review

Thank you to the Ukie Board 2014/15

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Mastertronic

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Vice President - UK, Ireland & Benelux
Activision Blizzard

Tom Stone
Managing Director
TT Games Publishing

Jo Twist
CEO
Ukie

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Our initiatives

askaboutgames
askaboutgames.com

Next Gen Skills
nextgenskills.com

Video Games Ambassadors
gamesambassadors.org.uk

Digital Schoolhouse
digitalschoolhouse.org.uk

Ukie Students
ukie.org.uk/student-membership

Cover and Infographic Art Direction
credit: Darren Garrett

Cover image
credit: Army of Trolls

foreword - rt hon john whittingdale MP

Secretary of State for Culture, Media and Sport

"

As last year's Ukie and Nesta Map of the UK Games Industry showed, the games sector is thriving all over the UK. This has hugely welcome implications for growth and jobs "

Video games are now firmly established as a major global industry – and the UK as a major player. They are also an important and exciting cultural phenomenon. The Government will do everything it can to

cement and build on this success. As last year's Ukie and Nesta Map of the UK Games Industry showed, the games sector is thriving all over the UK. This has hugely welcome implications for growth and jobs.

We are supporting all kinds of production, from mobile games made by the smallest of start-ups through to big budget, headline-grabbing AAA console games.

We have set an ambitious target to double exports. So I was delighted that 2015 saw the UK's biggest ever year at the gamescom show, with more than 50 companies exhibiting at the UK stand, run by Ukie.

Ukie has been working closely with UK Trade & Investment and others on a year-round programme of events and inward and outward missions. It is helping to show the world that the UK is a great place to make games and that we have some of the most talented and creative developers around.

UKTI's partnership with Ukie at the Games Developers Conference in San Francisco in March resulted in UK games companies winning £17.3 million worth of business.

In order to maintain our competitive edge we need a steady pipeline of people with the right skills. That requires government and industry to work together.

In March this year we announced a further £4 million in match-funding for Creative Skillset initiatives such as Trainee Finder, which is helping place new entrants from a diverse talent pool in games companies.

Some 100 employers are backing the Next Gen Skills Academy, which will be launched formally this September. It will support and bring on the next generation of games developers with new entry-level qualifications and apprenticeships.

A further £4 million over the next four years will support the production of video game prototypes and nurture design talent. And the Government's decision to include coding in the national curriculum will widen our talent pool further.

Games may be really good fun – but there is nothing trivial about them. Here's to another excellent year for the industry.

"

A further £4 million over the next four years will support the production of video games prototypes and nurture design talent "

chair's report - andy payne OBE

"

I am really pleased to report that we have successfully delivered against our plan which we set out three years ago "

In my tenth and sadly final year as Chair of Ukie, I am really pleased to report that we have successfully delivered against our plan which we set out three years ago. By way of a recap, the Ukie board of directors agreed to refocus the Ukie team to meet the changing needs of our membership and to attract new members to continue to reflect a wide and diverse games industry.

This plan included changing the structure of the membership fees and additional investment in new products and services. The board understood that this would be an investment in our collective future and we agreed to plan for operating losses in the first two years, namely £186,031 in 2012/13 and £107,310 in 2013/14.

"
I would also like to offer my personal thanks to the whole Ukie team Jo, Dan, Sam, Theo, Lex, Andy, Jenny, Judy, Sophie, Mo, Claire, Shahneila, Joseph, David and Regis. Your passion, commitment, attitude and pride in what you do for the industry is a credit to you all. I thank you from the bottom of my heart **"**

In line with our plan and through careful planning and strong management from our team, we have delivered an operating profit for 2014/15 of £152,425 which increases our balance sheet reserves to £987,908. Furthermore, our administration costs have been reduced from £1,192,879 to £912,367 thanks to improved financial planning and a reduction in exceptional items such as the cost of the move to the new offices. However, it is significant that a number of projects we have committed to were not able to be executed in full and those costs have been taken through to the 2015/2016 financial year.

This year income rose 18% to £1,454,883. Membership subscriptions increased, thanks to new members joining us, however income from other sources accounted for a record 30% of our total income. We will continue to diversify our revenue streams in order not to be reliant on membership subscriptions alone. This will deliver greater choice to our members with the option to access goods and services according to their own specific needs.

Ukie continues to reach out and respond to the needs of our members and deliver to their expectations. Our members are already seeing investment in key products and services around policy, intellectual property and international trade. There has been a significant reduction in financial support from UKTI for international trade events and Ukie will ensure that all future events are self-supporting.

This year also saw a significant change to our membership rules which ensured we continue to be fit for purpose and financially robust.

This was a six month project involving an outreach programme and much debate. This process culminated in an exciting EGM in March which saw the membership vote unanimously for the new membership model, demonstrating a consensus at all levels.

We also acquired the remaining shares in The London Video Games Festival Ltd and took control of ElGF Ltd. Ukie now has 100% of voting rights and shares in these two organisations, both of which will help our future events strategy, including our exciting plans for a major new London games initiative that will benefit the wider UK industry.

As you read this, I am very proud to report that Ukie is in an exceptionally robust financial position and continues to see its membership grow, currently standing at 269 members, up from 229 members this time last year, representing the full spectrum of companies active in the video game and interactive entertainment space.

I would like to sign off with special thanks on behalf of the board, the team and the membership to all Her Majesty's Government Ministers who have been supportive of the games industry in the past 12 months, including Ed Vaizey, Sajid Javid and Sir Vince Cable.

I would also like to offer my personal thanks to the whole Ukie team Jo, Dan, Sam, Theo, Lex, Andy, Jenny, Judy, Sophie, Mo, Claire, Shahneila, Joseph, David and Regis. Your passion, commitment, attitude and pride in what you do for the industry is a credit to you all. I thank you from the bottom of my heart.

ceo's vision

"

As the UK games industry continues to evolve and grow, so too does the trade body that only acts to promote and represent your interests

"

As a global sector, we are now estimated to be worth $113bn by 2018, with the mobile market expected to take a 39% share of that. At the end of this year, we will see the first consumer friendly VR headsets hit the market, and VR/AR combined is breathlessly expected to be a $150bn market by 2020.

Youtube and Twitch continue to compete for their share of the games hungry audience who love nothing better than to watch walkthroughs and broadcast their own game play, not to mention tuning in to watch professional players become stars and heroes.

We have seen 89 games (at the time of writing), of all budget sizes, across every platform receive their Video Games Tax Relief and we hope to see that grow year on year. We have a new but familiar government in place, and there are some new policy challenges emerging that we are seeing down the road.

To make sure our voice is heard we have invested heavily this year in a major Westminster Games Day culminating in our Westminster Reception to showcase and educate the new policy makers. We have also invested in two major policy reports that outline to decision makers what the sector needs and doesn't need.

Over the last couple of years, we have improved the data available about the UK sector and are building on this by investing jointly with Nesta in the next phase of the cluster map project, which we started last year. The intention has always been to take this online, to add new data sets, and to be a tool owned by and used by everyone in the sector, as well as to help policy makers locally and nationally see the size, shape and patterns of local growth.

My mantra over the last year has been to act locally, look globally. Local ecosystems and clusters of companies across the UK need practical support, but they also need access to funding and opportunities for them to reach their potential as digital exporters. We always try to ensure therefore that national and international policies support your ambitions.

This means our activities have ranged from helping to connect clusters with their local MPs, their Local Enterprise Partnerships, promoting their businesses and connecting them to local press coverage, to recruiting companies for UKTI funded trade missions to Gstar in Korea and China.

From a policy perspective it means ensuring companies can recruit highly skilled people from overseas while we fix the home-grown talent pipeline. It also means making sure interested companies get all the insight they need about markets, and have the chance to build those international partnerships.

Investment in people and their skills continues to be a critical part of sustaining the ecosystem for our industry. We remain committed to talent development from the earliest age, right through your careers, via the Digital Schoolhouse programme, our Student Membership, our VGA scheme, training and mentoring programmes.

This year has been one of bedding in some of the initiatives we introduced to serve you and the wider sector better. We also had one keen eye on ensuring we came out of deficit after three years as a small organisation and we achieved that, with a lot of hard work from the team to identify opportunities, working in partnership, and being entrepreneurial.

Our continuous professional development training programme, featuring courses delivered by accredited professionals, but modded to suit the needs of our sector, has been a welcome and much needed investment which has not only generated income for Ukie, but has also generated value for the entire sector.

We are now a truly diverse and representative trade network, with 45/55 female to male split in Ukie staff, and 25% women on the Ukie Board. We introduced some changes to our governance structure and our subscriptions to ensure we had a truly representative group, advocating the interests of big and small companies within our sector (we do not differentiate between publishers and developers anymore).

I thank all the Board for their continued passion and commitment to the sector through Ukie. But I would like to give a special huge thank you to Andy Payne who in 2015 stepped down as Chair of the Ukie Board. His passion, his investment of blood, sweat and tears into Ukie has been an inspiration to me.

Thank you also to my ever dedicated team - there are new faces but all are committed to working for you. They love games, and they love doing what they do for you. Finally, thank you, our members: by continuing as a member, you are supporting the sector and our ambition to make the UK the best place in the world to make and sell games.

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policy & public affairs
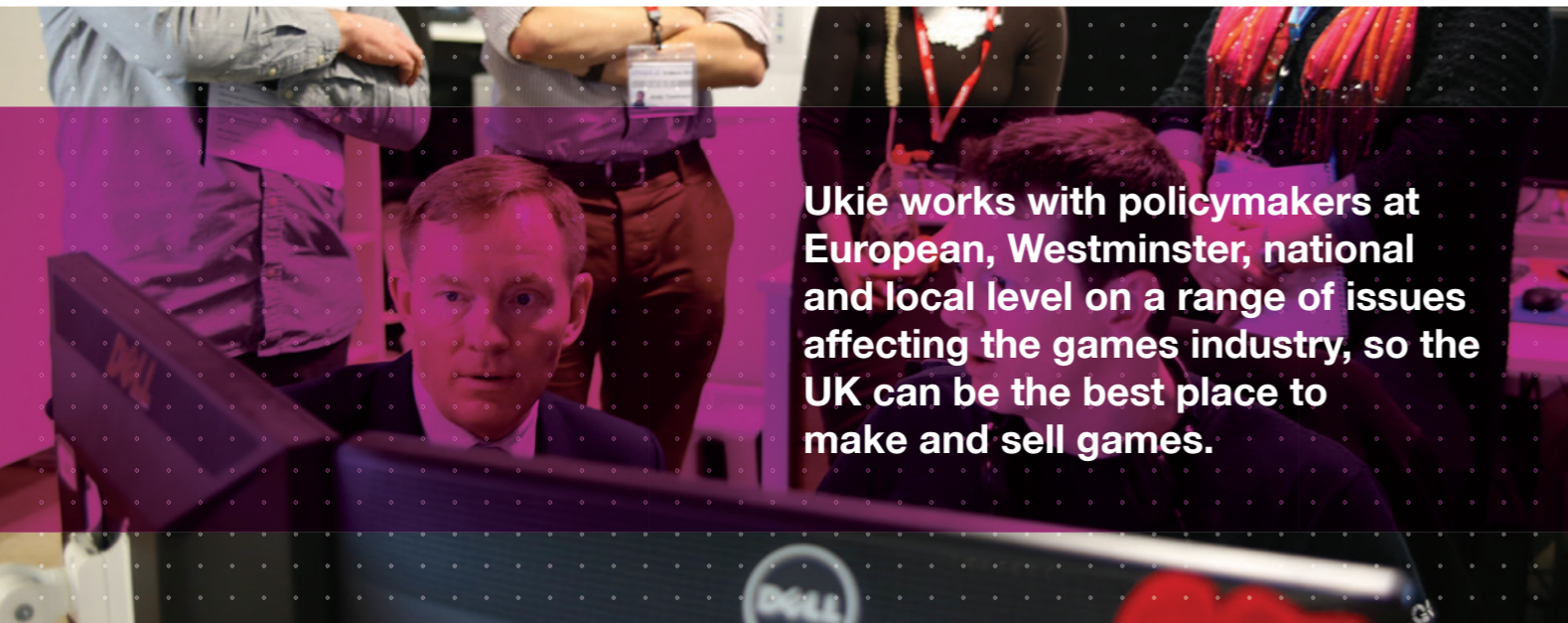
Ukie works with policymakers at European, Westminster, national and local level on a range of issues affecting the games industry, so the UK can be the best place to make and sell games.

Ukie's campaigning was crucial in securing a new Games Prototype Fund and more investment in skills for the sector in this year's budget. We also work to educate government about the innovative games sector and to stop unwanted regulation and make sure existing laws are applied sensibly.

Where existing legislation needs updating to reflect new digital business models and technology, we work with government to ensure consumers can have confidence, without companies facing unreasonable barriers.

The 2015 Election and the new Government

Ukie's Manifesto for the new Government was launched at the Westminster reception, sponsored by Ubisoft and Activision Blizzard, in September 2014. We had MPs from all parties attend and took the opportunity to outline what further public support the games sector needed to create content; a better platform for exports and inward investment; and support for talent development.

We re-established the All-Party Parliamentary Group (APPG) on Video Games, chaired by Chris White MP, immediately after the election. The APPG will play a major role in the first Westminster Parliamentary Games Day on 3rd November, where Ukie is organising a day of seminars and presentations culminating in an evening reception addressed by the Minister of State for the Digital Economy, the Rt. Hon. Ed Vaizey MP.

We have also been working closely with the APPG for Arts, Craft and Design in Education to raise awareness of our Digital Schoolhouse project in Parliament.

Over the last year Ukie represented member's views in 13 major official and political consultations, including the House of Lords Select Committee on Digital Skills, Migration Advisory Committee on tier two skilled visas, DCMS on their Digital Communications Infrastructure Strategy, and more.

Ukie held over 50 meetings with MPs, Ministers and Shadow Ministers and civil servants, including eight visits to games studios to show these decision-makers what it takes to make games and how our businesses work.

Future facing

Ukie leads industry efforts so that UK game developers and publishers' needs are understood by the new government, policymakers and the new cohort of MPs.

Ukie has commissioned a major independent study into the policy needs of the games industry over the next five years with recommendations that will focus on productivity, regional growth, skills and education, immigration and support for innovation.

European questions

With so much legislation now being affected by the EU, we're also increasingly active in Europe, working with games companies and with the European games trade body, ISFE, to ensure that the UK industry voice is heard. We're currently involved in issues like the Digital Single Market, to avoid the introduction of any unnecessary new regulations in areas such as consumer rights, geo-blocking and in-app purchases.

National and regional governments

As politics gets more devolved, Ukie works with decision-makers in Scotland, Wales, London and the other English regions to promote support for games companies. Ukie has been working closely with the Mayor of London and the London Enterprise Partnership on a range of initiatives to boost skills and inward investment. And we have engaged with select committees in the Scottish and UK Parliaments to help determine the future for Scotland's support agencies, including Creative Scotland and Scottish Enterprise.

Skills and education

Ukie's expertise over the past four years means that we're at the table during major discussions around technology and education reform.

Ukie sits on the UK Forum for Computing Education (UKFORCE), the advisory body on the new computing curriculum, and we contributed to the House of Lords report on UK Digital Skills, published earlier this year. In March, Ukie advised the London Enterprise Partnership on their £5m Digital Skills budget in a joint project with the Education Foundation think tank.

Coming next

Ukie has big plans for the next 12 months. We will be launching a major policy report in the autumn, as well as holding the first ever Westminster Parliamentary Games Day. This will be the biggest event the games industry has ever organised to reach out to politicians and help them understand our industry.

Consultation responses

+ Business, Innovation and Skills Committee inquiry on Government Support for Business
+ DCMS consultation on Digital Communications Infrastructure Strategy
+ ONS consultation on measuring the digital economy
+ Treasury consultation on tax-advantaged venture capital schemes
+ Competition and Markets Authority consultation on commercial use of consumer data
+ House of Lords Select Committee on UK Digital Skills
+ Labour Party independent Cole review of British Exports
+ Economy, Energy and Tourism Committee inquiry into Scotland's Creative Industriesl
+ Scottish Affairs Committee inquiry into Scotland's Creative Industries
+ Migration Advisory Committee review of salary thresholds for tier 2 visas
+ Migration Advisory Committee review of skilled migration system
+ Nominet consultation on contact data disclosure in the .uk WHOIS

Representing the UK games industry

Ukie represents member and wider industry interests on the following groups:

+ All-Party Political Group on Arts, Craft and Design in Education
+ All-Party Political Group on Video Games
+ Alliance for Intellectual Property
+ Bafta Learning & Events committee
+ British Screen Advisory Council (BSAC)
+ Computing at School Board
+ Creative Skillset Video Games Skills Council
+ Creative Industries Council (CIC)
+ CIC working groups on Access to Finance, IP, Skills, Infrastructure and International
+ EPSRC Centre for Doctoral Training in Intelligent Games and Game Intelligence Advisory Board
+ Interactive Software Federation of Europe Board (ISFE)
+ London Tech Ambassadors group
+ PEGI Board
+ Scottish Parliament Cross Party Group on Video Games Technology
+ UK Council for Child Internet Safety (UKCCIS)
+ UKCCIS Working Group on Parental Internet Filters and Overblocking
+ UKCCIS Working Group on Social Media Guidance
+ UK Digital Skills Taskforce
+ UK Forum for Computing Education
+ UK Trade and Investment Sector Advisory Group for the Creative Industries
+ UK Trade and Investment Sector Advisory Group for the Creative Industries working groups on International, Clusters and Alliances, Metrics, Inward Investment
+ Video Standards Council Board (VSC)

" we contributed to the House of Lords report on UK Digital Skills, published earlier this year "

+

For more about Ukie's Policy work contact andy@ukie.org.uk or visit ukie.org.uk/government-and-policy View all of our consultation responses ukie.org.uk/policy-papers

UKIE's GLOBAL TRADE PROGRAMME

£11k *Grants*

GAME CONNECTION
PARIS
FRANCE

20 COMPANIES

£30k *Grants*

GAMESCOM
COLOGNE
GERMANY

60 COMPANIES

£25k *Grants*

GSTAR
BUSAN
SOUTH KOREA

18 COMPANIES

£25k *Grants*

GDC
SAN FRANCISCO
USA

35 COMPANIES

AMERICAN
VISIT

30 COMPANIES

£20k *Grants*

CHINA JOY
SHANGHAI
CHINA

13 COMPANIES

CHINA
VISIT

25 COMPANIES

£103m OF BUSINESS DONE

£11k FUNDING FOR UK BUSINESSES TO ATTEND

UK STAND

UK FAMILIARISATION TRIP

OUTBOUND

INBOUND

changing perceptions

Educating, advocating and influencing policy makers, the media, other sectors and consumers, is one of our main roles as your trade body.

Together, we have a powerful voice and it is starting to make a difference in how we are perceived.

It is a constant job and we thank every member who has played their part.

> **we are keeping the industry and the wider world up to date with our progress in making the UK the best place in the world to make and sell games**

Responsible industry

Ukie represents the UK games industry in its role as a board member of the UK Council for Child Internet Safety (UKCCIS), where government, industry, law enforcement, academia and charities work in partnership to help keep children and young people safe online. As part of this role, we contribute and advise on the Council's aims. This year, members of our Marcomms and Community Sub Groups met with UKCCIS to input into their upcoming guidance on Social Media practices, and also advised on the potential negative impact parental filters will have on games.

Educating parents and carers

We fund and run askaboutgames.com in partnership with PEGI and the Game Rating Authority as a place to help parents, children and families make the most out of the games that they play. The online community is designed to help people make informed choices about what games to buy for children and play as families.

Not only does it have practical advice for keeping children safe online, with guidance on everything from PEGI ratings to child online safety advice, it also features regular positive news about the games sector. This includes research into the benefits of playing games, promoting games in education, and highlighting exciting career options in the sector.

Askaboutgames will once again be featured at EGX in 2015, after the success of the stand at last year's expo. Families can ask their gaming questions to the askaboutgames team, including Gamer Dad Andy Robertson, and the GRA team.

Managing the media

Ukie is here to give a fair and honest representation of the UK games and interactive entertainment industry in the media. In the past 12 months, Ukie has been featured in multiple national publications as the voice of the industry, whether this is reacting to breaking news that affects our sector or producing positive press to champion the UK games market in the media.

Our press clippings in the past year number 221 and include:

TV: BBC Business News, Sky News, Channel 5, CCTV News Interview (China),

Editorial: The Guardian Small Business Network, The Times Creative Industries series, The Telegraph Tech, The Guardian Unicef Partner Zone, Yahoo News.

Radio: BBC Newsbeat, Today Programme, Digital Jam Podcast

We also react to breaking industry news and report on the latest trends by producing our own news content for our members. In the past 12 months we have produced 163 blog posts and opinion pieces, and put out 27 press releases to ensure that we are keeping the industry and the wider world up to date with our progress in making the UK the best place in the world to make and sell games.

+
For more To find out more about educating parents and carers visit
askaboutgames.com
+
To view our latest press releases visit
ukie.org.uk/press
+
For press enquiries contact
sophie@ukie.org.uk
ukie.org.uk/forum

UKIE's YEAR IN NUMBERS

MEMBERSHIP GROWTH

42 — MEMBERS SEP 2010
90 — 48 UP — MEMBERS SEP 2011
136 — 46 UP — MEMBERS SEP 2012
181 — 45 UP — MEMBERS SEP 2013
229 — 48 UP — MEMBERS SEP 2014
269 — 40 UP — MEMBERS SEP 2015

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

REPRESENTING ALL **MAJOR FORMAT HOLDERS** AND **MULTI-NATIONAL PUBLISHERS**

OVERSEAS TRADE

TOOK **BIGGEST** EVER UK INDUSTRY STAND TO **GAMESCOM 2015**

60 BUSINESSES

SAVED UK BUSINESSES **£111k**

WITH EXHIBITOR **GRANTS** FOR **CHINA JOY**, **GAME CONNECTION**, **GAMESCOM**, **GDC** AND **GSTAR**

103M (BIG UP FROM £60M LAST YEAR) WORTH OF **BUSINESS DEALS** DONE BY UK BUSINESSES ON OUR **STANDS**

7100+ PEOPLE VISITING OUR STANDS AT **GAME CONNECTION**, **GDC SAN FRANCISCO** AND **GAMESCOM**

WEBINARS ORGANISED TO SUPPORT **OVERSEAS TRADE**

DELIVERING VALUE FOR *Members*

OVER **200** MEMBER **MEETINGS**

22 INDUSTRY **EVENTS** ORGANISED IN PAST YEAR

ARRANGED **HUNDREDS** OF **1-2-1** INTRODUCTIONS

525 COMPANIES ATTENDED A UKIE **BUSINESS SESSION**

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

£££ saved ON **MARKET DATA**

180k IN **FREE EVENT PASSES** *all areas*

ukie HOT DESKS AND MEETING ROOMS *Free* FOR **MEMBERS** TO USE

LAST 12 MONTH STATS **209** ROOM **BOOKINGS**

£99k MARKET **VALUE** ROOM HIRE - **SAVED** BY MEMBERS USING OUR **FREE SPACE**

RAN **32** TRAINING **COURSES** COVERING **9** **TOPICS**, TRAINING A TOTAL OF **386** **PEOPLE**

POLITICS

34 MP MEETINGS

13 GOVERNMENT RESPONSE & POLICY PAPERS PUBLISHED

PROMOTION

27 PRESS RELEASES THIS YEAR

221! ukie STORIES PUBLISHED

RADIO & TV INTERVIEWS

askaboutgames.com **11,000** VISITS A MONTH

DIGITAL *Schoolhouse*

NUMBER OF **TEACHERS** SUPPORTED **OVER 460**

NUMBER OF **PUPILS** REACHED **5516**

NUMBER OF **SCHOOLS** **78**

STUDENT MEMBERSHIP

OVER **1000** **STUDENT** MEMBERS **15** INSTITUTES

STUDENT CONFERENCE ATTRACTED **270** ATTENDEES AND **20** SPEAKERS

VIDEO GAME *Ambassadors*

250 REGISTERED VGAS

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

VGA

bridging the education gap

Ukie's Student Membership bridges the gap between academia and industry.

"

we have run 32 training courses covering nine topics, training a total of 386 people and the feedback that we have had speaks for itself **"**

Supporting games students

Ukie's Student Membership bridges the gap between academia and industry, providing students with unique networking opportunities, internships, placements, discounts and resources to bring them closer to their first job in games.

The most recent academic year kicked off in October with the inaugural Student & Indie Games Conference at Staffordshire University, which had over 270 attendees and 20 speakers from across the industry.

During the course of the year we have provided seven data sheets covering topics such as the economic value of games, diversity, and the size of the UK games industry. We have posted 30+ internships, hosted a webinar on games art and careers, and provided discounted tickets to EGX, Rezzed, the Women in Games Conference and Pocket Gamer Connects: Helsinki.

In March, Ukie Students were delighted to partner with NextGen Skills Academy, who have been providing invaluable resources and support for the scheme.

In May, Square Enix Collective and NextGen Skills Academy supported our largest Annual Ukie Student Game Jam yet, with 14 teams competing to create a game around the theme of "identity crisis". Goldsmiths University snatched the trophy for the second year in a row.

We are thrilled to continue to be partnered with the IGDA, who offer Ukie Students a year's membership of the IGDA. And over the last year we have had 15 institutes registered with over 1000 active student members. As we approach the third year of teh scheme, we look forward to growing the membership even more, and continuing to provide exciting opportunities for the UK's emerging talent.

Never stop learning

We recognise that in a fast changing industry, you can never sit still and stop learning. We are committed to giving all UK games businesses access to the best training opportunities at market leading prices (with further discounts for Ukie members). Since 2014, we have run 32 training courses covering nine topics, training a total of 386 people and the feedback that we have had speaks for itself with a 91% rating the course good or very good.

In 2015, we launched a brand new calendar of training courses in partnership with the Chartered Institute of Marketing (CIM) and legal experts Osborne Clarke. These courses have been designed with input from our members, specifically with games businesses in mind, and are relevant for developer and publisher businesses of all sizes. All courses can be offered in-house, and last year we ran nine bespoke single-company training days.

Mentoring

We continue to partner with Nesta on the Creative Business Mentor Network, which helps to advise and nurture games companies with an appetite for growth by pairing them up with well-established key industry leaders. Businesses who join the network receive one-to-one mentoring, workshops and events designed to meet other members in the wider network and coaching support throughout the course of the year.

Training courses
Our games training programme currently includes:

+ Digital Marketing for Games levels 1, 2 and 3
+ Digital Metrics and Analytics
+ Introduction to PR Strategy and Planning Campaigns
+ Legal Essentials for Games Companies
+ Marketing and Sales Forecasting
+ Marketing Metrics and ROI
+ Media Training for Games Industry Professionals
+ Project Management for Games Businesses
+ SCRUM Project Management for Games Businesses

+
To find out more about our
student membership contact
jenny@ukie.org.uk
+
To find out more about our
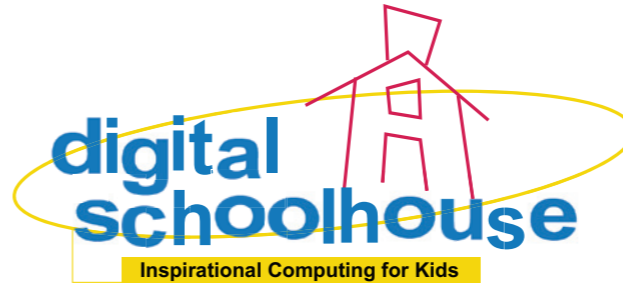**training courses** visit
ukie.org.uk/training
+
To find out more about **mentoring**
opportunities contact
david@ukie.org.uk

bridging the education gap

Funded by the Mayor of London, Ukie's ground-breaking Digital Schoolhouse programme is a bridge connecting the video games industry directly to schools

"

Jo Pomeroy, Headteacher Woodford County High School

The project complemented a school aim to develop a first class computing curriculum and to inspire an interest in programming among girls "

Digital Schoolhouse

Following the success of the Next Gen report, Ukie continues to lead the way in working with schools to promote computing and STEAM (Science, Technology, Engineering, Arts and Maths) subjects to develop talent that our industry needs. Our work now focuses on developing new play-based learning techniques which get children to experience computational thinking in a fun and exciting way. The programme also helps to give teachers the confidence, resources and support they need to teach computing.

Funded by the Mayor of London, Ukie's ground-breaking Digital Schoolhouse programme is a bridge connecting the video games industry directly to schools. The project set up nine Digital Schoolhouse hubs across London, each based in a secondary school. Lead teachers are trained by Ukie's collaboration with Queen Mary and Kings College London universities, along with professionals from the games industry and edtech.

Each Digital Schoolhouse worked with local primary schools, reaching over 5500 pupils since September 2014. Over 460 teachers have been supported using our innovative approach to deliver personalised training. Over 78 London schools embed the new computing curriculum using our techniques. These schools are the first in the country to use the 3Doodler 3D printing pen. The Let's Doodle curriculum pack to teach computational thinking is now used in classrooms across the world.

Other collaborations include work with Ukie member Code Kingdoms, the highly successful board game developed to teach programming concepts, and the BBC's Make it Digital campaign.

Materials developed in collaboration with Playniac and Disney and new sets of materials developed with Kuato Studios and Apps for Good launch in the autumn term. Using expertise from the games industry has enabled us to develop industry-relevant content in a format accessible for young pupils.

Following on from the success of this pilot in London, our aim is to set up at least one Digital Schoolhouse hub in each of the 12 games clusters identified in the recent Nesta report. Check out UkieTV on you tube for our videos.

Video Games Ambassadors network

Our Video Game Ambassadors (VGAs) are volunteers who inspire young people to consider careers in the games industry. They visit schools, colleges and other events to talk about the skills and determination that young people need, and how maths, art, physics and computer science skills are vital to working in the games industry.

The VGA programme has continued to go from strength to strength over the last 12 months, with 250 passionate experts from across the industry now registered and forming a network that provide support to each other professionally.

VGAs have a diverse range of backgrounds, skills and experiences which they share with thousands of young people in schools, clubs and workshops across the country. They have been involved in the Careers Bars that Ukie runs at the biggest games events in the country; EGX in September saw over 40 VGAs give careers talks, and at Rezzed in March there were more than 40 VGAs giving careers advice.

We help provide VGAs with access to the resources that they need (including free access to all our Digital Schoolhouse activities). Whatever activity you choose to do as a VGA (and it's up to you what you do), it can make a real difference in a young person's life and inspire the next generation of the UK games industry.

Visit gamesambassadors.com to sign up.

VGA activity

+ EGX 2014	40 VGAs
+ Go 8 Bit Stage at EGX involved	12 VGAs
+ Rezzed 2015	50 VGAs
+ EGX 2015	30 VGAs

+

To find out more about the Digital Schoolhouse contact shahneila@ukie.org.uk or visit digitalschoolhouse.org.uk

+

For more information on the VGA network contact jenny@ukie.org.uk or visit gamesambassadors.com

working harder for our members

Ukie is owned by its members and we exist to support their business. This includes adding products and services that give you tangible value. Here is an overview of what has been added in 2014-15

* Greater access to hot desk space and meeting rooms for members

We've freed up additional meeting room space at the Ukie office in central London. You can use our meetings rooms and hot desk space for free. Over 200 bookings have been made by members in the past 12 months – saving members £100k on equivalent paid for space.

* New sub groups

Our sub groups bring members together to share insight and knowledge on the key issues for the industry. Sub groups guide Ukie policy giving you direct influence.

New sub groups for 2014/15 included eSports, Retail, Diversity and a refocussed Policy group. To get involved go to ukie.org.uk/content/get-involved

* Guides and advice

We aim to make the Ukie website a go-to resource for business guides and data. This year we significantly increased the number of quick guides covering key business areas, bolstered the blog section, introduced a new Insight section ukie.org.uk/insight and added new subject matter experts to our directory.

The Developer Sub Group also released an excellent range of free standard contracts ukie.org.uk/contracts

* International trade

Our members trade in a global market and Ukie is here to help support international trade. 2014-15 has been our busiest year yet supporting trade with major UK industry stands at gamescom, GDC San Francisco, Game Connection and, for the first time, G Star in Korea.

We've also added inbound and outbound trade missions to China, trade webinars and organised international market focussed events at the Ukie offices.

* Discounts and training

We have improved our business directories of service suppliers on the Ukie website ukie.org.uk/service-directory and added a multitude of new discounts and offers on core services, software and products.

Our training programme is expanding quickly and covering the key areas highlighted to us by our members.

We continue to evolve our service and add new products but we need your help! Work with Ukie, join a sub group and tell us what you need to help grow your business.

promoting and protecting your creations

Over the last 18 months we have completely overhauled our IP services to match the needs of modern games businesses. We've been working hard with our IP Sub Group to find new ways to help protect consumers and help members make the most of their intellectual property so that they can grow their business in many different ways and get even more benefit from their Ukie membership. We now have a number of new IP–related services that make sure that once a game is commercially available it has the best opportunity to succeed without having to worry about unauthorised copies.

Helping consumers

It's vital that people can find safe and legitimate ways to access the game that they want to play so we help members identify copy, clone and rogue apps on the official app stores.

App stores

There has been an increase in websites that solely make available modified versions of mobile games. These modified versions bypass the in-app purchase mechanism to offer unlimited credit and power-ups free of charge. We can track these unauthorised versions of your games for you and get them taken down.

Following the money

Many websites that make games available illegally rely on traffic from search engines to generate advertising revenue – effectively they make money from your content without you seeing a penny of it.

This is something that our smaller members see as a problem when they face access to finance issues. We now work with the police to stop the flow of money to these illegal sites, helping to prevent brands and their agencies placing ads with them.

Improving discoverability

We now provide a web crawling service that monitors websites making available unauthorised copies of our members' games either via download or torrent links. Once the infringing links and pages have been identified, we can send takedown notices to get the content removed.

We work hard to ensure that consumers find legitimate versions of your games by letting search engines know to delist sites that make content available without your permission.

All of these services are included as part of your membership fee, including support on all IP related issues from Mo, our IP Coordinator. We hope that these new services help to reduce the availability of unauthorised games, educate consumers on the negative impact and help UK games businesses to grow.

+

To find out how Ukie can help you
make the most of your IP contact
mo@ukie.org.uk

sub groups

Our Sub Groups are a key way your views help drive the strategy of Ukie. They are open to members so please have your say, meet some new people and join one today

Community Group
Chair – Sarah Wellock, Bethesda Softworks

Our Community Sub Group meets to share best practices and work on mutual issues between the game industry's community managers. The sub group meets quarterly, often with the Marcomms Sub Group, to encourage the tackling of mutual problems, increase the positive perception of the games industry, and to run events that are relevant to our day to day roles. We're looking for new members to join the group, so if you want to come along to meet your fellow community managers, let Sophie know

Ukie contact sophie@ukie.org.uk

Developer Group
Chair – Ella Romanos, Strike game labs

The Developer Sub Group exists to provide support to the needs of Ukie developer members. In the last year, we have run a number of events aimed at the development community, including our "how to" sessions which provided PR, marketing, financial and engineering expertise and advice as well as a popular hands on with Steam hardware day. The group has also commissioned a free contract pack with useful templates of typical contracts used by developers and has been made sure that developers needs are fully represented in our new policy manifesto.

Ukie contact dan@ukie.org.uk

Diversity Group
Chair – Helana Santos, Modern Dream

The Diversity Sub Group is dedicated to supporting an inclusive game development industry regardless of gender, gender identity and expression, age, sexual orientation, disability, physical appearance, body size, race, ethnicity, religion or specific economic background.

Our aim is to identify areas where the industry can support and develop a diverse pool of creative talent, and deliver specific and measurable results in achieving these goals.

Ukie contact jenny@ukie.org.uk

eSports Group
Co-chair – Sam Bennett, Dovetail; David Yarnton, Gfinity; Craig Fletcher, Multiplay

eSports is one of the fastest growing sectors within the interactive entertainment industry. The UK has a strong and vibrant market but is not yet competing on a global level. The eSports Sub 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

Insight & Market Data Group
Chair – TBC

This Sub Group helps to shape the data and research that Ukie provides for its members. This year, the Sub Group has worked together with MCV on 2014's valuation of the UK video games consumer market, and prepared presentations and insight reports on topics such as Steam or the Chinese games market, available to all members on Ukie's website. The group also investigated reports and data sources that would be of interest to members, and we hope to offer rebated solutions to members by the end of 2015.

Additionally the group's input is leveraged when research projects on our industry are conducted by external parties.

We welcome anyone with an interest in games industry data to join us. The group is ideal for any organisation looking to learn about how other members approach data, listen to guest presentations from research specialists and who wish to set the agenda for what Ukie should look to provide for its members on the data side.

Ukie contact regis@ukie.org.uk

International Trade Group
Chair – James Brooksby

Ukie established an International Trade Sub Group to look at how we can support UK companies with information and access to key overseas markets. Ukie organises trade stands at international events, supports and organises overseas missions and runs webinars to highlight trade opportunities. This group develops these activities and ensures Ukie is establishing trade opportunities with the key expanding international markets.

Ukie contact sam@ukie.org.uk

IP & Legal Affairs Group
Chair – Neil Boyd, Nintendo

Our IP Sub Group meets every 6-8 weeks to discuss latest IP related issues and shape Ukie's overall IP strategy. Recent Sub Group activity has focused on gaining member input on shaping the IP Protection services that will be offered to as part of the membership to members from September.

If you would to join the group, know more about the IP Protection services or just be added to the mailing list do get in touch with Mo.

Ukie contact mo@ukie.org.uk

Retail Group
Chair – TBC

One of our newest sub groups, the Retail Sub Group aims to encourage knowledge sharing and identify best practice for businesses engaging with physical and digital retailers. The key areas of interest for the group include: Retail trends - the transition from physical to digital, merchandise and value added items; Data - market value, trends, consumer data, mobile; Understanding technology and its impact on retail; Release dates; Retailer engagement.

Ukie contact sam@ukie.org.uk

Marketing & Communications Group
Chair - Chris Glover, Square Enix Europe

The Marcomms Sub Group meets up to share best practice and discuss the key topics affecting the industry – to gain insight and offer input into our collective approach with and through Ukie. There's a good mix of participants and although everyone faces their own day-to-day challenges in their respective roles, there is a common interest in helping to protect and promote the wider industry.

We often team up with the Community Sub Group as the two groups share many common issues. This year we've been leading on re-refreshing askaboutgames.com as a destination for relevant gaming information and we've been working on how we push some positive stories about the industry to the national press – not for vanity PR, but to enforce the credibility of our industry with the UK media.

We're looking for more Ukie members to get actively involved in the Marcomms Sub Group - so if that's you, please do get in touch.
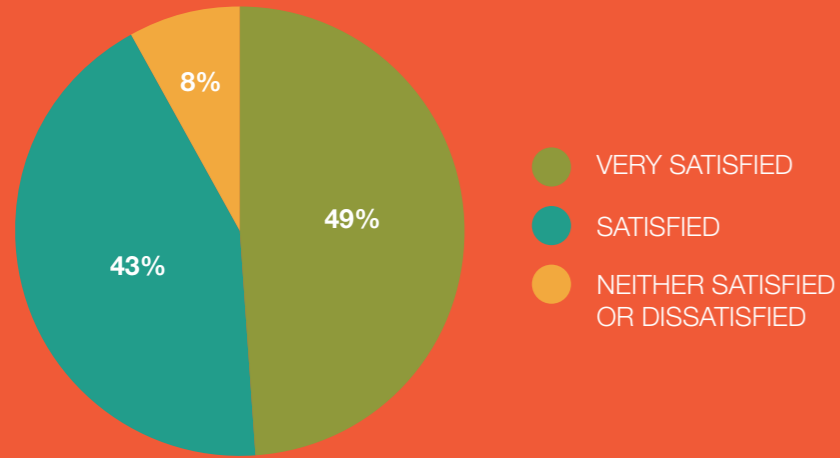
Ukie contact dan@ukie.org.uk

Policy Group
Chair – Andy Payne, CEO, Mastertronic

The Policy Sub 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. Over the next twelve months it will lead on delivery of a major policy research report and guide the political engagement strategy build around that report.
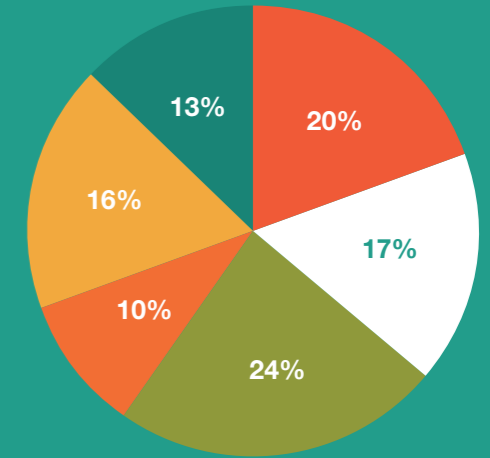
Ukie contact andy@ukie.org.uk.

WHAT OUR MEMBERS SAY

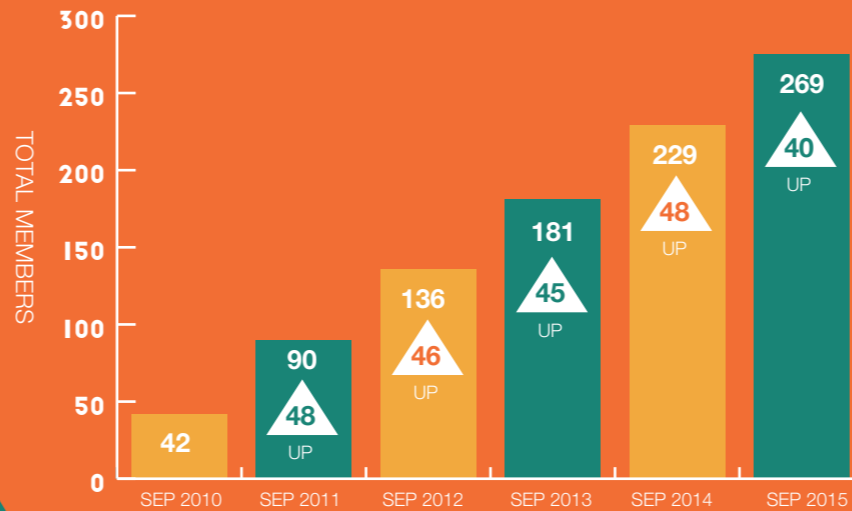## HOW SATISFIED ARE YOU WITH THE WORK UKIE DOES ON BEHALF OF THE INDUSTRY?

- 8% NEITHER SATISFIED OR DISSATISFIED
- 43% SATISFIED
- 49% VERY SATISFIED

- VERY SATISFIED
- SATISFIED
- NEITHER SATISFIED OR DISSATISFIED

MEMBERSHIP GROWTH

TOTAL MEMBERS

- SEP 2010: 42
- SEP 2011: 90 — 48 UP
- SEP 2012: 136 — 46 UP
- SEP 2013: 181 — 45 UP
- SEP 2014: 229 — 48 UP
- SEP 2015: 269 — 40 UP

HOW MANY UK EMPLOYEES ARE IN YOUR COMPANY?

- MICRO (1-3) — 20%
- SMALL (4-9) — 17%
- MEDIUM (10-25) — 24%
- LARGE (26-49) — 10%
- VERY LARGE (50-249) — 16%
- MASSIVE (250+) — 13%

THE PLATFORMS MEMBERS ARE WORKING ON

% COMPANIES WORKING ON

- MOBILE/TABLET: 26% / 74%
- CONSOLE DIGITAL: 30% / 70%
- CONSOLE PHYSICAL: 61% / 39%
- PC DIGITAL: 24% / 76%
- PC PHYSICAL: 65% / 35%
- VIRTUAL/AUGMENTED REALITY: 60% / 40%
- WEARABLES: 85% / 15%

- NO
- YES
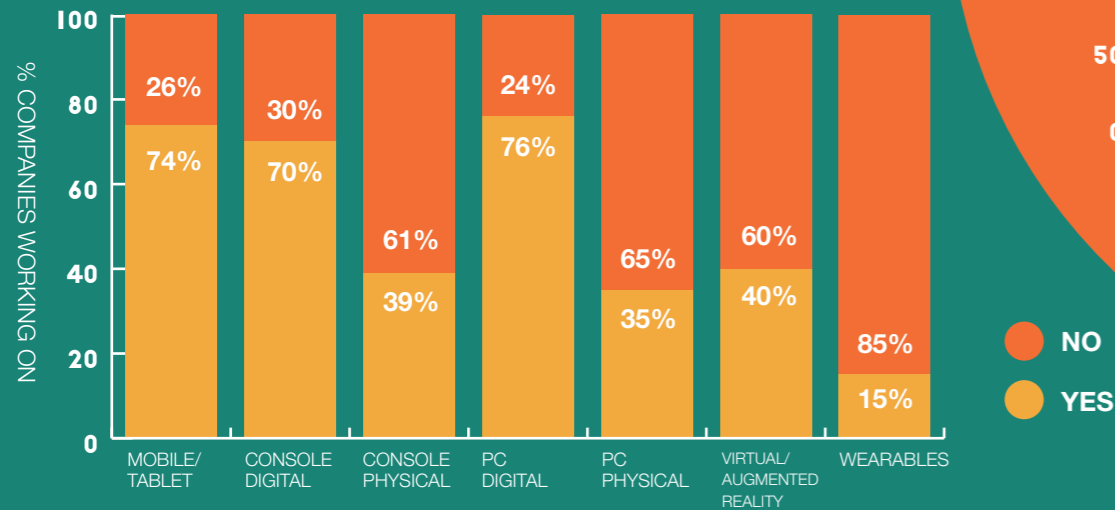
HOW OLD YOUR COMPANIES ARE

% COMPANIES

- 1 OR LESS: 6%
- 1-5: 40%
- 5-10: 19%
- 10-20: 14%
- + THAN 20: 21%

YEARS
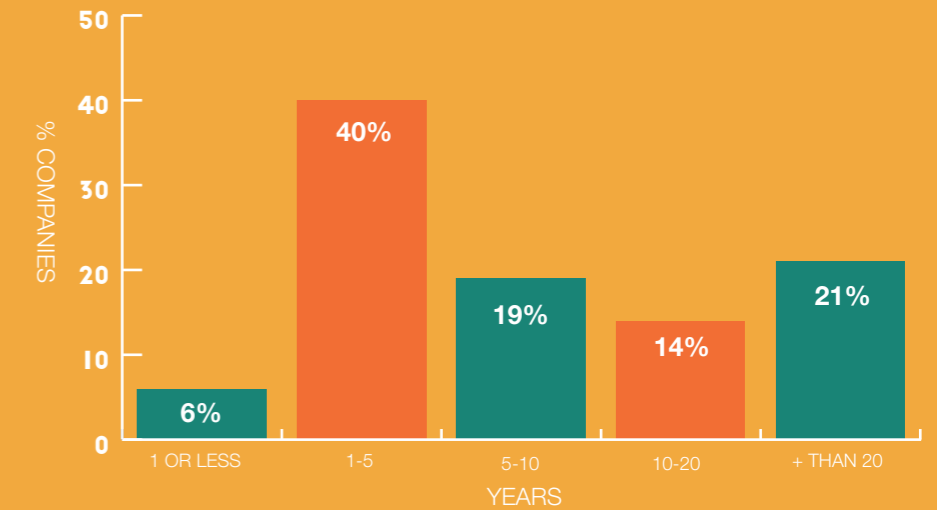
"Ukie always fight our corner and proactively find opportunities for us, they've been invaluable to the growth of our business."

Mike Movel, Fat Pebble

"I appreciate how inclusive Ukie are and how well they represent the games industry to government and the public."

Oliver Clarke, Modern Dream

"Only been a member a year but clearly Ukie is championing the industry and the UK as a place to do business."

Chris Taylor, Eaton Smith LLP

"Ukie gives the UK games industry a focal point for influence and political support."

Paul Sulyok, Green Man Gaming

my time as Ukie chair

Andy Payne - CEO, Mastertronic

> " **I felt that rather than leading the industry, we needed to be on the shoulder of the industry** "

3,716 days in the role of Elspa, and latterly Ukie, chair, phew. It's been an honour and at times a challenge since I was asked to take the role on from Scott Dodkins on the 22nd July 2005. I have had the pleasure to work with four Director Generals and now CEOs, Roger Bennett, Paul Jackson, Michael Rawlinson and now Dr Jo Twist as well as two vice chairs, David Yarnton and Ian Livingstone, and two treasurers Matt Carroll and John Clark.

I even had a stint of eight months as acting CEO between April 2011 – December 2011 which required me to do live TV and radio appearances to both defend and advocate this wonderful industry. I have discussed the merits of games with Church Mission Society, The Children's Society, and The Lighthouse Group, have taken on Adam Boulton live on Sky TV when we were fighting for tax production credits and the same with John Humphries live on BBC Radio 4's Today programme all of which were really good fun.

When ISFE needed us to up our game to ensure the UK adopted a single EU wide age ratings system, PEGI, we did not disappoint. Responding to the ground breaking Byron Report, we saw PEGI adopted into UK law within the Digital Economy Act in 2010.

I led the change from Elspa to Ukie in 2011 which saw us open our membership up to all companies in the games industry as the digital revolution began.

We even initiated a digital chart project the same year, something which is only now really being properly discussed by the whole industry!

In 2010 I ensured Ukie was front and centre alongside Ian Livingstone in the government consultation which resulted in the Livingstone Hope Report aka, Next Generation Skills, published in 2011. It was Ukie that led the coalition of technology companies, and Ukie that funded the resources that acted on the findings of the report. We now have computing and coding on the National Curriculum as a direct result of our work and have been leaders in the Digital Schoolhouse project.

We were founders of culturally significant Edinburgh Interactive Festival running that for 10 years and The London Games Festival also. We took the lead with UKTI in 2011 and now successfully run a global trade programme, including the official UK presence at GDC, gamescom and Game Connection.

We worked with TIGA to get the video games production tax credits approved in February 2010, only for the Coalition government to remove them a few months later in June! But we kept calm and carried on and were rewarded again when they were re-announced in 2012, formally coming into play in 2014. This was a huge boost for UK based games companies and long overdue.

I was a founding member of the Creative Industries Council in 2010 along with Ian Livingstone, which reports directly to DSMS and BIS.

This has established the Creative Industries as a recognised industrial sector which drives high value, productive jobs and growth. We ensured games took its rightful place at the top table.

And Ukie keeps powering on, showing leadership and example as part of its DNA. We facilitated and incubated the UK Crowdfunding Association and are now doing the same for the eSports sector. We lead the debate with the Competition and Markets Authority over in app purchases (IAPs) in games, an on-going project and are now working closely with ISFE to debate the Single Digital Market in the EU.

When I took this job on, over 10 years ago, I said to my fellow directors that I felt that rather than leading the industry, we needed to be on the shoulder of the industry, always there to defend, promote and play our part in building a wonderful sector.

I am happy to pass the torch on to the next chair, knowing that I have done my best and that Ukie is in a very strong position across all fronts. Thank you to the Ukie team, my fellow directors down the years and all of the members for the incredible support. It's been a blast.

our staff

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505 Games
Activision Blizzard UK
AIME
Altered Gene Studios
AppyNation
Atomicom
Autodesk
Avanquest Software Publishing
Awillys
BadLand Games UK
Bandai Namco Games UK
Barog
Bastion
Big Bit
Blazing Griffin
bluegfx
Born Ready Games
Bossa Studios
Brandculture Sport & Entertainment
Brown Betty
Brunel University London
Cambridge Game Creators Network
Caped Koala
Carbon Digital
Casual Games Association
CCS Media Packaging
CE Europe
Centresoft
Channel Four Television
Charles Russell
Chilled Mouse
China Business Solutions
Coatue
Code Kingdoms
Crash Lab
Crivantech
Crossover Sheffield Doc/Fest
Cubic Motion
Curve Digital
De Montfort University
Dead Good Media
deltaDNA
Dimoso
Dingit
Disney Interactive Studios
DNA
Dovetail
DR Studios
Eaton Smith
Edidou
Electronic Arts Limited
Elliot Advisors
Epic
ESL
European Gaming League
Exertis Gem
Exient
FACEIT
Fat Pebble
Fayju
FC Business Intelligence
First Touch Games
Flix Interactive
Focus Multimedia
Freekstorm
Future Games of London
FuturLab
Game Grin
GAME Retail
Game Wagon
GameBench
GameHorizon
Gamer Camp
Gamer Network
Games Britannia
GamesAid
GameSparks
Get Games
Gfinity
Ginx TV
Glitche.rs
Goldsmiths, University of London
Google UK
Green Man Gaming
Halo Financial
Harbottle & Lewis LLP
Hardlight
Hidden Armarda
Ian Hamilton Design & Consultancy
IGDA

Improbable Worlds Limited
Indigo Pearl
Innovation Birmingham Campus
Interactive Opportunities
Interface 3
Internet Advertising Bureau
Ipsos MORI
ISM
JiggeryPokery
Johnny Atom Productions
Joyful Works
Kalypso Media UK
Kantar Worldpanel
Kempt
Kinesthetic
King
Kiss
Koch Media
Koei Tecmo Europe
Konami Digital Entertainment BV
KPMG LLP
Kumotion
Kybele Studio
Lab 42
Level 3 Communications
Lick PR
Limelight Interactive
Localize Direct
London South Bank University
Ludus Magnus
Magic Notion
Majesco Europe
MakieLab
Margot Brando
Mark Monitor
Marmalade
Marvelous Europe
Mastertronic
MCM Expo Group
Media Molecule
Mediatonic
Mercia Fund Management
MHT Game
Microsoft
Middlesex University
Milky Tea
Modern Dream Games
Multiplay
Myriad Associates
National Film & Television School
NCSOFT Europe
Ndreams
Nesta
Net Names
New Bay Media
Next Gen Skills Academy
Nintendo UK
Nordic Games Publishing
Northern Ireland Screen
Norwich University College of the Arts
Oculus VR
OK Media
Omni Systems
OMUK
OPM Response
Opposable Games
Osborne Clark LLP
P2 Games
Pataphysics
Piggyback Interactive
Pinewood Studios Group
Plan of Attack
Playdom
Player Research
Playmob
Playniac
Pole to Win Europe
Pollen Capital
Polystream
Pomegranate
PQube Ltd
Preloaded
Premier
Press Space PR
Prospect Games
Purewal & Partners
Purplebeard
R8 Games
Rantmedia
Rare

Raspberry Pi Foundation
Ravensbourne
College RedBedlam
Reflection
Reloaded Productions
Replay Events
Revolution Software
Ripstone
Rising Star Games
Robo Pixel
Roll7
Rouse
Russells Solicitors
Saffery Champness
Science: Gamed
Scottish Enterprise
Secret Sauce
Sega Europe
Sheffield Hallam University
Sheridans
Sipara
Six to Start
SKARA The Blade Remains
Skill Search
Soccer Manager
Sold Out Sales & Marketing
Sony Computer Entertainment Europe
Sony DADC
Space Ape Games
SpecialEffect
Spilt Milk Studios
Sports Interactive
Square Enix
SRS Investment
Staffordshire University
State of Play
Steel Media
Stormlantern
Strike Games
Super Icon
Supermicro
Swallowtail Games
Swipe Right
System 3
TAG games
Take 2 Interactive
Take Off
Tandem Events
Tangentix
Target Media
Taylor Wessing
Team Dignitas
Teebster
Teeside University - School of Computing
Testronic
The Arts University College at Bournemouth
The Creative Assembly Limited
The Games Tribe
The National University eSports League
The Stationery Office
The Tall Trees
The Tiniest Shark
The Trailer Farm
Thechineseroom
TigerFace Games
Truly Social
TS Information Technology
TT Games
Two-Tails
Ubisoft Ltd
Unity Technologies
University Centre Grimsby, Institute of
Further & Higher Education
University of Abertay Dundee
University of Hull
University of South Wales
University of the West of Scotland
Upperstreet events
Utopian World of Sandwiches
Warchest
Warner Bros Interactive Entertainment
Warwickshire College
Waterfront Entertainment
Wired Productions
Wired Sussex
Women in Games Jobs
World Gaming Executives
XTM-International
YoYo Games Ltd
Zenimax Europe / Bethesda Softworks

269 members