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Ukie Annual Review 2024



ukie

ukie.org.uk

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Welcome to Ukie's Annual General Meeting 2024

CEO's Report

Nick Poole - Ukie CEO



It's a pleasure to address you all for the first time as CEO. I want to start by expressing my heartfelt thanks for the welcome you have given me as Ukie members as well as my thanks to the Board and staff team for the confidence they have placed in me. As the voice of the UK's video games industry, I want to reaffirm our unwavering commitment to supporting the dynamic and innovative businesses that make our sector the fastest growing in the creative economy.

Reflections on my first year

Since joining Ukie in April, I've been continuously inspired by the passion and dedication of our community. Visiting games businesses across the country—from indie developers to major publishers—has given me a deep appreciation for the incredible artistry and technological innovation that go into creating games.

I see an industry that has come of age – that is redefining culture, education and community for billions of players in the UK and worldwide. I see British innovation and IP driving amazing player experiences around the world, with tremendous spillover benefits into industry, technology and society.

Supercharging the UK's Video Games Industry

For over 40 years, the UK video games industry has shaped the modern world. British-made games are not only our nation's most successful export; they are artistic marvels that showcase our rich creative heritage.

Our new 5-year strategy and action plan, *Supercharged*, sets out how Ukie will ensure that everyone everywhere benefits from the social, cultural and educational power of video games and interactive entertainment, while helping UK-based games businesses to succeed. At Ukie, we proudly champion an industry that contributes over £6 billion to the UK economy and supports 76,000 jobs.

Now, we're shifting gears into a campaign mode, driving forward three key initiatives designed to energize the industry, empower talent, elevate games, and supercharge the future of the UK's video games sector for the next decade and beyond.

- **Energising Industry:** Creating an environment where local game businesses can turn innovative stories into globally successful IPs.
- **Empowering Talent:** Supporting game businesses in nurturing today's storytellers and tomorrow's creative entrepreneurs.
- **Elevating Games:** Championing British-made games as a force for good, ensuring they receive the recognition and support they deserve.

Looking ahead

As we look to the future, I'm filled with excitement about what we will achieve together. Our refreshed mission and strategic vision set a clear path for Ukie to advocate for our members and propel the UK video games industry forward. In five years, I want to ensure that we look back on this time as the moment our industry secured its rightful place as a creative, economic, social, and cultural powerhouse alongside the broader Creative Industries.

This is the work that I, alongside the Ukie Board and team, am dedicated to. But to make this vision a reality, it will take all of us—every developer, publisher, work-for-hire studio, freelancer, lawyer, financier—everyone who makes up this brilliant industry. Together, we will fight for our rightful place in the nation's future. I look forward to working with all of you to achieve our shared goals and ambitions for 2024/25 and beyond.



OLLULLI WORLD
By Post
Made in London



Chair's Report

Tim Woodley –
Ukie Chair, Head of Publishing
at Hello Games



2024 has been an exceptional year for Ukie, marked by significant milestones and remarkable achievements that highlight Ukie's commitment to the UK video games and interactive entertainment industry. We are proud to share these accomplishments as we continue to champion the interests of our members and secure the long-term future of the industry with a new Government.

Celebrating the Industry at Buckingham Palace

One of the most memorable events of the year was our visit to Buckingham Palace. It was an honour to have the UK video games industry celebrated at the Buckingham Palace Gardens. This prestigious occasion underscored the vital contribution our industry makes to the UK's creative sector. The event provided an unparalleled opportunity to celebrate and recognise the talent, creativity, and innovation that defines the UK video games industry.

Welcoming Our New CEO, Nick Poole

In April, we welcomed Nick Poole as Ukie's new CEO. Nick brings a wealth of experience and fresh energy to our organisation at a pivotal point in the development of our

industry. The Ukie Board are excited to support Nick as we embark on new initiatives and strategies aimed at fostering growth and advocating for our members.

Under Nick's leadership, we are developing a comprehensive growth strategy and action plan designed to champion the interests of our members. This strategy will focus on strengthening our voice in policy discussions to ensure the UK remains a leading hub for video games and interactive entertainment, promoting innovation within the industry by supporting new technologies and creative approaches, and creating the conditions that allow businesses to invest in talent development to ensure the UK continues to produce world-class game developers and industry professionals.



Passing on the baton

As we move forward, Ukie remains dedicated to representing and supercharging the UK video games and interactive entertainment industry. With the guidance of Nick Poole and the continued support of our members, we are confident in our ability to navigate the challenges and opportunities that lie ahead.

With that in mind, it is with mixed emotions that I hand the baton on to my successor. My term as Chair has been defined largely by the search for the CEO, a rare challenge, daunting and rewarding in equal measure. Of course, time will tell what my legacy will be as Nick and the future Chair bed in and take the industry to higher heights. But I'm supremely proud of the process which led us to Nick's hire and have the utmost confidence that he is the right person to lead us through the next decade.

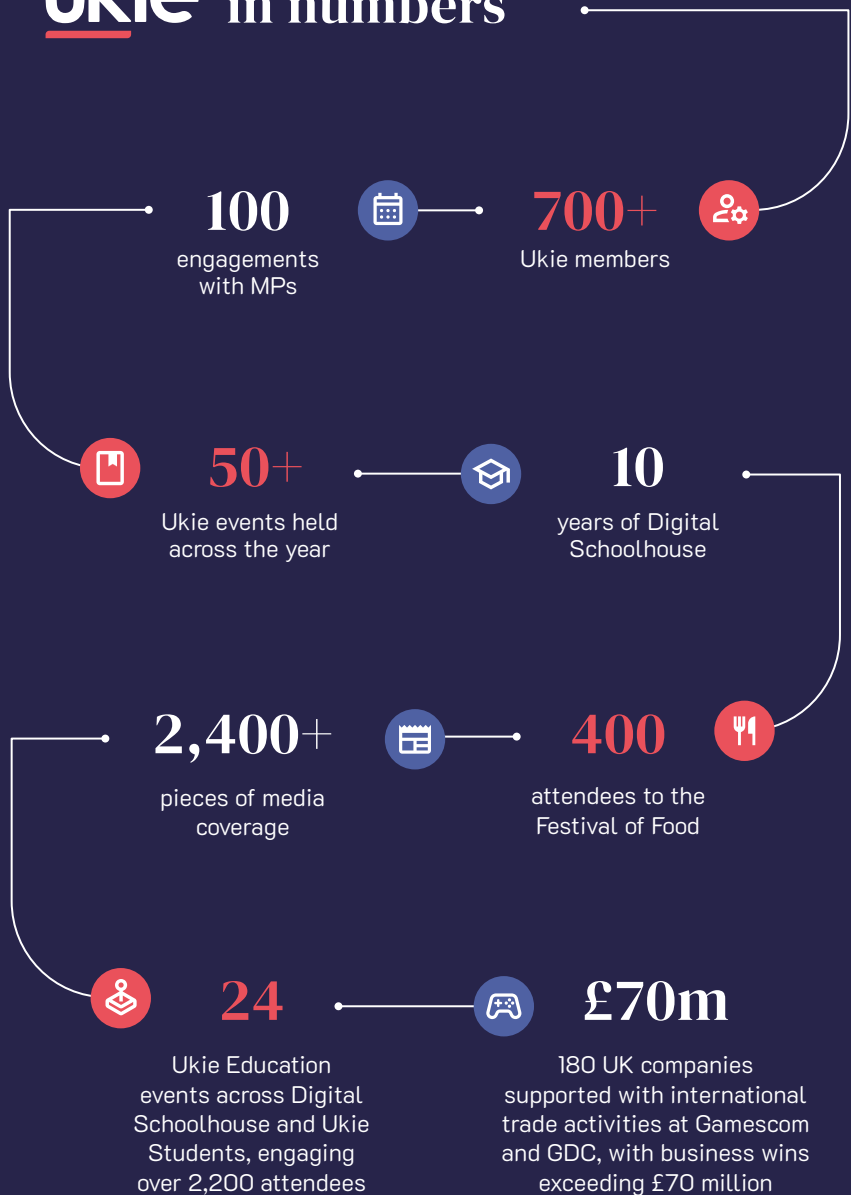
I have not done this alone. I have had a supportive and collaborative Board who have helped me every step of the way. People always comment on the size of the Ukie Board and question whether it is too unwieldy to be

effective. But the Ukie Board is necessarily large, representing as it does the rich tapestry of the UK games industry in 2024. It is rare that such a large group of potentially diverse and conflicting interests doesn't descend into political jousting, and it is a testament to the Board members past, present and future that the good of the industry is sacrosanct. I would urge anyone from within the membership with the same vested interest, especially those from under-represented groups, to put themselves forward to further our cause and ensure all voices are heard.

Closing remarks

In many ways the UK is the birthplace of video games. It is a heritage that we can still draw upon and be proud of. But we can't be complacent and rely on our history. The world moves on and other nations are building their own traditions and flying their industry flags vigorously. We must continue to demonstrate and assert our unique Britishness in the face of global competition and remind the world why we are uniquely positioned to maintain our special status on the international video games stage.

ukie in numbers





Over the past 12 months,
we have delivered
significant insight, impact,
and influence, making a
substantial difference for
our members across the
video games industry.



Insight

We have adapted swiftly and effectively to ensure that the UK games sector receives the necessary support to flourish.

Additionally, we have developed well-supported policy positions to influence government and key policymakers. Take a look at our key achievements over the last 12 months.

Evidence-based approach

Best demonstrated by Ukie's strategic efforts to establish close relationships with the online safety team at Ofcom, the team submitted over five consultation responses on key issues such as illegal harms and children's safety duties.

Our responses emphasised the video game sector's long history of self-regulating its online spaces with 'safety-by design' principles, highlighting how its functionalities differ significantly from other online services like social media.

We provided robust evidence to argue that Ofcom's current 'one-size-fits-all' approach hinders innovation and diversity in the market by overwhelming smaller developers with complex requirements. Additionally, we organised multiple roundtables between Ofcom and the industry to showcase further evidence of good practices within the sector.

By facilitating these discussions, we ensured that policymakers understood the unique aspects of the video game industry and the importance of tailored regulatory measures to support its continued growth and innovation.



Unrivalled games industry analysis

In November, Ukie, in collaboration with FTI Consulting, published *The Economic Impacts of Video Game Technology Spillover*, providing the first comprehensive analysis of how video game technology affects other sectors.

The report revealed that in the UK, video game technology contributed up to £760 million to GDP and supported nearly 10,000 jobs in 2021. Similar modelling for Norway, Sweden, Denmark, and Finland showed technology spillovers supporting between £60 and £570 million in GDP and up to 1,700 jobs.

The study highlighted the use of game engines in diverse industries like healthcare, automotive, and film & TV.

Additionally, we released our annual industry valuation, showing UK consumer spending on video games reached £7.82 billion, a 4% increase from 2022, reflecting the sector's stability amidst broader financial challenges.

This year, we also partnered with the BFI to assess the impact of video game adaptations on streaming and digital sales, adding £123 million to our valuation.



Influence

Shaping Government policy

Ukie travelled across the UK to engage with numerous members and academics, gathering insights on how the Government can make the UK the premier destination for creating, selling, and playing games. Key recommendations included introducing a Digital Creativity GCSE to enhance digital skills for the future workforce, committing to competitive tax reliefs to keep the UK attractive for starting and

investing in games businesses, and renewing and increasing the UK Games Fund to £30 million over the next three years to foster industry growth and diverse creative content for a global audience. We launched this Manifesto in Westminster, attended by MPs and civil servants, resulting in the inclusion of our sector in the main party's general election manifestos.

10 years of Digital Schoolhouse

This year marks 10 years of Digital Schoolhouse. Over the last ten years, the programme has reached over 299,470 pupils from 6,253 schools and supported 19,108 teachers.

Our network has delivered over 4,752 workshops. This was supported by the first Ukie Education & Industry Mixer event, bringing together representatives from

across the video games industry, educators across all educational phases, policymakers, and wider stakeholders. Alongside being a valuable networking opportunity, our checkpoint talks facilitated discussions around innovative cross-sector collaborations.







Impact

Protecting our members' IP

Over the past 12 months, our efforts have significantly impacted the protection and enforcement of intellectual property (IP) for our members. We have assisted over 60 members in safeguarding their games from IP theft, demonstrating our commitment to protecting their creative assets. Our proactive measures have led to the removal of unauthorised merchandise and digital goods, preventing illicit sellers from profiting off our members' IP. Notably, we prevented the sale of over £100 million worth of digital goods and services on eBay. Additionally, we empowered our members by providing them with the tools to report infringing content on social platforms and addressing game-specific issues collaboratively.

Our top achievements further highlight the value we bring to our members. First, we expanded our IP takedown service, increasing the number of members and titles we monitor. Second, we successfully removed over 1.5 million infringing links in the last year alone, significantly reducing the presence of unauthorised content. Third, we introduced a member-accessible portal for identifying and removing infringing content, streamlining what was previously a manual process. These initiatives underscore our dedication to protecting our members' IP and enhancing their ability to combat infringement effectively.

Driving innovative education

Digital Schoolhouse showcased its commitment to innovative education by hosting the inaugural Playful Computing Conference. This event brought together teachers, video games industry experts, and EdTech professionals for a series of insightful talks and workshops. The conference focused on four key themes: AI in Education, Careers Education, Esports in Education, and Game-Based Learning, fostering a collaborative environment to explore the intersections between technology, education, and gaming.

In addition, over 165 college and university students participated in our Ukie Student Game Jam, which returned by popular demand in March 2024 after a three-year hiatus. Each of the 40 teams was paired with a professional industry mentor to create a game based on the theme of 'integrity' within 32 hours. The winning game was showcased at WASD in London in April, where industry judges presented the award-winning teams with their trophies, highlighting the talent and creativity of the next generation of game developers.

Putting members first

Ukie organised 37 business support and networking events over the past year, attracting 2,371 attendees. These events ranged from the Hub Crawl tour and roundtables to investor dinners and the new Members Day and Awards activity.

Our international trade activities at gamescom and GDC supported 180 UK companies, which reported business wins exceeding £70 million and over £150 million in foreign direct investment (FDI). In addition to hosting these events, Ukie promoted and endorsed 65 member-organised events, offering discounted or free tickets and guest speaking opportunities.

We also launched the Video Game Growth Programme in partnership with Tencent and Player One Consulting, offering 30 UK companies a comprehensive learning journey through an accelerator and scale-up pathway. The programme includes over 60 hours of guided learning, guest speakers, expert sessions, and resources for independent study. Furthermore, Ukie introduced new support initiatives under the Here to Help banner, including 20+ Need to Know videos, an event calendar, a benefits directory, and training sessions. We published the third series of Playable Futures articles and an esports report, while the Ukie Worldwide campaign featured 30+ studios, highlighting the UK's talent and achievements on a global stage.

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Building an inclusive games industry

This year has been pivotal for advancing equality, diversity, and inclusion (EDI) in the video games industry. In November 2023, #RaiseTheGame (RTG) and Amigus launched the Empower Up Toolkit Platform, attracting over 10,000 visitors and covering topics like Neurodiversity, Gender, and LGBTQ+. Earlier this year, Ukie approved a new 5-year EDI strategy under the 'Supercharged' initiative, emphasising that diversity leads to stronger businesses and successful games.

We organised over 20 EDI-focused industry events, including the RTG Festival of Food

Evening at Develop: Brighton, drawing 500 attendees. The RTG Activity Select series partnered with organisations to focus on various EDI topics. Last year's focus was mental health; this year, it's empowering women in the industry.

Finally, in collaboration with the Geena Davis Institute, we launched the GDI Playbook, guiding game creators to develop diverse narratives. The RTG initiative engaged over 200 UK companies and 1,000 professionals, with growing newsletter subscriptions, highlighting our dedication to EDI.







Thank you to our sponsors

A huge thank you to our sponsors for making this year's work possible through their invaluable partnership.

From the flagship Ukie Hub Crawl, Video Game Awards to our influential industry reports and member engagement, your support allows us to continue our impactful work, championing the UK's video games industry.

Get involved and sponsor Ukie's work. Leverage our brand to benefit yours, and together, we can achieve even greater success for our industry.

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Campaigns for next year

For over 40 years, the UK video games industry has shaped the modern world.

British-made games are not only our nation's most successful export; they are artistic marvels that showcase our rich creative heritage.

At Ukie, we proudly champion an industry that contributes over £6 billion to the UK economy and supports 76,000 jobs. Over the next 12 months our campaigning efforts will be focused on our mission to supercharge the industry – to ensure everyone everywhere benefits from the social, cultural and educational power of video games and interactive entertainment, while helping UK-based games businesses to succeed. We will deliver this by:

Energising Industry: Creating an environment where local game businesses can turn innovative stories into globally successful IPs.

Empowering Talent: Supporting game businesses in nurturing today's storytellers and tomorrow's creative entrepreneurs.

Elevating Games: Championing British-made games as a force for good, ensuring they receive the recognition and support they deserve.





Join Ukie

Join Ukie and become part of the most influential games trade association in the UK.

We're here to support, grow and promote our members' businesses: including multinational publishers, platform holders, indie developers, leaders in mixed reality and esports through to the emerging generation of students and the service companies that support the sector's growth.

Membership of Ukie gives your business access to a raft of unique products and services to help your business thrive. Whether the market is buoyant or challenging Ukie is here to help companies get the support they need, and when they need it.

Become a Ukie member today.

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