TIGA™

GENRE REPORT

01/16

TIGA™

Kobojo

CONTENTS

TIGA™

TIGA represents developers, digital publishers, service companies and education providers and is the trade association for the video games industry.

Our core purpose is to strengthen the games development and digital publishing sector. We achieve this by campaigning for the industry in the corridors of power, championing the industry in the media and helping our members commercially.

TIGA is intent on building an enduring organisation which continually improves; a business that will make a significant impact on the games industry and so benefit our membership and the wider economy. Since 2010, TIGA has won 24 business awards, an achievement which reflects TIGA's drive for improvement and to meet best practice.

THE UK VIDEO GAMES INDUSTRY

The UK video games industry is important economically and culturally. The UK video games sector is the largest in Europe. In 2014 the video games sector contributed £1.115 million to the UK's GDP and generated £471 million for HM Treasury in tax revenues. 30,741 work in the games industry/are in jobs indirectly supported by studios, including 10,869 in games development.[1]

IN 2014

£1.115million contributed to the UK's GDP from the video games sector

£471million in HM Treasury tax revenues

30,741 people work in the games industry/ are in jobs indirectly supported by studios

10,869 work in games development

Games development is a knowledge industry par excellence. The sector sustains highly skilled, graduate employment. A typical games development studio will have 80 per cent of staff qualified to degree level or above and many studios provide on-going training.

The industry is export focused: 95 per cent of UK games development studios export at least some of their games. The sector makes intensive use of technology and many studios invest in R&D.

Some of the best performing games IP globally is generated in the UK. Notable examples include the Grand Theft Auto franchise, developed by Rockstar. Other UK studios have produced major games franchises such as Batman and Lego, as well as individual world-class titles such as RuneScape (developed by Jagex), the Sniper Elite series (developed by Rebellion) and Worms (developed by Team 17).

Video games are increasingly embedded in UK culture and society. Games are a top entertainment medium, selling more at retail and via digital distribution in 2013 than video and over twice as much as music.[2] Games are played in 7 out of 10 households.[3] Video games are cultural, audio-visual products on a par with film, television and animation. They draw on artistic disciplines such as music and art, and sometimes involve narrative. Video games also interact with other forms of media, for example, inspiring film, television and music.

The UK games development and digital publishing sector is a success story. The introduction of Games Tax Relief in 2014 – a measure which TIGA successfully campaigned for over the last seven years – will give the UK industry an important boost and enable it to compete on a more level international playing field against overseas competitors.

DFC Intelligence estimates that the global video games market is worth:

FROM **$68B** IN 2013

UP TO **$96B** IN 2018
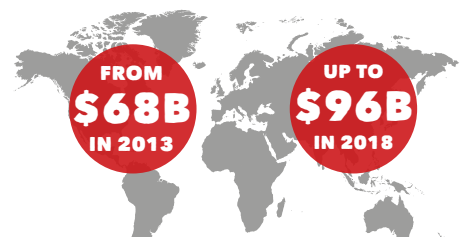
Yet too many studios in the UK fail. 29 per cent of UK games companies that have existed at any stage in the last five years have closed down.[4] If the sector is to achieve its full potential and make a significant contribution to UK employment and growth, then we need to do more. In particular, the UK needs to build an environment that is favourable to start-ups and the growth of more sustainable studios.

1. Gibson, N., Gibson R., and Wilson, R, *Making Games in the UK Today 2015* (TIGA 2015).

2. Source: Entertainment Retailers Association, ERA 2013 Entertainment Monitor, January 2014.

3. Source: Mintel video and computer games survey, 2011.

4. The death rate remains high. Over 10 per cent of all UK games businesses closed down in 2014. See Gibson, R., Gibson, N. and Wilson, R., *Making Games in the UK 2015* (TIGA, 2015).

1. SUMMARY

This report provides an analysis of the games released by a significant proportion of UK developers in 2015 and the genres they are defined by.

TIGA carried out extensive research on nearly 200 games released this year by 154 UK studios. The report looks into games released on various desktop, console and mobile platforms. The most popular genre of game released in 2015 was action/adventure games, making up 24.21 per cent of all games studied. Other popular genres were traditional arcade titles, which accounted for 18.42 per cent of releases and puzzle/trivia games, which made up 15.26 per cent.

24.21 per cent:
action/adventure games

18.42 per cent:
 traditional arcade games

15.26 per cent:
puzzle/trivia games

42.11 per cent:
other

TIGA ™

2. INTRODUCTION

TIGA commissioned this report to provide a picture of the genres UK games developers focused on for their 2015 releases.

The aim was to cover the makeup of the games industry in as much details as possible. As such, 191 games were examined, developed by 154 studios across the UK. These included studios of all sizes, whether small, medium or large, from solo developers and micro studios to in-house development outfits and other independent studios. Given there are over 660 studios in the UK, as previous research from TIGA has

shown, this report represents a significant portion of the UK games industry's output in 2015 and acts as a good indicator of the industry's focus.

Games were allocated to a specific category each in accordance with the genre that best defined them. This information was obtained through research on company websites and marketplace descriptions, though there is also partial subjective analysis when categorising some titles, as many games can straddle the boundaries between multiple genres.

RAW NUMBER BREAKDOWN

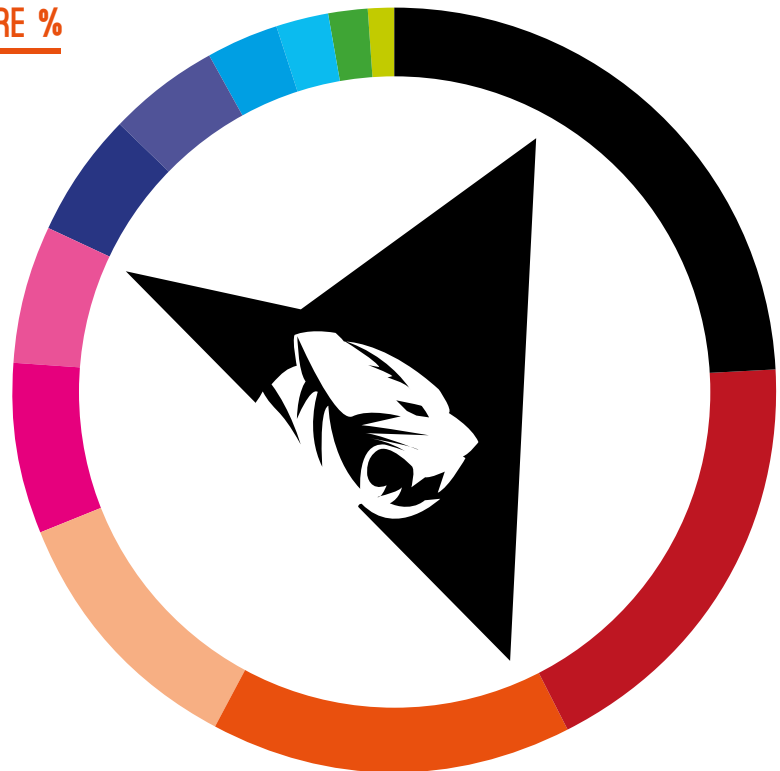| Genre	Count	Percentage
Action / Adventure	46	24.21%
Arcade	35	18.42%
Puzzle / Trivia	29	15.26%
Strategy	21	11.05%
Racing	14	7.36%
Simulation	11	5.78%
Sports	10	5.26%
Educational	9	4.73%
Casual	6	3.15%
RPG	4	2.10%
Music	3	1.57%
Horror	2	1.05%

3. ANALYSIS OF GAME GENRES

TIGA's analysis of the UK games industry shows that the action/adventure genre was the most popular for studios in 2015, making up 24.21 per cent of all UK games released. Close behind was the traditional arcade games genre with 18.42 per cent, followed by puzzle/trivia titles with 15.26 per cent.

Action and adventure titles are typically seen as the most popular genres in games, with most triple-A studios often releasing big games in this field. These titles can often include aspects of other genres, making them appealing to a wide array of consumers.

Traditional arcade games meanwhile can be either made widely accessible or targeted at 'hardcore' gamers, with their focus on fun a pull for many players. Puzzle/ trivia titles are also popular amongst wide audiences, particularly on mobile platforms.

The most popular genres were in keeping with TIGA's previous report on game genres (http://www.tiga.org/repository/documents/ editorfiles/reports/4218_tiga_the_name_ of_the_game_report_screen.pdf) published in 2015, with almost no significant changes in developer habits. Action/adventure games are more popular than ever, making up 24.21 per cent of all games released in 2015, up 2.8 per cent from last year.
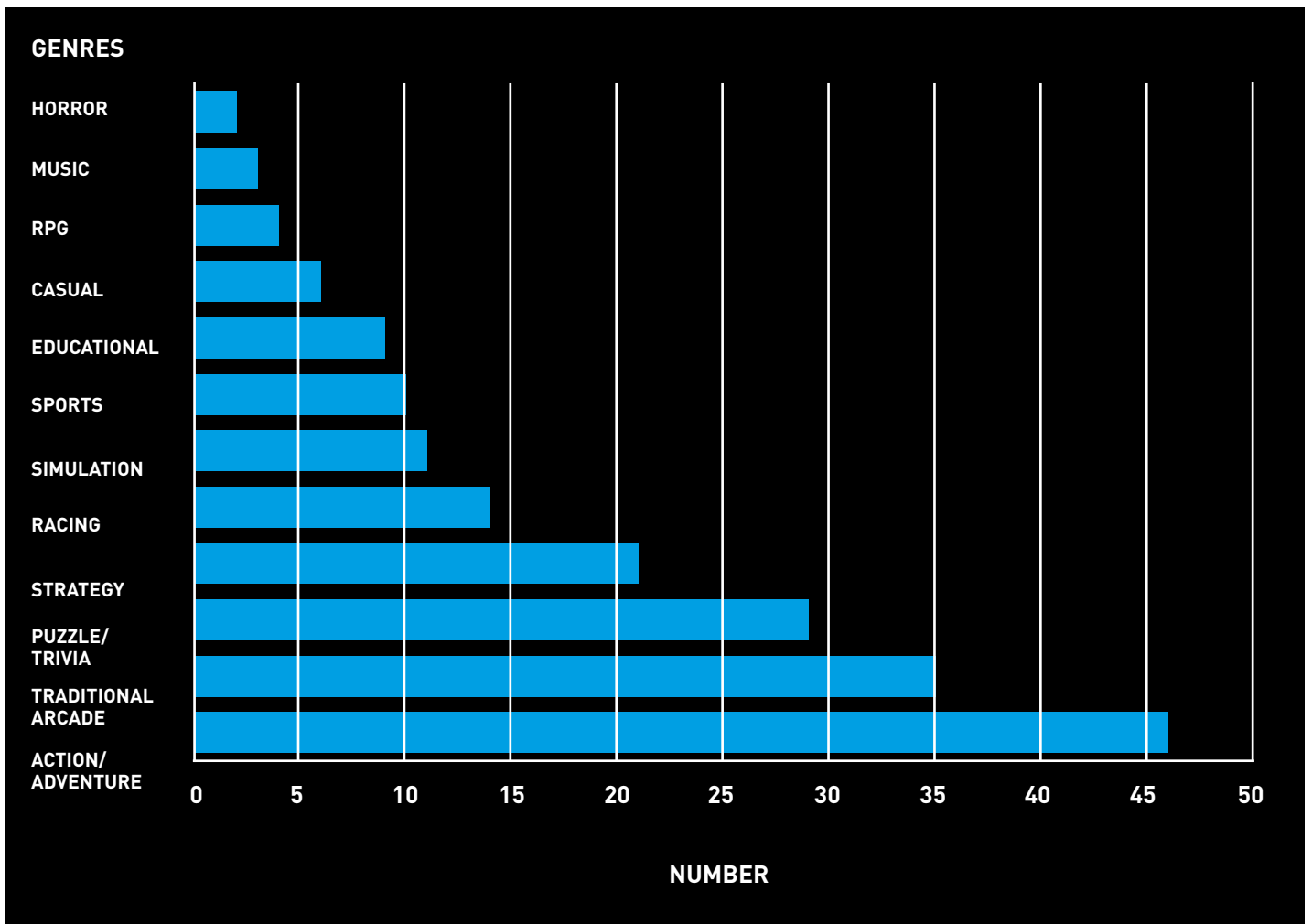
GENRE %

- Action / Adventure
- Arcade
- Puzzle / Trivia
- Strategy
- Racing
- Simulation
- Sports
- Educational
- Casual
- RPG
- Music
- Horror

GENRES

GENRES

Genre	Number
HORROR	2
MUSIC	3
RPG	4
CASUAL	6
EDUCATIONAL	9
SPORTS	10
SIMULATION	11
RACING	14
STRATEGY	21
PUZZLE/TRIVIA	29
TRADITIONAL ARCADE	35
ACTION/ADVENTURE	46

NUMBER

TIGA™

4.
BREAKDOWN OF PLATFORM RELEASES

The two most popular platforms for UK studios during 2015 were iOS devices and Windows desktop, accounting for a combined 41 per cent share of all game releases at a near even split. Android was also popular, with 17 per cent of all games released in the last year also appearing on the mobile operating system.

The marketplaces on these platforms, including, but not limited to, Steam, Google Play and Apple, are arguably the most open stores available to developers, and also each offer a large consumer base, so it is little surprise to see these as the most popular platforms for studios.

GENRE %
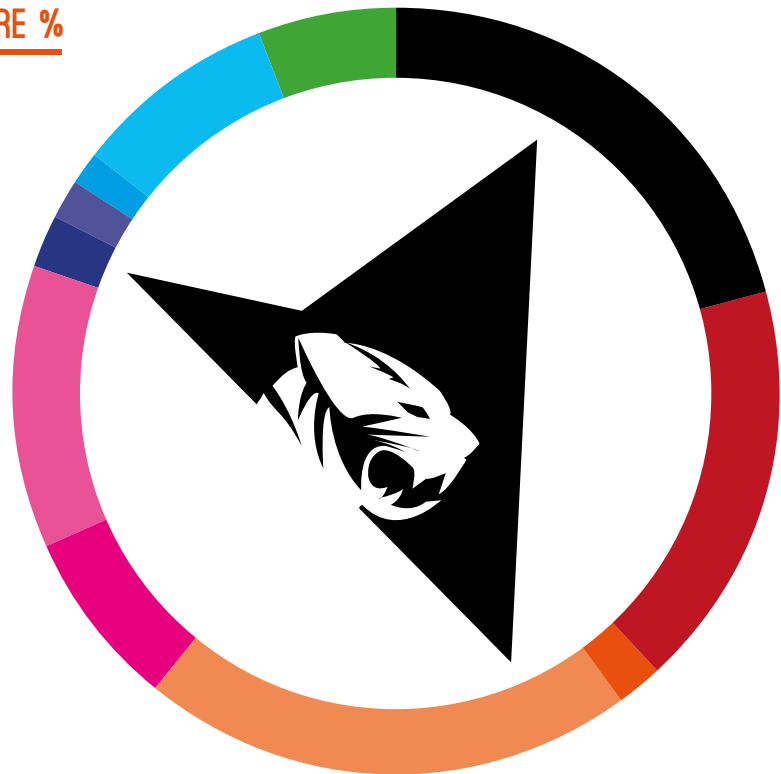
▶ iOS	▶ Linux	▶ Wii U
▶ Android	▶ Mac	▶ PS4
▶ Windows Phone	▶ PS3	▶ Xbox One
▶ Windows desktop	▶ Xbox 360	

PLATFORM BREAKDOWN BY NUMBERS

PLATFORM

Platform	Number
XBOX ONE	25
PS4	37
Wii U	6
XBOX 360	6
PS3	9
MAC	52
LINUX	32
WINDOWS DESKTOP	91
WINDOWS PHONE	8
ANDROID	75
iOS	92

NUMBER

TIGA™
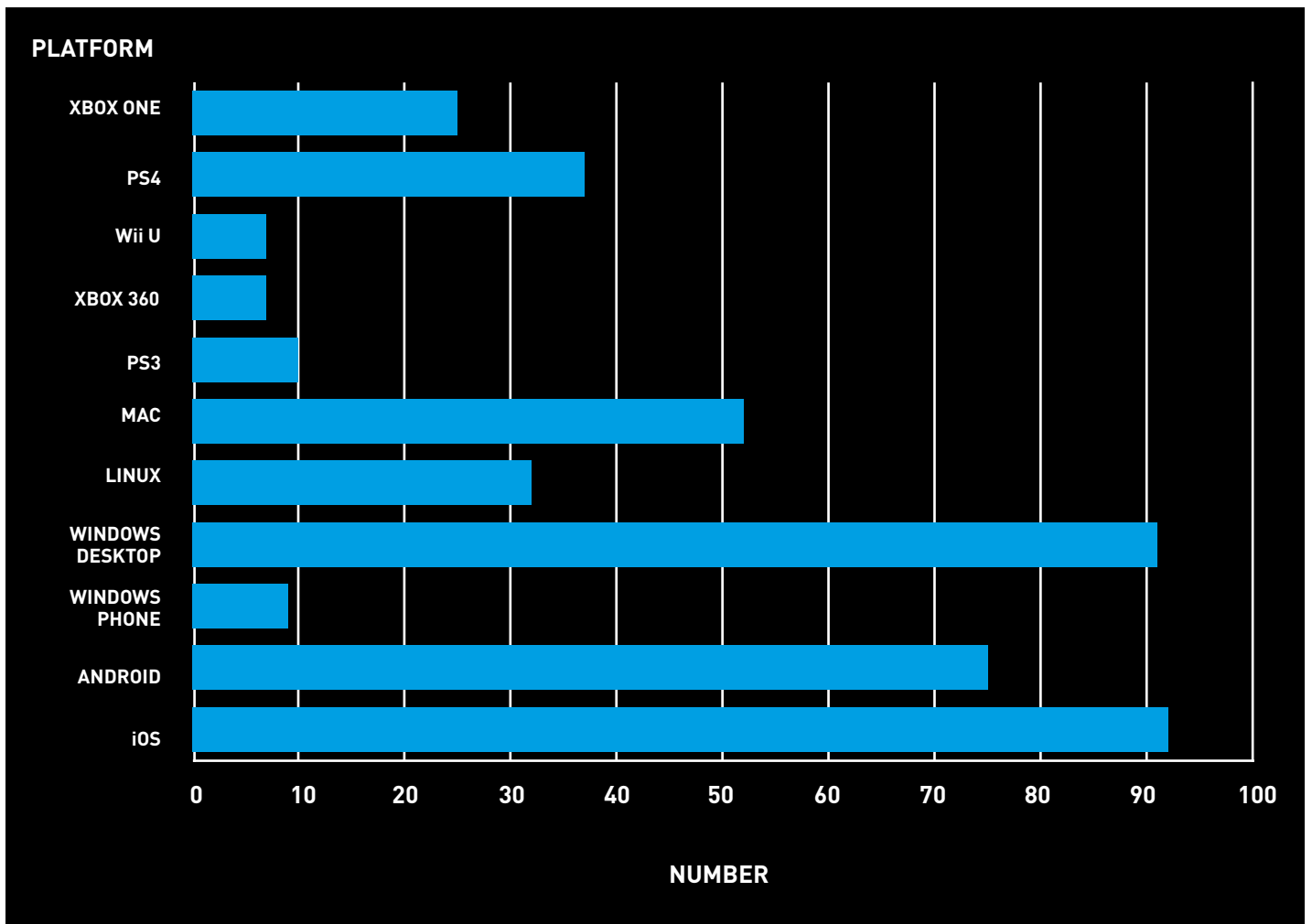
5. GENRES BY PLATFORM

The spread of genres is much more diverse on iOS than any other platform. In fact, while action/adventure games were the most popular on many other platforms, they ranked third on Apple devices behind the puzzle and arcade genres.

PC saw the most action/adventure game releases by UK studios in 2015 at 35. Strategy, simulation, arcade and puzzle/ trivia games were also popular categories compared to the remaining genres.

Windows was the most popular desktop operating system amongst developers, making up 52 per cent of all desktop game releases. Mac was the second most preferred, at 30 per cent, while Linux made up the remaining 18 per cent.

% OF MOBILE RELEASES BY GENRE

Legend		
▶ iOS	▶ Android	▶ Windows Phone
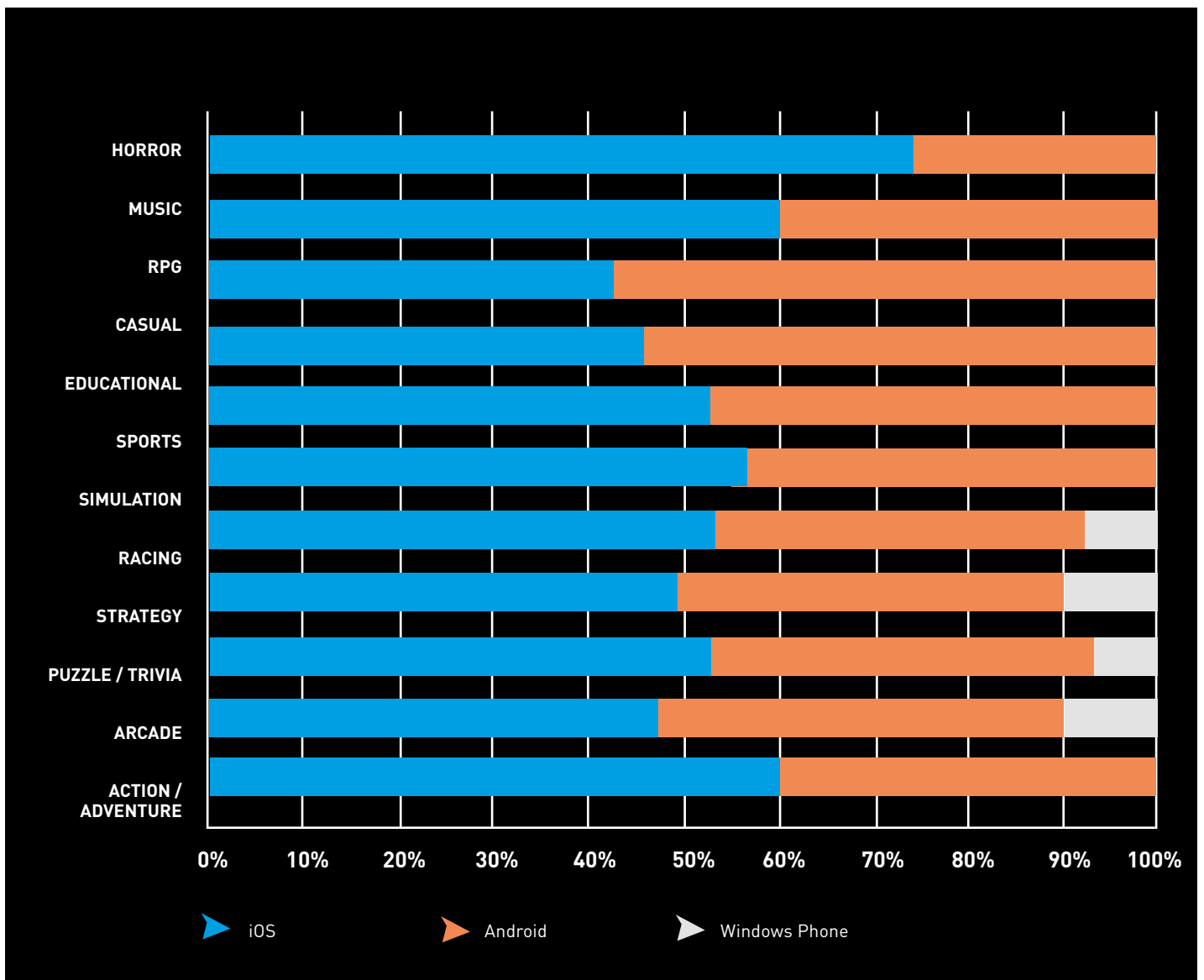
NUMBER OF MOBILE RELEASES BY GENRE

Genre	(chart data)
HORROR	
MUSIC	
RPG	
CASUAL	
EDUCATIONAL	
SPORTS	
SIMULATION	
RACING	
STRATEGY	
PUZZLE / TRIVIA	
ARCADE	
ACTION / ADVENTURE	

Legend: ▶ iOS   ▶ Android   ▶ Windows Phone

Axis: 0 5 10 15 20 25 30 35 40

% OF CONSOLE RELEASES BY GENRE

Chart legend:
- PS4
- Xbox One
- PSE
- Xbox 360
- Wii U

Genres (top to bottom): HORROR, MUSIC, RPG, CASUAL, EDUCATIONAL, SPORTS, SIMULATION, RACING, STRATEGY, PUZZLE / TRIVIA, ARCADE, ACTION / ADVENTURE

X-axis: 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

TIGA™

NUMBER OF CONSOLE RELEASES BY GENRE

Legend: ▶ PS4 ▶ Xbox One ▶ PSE ▶ Xbox 360 ▶ Wii U

% OF DESKTOP RELEASES BY GENRE

% of desktop releases by genre — horizontal stacked bar chart for genres: HORROR, MUSIC, RPG, CASUAL, EDUCATIONAL, SPORTS, SIMULATION, RACING, STRATEGY, PUZZLE / TRIVIA, ARCADE, ACTION / ADVENTURE. Axis from 0% to 100%. Legend: PC, Mac, Linux.
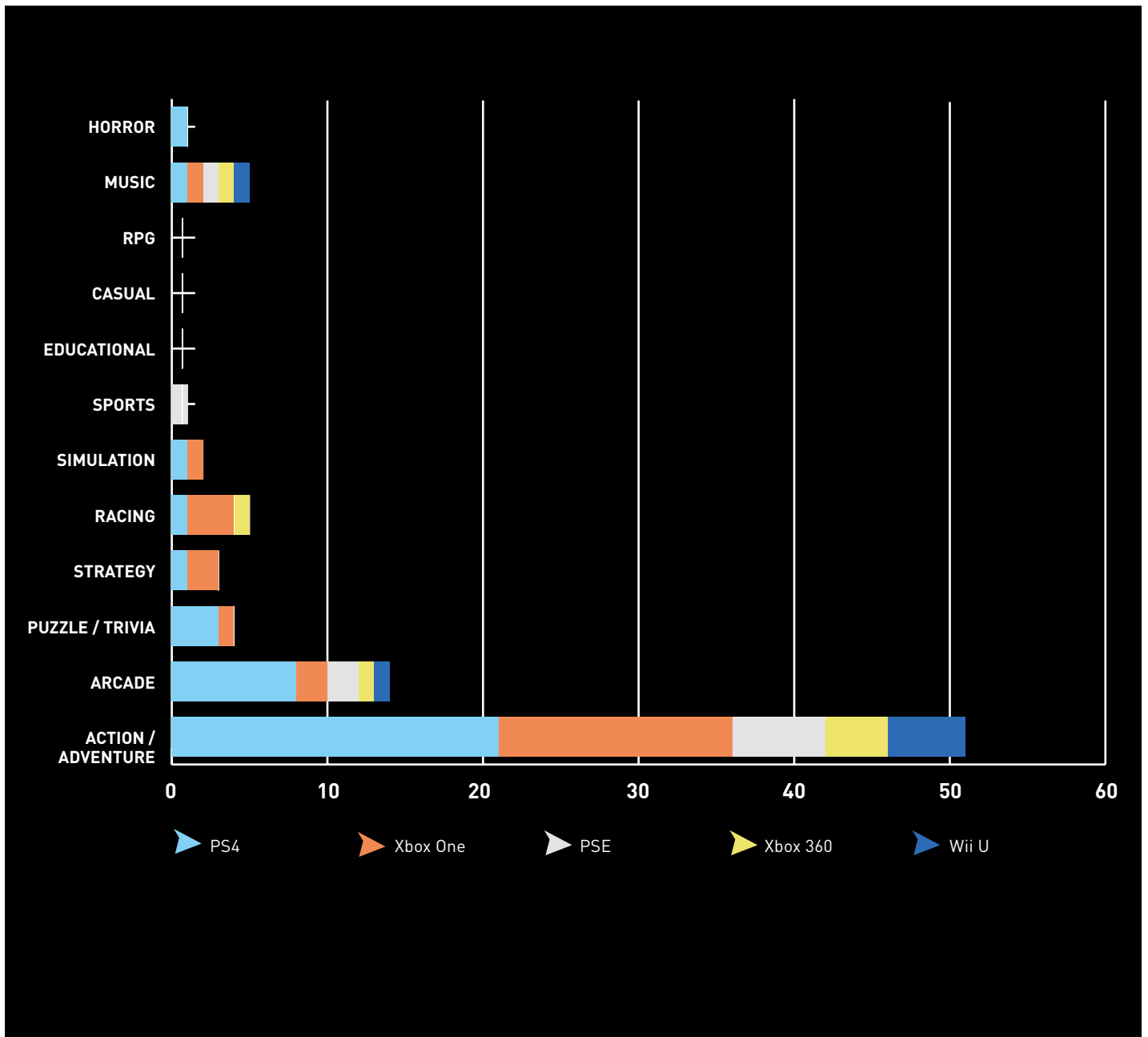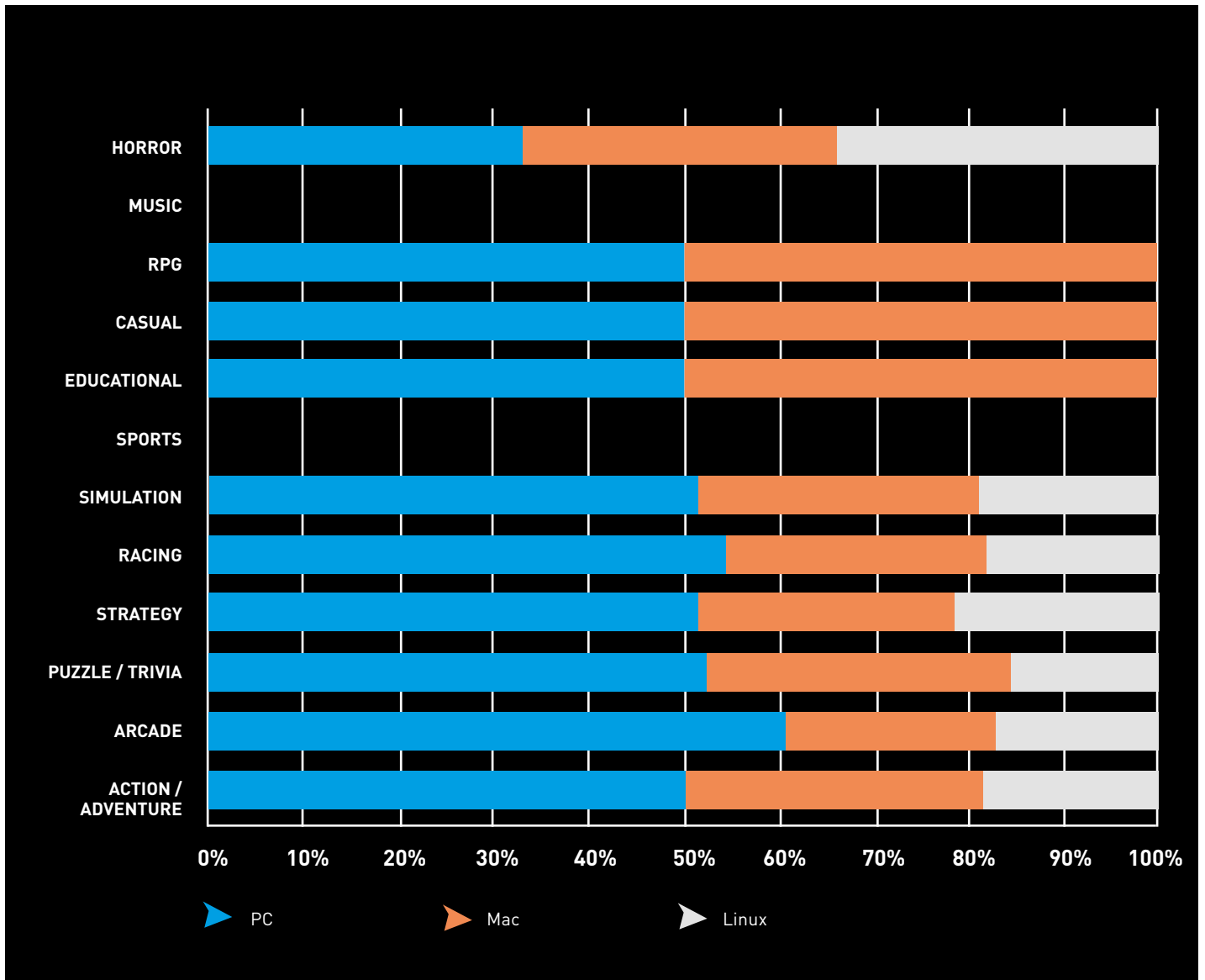
NUMBER OF DESKTOP RELEASES BY GENRE

Legend: PC, Mac, Linux
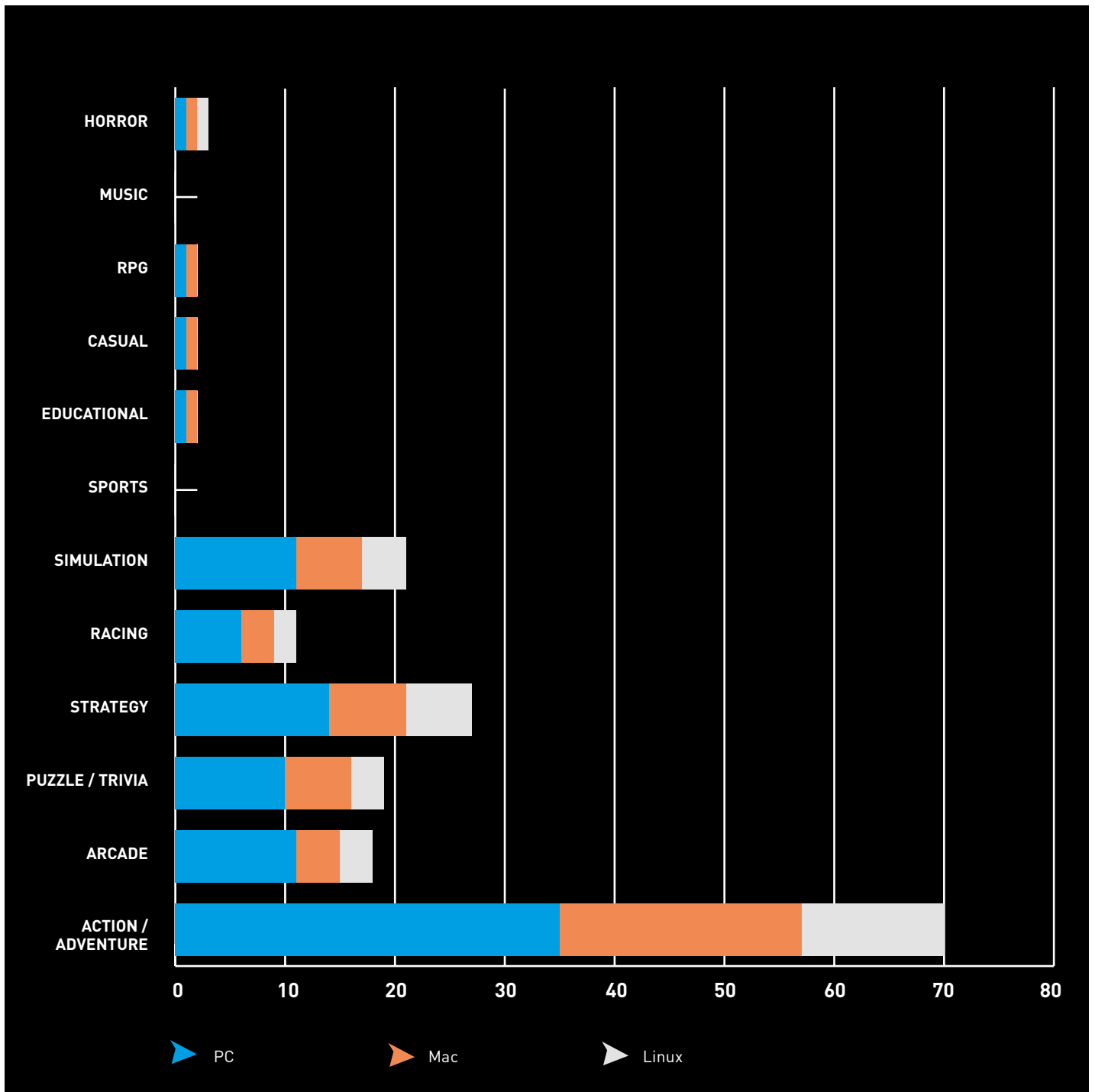
6.
EXAMPLES
FROM DIFFERENT
GENRES
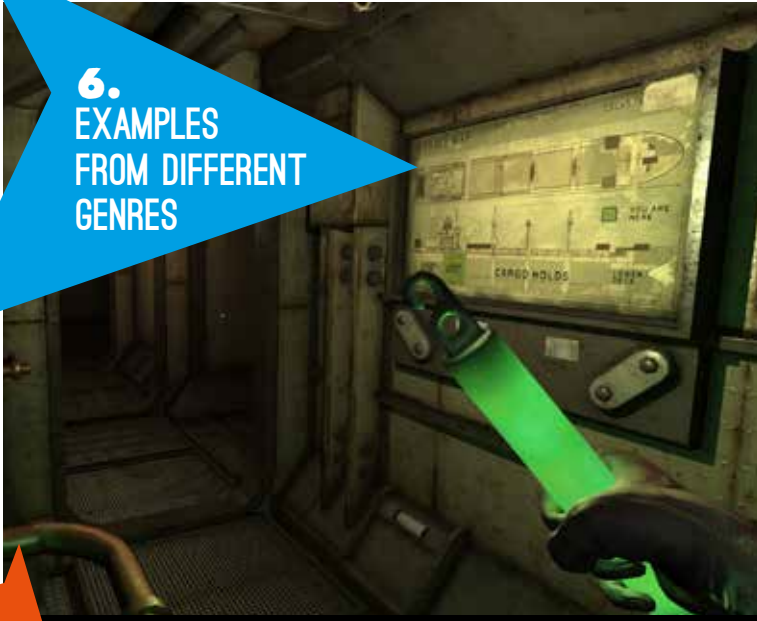
Junkfish Ltd

HORROR

Junkfish Ltd
Simon Doyle
Co-founder & Managing Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Since this was our first title I'm not really sure we can say that it does long term, originally it seemed a good fit due to the advantages stated below and the success several smaller teams had managed to achieve through it (Outlast, by Red Barrels, Amnesia, developed by Frictional Games, etc)."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"It is relatively easy to get free marketing from youtubers. Their audiences love watching them get scared, so covering the game is mutually beneficial. Horror games can if necessary be relatively simple functionally, the 'tricks' to scaring a person don't really require complex coding of AI, pathfinding, etc (although we chose to do those anyway!)."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"The market on PC is becoming saturated. We weren't the only ones to notice the success small teams could have in the horror genre. The market is actually quite small in comparison with the overall games market, fewer people enjoy being scared than enjoy being generally entertained, Age restrictions are also likely to apply cutting the market down even further (especially youtube crowd which can easily be under 16). It is my opinion horror games suffer from some of the same genre stigma as horror films in terms of awards / peer recognition."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"Our choice of platform (PC) was not really decided by genre, the simple fact is it was easier to distribute the game to a large audience on PC as steam was becoming more open (greenlight)."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"No."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Historically the only country I can think of with a real pedigree for creating horror games is Japan."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

- "5 - 15 man horror studios without pre-built audiences will not be able to remain profitable.

- Very small companies with less than 5 people will survive in an indie / experimental niche.

- Larger studios able to distinguish themselves through production quality and/ or marketing clout will come and go.

- If VR takes off, horror games will be one of the first to take full advantage of this new platform.

- Increase in 'choose-your-own-movie' style games like 'Until Dawn' which essentially present familiar horror movie characters/ trops in game form allowing players to choose who lives or dies."

TIGA™

Wired Productions

MUSIC

Wired Productions,
Leo Zullo, Managing Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Wired Productions have co-developed or produced over 20 different music games over the last few years, ranging from singing games to dancing games. We have successfully created an original IP with the We Sing franchise, and we have worked with leading brands like The Voice, which has culminated in having licensed close to 1,000 top hits, and has helped cement great relationships with all the record labels and publishers. We love it. We love music and we love games, so it is a great combination. A lot of our work is music research and licensing, video and audio editing, lyric editing, the overall look and feel, and all round production – age ratings, QA, localisation, submissions. We even we go as far as to create all publishing and marketing assets; it is the sort of work that suits us. We are not coders, and work closely with our long term partner studio Le Cortex, but we are good producers of music games. It is great to find a niche that you enjoy working in."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Music games generally fall in and out of fashion within the industry, but people love to sing, and people still love to play the guitar. So there is an evergreen market for them. To an extent the music genre is a specialist genre. Once you have identified your bespoke technical pipeline, your music production pipeline, and your specialised knowledge of music licensing, it becomes a good competitive advantage, and when you have a name for yourself in this field, there are plenty of partners that want music games."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"There are a few disadvantages of course. Music licensing can be expensive, it can be slow, and sometimes you can't license the songs you want. Format evolution is a big issue. Singing games are often a casual experience, and with the recent format changes and the death of the Wii, it can be difficult to know which console to back. The return on investment is tight if you don't have a product that can be sold in multiple territories and on multiple formats."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"Music is an every green genre. Whether you wish to play on the console with friends, or play on a table/mobile for a singular experience, if you choose the right music, the audience is ready to digest. We tailor our games to each format, but always look at getting the most premium of content."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Music is a huge part of UK culture. Wired Productions is at the forefront of new music, and generally our tastes are quite evolved, so this puts us in a great position of knowing what music is current. It also helps massively that all the record labels and publishers have main offices here, so those relations are hugely important."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The US has a great heritage of music games, possibly on a par with the UK and as such both are the leading countries. I'd also say that developers from France and Germany are renowned for their skills in the genre."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"I think the music genre is about to see another explosion of activity. The new generation of console formats now has a good install base; it is now possible to have large catalogues of content; mobiles and tablets now come with unlimited data streaming; and the rush to own the TV via one of the many types of set top boxes, well, there are lot of exciting opportunities. Music games as a service will be the way forward for the right products."

TIGA™

Kobojo

ROLE PLAYING GAMES

Kobojo
Chris Stamp, Studio Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"The studio was created with the genre in mind, so recruiting and other activities were focussed on this to the point where it suits Kobojo's Dundee studio very well."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"It's very creative work, appealing to game developers and fun to work on, and has a rich heritage of global titles and a very committed fan base. There are also some well-established game design standards to build on."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"The expectations are very high for a genre that the players take very seriously!"

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"It's a genre that has wide appeal across platforms, but establishing it on mobile where the audience is still typically more casual and play patterns are less well-suited to the more involved gameplay involved in the deeper RPGs, is still a work in progress."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"I wouldn't say so – the heritage comes more from other countries. The US for example, but particularly Japanese developers."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

See previous.

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"I think the major evolution will be around the free-to-play business model which is yet to sit comfortably with the more hardcore RPG gamers. No doubt a breakthrough will be made at some point involving a new way of applying the free-to-play model that now dominates mobile to this long-established premium/retail genre, or a free-to-play RPG compelling enough to overcome the resistance to the F2P model will emerge."

TIGA™

Rocket Rainbow

CASUAL GAMES

Rocket Rainbow
JP Vaughan, Co–founder

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Very well as we grew up in mobile and making games for J2ME portals which were predominantly casual."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Advantages are quick development cycles with broad appeal and a cash rich audience."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"Wide audience means it can be difficult to differentiate yourself as habits are formed and seldom broken. It is a very crowded market also."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"Mobile and tablet are usually used for gaming in short intervals which is good for a casual title. Cellular data connections mean more social experiences."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Yes."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Germany, US and Japan."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"More innovative game types that leverage geographical position and augmented reality."

TIGA™

Lockwood Publishing

CASUAL GAMES

Lockwood Publishing
Halli Bjornsson, CEO

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"It does very well as we re-built the team to make it work."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"There's a bigger market potential in casual than more specific genres which means potentially a bigger long term upside. We're appealing to a potentially wider audience essentially."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"There's lots of competition but you could say that about any genre."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"We're on mobile, Google Play, iOS and Amazon. Mobile has the biggest casual audience and is the fastest growing. Casual tends to be Free to Play and mobile is really the only platform that can support F2P given the numbers you need to support that."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"I don't think UK devs are naturally aligned to casual. It's not because they'd not be good at making them but more because they'd be more naturally inclined to do more hardcore games or games with deeper game-play like we see on console and PC where the heritage and interest lies."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The Scandinavians are pretty good in this genre. I think because for the most part their games industry was behind the UK and they had therefore mostly to skip console and go straight to mobile where they've got about 10-15 year lead. The UK is catching up in areas on mobile however where the games naturally evolve into more complex areas with higher production values like most games platforms have done in the past. Mobile will always be limited by memory, screensize and control methods so doesn't favour naturally high technical expertise or deep game-play to a certain extent. There's also more time available for short periods of game-play for more people and even consoles are hugely interrupted by social on mobile (Facebook, Instagram, messaging in general etc). Mobile is such a hugely disruptive platform because of its social aspect to games since at the end of the day then people are more interesting than games, especially to younger people. Casual is good because you can fit it in between doing stuff more easily than most other things."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"The main thing is that the market will get more and more saturated in casual with customer acquisition getting harder and harder for most. The main thing is the aspect of the game which relates to customer acquisition which can be designed into the game or attached. It's also likely that the market will be controlled by those who have got users already as they can cross promote within their own games, make a lot of small bets on new games as well as spend a lot of cash on marketing which keeps others out of the top. They also have strong relationships with the appstore owners, which ensures a certain amount of priority treatment. The games themselves probably won't change hugely apart from the cost of refining and developing the aspect of the game that relates to viral invites or customer acquisition. What I've discussed is in relation to what most casual games are like. I'd say that we're making a casual game with 'Avakin Life', although it's in a bit of a side category since it's difficult and expensive to make and relatively complex compared to most other casual games. I'd say it's casual because it's very light on the game side like many casual games. Some would say it's perhaps more of an RPG type game although it doesn't sit very well in there either as most RPGs have complex levelling and achievement systems and some gameplay most of the time. So it's a bit vague really!"

TIGA™

MEDEVAC on it's way back to base.

Sgt Sanders: Sir the local press have reached our position and a crowd has started to gather. I suggest we try to clear this up as quickly as possible.

Playgen

SIMULATION GAMES

Kam Star
Chief Play Officer, PlayGen

HOW DOES DEVELOPING A GAME FOR THIS GENRE (SIMULATION GAMES) SUIT YOUR STUDIO IN PARTICULAR?

"We love it – we need simulation games as well as 'entertainment only' games. Just as we need Hollywood, we need documentary makers - we are the documentary makers in the games space."

WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE (SIMULATION GAMES)?

"You give something back to the players: in particular, they learn and they grow."

WHAT ARE THE GENERAL DISADVANTAGES?

"It's difficult - you have to seriously invent a lot of new things. It's for those who want a real challenge."

ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE OF SIMULATION GAMES?

"Not particularly. Most specialists have disappeared or dropped the notion of games and just focus on the training/learning/simulation domain."

ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Well - there are quite a few European countries like the Netherlands.

France did an interesting thing where they piled in €m for this sort of game, some interesting stuff came out of it."

WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"The European commission has heavily invested in R&D in this space. PlayGen has also invested heavly in R&D funding to transform this space.

Our biggest flagship project is RAGE http://www.rageproject.eu/"

TIGA™

Fish in a Bottle

EDUCATIONAL GAMES

Fish in a Bottle
Drew Wilkins, Co–Founder
and Production Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

We've been developing educational games for over a decade and so we have an experienced team and good insight into what does and doesn't work educationally. We work with education advisors to help us to ensure we get the educational content spot on and our game development background ensures the educational content we produce is fun and engaging."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Games are a very powerful way to educate an audience and in many cases learning through play is more effective than more traditional teaching methods."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"It can be difficult to get the balance between educational content and fun right. If an educational game isn't fun then it won't matter how good the educational content is because no one will be playing it. However, you also need to be careful not to obfuscate the learning with gameplay and create a game which is fun but doesn't teach anything. Finding this balance takes experience."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"We don't really have a target platform. We develop for a range of platforms and the platform is normally determined by the audience we're trying to reach."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Yes, UK developers have a strong track record for delivering good quality educational games."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The US has a strong culture of developing educational games to support the curriculum over there."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"The quality of the games being delivered in this area will continue to improve and games will be tailored more towards the learners requirements, supporting the different learning styles. Mobile learning games will continue to be important, allowing learners to engage with the games on the move, and we'll also see virtual reality become important for delivering experiential learning experiences."

TIGA™

Distinctive Developments Ltd

SPORTS GAMES

Distinctive Developments Ltd
Nigel Little, CEO

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Distinctive has been developing sports games for mobile since 2002 when we started developing the mobile versions of 'FIFA Football' for Electronic Arts. The founders of the company came out of Krisalis Software which was very highly regarded for producing high quality sports related games such as 'Manchester United' and 'Soccer Kid'. We therefore have a large amount of knowledge and experience in producing this genre of game."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Sports games have a ready-made audience that are generally very passionate and much of their free time revolves around their favourite sport. They are therefore looking for games that extend their enjoyment of that sport beyond passive entertainment. Additionally, there are a large number of media channels aimed at sports fans that we can use to promote our games directly to our target audience. Finally, with the arrival of social media, we can license sports brands & personalities to help promote our games like we have with Patrick Kane, Gilbert and various European football clubs."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"The big publishers are also very active in the major sports, such as EA and Take-Two. It is therefore nearly impossible to compete directly with these publishers so you have to either focus on more niche sports or find creative game-play approaches that the big companies are not doing."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"We focus on mobile. Given the size and diversity of the mobile gaming market, this allows us to produce a very successful Rugby game ('Rugby Nations') as we can develop it on a modest budget and sell to a very large audience at a great price. On console, with its much more modest install base, it would be difficult to take the same approach and it is arguable whether a console Rugby game is financially viable. It also allows us to consider different approaches to sports games that address a more casual audience, an audience that just doesn't exist on PC/Console."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The UK has a good track record of producing good sports games, from 'Match Day' and 'Daley Thomson's Decathlon' through to 'Championship Manager' and 'Football Manager'. However, many of the major successful sports games of recent years are now produced overseas, exceptions are companies such as Sports Interactive, Full Fat, First Touch Games and ourselves, that continue to fly the flag for UK sports games developers."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The main two producing countries are US and Korea - mostly in the form of Baseball, Basketball, American Football, Extreme Sports and Fishing games."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"Sport fans around the world is a huge market made up of many different types of people, some with many years of gaming experience and others who have never picked up a game in their lives. As smartphones and tablets continue to make their way into to hands of all sports fans, they will demand different types of sports gaming experiences from very casual experiences to hardcore simulations. Additionally, sports and how that sport is perceived/enjoyed varies widely from country to country. Developers therefore need to have a much more international perspective when designing sports games for a global market, not just consider their own domestic experience of that sport. Therefore there is opportunity to re-imagine what a sport game actually is and produce experiences for people who have no inclination to spend the time or money on FIFA but want a more casual experience like what First Touch Games are doing with their 'Score Hero' game and like we are exploring with our more casual sports games we have in development."

TIGA™

Gateway Interactive

RACING GAMES

Gateway Interactive
Jenny Eckloff, Communications Manager

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"It's something that we are very passionate about, especially when we can add in other creative elements to the mix, like the chiptune soundtrack by Chipzel."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"It's very fun to make and we get to indulge our love of speed, fast paced gameplay and messing with physics. We like fast games."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"It's a narrow market place, your game is very niche and if you don't get it right then not many people will be interested."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"The control medium is so much more aligned to real time input which makes the racing genre perfect for the Xbox One."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"We think so yes. Some of the most popular racing games ('Forza', 'Project Cars', 'The Crew', 'Need for Speed'). All have British and UK based Studios working as part of the development team. Their popularity speaks for itself!"

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Yes there are many other companies from different parts of the world who are great at developing racing games. Companies from America, Sweden and France are also working on the same popular titles."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"There is lots of innovation that many companies are experimenting with at the moment when it comes to the racing genre of games, all about the hows and the whys to a simple concept of "cross the finish line". As for where it goes, we will just have to see!"

Space Ape

STRATEGY GAMES

Space Ape Games
Simon Hade, Co Founder and COO

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"At Space Ape we make games for gamers. The people playing RTS are very similar to us - they like playing hardcore games and used to play a lot, but now the pressures of time, family, jobs, etc. mean they no longer can. We can relate to them. We are them. We want to provide them with a high quality immersive experience whether they have five minutes or five hours. We found our way to this strategy after our first project, a sports app, didn't work out. We realised our mistake was not making something we felt passionate about. Our future games will sit in the overlap of what we like to play as gamers and what the market wants."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"This is a mature genre now, players know what to expect and there is a large install base of people who like these kinds of games and are looking for more. As the genre develops, players are looking for a better, more satisfying experience on mobile, deep community gameplay, competitions, etc. we understand that and, based on our own evolving experiences as gamers, we're continuing to innovate to meet this demand."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"It's very crowded. The top two companies are spending millions every day against same users with limited mobile inventory. This means it's very expensive to acquire users which puts pressure on upfront monetisation and differentiation - it's generally tough to make games under those conditions. For example the things that make 'Rival Kingdoms' special evolve deep into the game, so we need to make sure early play allows people to get in deep enough to experience them. As an independent developer we constantly have to innovate on marketing. It's very expensive and takes a lot of energy that we'd rather be putting into game innovation."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"It can offer up short and long play sessions. Players can spend a quick five minutes on a few battles - or play with their alliance in a 12 hour event on the weekend."

### 5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Just us!"

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"There's Supercell in Finland, but I wouldn't say this is a Finnish speciality. The top five games in this genre hail from Finland, China, US, UK and Australia. Generally as the genre matures the monetisation and community gameplay will be more and more inspired by the East, so I think teams with some Eastern leanings will do well. At Space Ape we have a Korean project manager, a Chinese server developer and an artist from Hong Kong. China is our second biggest market. We've already made good in-roads there which puts us in good standing. One of the advantages of being a London based company is the diversity in nationalities that we attract to our team."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"The genre is currently dominated by Supercell, there's no escaping that - they had a good game with great timing. In my opinion the best way to survive is to pick a niche and obsessively cater that audience. In our case it was hardcore players, the most competitive in the genre. Another effective strategy is to partner with a brand - this solves your user acquisition challenge of having the incumbents buy up all the marketing space because IP gets people in the door. Our next game in the genre is with one of the most well known brands in the world."

TIGA™
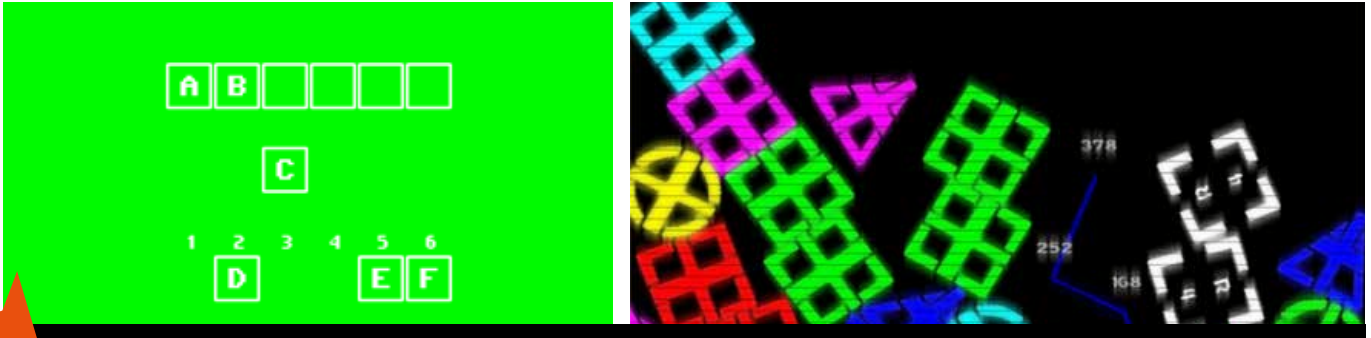
Gamepopper

PUZZLE/TRIVIA GAMES

Gamepopper
Tim Stoddard, Independent Game Developer

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"As a game developer who prefers to make quick and short games, puzzle games are a genre where the task becomes more possible. Other genres such as shooters and platformers tend to take a bit more time since they require more focus aspects like physics on the logic side that feel like core elements instead of expansive, while puzzle games tend to have basic concepts that are expandable with balancing and variety."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Fast prototyping is one advantage, and if a puzzle game is designed well enough, then basic graphics isn't even needed to test if the logic of the puzzle mechanics work. This makes it quicker to test what works and what doesn't in the pre-production and alpha phase, and allows for much more time to polish the game in later phases of game development. I find it's also a very straightforward genre to most people, as I have witnessed many gamers and non-gamers casually pick up and play puzzle games in much shorter time spans, which is probably from the simple control schemes and user interface that puzzle games often have."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"It's a pretty saturated genre in recent times, since being simple to develop and play also makes the turnover for puzzle games very quick. The simplicity also makes cloning much more prevalent, as the case of Threes/1024/2048 being widely considered the most infamous and largest case of video games being cloned and swarming the mobile market. This makes releasing a successful puzzle game a case of having a concept that is unique, pushing it out and hit the ground running to make your version the most popular. The only other option I've heard from other game developers is to not bother and try another genre."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"As said earlier, puzzle games are short, simple and easy to pick-up, which tends to be the key aspects of mobile and web games. Puzzle games are the kind that appeal to those who want to kill time in short bursts, instead of invest in long periods, so it often doesn't make sense to release them on PC or Consoles unless there is enough complexity and diversity to warrant that level of engagement."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Considering the success of King with the Candy Crush series and Fireproof Studios with The Room series, UK developers do have a strong footing in the genre, although there are a considerable number of competitors in the US. That being said, I think it's safe to say the UK does have a strong appeal over puzzle games as they require a lot of thought and sometimes strategy."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"As mentioned earlier, US is a huge competitor, although it would be wrong to ignore the more successful puzzle games that have come from Eastern Europe, such as Russia ('Tetris', 'Cut the Rope'), Finland ('Angry Birds') and Poland ('Phantasmat', 'Magic Match') to name a few."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"What I think will be inevitable is that the genre will wane in popularity until the next big craze comes along, as most of the big developers appear to be relying on the success of their franchises while the smaller developers try to make a name for themselves. Thanks to the rise of smarthphones and tablets, puzzle games have already found a place where they can gain the largest audience, however too many developers are trying to get parts of that audience by taking better ideas instead of innovating and trying new ideas, and possibly new control schemes. I would like to see some puzzle games on VR, as the free movement has the potential for new ways to solve puzzles."

Futurelab

TRADITIONAL ARCADE

Futurlab
James Marsden, Owner and Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"We're a small team with a clear focus on highly enjoyable and innovative moment to moment gameplay. Creating arcade games allows us to innovate freely without the financial risk associated with larger games."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"Arcade games are less reliant on high end graphics, open worlds or deep storytelling; all things that require a great deal of time and resourcing. As such we can focus on what really matters – gameplay - and reliably deliver award winning experiences."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"Appealing to the younger age bracket of between 7 and 18 is generally more difficult as these gamers tend to see arcade games as not worth their investment of time."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"It is our belief that action games are not suited to tablet or mobile because they require very high input intensity; something that tablet or mobile devices can't offer due to their touch-only interface."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Not particularly, no. I can only think of a handful of studios in the UK that are as proficient in this genre as FuturLab."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The US and Japan tend to produce the best arcade games."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"Arcade games are always focused on the moment to moment gameplay, and for that reason they will always have a place on new and emerging platforms provided the hardware has reliable input devices (buttons, sticks, keys). As graphical power of consoles, PCs and handheld devices continue to increase, arcade game producers can experiment more freely with highly expressive visual styles."

TIGA™

Naked Penguin Boy

TRADITIONAL ARCADE

Naked Penguin Boy
Rowan Heasley, Founding Partner

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Our studio has traditionally created games for brands and these all had specific budgets and timelines which aimed to engage users for a few minutes a day. Arcade games fit into this category perfectly, they are easy to pick up and play but the difficulty often increases quite quickly creating a challenge that requires users to return to the game again and again. All in all our studio is geared up for building games that take no longer than 6 months at the most to develop which is suits us perfectly as we are not stuck building one game for long periods of time which keeps us enthusiastic, motivated and creative."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"The main advantages are that we can build a number of games a year which adds more excitement in the studio and staves off boredom, it gives us more flexibility, we can stop the build for a few weeks while we jump on a client project and easily pick up where we left off. It also means we are not putting all our eggs in one basket hoping for the next big hit. Arcade games are popular in the app stores and with each new release we see an uplift in our other games so there is sure to be a long term benefit in specialising on one genre."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"The disadvantage of developing arcade games is that we probably won't build a game like 'Castle Clash' which has had a huge amount of development in it over a number of years and is very popular. We just don't have the internal structure or budgets to be able to put all our efforts into one big build but possibly one day we will be able to."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"Arcade games are very much a pick up and play game, there is a minimal learning curve and they are played across all ages which makes them popular with mobile users, they are perfect to while away the time when waiting for a train or bus or fill a few minutes of time in a queue. If you are interrupted you don't normally lose much in the way of game progress and so are suited best for mobiles."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Yes, studios like Miniclip & Nitrome have produced several great arcade games and the UK has always had that creativity and willingness to try something new. It's something to do with our culture I suspect, we are always exploring, testing, researching and playing with new things."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The US is obviously a good one for arcade games, but there's also been some great games coming out of studios like Jelly Button Games in Israel, Angry Mob from Romania & Ketchapp in France. Creativity comes in all forms and all over the world but it really shines when you get ambitious, creative, like minded individuals aligned in a team that produces something wonderful."

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"Every now and again we are going to get a new game that is going to explode and imitators will then take it and change it over and over again honing games to perfection. New controls will be used for old games giving them a strong point of difference and new technologies such as the Oculus Rift and Apple Watch will allow developers to explore new ways of creating arcade games."

Terra Tek Studios Ltd (trading as Payload Studios)

ACTION AND ADVENTURE

**Terra Tek Studios Ltd
(trading as Payload Studios)**
Vincent Scheurer, Director

1. HOW DOES DEVELOPING A GAME FOR THIS GENRE SUIT YOUR STUDIO IN PARTICULAR?

"Most of our team have already shipped action / adventure games on multiple platforms, so it is a genre we know very well. We also love playing them! We created our company to make games like TerraTech that we also enjoy playing. This makes the whole process of development and self-publishing much easier. In addition, the action / adventure genre is very popular on Steam, which is a fantastic first platform for a startup studio because of the PC "early access" community."

2. WHAT ARE THE GENERAL ADVANTAGES OF DEVELOPING A GAME IN THIS GENRE?

"We know that there is a strong market for action / adventure games, so we don't need to worry about whether the market exists or not – obviously this is a risk for totally new genres. As mentioned above, we also enjoy playing these kinds of games, so we know the genre well. This genre also allows us to work with lots of great gameplay concepts that our players are already very familiar with, including explosions, guns, missions, experience points and so on."

3. WHAT ARE THE GENERAL DISADVANTAGES?

"There is a lot of very strong competition! New games are released in the action / adventure all the time, and many of these are fantastic. We need to measure ourselves against these, and that is a constant challenge. In addition, it can be a bit harder to introduce new and distinctive elements in a genre which is already very well known, as these can jar with our audience's expectations unless they are introduced carefully."

4. WHY DOES THIS GENRE OF GAME IN PARTICULAR SUIT YOUR TARGET PLATFORM (I.E. PC, MOBILE/TABLET OR CONSOLE)?

"We are developing for the PC genre first, which is perfect for us as PC gamers are receptive to "Early Access" games, and provide fantastic support and encouragement (and lots of constructive criticism!) during development. In addition, PCs support many input types, in particular mouse/keyboard, which gives plenty of flexibility in an open/early-access development approach. This allows us more freedom in designing/honing controls for more restricted input methods, like touch & gamepad."

5. ARE UK DEVELOPERS PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"Obviously many of the greatest action/adventure games in history come from the UK, so there is a strong history of developing these games here, but the same can be said of many other countries."

6. ARE THERE ANY OTHER COUNTRIES THAT ARE PARTICULARLY GOOD AT DEVELOPING GAMES IN THIS GENRE?

"The genre is so broad that we can't pinpoint any particular country. All game developing countries will have some fantastic action / adventure studios. Our competitors are everywhere!"

7. WHAT DOES THE FUTURE HOLD FOR GAMES DEVELOPMENT IN THIS GENRE - HOW WILL THEY EVOLVE?

"I think we will continue to see a shift towards open, evolving development in this genre, especially on PC. It is easier to take the "Early Access" route with these kinds of games than, say, traditional, narrative-driven adventure games which are harder to release until they are absolutely finalised and locked down."

7.
CONCLUSION

2015 once again saw the action/adventure, traditional arcade and puzzle/trivia genres record the highest number of releases, representing a combined 57.89% of all games released this year.

24.21 per cent:
action/adventure games

18.42 per cent:
traditional arcade games

15.26 per cent:
puzzle/trivia games

42.11 per cent:
other

Futurelab