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Ukie Annual Review

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Our initiatives



askaboutgames askaboutgames.com



Digital Schoolhouse digitalschoolhouse.org.uk



Games London games.london



Ukie Students ukie.org.uk/student-membership



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foreword

Matt Hancock MP - Minister for Digital



As Minister of State for Digital my brief is wide and diverse, from online safety to the creative industries, and digital connectivity to skills and inclusion



I engage with some of the most innovative and advanced businesses in the country and see first-hand how they're playing their part in driving our economy.

I consider myself fortunate that the games industry falls in my portfolio. Our games sector boasts some quite extraordinary talent, working across a vast range of disciplines, and producing some of the most creative cultural output our country has to offer.

It has developed - and continues to develop - skills and innovations which now fuel our wider digital economy, from advances in virtual and augmented reality to the practical application of artificial intelligence.

Added to that, the industry employs some 23,000 people and, according to Ukie's UK Games Map, there are more

than 2000 games businesses across 20 distinct clusters - encompassing global giants and rapidly scaling start-ups - distributed through the UK.

The digital and creative industries are a priority for this government. In January we launched the Industrial Strategy Green Paper which set out our commitment to an early sector deal for all the creative industries, not least video games.

The deal aims to build on our areas of global excellence and help emerging sectors thrive, by supporting businesses to take the lead in transforming and growing their own industries. I look forward to seeing the games industry

play an important part in the sector deal and in ensuring it continues to drive growth in our economy. Of course we are now negotiating to leave the EU. Along with the undeniable challenges there also come new opportunities.

I know that Ukie members have highlighted concerns around talent and immigration, access to markets, crossborder data flows and cultural funding.

I look forward to continuing my work with Ukie and the wider games industry to make sure that, throughout and after our withdrawal from the EU, the UK remains the best place in the world to make and play video games.

chair's report

Noirin Carmody, COO Revolution Software



I am delighted to report that Ukie has never been in a stronger position to represent the voice of the UK's games and interactive entertainment industry



This year Ukie welcomed some of the best-known games names in the world to its already impressive membership, with Jagex, Riot Games, and Codemasters further amplifying Ukie's voice. We are delighted to have them on board.

Having this diverse membership greatly adds weight to what we say to government, meaning that we can better represent the sector and continue to be at the heart of so much that makes the UK a great place to make and sell games.

I am pleased to report that a fastgrowing, strong membership has also been matched by a solid financial performance in the last year, as the Ukie team have again worked incredibly hard to deliver a huge amount of activity, whilst reducing the overall operating costs.

Whilst there was a slight decrease in turnover (2%) in 2016/17, direct costs have decreased by 9% and overall

With a membership of over 360 of the country's innovative games businesses, including the brightest start-ups, well established studios, multinational publishers, esports companies and service businesses, Ukie represents the broadest range of the sector.

operational expenses have decreased by 2%. This has resulted in a positive position for Ukie of £98,517 and a total of £1,181,610 in reserves.

These reserves give us operational security in uncertain times and any surplus is reinvested in projects that benefit the sector (such as the UK Games Map) or contribute to the overall cost of running Ukie.

This year we will be reviewing our banking arrangements to improve the return on the reserve. A strong trade body is the sign of a strong UK games sector.

With an uncertain political and economic landscape, this cannot be taken for granted and Ukie will be doing everything it can to ensure the government understands the sector's needs around skills, immigration, funding and every other regulatory area that affects games businesses.

And this is of course not all that Ukie does: it runs a global trade and investment programme; provides a digital IP scanning and takedown service; launched Digital Schoolhouses around the country (with support from PlayStation); is a source of high quality industry research; and acts as the voice of the sector in the media and more.

This is all only possible through the support of our members, so thank you all.

We know that we need to work hard on your behalf, and the Board and the entire team are all committed to Ukie being your voice and providing the support to businesses that will help the UK to continue to be the best place in the world to make and sell games and interactive entertainment.



ceo's reportDr Jo Twist OBE, CEO Ukie

During a time of global political upheaval, a strong, steady, persuasive, evidenced-based voice of the industry is critical



Evidence is key to informing policy. Policy is key to the business environment that you operate in – at home and abroad.

Whether that be in ensuring the incredibly successful VGTR - which has seen a 115% increase in claims and £119m granted since 2014 to UK studios across 420 claims – continues, or helping businesses make the most of global business and investment opportunities, to identifying where we need to unlock more funding and support for games businesses and their products at local and global level, skills development, or simple introductions – your trade body is your trade buddy.

Over the last year, we have tried to balance your practical needs with the demands of the policy arena which will determine our future.

In September 2016, we were quick out the blocks with a positioning paper on what the key priorities, threats and opportunities were concerning the sector following the EU referendum.

We conducted an extensive UK-wide roadshow and online consultation to ensure we had the full representation of the industry's voice.

The resulting State of Play report was presented at a Parliamentary event and

Over the last 12 months, we have invested our income into ensuring that we have the most persuasive case to present to government as we look towards a new future with and beyond Europe.

was very well received as an excellent, detailed, evidence-based piece of work. Your voice as members and sector representatives is vital and we will be continuing this consultative process over the next 12 months through our newly formed Immigration & Talent working group, as well as via our other sub groups which are open to all members.

The Ukie team has worked across a broad range of industry groups and Councils, across sectors to ensure our needs are represented directly at the top table to Parliamentarians to inform what an Industrial Strategy fit for creative digital sectors like ours looks like.

Our international activity has gone from strength to strength. As well as record-breaking GDC and gamescom UK Industry stands, our programme of curated Trade Missions have generated £103m of business wins for UK companies.

The UK Games Map has grown in the last year to represent more than 2,150 active companies across the UK and has proved to be an effective lobbying and international promotion tool.

Our Games London programme, the centrepiece of which is the London Games Festival, is entering its third year. Since its launch in January 2016 Games

London has connected 145 games businesses in the UK with 109 global investors, driving over £30m potential business back into UK games companies. However, London Games Festival does more than that: it is successfully disrupting the cultural perception of games and is attracting more confident attention from cultural and arts institutions.

With more public, political and investor focus than ever on AR, VR and AI, we have the skills, experiences, and expertise through our blend of innovation and creativity to lead the world.

We will be there to remind the world that the potential of these innovations will only be realised if we invest in the skills and expertise that the games industry generates.

Ukie would be nothing without our members, but we cannot do what we do without my brilliant team who are ever more committed to doing the best job for you and our sector.

I would also like to thank my Chair, Noirin Carmody for her leadership, the enormous dedication she has to Ukie, and her support. I thank my fantastic Board too who have been so supportive of Ukie's mission on behalf of the sector their time and expertise is invaluable.





We are the official secretariat to the All Party Parliamentary Group (APPG) on Video Games, and have a programme of meetings and events to ensure policy makers are informed about our changing industry, new technology and new business models, and it helps us to keep our finger on the policy pulse.

Key workstreams

Over the winter we embarked on an ambitious member engagement programme to inform our **State of Play Brexit report**. Over 70 companies attended 11 roundtable events across the country with 75 additional businesses responding to our online survey.

The report highlighted continued access to talent, ease of trade and access to markets, establishing data adequacy and public funding as the key issues Brexit raises for the games industry, along with recommendations on how to tackle them

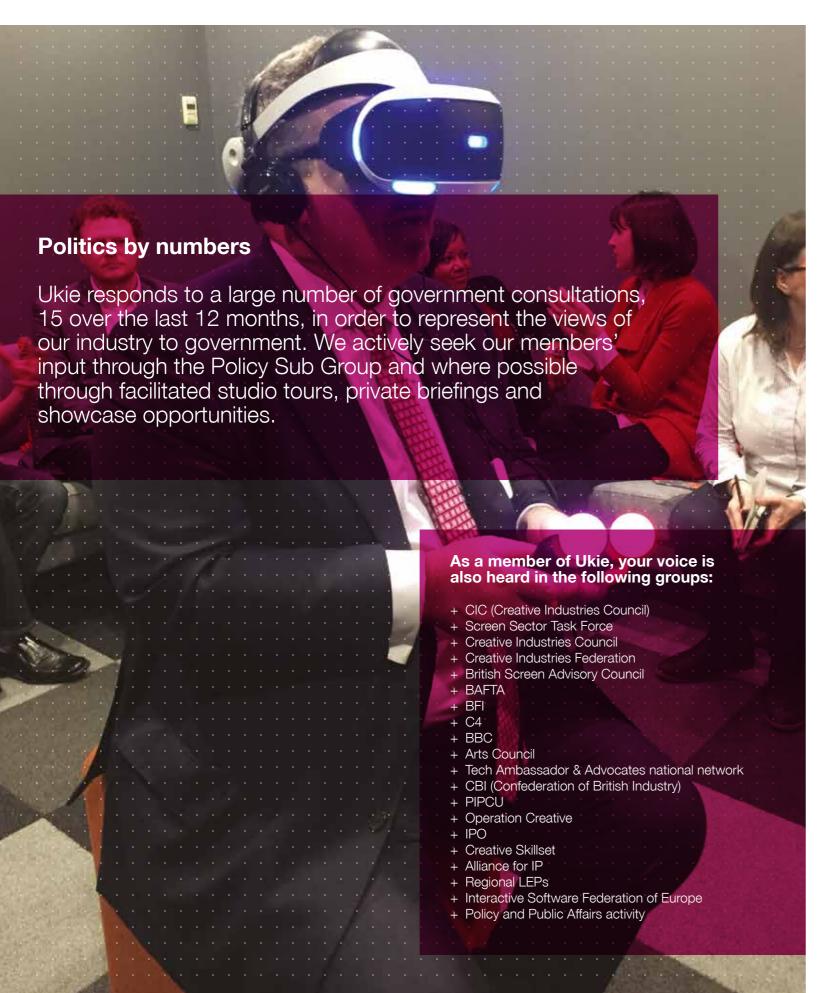
The report was launched at a parliamentary breakfast with parliamentarians and policy makers and followed up through one to one meetings with MPs. Ensuring MPs respond to the threat to access to talent remains one of our top priorities.

At the start of the year the games sector, along with the wider creative industries, were included in the **Government's Industrial Strategy** green paper. Ukie responded to the green paper in the spring and, as part of the **Creative Industries Council**, Ukie are now helping to develop a wider sector deal for the creative industries as well as submitting our own proposals to deliver our local blueprint for growth nationally, seek more public funding for games, expand the Digital Schoolhouse programme and secure a long-term trade deal for the sector.

In May we published our manifesto **Powering Up**, outlining our key policy issues for the new government. The context for this was established over the year, in particular through our work on Brexit and developing our position for the industrial strategy and contained 10 recommendations for the next parliament to ensure the UK remains the best place in the world to make and play games. We called on government to:

- **1.** Conduct a detailed forward-looking review of the nation's skills needs at the beginning of each Parliament
- 2. Work with the creative industries to develop an immigration system that keeps pace with the rapidly evolving specific skills needs
- **3.** Provide early assurance that EU citizens working in the UK prior to our departure from the EU in March 2019 will have the right to remain and work in the UK
- **4.** Post Brexit, ensure that our future trade agreements enshrine existing trade liberalisations and avoid future regulatory divergences
- **5.** Provide new funding as well as a clear remit to public agencies to support the coordinated development of the games industry
- **6.** Recognise the economic and cultural impact that the games industry has around the UK by developing local plans for scaling-up existing games clusters
- **7.** Establish a more coherent approach to export and inward investment strategy
- **8.** Allow flexibility within the apprenticeship levy funds to develop standards that work for the industry
- **9.** Prioritise obtaining a data adequacy decision from the EU as early as possible
- 10. Ensure that ambition for UK connectivity is set in the hundreds of megabits per second rather than the tens by 2025

a year in westminster and brussels



In the last 12 months Ukie has responded to the following consultations:

- + Apprenticeship Levy Funding
- + BFI 2022
- + Arts Council Review
- + Gambling Commission
- + DCMS Sectors Economic Estimates
- + House of Lords Internal Markets Sub-Committee inquiry into trade of services following Brexit
- + Culture, Media and Sport Committee Inquiry on the Impact of Brexit
- + Department for Exiting the EU Committee inquiry in to Brexit
- + Scottish STEM inquiry
- + Science and Technology Select Committee STEM skills gap review
- + Home Affairs immigration inquiry
- + Labour Industrial Strategy consultation
- + Building our Industrial Strategy green paper consultation
- + European Commission public Consultation on the Creative Europe Programme
- + House of Lords Artificial Intelligence inquiry
- + Migration Advisory Committee Call for Evidence: EEA-workers in the UK labour market

Our engagement with policy makers does not end with consultation responses. Throughout the year we run a comprehensive engagement programme with the key political influencers across Whitehall.

We have met with five ministers over the course of the year, including Matt Hancock, Minister for Digital, Brexit minister Robin Walker, Trade Minister Mark Garnier and Small Business and Industrial Strategy Minister Margot James.

Since September 2017 we have also met with over 20 MPs and a further six peers from across the political spectrum, educating them about the role the games industry plays in issues such as international trade, child online safety, data and computer science education.

We have also continued to facilitate briefings for our members with civil servants on changes to the immigration system, the apprenticeships levy, the Digital Content Directive and Geo-blocking Regulation.

In addition to these meetings we have organised studio tours for local MPs and ministers, giving our members the opportunity to showcase the innovative and creative technologies in the games industry and talk about the challenges and opportunities they face. Over the past year we have arranged four of these tours.

Europe

We continue to ensure the UK games and interactive entertainment industry's voice is heard on key European policy initiatives like the Digital Single Market. As well as representing our members through our European trade body the Interactive Software Federation of Europe (ISFE), we have met with UK civil servants to discuss forthcoming European legislation which will impact UK games business' operations following our departure from the EU.

We've met with UK civil servants to discuss the Audiovisual Media Services Directive (AVMSD), the European Commission's Free Flow of Data Initiative, Geo-blocking Regulation, Digital Content Directive, and ePrivacy Regulation.

This year, we also enjoyed taking part in ISFE's European Parliament Games Showcase which focused on the role of data in the games industry, and made the most of our time in Brussels to meet with British MEPs and their advisors, as well as representative from the UK Permanent Representative to the EU.

In light of our forthcoming departure from the EU, we have consistently been calling on government to ensure that there is no significant departure from existing EU rules on cross-border commerce, access to content, or data protection to ensure that UK-based companies can continue to seamlessly offer games directly to the whole European market.

Esports policy

Ukie represents most of the major stakeholders active in esports in the UK today including: esports event organisers ESL, Multiplay, Gfinity and EGL; developers and publishers such as Riot Games, Hi-Rez, Activision Blizzard and EA; teams and university leagues, Team Dignitas and the National Universities esports League; and organisations such as the British esports Association.

In November last year we launched our 2016 esports whitepaper: Growing the UK as an esports hub at an event at Gfinity's London Arena.

The whitepaper was written in consultation with the UK's esports community via Ukie's esports Sub Group, and made recommendations for how industry and government can work together to make the UK a global leader in esports.

Ukie has since then been developing new esports qualifications and expanding our Digital Schoolhouse esports competition to give over 1000 children from schools all over the country the chance to compete against each other and get a taste of the wide range of roles that make up esports.

And as the main point of contact for government policy and regulation relating to esports in the UK, we will continue to call for more support from government for esports in this country.

For more about Ukie's
Policy work please contact
Head of Policy & Public Affairs
tim@ukie.org.uk
Policy & Public Affairs Officer
marianna@ukie.org.uk
ukie.org.uk/government-and-policy

All of our consultation responses ukie.org.uk/policy-papers

research and analysis

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Research and data sit at the heart of Ukie's mission to make the UK the best place in the world to make and sell games



research and analysis



Our work with disabled gamers takes us all over the country and the UK Games Map is a great way for us to research and connect with the local games industry in the regions we visit

At nDreams, we've found the Games Map invaluable when speaking to young people who are keen to break into the games industry

Tamsin O'Luanaigh - nDreams

UK Games Map

Since its launch in September 2016, the UK Games Map gamesmap.uk - has proven to be an invaluable source of data about the UK games industry, providing an up-to-date snap-shot of the size and geography of the UK industry. Now one year old the map lists **2,175 games companies** currently operating in the UK, a 9.6% increase since launch.

The map combines a big data and crowdsourced approach to data gathering, pulling in additional data for established companies from across the internet, as well as allowing new businesses to register themselves directly. With a further 450 games companies listed in the map that are no longer trading, the UK Games Map currently contains a record of 2,625 UK-based games companies.

One thing that's immediately clear upon viewing the UK Games Map is that there are games companies wherever you go in the UK, however we also see the industry coalesce around a core of key hubs.

London remains host to the largest number of active games companies (592), but there are also significant games clusters in Manchester, Glasgow, Dundee, Edinburgh, Cardiff, Belfast Brighton, Guildford and Slough to name a few.

Interestingly, the highest densities of games businesses are seen in Dundee and Brighton, with one in every 250 businesses in the towns developing or publishing games, compared to around one in every 770 businesses in London.

As well as games business, the UK Games Map lists 231 games courses across 94 university and educational institutions nationwide and 149 "service" companies that don't develop or publish games, but still operate in the industry, including PR and legal services, charities, esports companies, technical services and middleware.

The UK Games Map provides the sector with a critical data set that we can feed into numerous projects, including for the upcoming Economic Valuation of the Screen Sectors report, in collaboration with the BFI. This data has also been used in our recommendations to update the government's SIC code system, as we can show that 51% of games business are registered without the right SIC, and therefore are not necessarily being counted in government economic data.

Throughout the last year, Ukie have delivered an ongoing program of updates, fixes and new features to the UK Games Map, which is planned to continue into the coming year. We will strive to maximise the effectiveness of this data and continue to build a UK Games Map that works for the industry, by the industry.

MEMBERSHIP GROWTH



DEVELOPERS – FROM MICRO TO **LARGE** ESTABLISHED STUDIOS

REPRESENTING ALL MAJOR FORMAT HOLDERS AND MULTI-NATIONAL PUBLISHERS

DELIVERING VALUE FOR Members

OVER **280** MEMBER **MEETINGS**

INDUSTRY **EVENTS** ORGANISED & PROMOTED

OVER **800** MANAGED



BUSINESS INTRODUCTIONS

650+ COMPANIES ATTENDED A UKIE BUSINESS SESSION OR SUB GROUP MEETING



THROUGH MEMBER **DISCOUNTS** ON **SERVICES** – INCLUDING DISCOUNTS ON GAMES TAX RELIEF ADVICE





UKIE HOT DESKS AND MEETING ROOMS INCLUDED FOR MEMBERS TO USE



LAST 12 MONTH STATS 3 0 ROOM BOOKINGS

£125k MARKET VALUE ROOM HIRE - SAVED BY MEMBERS USING OUR FREE SPACE

IP WEB SCANNING SERVICE TAKING DOWN 13,000 ILLEGAL DOWNLOAD LINKS EVERY MONTH. OVERALL OVER **250.000** LINKS REMOVED.



UK GAMES BUSINESSES EXHIBITED AT AN
OVERSEAS SHOW ON A
UKIE STAND



GRANTS DISTRIBUTED TO UK COMPANIES

-600

NEW CONTACTS MADE BY UK COMPANIES VIA THE **UKIE TRADE** PROGRAMME



PEOPLE VISITED A **UKIE STAND** AT AN OVERSEAS TRADE SHOW.



RECORD NUMBER OF UK EXHIBITORS ON A **UKIE** TRADE STAND, GAMESCOM 2017



WORTH OF **BUSINESS DEALS** DONE BY **UK BUSINESSES** ON OUR STANDS

WEBINARS AND INVESTMENT **DINNERS** ORGANISED TO SUPPORT **OVERSEAS TRADE**

POLITICS



GOVERNMENT RESPONSE & POLICY PAPERS PUBLISHED

PARLIAMENTARY MEETINGS

PROMOTION



PRESS RELEASES THIS YEAR



STORIES PUBLISHED ON **UKIE NEWS** BLOGS



UKIE FEATURED ON: THE GUARDIAN BBC RADIO 5 LIVE BBC RADIO 4 THE SUN, WIRED, THE METRO
THE EVENING STANDARD
BBC SWITCH



DIGITAL Schoolhouse

SINCE SEPTEMBER 2014...

GROWN FROM



DIGITAL SCHOOLHOUSES

REACHED OVER 62,000 CHILDREN

NUMBER OF **TEACHERS**

1700 SUPPORTED

NUMBER OF **UK SCHOOLS**

230

STUDENT MEMBERSHIP

2029 STUDENT MEMBERS

INSTITUTES



2 STUDENT CONFERENCES ATTRACTED OVER 400 ATTENDEES AND 30 TALKS

VIDEO GAME Ambassadors

300

REGISTERED **VGAS**

85

VGAS GAVE CAREERS ADVICE AT **EGX** AND **REZZED**





Local games cluster strategies

With the games industry clustered across the UK, it's increasingly important that games clusters receive local support. tailored to their own needs. We have continued to work with Local Authorities, Local Enterprise Partnerships (LEPs) and other local support networks and organisiation to shape strategies that will help grow the UK's games clusters.

Two years ago we successfully bid to the London LEP, with support from the GLA, for £1.2m to create Games London (in partnership with screen agency Film London).

The programme promotes London as one of the world's leading games destinations and provides opportunities for businesses all over the UK to showcase their work, get investor ready and get access to investors themselves. Since its launch in January 2016 Games London has connected 145 games businesses in the UK with 109 global investors, driving over £30m potential business back into UK games companies.

It also runs the London Games Festival. Over 50,000 people attended 40 different events across 20 different venues during the 2017 festival. The Festival has also established itself as a platform for global business in games with the Games Finance Market delivering nearly £20m potential business in April.

The London Games Festival will return in 2018, running from 5 April to 15 April. The 2018 festival aims to go even further with a wider programme of outdoor events and an even bigger offering for the games developer community.

Highlights for next year include:

- + The third Games Finance Market (Tuesday, 10 April to Thursday, 12 April) the only event of its kind in the UK, connecting 60 games studios with 60 global games investors
- + Now Play This, the festival of playful work and experimental game design at Somerset House
- + London's largest games event EGX Rezzed (Friday, 13 April to Sunday, 15 April), a showcase of PC and indie games, at Tobacco Dock
- + The BAFTA Games Awards on Thursday, 12 April at Troxy

The London Games Festival is also curating the brand new HUB event (Monday, 9 April and Tuesday, 10 April). HUB is a new two-day B2B event housing the Festival's summits, a demo zone for prototpyes and start-ups, a pop-up coworking space and gallery.

Growing the games industry in **Coventry and Warwickshire**

Following the success of Games London, we have been working with Coventry and Warwickshire LEP to shape a similar strategic plan for games businesses in the region, notably in and around Leamington Spa.

This new programme will operate for two years and will provide local games businesses with trade and investment missions, CPD training, investor-ready bootcamps and skills initiatives.

We are already working with several other major games clusters and will continue to roll out this approach, working with LEPs, Local Authorities, Combined Authorities and the government in Westminster to get more support for games businesses throughout the UK.

We will continue to lobby for more local support via the Industrial Strategy.

For more information on our International Trade Programme please contact Head of Commercial and Membership

sam@ukie.org.uk ukie.org.uk/international-trade-shows

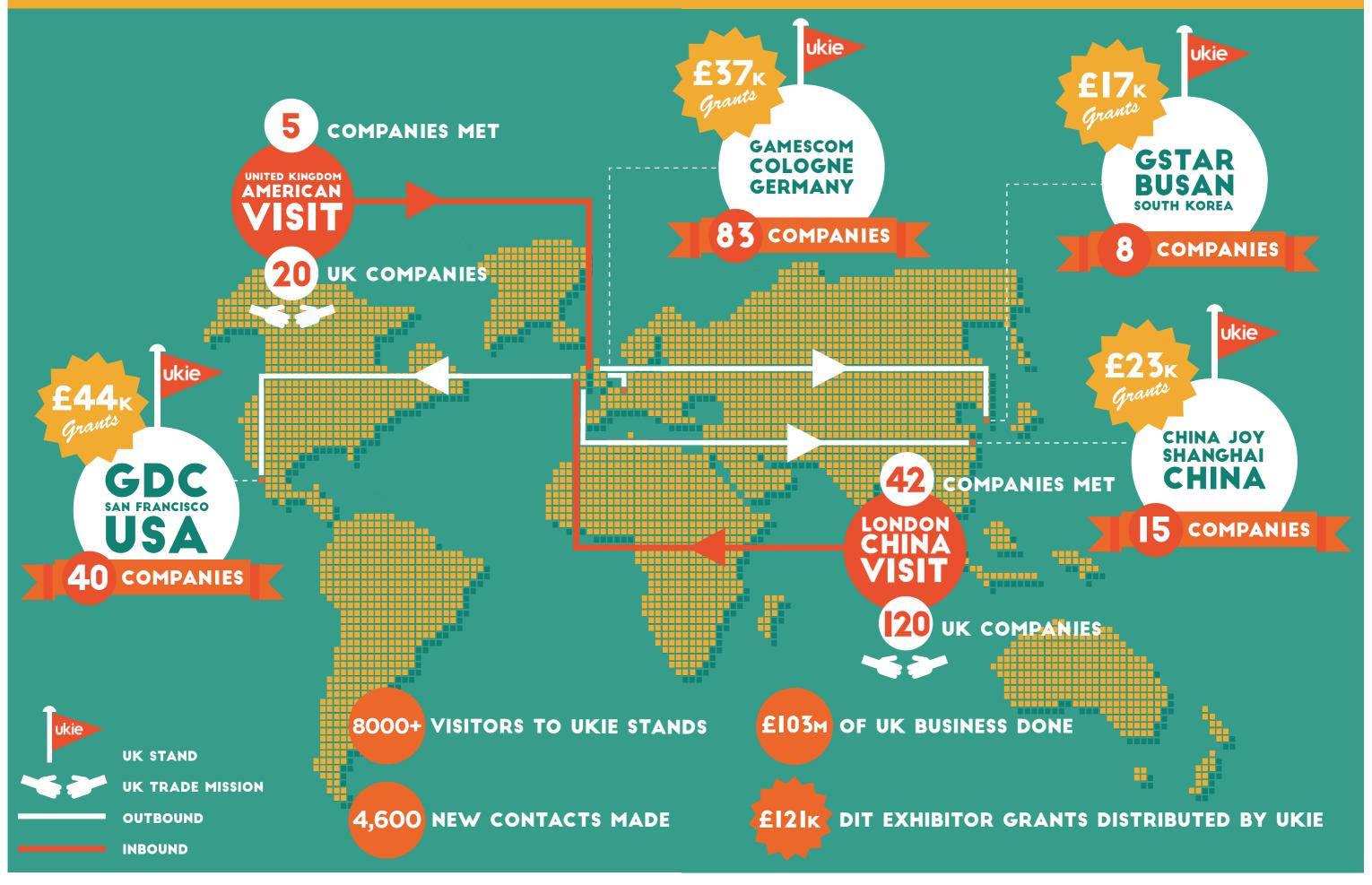
> For more information on our Clusters Programme please contact

For more information on Games London contact

Senior Games Programme Executive michael.french@games.london games.london



UKIE's GLOBAL TRADE PROGRAMME



the digital schoolhouse

powered by PlayStation

Our mission is to revolutionise computing education to inspire the next generation

Ukie's Digital Schoolhouse (DSH) programme, powered by PlayStation®, sponsored by SEGA & Warwickshire County Council, is a not-for-profit programme which uses play-based learning to engage pupils, whilst upskilling teachers to deliver the new computing curriculum. Our mission, to revolutionise computing education to inspire the next generation





Originally seed-funded by the GLA, DSH continues to gain momentum since its successful pilot in 2014. Thanks to lead partner **PlayStation®**, last year we launched a national programme of 20 Schoolhouses across England.

In 2017, we continue expansion by 50%, with 29+ Schoolhouses across the UK and Northern Ireland. Workshops are predicted to exceed last year's impact, with a projected reach of 15,000 pupils and 1,600+ teachers.

DSH is also proud to have on board its new supporters, **Sega** and **Warwickshire County Council**.

With their contributions, the programme will provide even more Schoolhouses with bursary funding, helping to alleviate the financial burdens faced with implementing creative computing.

Industry and education work together to develop new classroom resources; providing pupils with practical value to support subject content. This year has seen significant collaboration with BAFTA and the development of Young Games Designer resources.

New activities include: Gamebook
Computing and The Computational
Thinking Duck, using LEGO bricks.
DSH's successes are being more widely
recognised; this summer, presenting
at the WCCE 2017 in Dublin and at
TEDXMatera in Matera. DSH Director
and Head of Education, Ukie Shahneila
co-wrote "Hacking the Curriculum..."
with lan Livingstone, receiving great
reviews and critical success.

In addition, DSH achieved award finalist for the highly prestigious BETT 'ICT Innovator of the Year' Award 2017.

A new DSH pilot last year was the first ever schools-based esports tournament, with over 460+ students participating across England. This offered a unique blend of education and careers, engaging students by immersing them in world of esports.

The grand final was hosted by Gfinity as part of London Games Festival, with coverage from BBC Newsround, Waypoint, Vice and more.

The tournament saw a 16% rise of all students considering a possible career in the creative digital industries, with greater impact on over 16s: 87% reporting increased interest in studying computing/tech-related subjects.

Attendance also increased during the tournament; on average 13% rise at New College. Soft skills developed included: Team Working (58%) and meeting new people (46%).

Results clearly demonstrate how DSH can continue to use video gaming to equip the next generation and plug the digital skills gap. DSH can't grow without you. Together, we can revolutionise computing education.

To find out about Schoo
Adoption and wider collaboration
opportunities contact

shahneila@ukie.org:ul

ogramme Development Executive laura@ukie.org.uk

digitalschoolhouse.org:ul







Video Games Ambassadors

Our Video Game Ambassadors (VGAs) are industry volunteers who inspire a diversity of young people and career changers with tangible advice about getting started and making meaningful careers in the games industry. They visit schools, colleges and games events across the country to talk about the options available in the industry, the **STE(A)M agenda** and the skills needed to achieve a successful career in the sector.

The VGA programme has continued to grow from strength to strength over the last 12 months, with over **300 passionate industry experts** now volunteering their time at events throughout the year.

Diversity is always key to the VGA network, and they all have a wide range of backgrounds, skills and career paths which they share with thousands of young people or career changers across the country. 20% of the network are female, which is above industry average, and we are committed to raising this number in the coming year.

Speakers develop their own presentation skills and confidence too by presenting at the Ukie run Careers Bars at the biggest games expos in the country: at EGX in September 2016 and Rezzed in March 2017, which was the biggest Ukie Careers Bar to date, as part of London Games Festival, with over 85 VGAs volunteered across the weekends to give careers talks and one-to-one advice.

There is a huge range of activities that VGAs can get involved in throughout the year, including judging game jams, school scratch competitions and much more. Each activity can make a real difference in a young person's life and inspire the next generation of the UK games industry.

Student Membership

Ukie's Student Membership scheme bridges the gap between academia and industry, providing over 2000 students, from 23 of the country's leading games courses with unique contacts, opportunities, insight, resources, internships and industry discounts to bring them closer to their first job in games.

The 2016-17 academic year has been jam packed with activity starting off with the **Ukie Student Conference North** hosted at Staffordshire University in November which attracted over 200 students from across the UK to hear from a diverse range of professionals within the games industry. Students also received 1-2-1 advice on their portfolios, websites and interview techniques from recruitment specialists and Ukie member Amiqus.

The Ukie Student Conference proved so popular that we ran the Ukie Student Conference South for the first time this year, as part of the London Games Festival in April. This conference was a full day of talks with two tracks hosted at London South Bank University. It also had the very first Ukie Students Conference Expo with companies such as Creative Assembly, Barog Labs and others taking part. The conference also saw the return of the careers section this time hosted by Ukie members OPM Response.

May saw the return of the eagerly awaited annual **Ukie Student Game Jam**. Bigger and better than ever we had **21 teams** from across our membership compete to make the best game in under 48 hours in hopes of winning the coveted Ukie Student Game Jam trophy. The stakes were higher than ever with fantastic prizes donated by our membership including exclusive studio tours, developer meet and greets and of course lots of merchandise and games.

For more information on the VGA network contact
Community & Communications Officer sophie@ukie.org.uk or visit

To find out more about our
Student Membership contact
Business Development Executive
megan@ukie.org.uk
ukie.org.uk/student-membership









Askaboutgames

Ukie and the VSC Rating Board jointly run and fund askaboutgames.com, an online resource which contains a comprehensive range of advice about PEGI ratings, online safety, family friendly games advice, and parental controls.

Used by parents, carers, teachers, government, and industry partners alike, it is the go to place for anyone who has questions about children's online behaviour, as well as interesting relevant news pieces and tangible career advice.

In the last 12 months, askaboutgames has been featured in many mainstream articles, including references in The Sun and The Guardian and was also selected as one of the top places for parents to seek online safety advice by DCMS ahead of Christmas.

For 2017-18 we're excited to announce that the VSC Rating Board renewed their partnership and we undertake a brand refresh and relaunch of the askaboutgames site, which launched at EGX 2017.

Press

Ukie is here to fairly and accurately represent the UK games and interactive entertainment sector in the media. We are trusted to give honest representation of the sector in related news stories, as well as a trustworthy and robust source of industry data, and also act as a human shield for the industry and our members in times of crisis.

In the past 12 months, Ukie has been featured in multiple national publications as the voice of the industry, whether reacting to breaking news that affects our sector, or proactively producing positive press stories to champion the UK games market in the media.

Our press clippings in the past year number 209 and include stories in/on The Guardian, BBC Radio 5Live, BBC Radio 4, BBC Tech Tent, The Sun, Wired, The Metro, The Evening Standard and BBC Switch as well as the games press.

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In the last 12 months, askaboutgames has been featured in many mainstream articles

For more about educating parents & carers askaboutgames.com

View our latest press releases ukie.org.uk/press

For press enquiries contact
Community & Communications Officer
sophie@ukie.org.uk

making the most of your IP



Our IP Scanning service identifies where your games are being made available illegally and removes the infringing links. In the last nine months, the service has helped games businesses to protect over 400 of their titles, **removing over 300,000 infringing links** - 70% within 24 hours of being reported, with an overall 92% removal rate.

Monitoring 150 of the most popular sites multiple times a day the scanning service sends instant takedown notices ensuring that the download (and torrent) links have a limited life span.

This has resulted in 10 sites that were making games titles available illegally shutting down and a dozen more completely removing the pages where the download links were found.

It's not just the AAA titles that are infringed, the service finds links for small indie releases including mobile game titles. The greater the range and higher the volume of titles we protect will generate more results that will determine the scale of infringement and where we should focus our enforcement efforts.

We have been working with the **Police Intellectual Property Crime Unit** (PIPCU) submitting sites that make money from using others' IP illegally, which should appear on an Infringing Website List (IWL). PIPCU then seeks to stop the revenue streams going to these sites, severely impacting how they operate.

We are also working in other ways to protect your IP. With the support of the government we are looking to implement changes in how search engines work, that will demote or even remove results to infringing sites.

The goal is to replace 'bad' results with results to your website or partners so a player has the opportunity to buy a game legally. We have been working closely with the **National Cybercrime Unit** (NCCU) to gain a better understanding on how companies and games players are affected by cybercrime.

As a business owner you may have received suspicious emails pretending to be from a colleague requesting a large amount of funds be transferred into an unknown bank account. You won't be alone and by sending these emails to the NCCU the bank accounts are shut down and the criminals behind this activity are stopped.

The PREVENT campaign aims to raise awareness around cybercrime amongst young people so none of them inadvertently try to DDoS or hack a friend or family member which could lead onto more serious activity. So take advantage of the free scanning service and get involved to ensure your business is protected from cybercrime.

To find out how Ukie can help you contact
IP Coordinator
mo@ukie.org.uk



Ukie is a force to be reckoned with for the UK games industry. Passionate, informed, smart, focussed, driven and totally committed to the future success of the whole industry. Proud to be a member

As the sector evolves, Ukie shifts with it to maintain and improve the support services and functions we provide.

This includes access to networking and promotional events such as our increased presence at VR/AR and esports events in particular, with speaking opportunities and panels of experts supplied for key events.

Our Mixed Reality and esports Sub Groups are amongst our most proactive. Featuring the best industry experts, these groups have led both Ukie and industry thought leadership in key areas.

Events also continue to be an important tool for members to raise their profile.

Alongside our B2B trade programme,

Ukie has supported a series of UK B2C events with a strategic partnership with Ukie member, Payload Studios.

Payload delivers the distinctive **Tentacle Stand** at major consumer shows including Insomnia and EGX and Ukie has supported and promoted this great initiative as a gateway for members to reach consumers.

Market data and industry guides continue to help businesses drive forward, providing high quality information and analysis

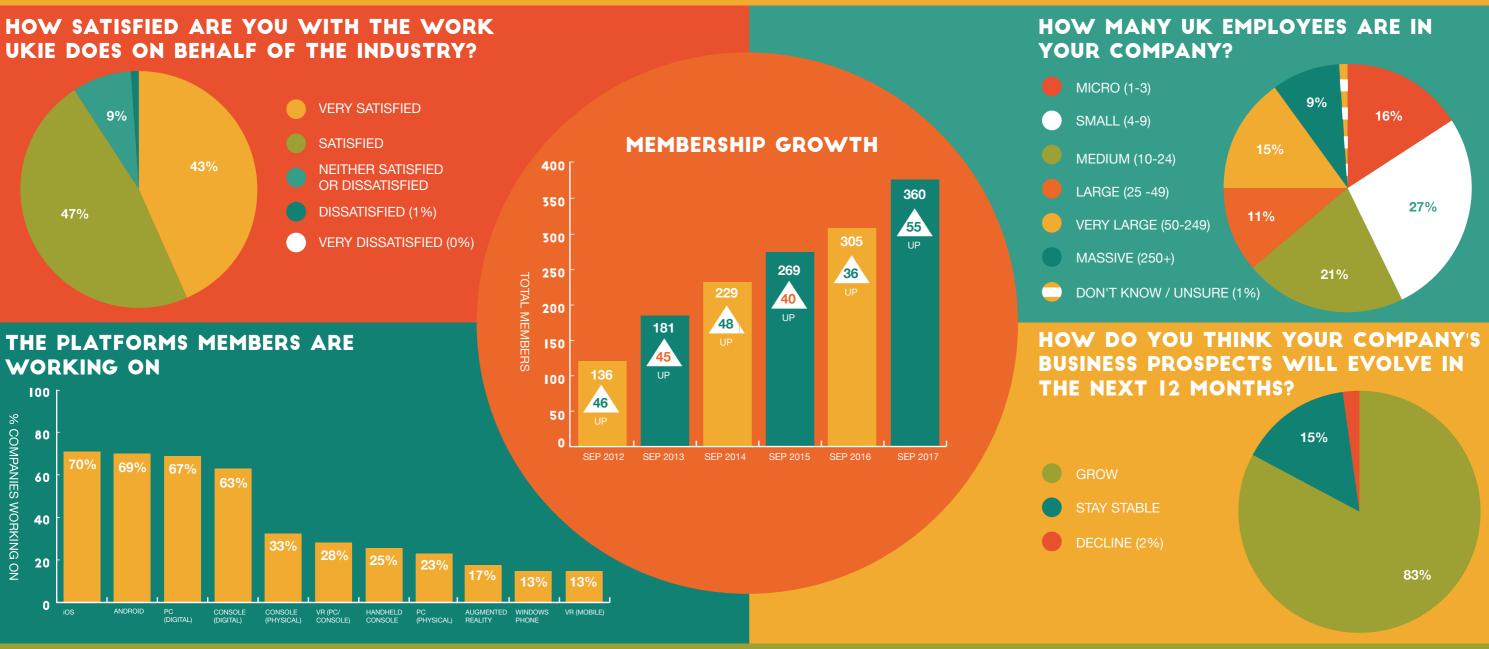
Ukie continues to offer market-leading data to help businesses with planning decisions and has added, via our Research Analyst Luke, a new level of data interpretation and insight.
Bespoke reports, commissioned by members, are now available.
Members continue to have access to the wide range of service discounts and event access for key events that Ukie membership offers.

Free tickets to games events worth over £70k were distributed to members with total exhibitor discounts at trade shows of £5k per company available.

Our Partner members continue to provide discounted and preferential rates on legal advice, currency transactions, R&D tax applications, Video Game Tax Relief applications amongst other key business services.

For more information on these services and any other membership activity please contact Head of Commercial & Membership sam@ukie.org.uk
Business Development Executive megan@ukie.org.uk
ukie.org.uk/reports
ukie.org.uk/support
ukie.org.uk/events-and-training
ukie.org.uk/international-trade-shows

WHAT OUR MEMBERS SAY



Ukie should be the model for all trade bodies. They are industrious, knowledgeable, a positive force and fair. We love every single one of them.

Ukie is a force to be reckoned with for the UK games industry. Passionate, informed, smart, focussed, driven and totally committed to the future success of the whole industry. Proud to be a member.

Ukie have helped our small three person team become a global player.

Ukie is, in my opinion, the main reason the games industry is taken seriously by the UK government.

The team at Ukie work tirelessly to promote the UK games industry on a local and international level...
The profile of the UK games industry as a global creative powerhouse is hugely advantaged by their constant drive.

Ukie have been a great help to me when I started my business. I would recommend that every new UK games business joins.

sub groups

One of the best ways to get involved is through our programme of special interest Sub Groups.

Our Sub Groups are Chaired by Ukie members and give games businesses the chance to discuss key issues that they are facing and work together at finding industry-wide solutions. Anyone from a Ukie member business can join a Sub Group so get in touch with the contacts below if you want to get involved.

Developer Group

The Developer Group exists to provide support to the needs of Ukie developer members.

Ukie contact - megan@ukie.org.uk

esports Group

The esports Group brings together leading esport event and service companies and content owners to identify opportunities and lead growth and expansion within the UK.

Ukie contact – sam@ukie.org.uk

Immigration and Talent Group

The Immigration and Talent Group looks at issues surrounding talent acquisition and immigration.

Ukie contact – marianna@ukie.org.uk

International Trade Group

The International Trade Group looks at how we can support UK companies with information and access to key overseas markets

Ukie contact – sam@ukie.org.uk

IP Group

Our IP Group meets to discuss latest IP related issues and shape Ukie's overall IP strategy.

Ukie contact – mo@ukie.org.uk

Mixed Reality Group

The VR & AR Group exists to provide support and identify opportunities and lead growth and expansion within the UK. Ukie contact – luke@ukie.org.uk

Policy Group

The Policy Group exists to lead member input on Ukie's policy and public affairs strategy, to advise on political issues, to assist with the preparation of consultation responses and other submissions to government, and to provide a focal point for all Ukie engagement with members on political issues. Ukie contact – marianna@ukie.org.uk

our staff



Dr Jo Twist OBE: CEC For all your questions jo@ukie.org.uk @Doctoe



Dan Wood: COO
For all your operational questions/ideas
daniel@ukie.org.uk
@DamolW



Sam Collins: Head of Membership and Commercial For all your membership and commercial questions/ideas sam@ukie.org.uk



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@UkieTim



Mo Ali: IP Coordinator
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@UkieSophie



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For all money, fees and invoice questions iudy@ukie.org.uk



Claire Macbeath: Team Assistant and PA
For all training questions/ideas and meeting request
claire@ukie.org.uk



Laura Martin: Programme
Development Executive, Digital Schoolhouse
For all your Digital Shooolhouse questions/ideas
laura@ukie.org.uk



Megan Rice; Business Development Executive For all your Commercial questions/ideas megan@ukie.org.uk @MegMgumi



Shahneila Saeed: Head of Education; Director, Digital Schoolhouse For all your Digital Schoolhouse questions/ideas shahneila@ukie.org.uk



David Smith; Member Services and Facilities Coordinate For all your meeting/event bookings at Ukie HQ david@ukie.org.uk @Dave74205



Alexa Turness: Events Manager
For all your events and expo questions/ideas
alexa@ukie.org.uk
@Ukie Lex



ukie.org.uk

21-27 Lamb's Conduit Street London, WC1N 3NL @uk_ie >> search Ukie on facebook f search Ukie on linkedIn in

our members

505 Games 50cc Games A Brave Plan Activision Blizzard UK Altered Gene Studios Amiqus ANDi Games Ansible PR & Communications Atomicom Autodesk BadLand Games UK Bandai Namco Games UK Barog Game Labs Bastion Bastion
Beijing Legend of Warrior Network
Beloudest
Bidstack
Bidstack Blazing Griffin bluegfx bluegfx
Boolean Technologies
Born Ready Games
Boss Mode
Bossa Studios
Brightrock Games
British Chamber of Commerce Korea
Ritish Engots Association British Esports Association British Esports Association
Brown Betty
Brunel University London
Bulkhead Interactive
Burke & Best
Cambridge Game Creators Network Cape Guy Carbon Digital Cardboard Sword
Casual Games Association
CCP Games
CE Europe Centresoft Channel 4 Television Charles Russell Speechlys LLP Cheetah Mobile Coatsink Code Kingdoms Codemasters
Connect 2 Media
Conspexit Game Studio Conspexit Game S Cooply Solutions Crash Lab Crayfish Creative Assembly Cubic Motion

Curve Digital Dakko Dakko Darbotron
Dashine Electronics
De Montfort University
deltaDNA Desk Dragons Interactive Diana Award
Dimoso
Dinglt TV
Dlala Studios
DNA
Dovetail Games
DR Studios
Draw & Code
Dream Harvest
F Champions Dream Harves
Champions
East2West
Eaton Smith
CommPay
Ediedo EGL
Ellectronic Arts
Endermol Shine UK
Endermol Shine UK
Escape Studios (Pearson College)
Escape Technology
ESL UK
EXCEL London
Evertis Gem

Fan Studio FC Business Intelligence

FengKuang First Touch Games Flamin Galah Fix interactive
Focus Multimedia
Foot Anstey
Freak Fandango
Freefly VR reejam reekStorm Funsolve
Fusebox Games
Future Games of London
FuturLab
GAME Retai
Game Wagon GameBench Game Grin Gamer Camp Studios Gamer Network Games Britannia Games London Games Aid Gamification Nation Genba Games Gfinity Ginx TV Glowmade Goldborough Studio Goldsmiths, University of London Good Catch Gram Games Gram Games
Green Man Gaming
Ground Shatter
Halo Financial
Hamlins LLP
Harbottle & Lewis LLP Hardlight Heaven Media Heaven Media
Hi-Rez Studios
Huddersfield University
Ian Hamilton Design & Consultancy
ICO Partners
Improbable Worlds
Incendium Games Indigo Pearl Innovation Birmingham Campus Innovation Birmingnam Campus Insert Coin International Games Developers Association Internet Advertising Bureau Ipsos Connect ISM Jayex
Johnny Atom Productions
Joyful Works
Kalypso Media Digital Kartridge Key Mailer KISS
Koch Media
KOEI TECMO EUROPE
Konami Digital Entertainment
Krotos Audio
Kuju Entertainment Kybele Studio Lab42
LeapFrog Enterprises, Inc
Legendary Games
Lick PR
Liquid Crimson
Little Big PR
Localize Direct Localize Direct London South Bank University London South Bank Lucid Games Lucky Voice Group Ludus Magnus Magic Notion Marvelous Europe Matata Corporation Maximum Games MCM Expo Group Mechabit Media Molecule Mediatonic

Mediatonic Mercia Fund Management

Merge Games

Middlesex University Mike Bithell Games

Milky Tea Mobile Free to Play Modern Dream Modern Dream Moov2 Multiplay (UK) Myriad Associates National Film & Television School NCSOFT Europe Nerd Monkeys Nescot NetEase Network N NewBay Media Europe Next Gen Skills Academy Nintendo UK Nordic Games Publishing Northern Ireland Screen
Norwich University College of the Arts
Nosebleed Interactive
Oculus VR
Omni Systems OMUK * OPM Response OPM Response
Opposable Games
Osborne Clark LLP
Outright Games
Pandabox Games
Paper Seven Pataphysics Payload Studios Payload Studios
Perpetual Europe
Piggyback Interactive
Pinewood Studios Group
Pixel Toys
Plan of Attack Plaver Research Playmob Playniac Limited Playrise Digital PlayStack Plus Accounting Pole to Win Europe Pollen VC Polygon&Pixel Polymath Aspire Polymath Aspire Pomegranate Group Premier Press Space Psytec Games Purewal & Partners Quantum Soup Studios Queen Mary College for Commercial Law R8 Games Rantmedia Games Rare
Raspberry Pi Foundation
Ravensbourne
Reality Games
Reflection.io
Renaissance PR
Replay Events
Retro Games

Revolution Software Revolution Softwan Rift Group Riot Games Ripstone Rising Star Games Robot Teddy

Hocket Lolly
Rogue Vector
Roll7
Rovio
Russells Solicitors
Saffrey Champness
Scary Puppies
Secret Sauce

Secret Sauce SEGA Europe Sheffield Hallam University Sheridans Silvertown Partnership

Six to Start Skara - The Blade Remains

Sketchbook Games
Skillsearch Games and Interactive
Slingshot Cartel
Soccer Manager

Rocabee Rocket Lolly

Solid Out Sales & Marketing Solihull College Sony DADC Sony Interactive Entertainment Europe Southampton Solent University Space Ape Games SpecialEffect Spit Milk Studios Spilt Milk Studios Spirit Al Spilash Damage Splendy Sports Interactive Square Enix SRS Investment Staffordshire University State of Play Games Steel Media Storienteer Strike Gamelabs Swallowtail Games Swipe Right Takeoff (Uk) Creative Services Take-Two Interactive Software Tangentix Target Media Team Dignitas Teeside University Teeside University
Testology
Testronic Labs
The Arts University College at
Bournemouth
The Chinese Room
The Games Tribe
The National University eSports The National Universit League The Secret Police The Tall Trees Games The Tiniest Shark The Trailer Farm Three Knots
TinyBuild
To Play For
Tower Studios
TSIT
TT Games
Two Tails
Libisoft Ubisoft
Ultrahaptics
Ultrahaptics
Unity Technologies
Universally Speaking
University Centre Grimsby, Institute of
Further & Higher Education
University of Abertay Dundee
University of Central Lancashire
University of Central Lancashire
University of Chester
University of Hull
University of Hull
University of Burrey
University of Surrey
University of Surrey
University of Westminster
University of Westminster
University of York University of York
Upload Agency
Upopian World of Sandwiches
Uzone Network Technologies
Venatas Media
Virtual Arts
Vision Games Publishing
Warchild Warner Bros. Interactive Warner Bros. Interactive Entertainment Warwickshire College Waterfront Entertainment We Heart Dragons Well Played Games West College Scotland Wibbu Wired Productions Wired Sussex Women in Games

Sold Out Sales & Marketing

360 members







Woodshires World Gaming Executives Xiotex Studios

ZeniMax Furone