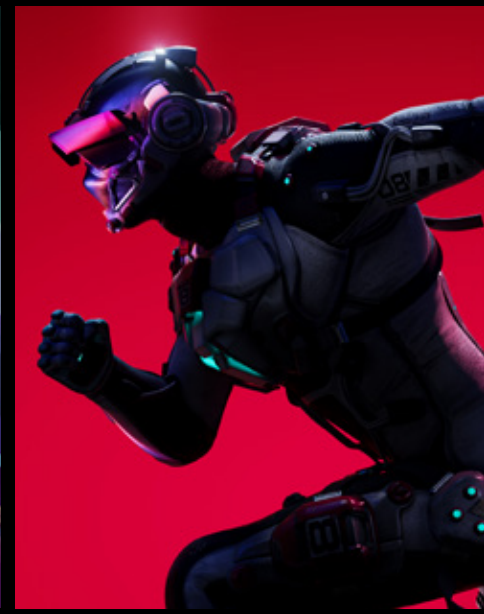
ABOUT TIGA

TIGA is the not-for-profit trade association representing the UK video games industry. Our membership includes game developers, digital publishers, universities and service providers. TIGA's vision is to make the UK the best place in the world to develop video games.

TIGA strives to achieve this in three principal ways.

- 1. Engaging with Government and **Parliament** to create a favourable **environment** for the games industry.**
- 2. Enhancing excellence in games education and skills through our [accreditation programme](#), the [TIGA Games Education Awards](#) and [our Education Conference](#).**
- 3. Driving excellence across our industry via the provision of best practice reports and participation in the [TIGA Salary and Benefits Survey](#), the [TIGA STAR Employer Awards](#) and the [TIGA Games Industry Awards](#).**





Images clockwise from top left: Disney Illusion Island – Dlala Studios, DeathSprint 66 – Sumo Digital Ltd, The Dark Pictures: Switchback VR – Supermassive Games, Piñata Smashlings – Toikido, Sniper Elite 5 – Rebellion, TerraTech World – Payload Studios, Synapse – nDreams, Still Wakes the Deep – The Chinese Room.

1. ENGAGING WITH GOVERNMENT AND PARLIAMENT



TIGA has a track [record](#) in influencing Government policy. Over the last year, TIGA has advocated fiscal and educational reforms to promote growth in the games sector and championed our industry vis-à-vis the Government and Parliament.

VIDEO GAMES EXPENDITURE CREDIT (VGTR)

- TIGA successfully campaigned for the introduction of [Video Games Tax Relief](#) in 2014.
- Since VGTR was introduced in 2014, companies have made claims for 1,940 games¹ and £830 million has been paid out by HRMC to UK games companies. Research published by TIGA shows that since 2014, headcount in the UK video games development sector has increased at an annual average rate of 9 per cent.
- The Government announced plans to replace VGTR with a Video Games Expenditure Credit (VGEC) in the [Spring Budget 2023](#), following consultations with TIGA and the wider games industry. TIGA responded to Government consultations on VGEC in February and September 2023, engaged with Government officials and set out our position in letters to The Chancellor of the Exchequer, The Secretary of State for Culture, Media and Sport, The Financial Secretary to the Treasury, and HMRC officials. TIGA's proposals included the elimination of the £1 million outsourcing cap; an increase in the rate of relief; and for 'connected party profits' to qualify for VGEC.
- In the Autumn Statement on 22nd November 2023, the Government announced or confirmed four positive developments in relation to the VGEC. (1) VGEC will have a rate of 34 per cent applicable to 80 per cent of qualifying costs and subject to Corporation Tax of 25 per cent. The net benefit to the claimant will increase from the current rate of 20 per cent of qualifying expenditure to 20.4 per cent. (2) VGEC will apply to connected party profits, provided that the connected party transaction is at arm's length, details are disclosed to HMRC and constitutes qualifying expenditure. (3) The £1 million subcontracting cap will be removed. (4) All qualifying costs for video games will need to be used-and-consumed within the UK. EEA expenditure will no longer be eligible for relief. This will provide a big boost to service providers in the UK.
- TIGA is now campaigning for a [higher rate](#) of VGEC and the introduction of an Independent Games Tax Credit.

¹ [Creative industries statistics commentary: August 2022 - GOV.UK \(www.gov.uk\)](#)

TIGA MANIFESTO: SETTING THE AGENDA



Dr Richard Wilson OBE, TIGA Manifesto launch video.



TIGA Manifesto launch at Church House.

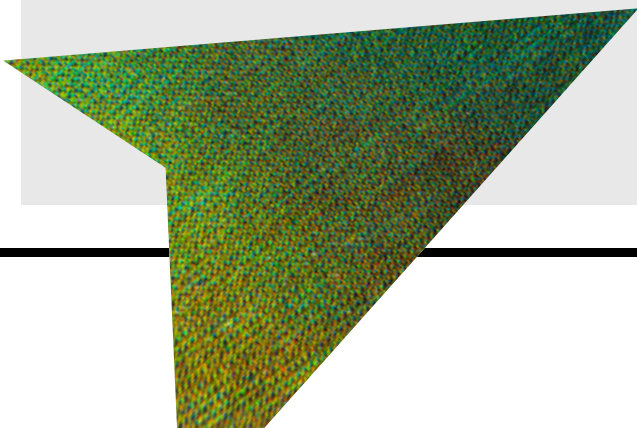
- TIGA launched an ambitious [10-point 2024 Manifesto](#) on 30th April 2024 to enable the sector to achieve its potential and support economic growth across the UK. The Manifesto was [launched](#) at Church House, London, with a keynote speech from the Rt Hon Stephen Timms MP.
- TIGA's proposals for an Independent Games Tax Credit (IGTC), a National Games Accelerator and the Video Games Investment Fund alone could create 2,660 additional games development jobs by 2028.



The Rt Hon Stephen Timms MP.

TIGA'S 10 PROPOSALS

- 1.** Retain the VGEC and create an Independent Games Tax Credit to boost production of UK independent games.
- 2.** Establish a National Games Accelerator to enable more start-ups to scale-up.
- 3.** Maintain the level of support for the UK Games Talent and Finance CIC.
- 4.** Introduce a Video Games Investment Fund to stimulate growth in the sector.
- 5.** Set up an Industrial Secondments Programme.
- 6.** Back BTECs.
- 7.** Incentivise training.
- 8.** Reform the apprenticeship levy.
- 9.** Operate a competitive visa and salary system for the recruitment of skilled workers.
- 10.** Promote competition in the game engine and platform markets.



1. ENGAGING WITH GOVERNMENT AND PARLIAMENT

LEADING THE DEBATE AND REPRESENTING THE INDUSTRY

- TIGA published 6 reports, including: [Best Practice in Games Education Conference 2023](#); [Making Games in the UK Today](#); [TIGA Skills Report 2023](#); [TIGA Business Opinion Survey 2023-24](#); [TIGA Manifesto 2024](#); and our annual report.
- TIGA submitted proposals to the Treasury ahead of the [Autumn Statement 2023](#) and the [Spring Budget 2024](#).



Dr Richard Wilson OBE, Julia Lopez MP, and Justin Tomlinson MP.



Thangam Debbonaire MP and Dr Richard Wilson OBE.

TIGA met MPs including:

Julia Lopez MP, Minister of State Department of Culture, Media and Sport (DCMS);

Sir Chris Bryant MP, Shadow Minister for Creative Industries and Digital;

Thangam Debbonaire MP, Shadow Secretary of State for DCMS;

Dame Caroline Dineage MP, Chair of Culture, Media and Sport (CMS) Select Committee;

Damian Green MP, member of the CMS Select Committee;

Jonathan Gullis MP, member of the Business and Trade Select Committee and Vice-Chair of Video Games and Esports All-Party Parliamentary Group (APPG);

Jamie Stone MP, Liberal Democrat Spokesperson for Culture, Media and Sport;

Matt Western MP, Shadow Minister, Education and Vice-Chair of Video Games and Esports APPG;

Justin Tomlinson MP;

Damian Collins MP;

Rt Hon Stephen Timms MP;

Deidre Brock MP;

and **Lord Iain McNicol**.

TIGA also engaged with civil servants, including from the Department for Culture, Media and Sport.



STANDING UP FOR DEVELOPERS

- Unity sent shockwaves through the development sector by announcing plans to introduce Runtime Fees from January 1st 2024. Unity planned to charge developers each time their game was installed once certain thresholds were reached. Unity intended fees to be levied on existing games as well as games launched from the beginning of 2024.

- TIGA issued a [statement](#) about Unity's [runtime fees](#), criticising the sale of Unity's fee increase, the retroactive application of the fee to existing titles, the short notice period and the negative impact of the plans on jobs, costs and investments. TIGA also wrote a [letter](#) to the UK Government and contacted the Competition and Markets Authority about Unity's position. Unity eventually [backtracked](#) on its runtime plans.

CHAMPIONING OUR INDUSTRY IN THE MEDIA



187 press releases

409 social media posts

TIGA provides a powerful voice for the games industry in the media to support our political campaigning. Between 1st June 2023 and 31st May 2024 TIGA issued 187 press releases and website posts, posted 409 times on social media and generated 97 media citations over the year about TIGA and the video games industry.

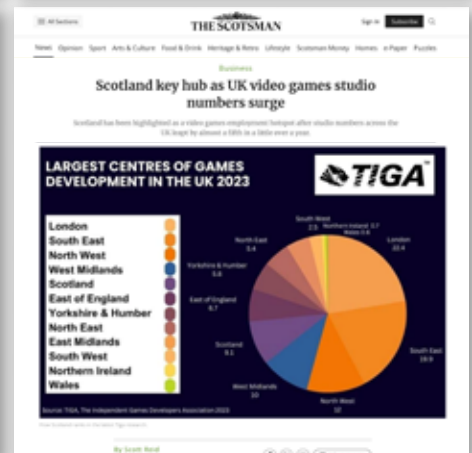
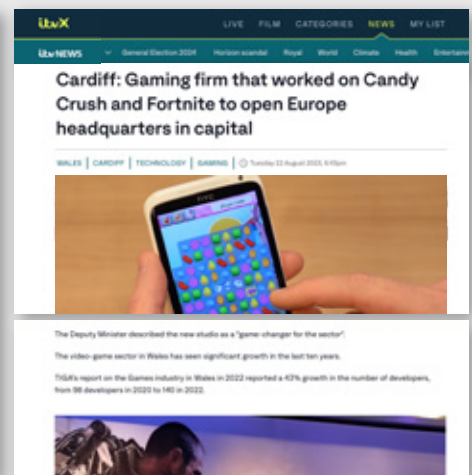
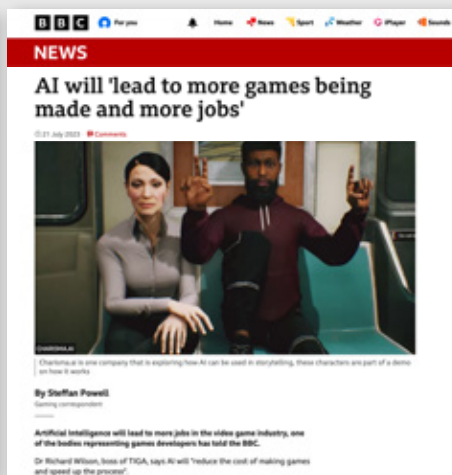
TIGA was cited in a variety of news outlets including 21 times in regional media (e.g. *BBC Scotland*, *BBC Radio Bradford* and *BBC Radio Surrey/Sussex*), 28 times in business media and 3 times in the national media (*BBC* and *ITV*) over this period.

**Cited:
21 times
in regional media**

**28 times
in business media**

**3 times
on BBC and ITV**

TIGA's social media profile grew steadily over the year (e.g. Twitter followers have increased from 27,900 to 28,700).

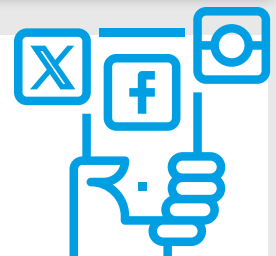


TIGA achieved impressive levels of engagement on X/Twitter during and after the TIGA Awards – average daily impressions for November were 7,000, but that spiked to 48,000 and 78,000 on the 16th & 17th of November 2023, respectively, as attendees and winners tweeted about the night.

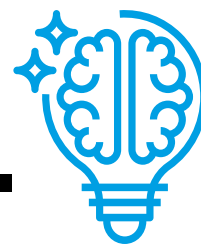


Daily impressions spike after TIGA Awards 17th Nov 2023)

78,000



2. ENHANCING EXCELLENCE IN GAMES EDUCATION



TIGA COURSE ACCREDITATION

TIGA introduced the TIGA Accreditation system in January 2015 to promote excellence in university and college education and to ensure learners acquire industry-relevant skills.

Between 1st June 2023 and 31st May 2024, TIGA accredited or re-accredited 9 video games courses: 6 courses from Abertay University; 1 course from Brunel University, London; 1 course from the University of Greenwich; and 1 course from the University of Suffolk.

As of 31st May 2024, 41 UK video games courses at 17 higher and further education providers have achieved TIGA [accreditation](#).

The following universities and college have one or more TIGA accredited games courses:

- ▶ Abertay University, Dundee
- ▶ Anglia Ruskin University
- ▶ Bournemouth University
- ▶ Birmingham City University
- ▶ Brunel University, London
- ▶ City University London
- ▶ Greenwich University
- ▶ Norwich University of the Arts
- ▶ Sheffield Hallam University
- ▶ Staffordshire University
- ▶ University of Gloucestershire
- ▶ University of Hertfordshire
- ▶ University of Portsmouth
- ▶ University of Suffolk
- ▶ University of the West of England
- ▶ University of the West of Scotland
- ▶ Leeds City College



**41 GAMES
COURSES HAVE
ACHIEVED TIGA
ACCREDITATION**



Boom Beach Frontlines - Space Ape Games.



Stampede: Racing Royale - Sumo Digital Ltd.

2. ENHANCING EXCELLENCE IN GAMES EDUCATION

TIGA UK GAMES EDUCATION AWARDS 2023

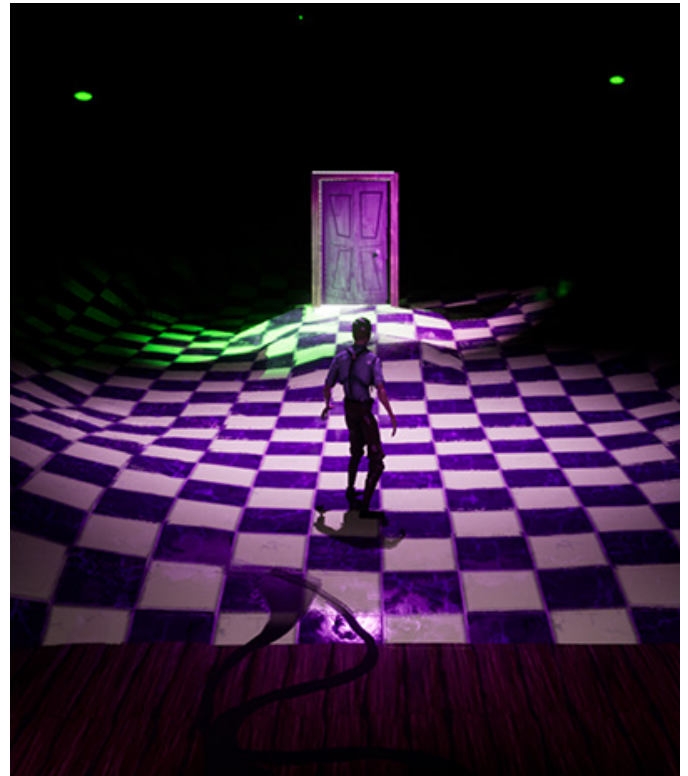
- TIGA delivered the UK Games Education Awards 2023 to recognise outstanding students, education providers and best practice. The Awards were sponsored by Creative Assembly, Sumo Group and Lockwood Publishing.
- University and FE college members of TIGA and their students were eligible to enter various Award categories. The number of entries increased from 61 in 2021 to 115 in 2022 and to 137 in 2023.
- The winners were announced in a virtual Awards [ceremony](#) on 29th September 2023.



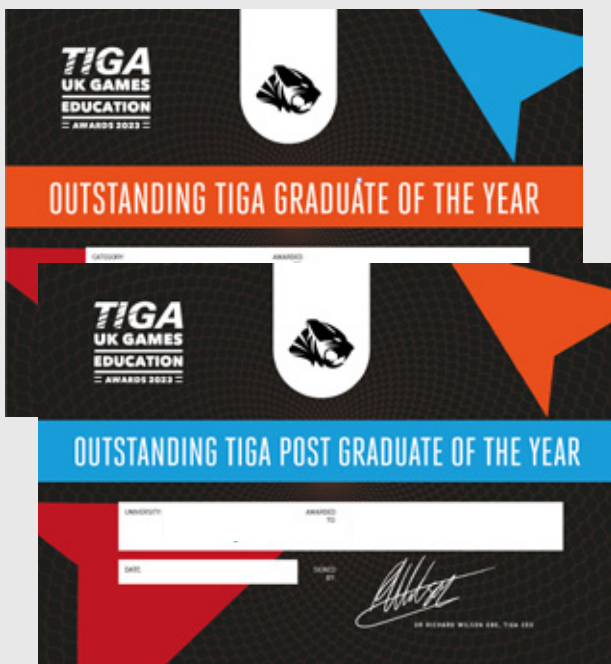
Best Student Game Winner 2023, University of Portsmouth: Malltopia.



TIGA Education Awards 2023 winners video.

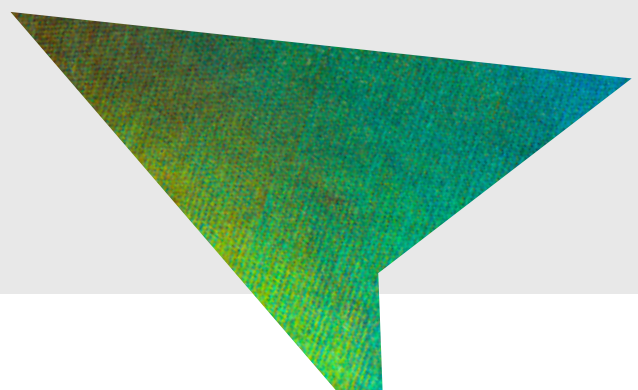


Best Student Game Entry 2023, University of Hertfordshire: My Shadow.



TIGA GRADUATE OF THE YEAR PROGRAMME

In 2023, 89 students were nominated by their respective universities for the award 'TIGA Graduate of the Year'. Judges from the TIGA Education Committee reviewed the submissions and then awarded each student the accolade of 'TIGA Graduate of the Year' or 'Post-Graduate of the Year' in recognition of their excellent [work](#).



3. DRIVING EXCELLENCE ACROSS OUR SECTOR



TIGA promotes excellence across our industry and gives businesses and education providers opportunities to excel.

- The TIGA Games Industry Awards 2023 celebrated creativity, technical excellence, business proficiency and best practice in the games industry. 33 awards were made to industry winners and the TIGA Awards programme attracted the support of 26 sponsoring companies. The [Awards Ceremony](#) took place at Troxy, London.
- TIGA operates the [TIGA STAR Employer Awards](#) to promote excellence in business and employment practices in the games industry. Our STAR System enables games businesses to benchmark performance and identifies areas for improvement.



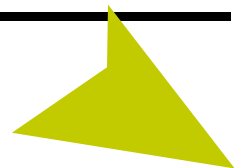
- TIGA produced a detailed and exhaustive [Salary Survey Report](#) for participating companies. The report enables participating businesses to benchmark employee pay and benefits against some of the UK's leading games studios.
- TIGA published [The TIGA Guide to Employee Wellbeing in Game Development](#) and the [TIGA Guide to Environmental Sustainability in Game Development](#).



Images from the TIGA Games Industry Awards 2023.

TIGA'S CHARITY PARTNERS

- TIGA supported [The Passage](#), the caretaker of the homeless community in London, by choosing the organisation as our charity partner for the TIGA Games Education Awards 2023.
- TIGA supported [SpecialEffect](#) by selecting the organisation as our charity partner for the TIGA Games Industry Awards 2023.



THE FUTURE

TIGA's ambition is to make the UK the best place in the world to develop video games, drive growth in our industry and enable our sector to contribute to the prosperity of the wider UK. TIGA will:

- Engage with Government and Parliament to improve video games tax credits.
- Develop our Accreditation Programme, Education Awards and Education Conference.
- Drive excellence across our sector via our Awards programmes.
- Deliver networking opportunities for members.
- Enable more studios to start-up, scale-up and grow.



THANK YOU

Dr Richard Wilson OBE (TIGA CEO); Jason Kingsley CBE (TIGA Chairman); Mark Gerhard (TIGA Vice Chairman) and the rest of the [Board](#) would like to thank all TIGA members and partners for your support during 2023-24.

Get in touch with TIGA:



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Whilst every care has been taken to ensure the accuracy of the information in this guide at the time of publication, the information is intended as guidance only. It should not be considered as legal or financial advice.