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VP, Business & Legal Affairs
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OUR INITIATIVES



askaboutgames.com



digitalschoolhouse.org.uk



games.london



ukie.org.uk/student-membership



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UK GAMES MAP
gamesmap.uk



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2019: chair's report

NOIRIN CARMODY – UKIE CHAIR

After four years as Chair, I deliver my final annual report. I have served seven years as a Board Director and believe it is the right time for me to step down.

But I do so safe in the knowledge that Ukie – and my successor – will be well placed to represent the sector effectively for many years to come. This is partially because of Ukie's strong strategic and financial position. The annual turnover in 2018-2019 was restated upwards from £1,836,047 to £2,073,427 following a Board decision to include the Ukie Digital Schoolhouse's income within the organisation's annual statement for that year. I'm pleased to report that Ukie's turnover for 2019 is £2,318,714 - an increase of 11.8% from the previous year. This will allow the team to continue to provide support for members at a crucial time for the industry, while also helping Ukie meet its increased cost base as a result of investing in key policy, trade and data initiatives.

Ukie's financial position is bolstered further by its impressive membership growth. In last year's update, the organisation drew upon the support of 410 members. In 2019, that figure has increased by over 13% to 466.

The size and diversity of Ukie's membership – which encompasses independent or otherwise

developers, publishers, platform holders, esports businesses and our valued partner members – gives it the credibility needed to effectively represent the industry. I thank all our members, and Ukie's hard working membership team, for their contribution.

However, it is fair to say the success of Ukie isn't due solely in how well it recruits members or manages its finance. It is also evident in how effectively it champions, promotes and protects the sector it represents supported by a strong and diverse Board of Directors and a dedicated highly skilled team. Indeed Ukie – and its predecessor ELSPA – has been delivering for the sector over the past 30 years. This has included pioneering work on protecting intellectual property, the creation of Chart Track, supporting the creation and maintenance of age rating systems, campaigning successfully for Computer Science in schools, and helping push through the invaluable Video Game Tax relief scheme.

Over the past seven years, I've been fortunate enough to watch Ukie continue to do that work in a number of inspiring ways.

Ukie's Digital Schoolhouse has evolved into an outstanding industry leading educational initiative backed by Ukie members. The London Games Festival has gone from strength to strength,

producing a fabulous return for the industry. From an economic perspective, the festival has generated a business pipeline in excess of its targeted £35m of incremental revenue for games businesses. And culturally, I'm pleased to say that Ukie helped fund Now Play This at Somerset House – showcasing the creativity of our magnificent sector as part of the festival's wide selection of cultural events.

Ukie's data output has also improved strongly in the past five years. From the Ukie Games Map to the annual Industry Valuation through to October 2018's crucial BFI Screen Business Report – which demonstrated the clear value of Video Game Tax Relief to the UK economy – that helped quantify our contribution effectively.

Despite these successes, there is more we can do. There are an increasing number of challenges facing the industry today that require us to demonstrate our ability to pro-actively take a responsible and mature attitude to the way we do business. As the voice of the industry, Ukie has to play a role in this. It is why I am pleased that the Board has taken the first steps to bringing its governance structures in line with other trade bodies - including the introduction of term limits for board members – to ensure it operates as professionally as possible.

we must work together to show how seriously we take **our responsibilities** and do what we can to **continue the positive growth** of our sector for many years to come.

NOIRIN CARMODY – UKIE CHAIR

if there is **one thing**
that we have all
learned from the
history of **our trade**
body – and that of
the wider industry
– is that we are at our
best when faced
with adversity.

DR JO TWIST OBE – CEO UKIE

2019: ceo's report



DR JO TWIST OBE – CEO UKIE

This annual review marks an important moment in our history. Ukie is 30. When it was first founded as ELSPA in September 1989, the main challenges facing the industry trade body were – it's fair to say – quite different to those facing the sector today. Whereas today's policy environment is dominated by debates over loot boxes, age appropriate design codes and the dreaded B word (and I don't mean Boris), ELSPA faced the challenge of formalising a sector that had – to that point – thought little about doing so.

Its early years were spent doing just that. It formed an aggressive intellectual property unit to defend the rights of video game publishers, which was subjected to some gentle ribbing from the games press at the time due to one memorable advertising campaign.

It spent time pulling together the structures to track the first video game sales data, helping companies to understand the scope of a market that had hitherto been informal to the point of being laid back. And it had to deal with the first wave of political panics, creating the first age rating systems with the help of the BBFC in 1994 in response to concerns from regulators with a keen eye on the terms of the Video Recordings Act. While it's fair to say that ELSPA and Ukie have had to deal with

different problems – our most recent hotline gave out business advice, rather than encouraging 14 year olds to do in mates playing pirated games for example – the over-arching challenge for both bodies has remained the same.

As in 1989, the games industry in 2019 is at the forefront of innovation. It supports jobs across the country. It is entrepreneurial. It is creative. And it pushes the boundaries in ways that other sectors simply can't, because they don't have the talent, the mindset or the skills to do so. It is also – still – misunderstood. As Peter Etchell wrote in *Lost in a Good Game*, the stereotype of the spotty, basement bound male teenage 'gamer' (a word I hate) endures even as the sector creates world leading entertainment and culturally affirming content for everyone.

Today that unfair and unfounded negative perception of our players – and by extension our industry – dovetails with un-evidenced fears over the effects of screen time, deliberate attempts to unfairly conflate our industry with gambling and a wider 'techlash' that assumes malicious intent from developers.

This creates an environment that is...well, rather problematic. And I know how frustrating it is to the

industry, to our members and to the hard working Ukie team to see the good the sector does buried under the weight of negative headlines.

But complaining doesn't get us anywhere; working does. And if there is one thing that we have all learned from the history of our trade body – and that of the wider industry – is that we are at our best when faced with adversity. Our major successes – such as the introduction of PEGI or the hard fought for Video Game Tax Relief - all came in response to moments of crisis. We all collectively stepped up as an industry, found a solution to the problem facing us and made our sector better in the process.

Today, we sit at another one of those moments. A perceived lack of transparency, an assumed lack of care and an implied malice has caused our sector to come under attack.

But we can, and must, work constructively to solve those problems. We are ploughing on with initiatives designed to open up our industry to our key audiences, to demonstrate how much we do look after our communities and to demystify what we do to remove concerns at source.

And if we pull together now and show that we stand ready to take on board our responsibilities, show our maturity and give control to our players, we can overcome the challenges we face today to shape the next thirty years of success.



**policy and
public affairs**

To say the past 12 months in policy have been challenging would be an understatement. Since the last annual review we have continued to coordinate globally on the industry’s response to the World Health Organisation’s inclusion of “gaming disorder” in their international classification of diseases diagnostic manual, engaged with gambling regulators on loot boxes and skin betting, made new acquaintances with the Information Commissioner’s Office and UNICEF.



Over the course of the year the WHO’s gaming disorder classification has continued to make headlines. It has seen us develop closer ties with leading independent academics and health professionals as we seek to develop a more robust and informed evidence base. As an industry we can and should do more to demonstrate how player safety is at the forefront of everything we do.

We have also had a year of yet more indecision, confused messaging and political upheaval as the Brexit situation drags ever onwards. The prospect of the UK crashing out of the EU without a deal has been lurching up and down the agenda. Ukie have remained in constant dialogue with the government over the implications for the games sector, seeking clarity on the many issues this uncertainty creates. Our Brexit No-Deal survival guide contains all the latest information on how best to prepare. But this is far from over yet and we will continue to engage with government as Brexit progresses to ensure that it understands the damage that a no deal outcome could have on the sector.

Sticking with Europe, we continue to influence the sector by working closely with ISFE and European national trade bodies. Some complicated issues, still ongoing, have arisen as a result of Digital Single Market implementation, including geo-blocking exclusion, the copyright directive, the New Deal for Consumers and ePrivacy regulation, all of which are set to run for the next few years as they make their way through Brussels. We have also been working closely with our European colleagues on the gambling and lootbox debate, again being able to provide context and perspective from the UK.

Closer to home the Digital, Culture, Media and Sport Select Committee launched an inquiry into what they termed “immersive and addictive” technology.

The committee heard from a number of academics, self-identified former games addicts, social media companies as well as the games sector.



We look forward to seeing the recommendations from the committee in the Autumn, which we are sure will have far reaching implications for future policy around online safety and data protection.

Last year also saw the games sector included within the scope of a flurry of proposals and consultations from government and other bodies, of which Ukie responded to. Some of these consultations included: **a proposed Digital Services Tax (HM Treasury), a review of the Shortage Occupation List (MAC), an Age Appropriate Design code (ICO), and the recent Online Harms white paper (DCMS, Home Office). Ukie continues to be in contact with the ICO and DCMS regarding the latter consultations and we will remain updated as they each progress.**

It's not all bad news, however; the rise of esports has seen a further boost in awareness and interest with the establishment of a European Esports Federation and the first ever UK Parliamentary event on esports, delivered by Ukie, which was followed by an APPG-led roundtable discussion looking at the opportunities and challenges ahead.

Political Engagement

With the rapidly increased amount of political interest in the games industry, it is imperative now more than ever for Ukie to proactively engage with MPs and policy makers, educating politicians on what is often emotive and contentious topics related to the industry, whilst taking part in some myth-busting along the way.

Recent sensationalised media headlines about the games sector is bleeding into political consciousness and leading to a potentially damaging regulatory environment. As a result, it has been a vital 12 months for our engagement programme and this is only set to continue as this interest grows.

We have met with MPs, Peers and Mayors across the country in order to demonstrate the industry's creative passion, economic and cultural impact, our effective self-regulation, and strong sense of responsibility towards the safety and wellbeing of our players. These engagements included games studio visits, one-to-one chats, and roundtable discussions, which gave policy makers a genuine insight to the diverse nature of our sector. We sought to reach out to those from across the political spectrum, both within and outside of government, and directly connect them with the fantastic games companies working here in the UK.

Some of the political figures we met included **Former Minister for Digital Margot James MP, Caroline Lucas MP (Brighton and Pavilion); Minister for Skills Anne Milton MP (Guildford); Jo Stevens MP (Cardiff); Alison Thewliss MP (Glasgow); Mayor of London Sadiq Khan, Mayor of Greater Manchester Andy Burnham, and Lord Brooke of Alverthorpe.**

There has never been a more important time for us to continue to represent the industry and lobby government; educating and informing them of our amazing, talented, creative and responsible sector is a priority, and one which needs to be coordinated globally for the biggest impact.

We will continue to draw on the expertise of our members, fellow trade bodies and wider networks in order to enable our sector to further thrive.

TO FIND OUT MORE

For more information please contact tim@ukie.org.uk

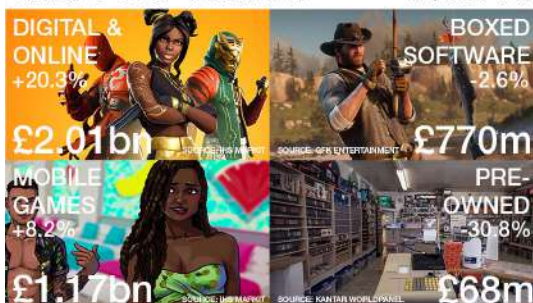
research and data



research and data is key to Ukie's mission to make the UK the best place to make and sell games.

ukie UK GAMES INDUSTRY 2018 MARKET VALUE **£5.7bn**

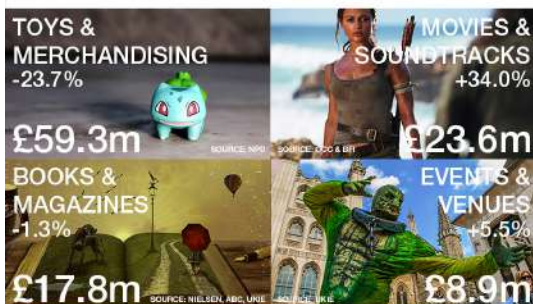
GAME SOFTWARE: £4.01bn



GAME HARDWARE: £1.57bn



GAME CULTURE: £109.6m



ukie.org.uk @uk_ie **ukie**

Gathering robust, authoritative evidence and data about the market underpins everything we do. It provides the base upon which we build our policy agenda; it provides companies with the market data they need to confidently enter the UK consumer market; it helps communicate the value our sector adds to the national economy to government and beyond.

Ukie pulls together this information in a number of different ways. Our UK Games Market Valuation tracks the year on year growth of consumer spend on games and game related products. 2018 saw another record year for the UK games market, with our consumer valuation pegging the market at £5.7bn – an 11.5% increase on the 2017 figure.

The Ukie Games Map continues to act as a key resource for identifying how big - and where - domestic games businesses are. It is currently listing 2280 active games businesses, 152 service companies and 102 educational institutions across the country.

Additionally, Ukie continues to be the home of the official UK game charts and provides access to detailed UK and sales data. With the help of partners such as GfK ChartTrack, Reflection's Mobile Charts and GSD, we are able to offer businesses in depth access to market information that helps them to plan and perform more effectively.

Importantly, our work to provide robust data about our industry isn't limited to Ukie led initiatives alone. The organisation has worked closely with partners, groups and industry bodies across sectors to quantify the impact of our sector.

The BFI's Screen Business Report was a notable example of this approach. It demonstrated that the UK video games industry contributes £2.87bn in gross value add to the economy; that it supports nearly 50,000 jobs directly, indirectly and through induced effects; that the landmark Video Game Tax Relief (VGTR) delivers £4 in value add for every £1 invested into it by government.

Ukie's efforts to quantify the UK games economy provide important support to our policy team, to our members and to the wider public. We will continue to do what we can to measure and assess our industry to do what we can to provide confidence in the value of our sector to our audiences.

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. As of August 2019, the map lists 2,282 active video games companies operating in the UK.

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. And with 428 historic games companies listed in the map that are no longer trading, the UK Games Map now contains information for over 2,700 companies to have made games in the UK.

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 (over 600) but there are also significant games clusters in Manchester, Brighton, Guildford, Cambridge, Leamington Spa, Bristol, Dundee, Cardiff, Liverpool and Belfast.

Interestingly, the highest densities of games businesses are seen in Dundee and Brighton, with around 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 games courses across over 100 university and academic institutions nationwide.

The map is also becoming a healthy source of information for "service" companies – including PR and legal services, charities, esports companies, technical services and middleware that support the industry – in the UK, with over 150 present on the map.

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. It also supports our crucial policy work, allowing us to determine games businesses operating in parliamentary constituencies. This helps us to target MPs representing large parts of our sector to ensure they're aware of the value to the UK economy at large.

The value of the UK Games Map to our industry has provided genuine tangible value to the sector. We will strive to maximise the effectiveness of this data and continue to evolve the UK Games Map so that it continues to work for the industry in the coming years.

TO FIND OUT MORE

For more information on these services, please contact - luke@ukia.org.uk

communications



it is reasonable to say that the games industry has had a challenging year within the mainstream media.

A perfect storm featuring the World Health Organisation's decision to include 'gaming disorder' within ICD-11, the Department of Digital, Culture, Media and Sport (DCMS) Immersive and Addictive Technologies Inquiry and wider societal concerns over issues such as screen time has helped paint a large target on the industry's back.

It is therefore unsurprising that leading media outlets have chosen to try to hit it. EA, Kings and Epic Games' appearance before the DCMS committee was covered widely in the mainstream press, with the likes of The Guardian, The Telegraph and The Sun – somewhat unusually - picking up the story for print editions and creating a lot of noise in the process.

And naturally, this has meant that Ukie has had to weather the storm too. We've had to field numerous inquiries on these issues and more: fending off hostile encounters, constructively informing journalists where stories may have gone awry and making the sector's case where appropriate.

Mixing with the mainstream

While this level of noise could be viewed negatively for the industry – especially considering the tone of much of the coverage – we should look beyond the short-term horror headlines to the longer-term significance of this news. In particular, we must see it as a sign that our industry is finally cutting through into the mainstream. After decades of effort, the national news media sees our sector as worthy of investigation. This demonstrates a shift in the way games are perceived in wider society, suggesting that we will, eventually, have the opportunity to tell our story in ways that haven't been available to now.

Furthermore, the national interest is trickling down to a local level too. In the past year, Ukie has fielded and supported press inquiries across its programme of activities from places such as Brighton, Glasgow and Warwick. This indicates that the industry's efforts

to paint itself as a national endeavour built upwards from local clusters.

There is also increasing appetite from the consumer and business press to take deeper stories about the issues affecting the industry. Publications such as Kotaku, PC Gamer, Eurogamer and PCGamesN have tackled stories that sit within the public affairs environment – showing how players are engaging with the bigger issues surrounding our sector.

Shifting the debate

The question for the industry then is how to harness this shift as effectively as possible. Currently, we are on the defensive. The barrage of stories, driven in many cases by hostile interpretations of our industry caused through misunderstandings, has forced us into a reactive position where we deal with challenges as they come in.

This, in part, has prevented us from pro-actively telling the positive story of our industry. But we have also not done enough to discuss publicly how we make the great games that shape our sector, the people who drive our industry forward and the deep, genuine passion that we bring to our profession. And we haven't shown enough of the positive actions we've taken to do this. We need to change this. At Ukie, we're taking proactive steps to shape the debate. Our communications team, now headed up by former video games journalist George Osborn and supported by John Parry in the digital marketing team, is building the strategy and structures to ensure we effectively communicate this. However we also need your help to make sure that we're hearing as much as possible from you, our members.

We're proud to step forward to represent the industry, to shape the debate and to be the first port of call for the press (especially when a crisis comes knocking).

But we want to be able to share the stories of the games, the people and the teams who make our industry great with the many outlets who contact us for comment. So in the coming year, we're calling on you to offer up experts, talk to us about the great initiatives you're working on and let us know where you can help us to lead the story.

Ukie wants to act as the voice of the industry. Let's work together in the coming year to make sure we all speak – as best we can – with one clear resounding voice and tackle the challenges facing our sector constructively.

TO FIND OUT MORE

For more information on these services, please contact - george@ukie.org.uk



business support

Membership of Ukie reached a new landmark of 466 companies by September 2019. The addition of 56 members this year and 60 last year represents our two largest annual increases in membership as an organisation. It is a far cry from the 42 members the organisation had when ELSPA transitioned into Ukie and demonstrates just how far we've come.

Indeed, as we celebrate our 30th year as a trade body in 2019 we've looked back at the 'old' ELSPA, and indeed the early days of Ukie and the business support offered today is incomparable to those years.

As our membership profile has changed, so have the products and services we offer. With development studios, academic institutions and service suppliers joining Ukie, with the almost daily changes we have seen in the market and the opportunities that have followed, Ukie has successfully re-invented its offering – and will continue to do so in the future.

Expanded events UK-wide

Ukie is a national trade body and is committed to deliver events all around the UK. Our Hub Crawl 2019 focussed on helping businesses prepare for investment and took in 15 UK locations from Dundee to Bristol and Ipswich to Belfast. Over 475 studios came to the Hub Crawl. We are already planning the 2020 tour.

We understand that audiences need bespoke content, delivered in a meaningful way, by industry experts. Even if this means making repeated visits to a region, covering different content every time. In early 2019 we made four visits to Scotland in a month to ensure we covered all the major issues of the time with the appropriate level of detail. And we don't just deliver events and move on. Our Hub Crawl was supported by the release of an investment ready tool kit, our event on trading in China was followed up with a free localisation package and our Westminster esports

International superstars

As well as a comprehensive series of UK events Ukie's award winning international trade programme continues to give UK games businesses unrivalled access to key partners and crucial data in overseas markets. Over 250 UK games businesses participated in this programme and accessed trade expo space, inbound and outbound trade missions and trade and investment dinners.

Live from London

The free to use broadcast-ready studio, located within the Ukie offices, is becoming a popular facility for members to live stream and record podcasts. And our meeting rooms and hot desk space remain incredibly popular spaces, which is perhaps unsurprising considering they are free to use for all Ukie members.

The way to talk to you

Engaging and communicating with our members is number one, two and three on the importance list for the Ukie team. With our new website coming on stream we are going to be able to support our members to a far greater degree – giving you access to the vital information you need, when you need it.

Our new communications regime - a weekly newsletter on broad industry issues, a monthly events email and the mid-month Ukie Insider – has gone down well and we'll continue to refine the content. We are using more video content in our communications and the team are active, every day on Twitter and through the industry slack group.

TO FIND OUT MORE

For more information on these services, and any other membership activity, contact - sam@ukie.org.uk

international trade



With the UK accounting for just over 4% of the global games value by consumer spend, all UK games businesses look to overseas markets to support their growth.

With digital content and established distribution channels, the games industry has a significant advantage over many other sectors when it comes to reaching overseas customers. The export opportunity for the UK game sector in particular is immense, given that the UK features some of the world's best studios, service providers and publishers and we have a competitive advantage over the competition. The industry wants to develop trading relationships with partners around the world. As a result we have continued to invest in the growth of our International Trade Programme.

As well as hosting and managing major UK pavilions at GDC and Gamescom we made our debut at the Intel Extreme Masters in Katowice, Poland in February. This esports event created some crucial opportunities for UK businesses, supported by the Department for International Trade. We also welcomed our first trade mission from Germany to add to two from China and a further one from the USA, delivered by Games London. Our outbound mission to China Joy in Shanghai, for the fifth consecutive year, produced the best results yet and an exciting batch of 20 UK companies were involved.

Our partnership with DIT also enabled the delivery of a raft of additional projects this year including investment dinners in the US, Germany and China, the creation of an investment ready toolkit and funding to deliver exceptional video content promoting the UK as a global development hub. The net result of these projects is increased games businesses in the export and investment pipeline with the promise of great results in the coming years.

4,500

New business connections made

250

Over 250 UK games businesses participated in the trade programme with 124 businesses exhibiting at an overseas show on a Ukie managed stand

7500+

People visited a Ukie stand at an overseas trade show

£73m

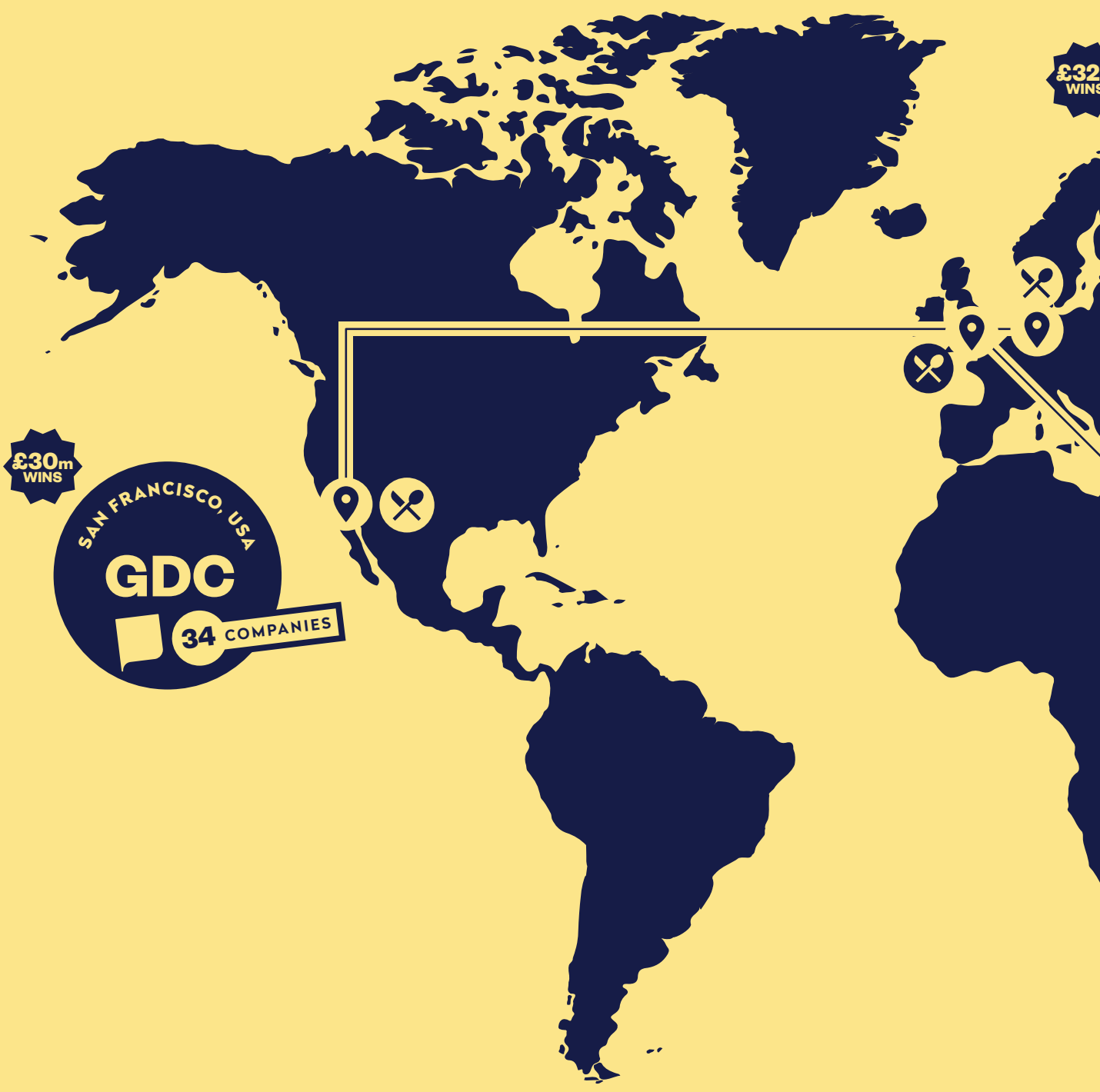
Worth of business deals done by UK businesses on our trade stands

£6m

Estimated further £6m of exports secured on trade missions

TO FIND OUT MORE

For more information on these services, please contact - sam@ukie.org.uk



ukie's global trade programme

—— outbound
 inbound
  ukie stand
  trade mission
  trade investment dinner



£79m
UK BUSINESS DONE

240
UK COMPANIES ACCESSED
UKIE TRADE PROGRAMME

CHINA
TRADE AND INVESTMENT
DINNERS AT CHINA JOY,
GAMESCOM, GDC

4500
NEW BUSINESS CONNECTIONS
MADE VIA TRADE PROGRAMME

124
UK GAMES BUSINESSES
EXHIBITED OVERSEAS

7500+
VISITORS TO UKIE
OVERSEAS STANDS

£100k
DIT EXHIBITOR GRANTS
DISTRIBUTED BY UKIE

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



**DIGITAL
SCHOOLHOUSE**
together with



Ukie's Digital Schoolhouse together with Nintendo Switch and sponsored by PlayStation®, SEGA, Warwickshire County Council and Ubisoft, has had another landmark year.

The not-for-profit programme, which uses play-based learning to engage the next generation of pupils and teachers with the Computing curriculum, reached more students than ever in the past academic year.

Thirty four Schoolhouses and over 2653 teachers helped engage over 27,355 students across the UK, showing the positive power of play in the classroom. But what went into the making of another successful academic year? And what is coming next for Digital Schoolhouse? Let's take a look.

Key partnerships

We couldn't be as successful as we have been without the support of a number of crucial partners. Since the programme's inception, we've been fortunate to benefit from fantastic relationships with a number of bodies including PlayStation®, who have continued to enable the national rollout of the programme since joining in 2016.

In the past academic year, we've continued to grow with both government and industry support. First, the Department for Digital, Media, Culture and Sport (DCMS) provided the programme with £200,000. The funding was provided to help us accelerate our growth; going from 34 to 50 schools aiming to reach an extra 7000 pupils in the coming academic year. We also received government recognition for our fast growing esports tournament. Backed by the DCMS funded Creative Careers Programme, the tournament is on track to support over 6000 students from 60 schools across the country in 2020.

Looking forward we are excited to welcome Nintendo as our newest Lead Partner. With their support we aim to reach more students and schools than we ever have before. From esports to digital sound the team is developing a range of new materials to support the breadth of the computing curriculum and related careers.

Esports expansion

The Digital Schoolhouse team also delivered its biggest annual esports tournament to date. The tournament, which encourages students aged 12-18 to develop practical and soft skills through an immersive careers experience, reached over 5000 pupils across the country.

Featuring school heats, eight live events and one epic grand finale at Gfinity's esports arena in London, the competition was truly national in scope and proved to be an inspiration for students looking for careers within the industry.

Growing the team

There were three key hires into the DSH team last year. Estelle Ashman joined as Curriculum Content Developer, leading the way in a new role that combines being a teacher with an industry practitioner. Mike became Digital Schoolhouse's Esports Programme Manager, seeking to use his experience in the world of esports and teaching through play-based and task-based learning in Japan to help grow the programme.

And Sophia Aker has become the team's Programme Coordinator, having recently graduated from Durham University.

Onwards and upwards

The past year has been a great one for Digital Schoolhouse, but we're aiming to do even more in the coming year.

Already, we've exceeded the target of signing on 50 Schoolhouses. Next academic year, we currently have 55 Schoolhouses on board including one in every county of Northern Ireland. Which means that we are set to reach more than 32,000 pupils and 4000 teachers over the coming year.

But there is always more that we'd like to do and more that we could do. This is why we're always open to talking to more potential partners in the industry.

TO FIND OUT MORE

For more information on these services, please contact - shahneila@ukie.org.uk

inspiring talent





Student Membership

Now in its 6th year, Ukie's Student Membership scheme continues to grow and bridge the gap between academia and industry. This year along the scheme grew substantially and now provides over 3,000 students, from 40 of the country's foremost games courses with exclusive opportunities, events, resources, insight, internships and industry discounts to bring them closer to their first job within the industry.

The 2017-18 academic year was filled with more key activity than ever with three separate student conferences being held at Staffordshire University, Abertay University and the final taking place during London Games Festival.

These events collectively reached over 1,000 students from across the UK, providing them with the opportunity 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 members Amiqus and OPM Response.

This academic year also saw the Ukie deliver the UK's biggest ever student game jam, with over 250 students participating across 55 teams nationally. Each team was

paired with an industry professional to help guide them through the 48-hour game jam. This activity would not have been possible without the support of our sponsors Epic Games, Codemaster, Amiqus, OPM Response, Tag Games and Coatsink, so we thank them for their support.

The future of the Student Membership scheme is looking stronger than ever, with a jam-packed year of activity planned. Kicking off in October, the annual Ukie Student Game Jam will see students competing to take home the coveted Ukie Student Game Jam trophy.

The Ukie Student Conferences at Staffordshire University and Abertay University will also return in October, both of which will contain a variety of industry expert speakers delivering talks spanning a multitude of trade relevant topics, an expo area and a CV workshop. Ukie continues to see students leave university, form their own studios and subsequently join Ukie as full members. This is a trend that is no double likely to continue as more and more student members graduate having gained valuable experience from their respective institutions.



Video Game Ambassadors

Video Game Ambassadors (VGAs) scheme are volunteers from the games industry who are driven to encourage and inspire the next generation to pursue a career in games. Through creating their own presentations and presenting them to a crowd of students, this programme is great for young career starters to increase their confidence.

The VGAs have been busy this year, giving presentations all over the UK, from the Ukie Student Conference in Dundee to a high school in Lavington. Participation also included mentoring in game jams and being part of a panel at the Careers Bar at EGX in Birmingham.

We are always looking into how to grow and improve the VGA scheme. One of the major goals is to increase the diverse list of VGAs with volunteers from different backgrounds, skills and careers paths to give an array of talks to hopefully connect with all students encountered.

JOIN OUR NETWORK

For more information on these services, please contact -
leon@ukie.org.uk



LONDON
GAMES
FESTIVAL



2018/2019 was a landmark year for Games London, the joint initiative between Film London and Ukie. Underpinned by funding from the Mayor of London, the year started strong with mayor Sadiq Khan renewing the programme for a further three years – ahead of schedule as the initiative continues to deliver ahead of target. Games London, its B2B programme including the Games Finance Market plus inbound and outbound missions, and cultural efforts like the London Games Festival, is now guaranteed until at least 2021.

Games London receives £1.2m every three years to help UK businesses add an incremental £35m over the same period. However since its official debut in 2016 the business pipeline is in excess of £45m, facilitating deals of all sizes: from smaller £25-50k project seeds through to multi-million deals.

The past 12 months have seen the programme grow from strength to strength as its mission to make London the games capital of the world catches on with audiences at all levels.

London Games Festival attracted 97,000 visitors across over 30 events. B2B audiences were catered to with signature events like LGF's range of summits – including the new Games Impact Summit and popular forums like WIN – and the Games Finance Market, plus partner offerings including the BAFTA Games Awards. This year saw an increase of international delegations with groups from USA, China, Italy, Germany and more here to do business and fund games.

On the consumer side, audience growth came as Games London connects new and existing audiences with free one-of-a-kind games experiences or original commissions through flagship events Now Play This and the Trafalgar Square Games Festival.

With further investment from Ukie itself, Now Play This at Somerset House was extended to a 10-day exhibition featuring 51 artists and 11 new commissions. Now Play This remains one of the most unique games events in the world, with alternative experiences, interactive artworks and playful experiences. Audiences agree with nearly 32,000 attending the free and paid works installed

at one of London's most iconic cultural institutions. The Trafalgar Square Games Festival catered to another 25,000+ with a day of competitive games challenges and outdoor fun: a free FIFA-backed Play With A Pro experience where the best walk-up players could take on visiting pros representing Chelsea, Wolves and Swansea; plus a LEGO Overwatch installation, Kojima Productions pop-up shop, cosplayers and arcade games. For 2020, this event will turn into a two-day long experience with an added stage, live music and more partnership opportunities. Meanwhile during LGF, the BAME-focused Ensemble exhibition debuted its second year of profiles championing creative in games with eight new starts profiled and showcased. Ensemble has proved a lightning rod for the discussion around representation and new networks for diverse groups.

Of course the year-round B2B work continues alongside the annual festival with highlights including the yearly outbound missions to Slush in Helsinki and the summer inbound 'familiarisation' trips for bringing new investors to the capital. Each year these events create 60+ leads for both studios and investors and promote London and UK talents in ways that just aren't delivered elsewhere. In fact this is true about everything Games London does: the activity it delivers and business opportunity it creates simply wouldn't have happened otherwise without direct funding from the GLA and corporate partners. And as the business opportunities grow so to does our cultural footprint where we are building connections between institutions, creating free events in public spaces, and exposing more people to the variety and potential of interactive entertainment.

TO FIND OUT MORE

Find out more - [gameslondon.com](https://www.gameslondon.com)



intellectual property

Ukie turned 30 this year, and over this period of time, games have evolved to reflect changing technology and culture. This has posed different challenges for businesses seeking to protect their intellectual property.

Games are now accessible via a number of different platforms, from consoles and PCs, to mobiles and Smart TVs. No longer do players have to pay or own a physical copy, as a game can be played online or via a mobile app, often for free. The technology used to protect against copying or theft has improved, which has meant bad actors are finding new ways to steal and profit from our members' IP.

For example, the games many of us played growing up are now available via smartphones or new 'retro' consoles designed to work with the latest TVs and cable-free Bluetooth game controllers. This growing nostalgia powered market is being targeted by unsavoury characters who are selling unlicensed 'retro' devices with tens of thousands of games, often for less than £200. None of the sellers have obtained permission to distribute the games and the majority of the games were obtained from infringing download sites – an outright breach of IP law.

Over the last year, Ukie has taken action to stop sales of the unlicensed devices by using Cease & Desist letters, Trading Standards and PIPCU. The top sellers are no longer trading, which is a welcome development, but there are still a few sellers operating directly via their websites and social media. There are also a number of listings on marketplace platforms which are comparable to ISD sellers (before preventative measures were implanted by platform owners to thwart the sale of those devices). By highlighting the issue, our aim is to work with our partners to prevent, disrupt and stop this activity and raise awareness amongst the game players that they should not buy the unlicensed devices.

There is still an issue with 'cracked' games being made available online. The cracked files are found on game specific download and torrent websites and websites making available other types of content (book, music, films etc.).

Ukie's IP Scanning service has reported over 1 million URLs for 500 game titles which is a higher number of URLs per title compared to other content types (books, music and film). Game files are very large and therefore financially more lucrative to the site operators who receive revenue each time a file is downloaded from a Cyberlocker site.

Site operators can achieve more revenue from one game title being downloaded a few hundred times compared to other smaller files being downloaded thousands of times. Taking down infringing links and reducing access to sites via takedown notices, PIPCU action and search engine delisting is crucial to limit the damage and harm caused to game publishers.

There are also IP issues within free to play games. Criminals have found new ways to exploit the IP for these game titles such as counterfeit merchandise or illegally obtaining the in-game currency and or items and selling them for profit.

This is a major issue for the industry. The illegal use of in-game currency or items on secondary sites has led – inadvertently – to some outside the industry thinking these are legitimate parts of the gaming economy. This has meant that skin gambling sites or black markets have been conflated as part of the industry, potentially having a regulatory impact on the whole sector down the line.

This is why Ukie is working actively with Law Enforcement and Payment providers to disrupt these activities. And we do so to prevent lost revenue in companies, players feeling cheated by their games and to combat confusion in wider society about how our games operate.

TO FIND OUT MORE

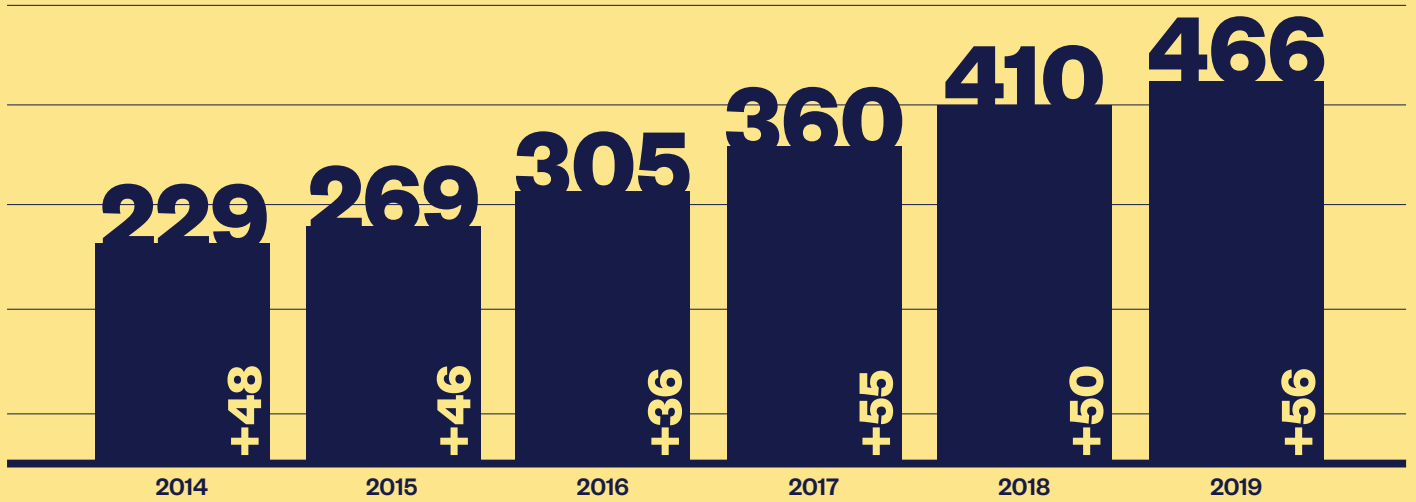
About the work we do or want to sign up for the scanning service, please contact — mo@ukie.org.uk

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MO ALI - IP SERVICES, UKIE

ukie's year in numbers

MEMBERSHIP GROWTH



Developers from **micro** to **large**
established studios

DELIVERING VALUE FOR MEMBERS

44 ✓

ukie member meetings delivered

66 ✓

companies attended a ukie business session

110 ✓

industry events organised + promoted



saved through **member discounts** on **services** including discounts on **games tax relief** advice

£120k



£180,000

in **member free** event passes

2k+

managed business 1-2-1 introductions

250

room bookings at the ukie office

350k

illegal download links removed by IP web scan

INTERNATIONAL TRADE



£100k
of DIT exhibitor grants distributed to UK companies by Ukie

124
UK games businesses exhibited at an overseas show on a Ukie managed stand

7500+
people visited a Ukie stand at an overseas trade show

4,500
new business connection via trade programme

240 UK games companies accessed the ukie international trade programme

124 UK games businesses exhibited at an overseas show on a ukie managed stand

£79m worth of business deals done by UK businesses on our trade stands

a 14 day UK tour getting companies ready for investor ready with a toolkit

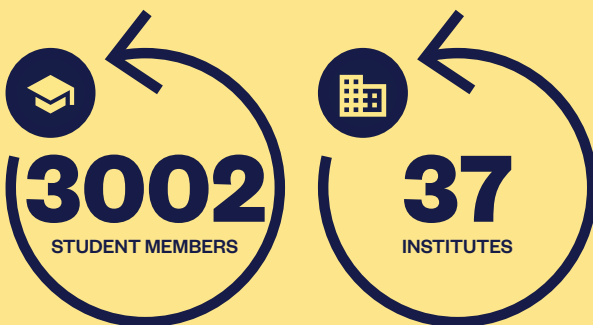
DIGITAL SCHOOLHOUSE

SINCE WE BEGAN IN 2014, WE HAVE SUPPORTED:

IN 2019, WE HAVE SUPPORTED:



STUDENT MEMBERSHIP



VIDEO GAME AMBASSADORS



3 STUDENT CONFERENCES ATTRACTED OVER 800 ATTENDEES AND 60 TALKS

POLITICS



**equality, diversity
+ inclusivity**



One of the biggest challenges facing the industry today is increasing its diversity. Games are played by billions of people across the world and across the demographic spectrum.

But when it comes to the making of games, the industry recognises that there is much more to be done to ensure its workforce matches the reality of the world today.

This is particularly important in today's political environment. As part of the Department for Digital, Culture, Media and Sport (DCMS) inquiry into Immersive and Addictive technologies, the issue of industry diversity was raised on a number of occasions: including in one dedicated session exploring the topic. In particular, the industry was challenged to produce data on itself that would define clearly the state of play in terms of diversity across the sector.

It is a challenge that we should all rise to. This is why Ukie has been taking a number of steps this year to tackle the issue head on, which are set to bear fruit in the coming year.

Robust diversity research

Central to our efforts is tackling the lack of detailed data head on. We're launching an industry census to help us define the issue with informed, robust data. We have partnered with academics from the University of Sheffield to create the survey. Covering a broad definition of diversity, the survey will seek to gather data related to age, gender, sexuality, caregiver status, social mobility and more to provide as comprehensive a picture of the state of play in diversity in our sector.

The census is being supported strongly by a number of Ukie members, who will be working hard to get their staff to provide data for the project.

However, we will be inviting individuals from across the industry to contribute to ensure that the data we collect, analyse and report on in the coming months provides the most accurate picture of the sector as possible.

The pledge

While it is important to gather data on diversity to determine where we stand, we should also do what we can to take proactive steps to continue to open up our industry's culture.

To help do this, we're creating The Pledge. Our intention is for the industry to agree to sign up to the pledge, which consists of four main principles all designed to ensure that diversity sits at the heart of the way our businesses operate.

The principles are:

- 1.** Attract more diverse talent to join the games industry by recruiting as fairly and widely as possible.
- 2.** Reflect greater diversity in our work by ensuring this shines out in everything we do, from game design and development, through to marketing and including support services.
- 3.** Create an inclusive culture where all can thrive by educating and inspiring our people to take more personal responsibility for fostering and promoting diversity and inclusion.
- 4.** Encourage greater industry engagement on diversity by looking outside, raising awareness and encouraging debate with others to improve diversity and inclusion across the wider games industry.

However, principles without practical advice are hard to execute. We will make sure that when The Pledge formally launches that we issue practical guidance alongside it to ensure words convert successfully into meaningful action.

Diversity today

Ukie has already played a role in supporting industry diversity. Its work with Film London on the London Games Festival has helped support the Ensemble initiative, which promotes inspirational diverse figures far and wide.

We have supported a number of industry groups dedicated to increasing diversity across demographics that are currently under-represented within the industry. The Ukie team itself has been working hard to improve its efforts to ensure it considers diversity as much as possible, including taking on unconscious bias training. However, the purpose of our initiatives in the coming year is to turn the wider action in house and in the industry into a sustained campaign. By doing so, we hope to understand the nature of industry diversity much more effectively, determine where the industry needs to do work and begin the actions that will help us resolve the problems for the industry of the future.

TO FIND OUT MORE

For more information on these services, please contact - anderona@ukie.org.uk

member groups

One of the best ways to get involved is through our programme of special interest groups

Our 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.

ESPORTS

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EQUALITY, DIVERSITY + INCLUSION

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INTELLECTUAL PROPERTY

contact - mo@ukie.org.uk

MIXED REALITY

contact - luke@ukie.org.uk

POLICY

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PR + COMMUNICATIONS

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1939 game **258 Group** 3dnative **505 Games** 500c Games **A Brave Plan** Aardvark Swift Recruitment **Access Sports** Access to Music **Accumed Consulting** Activision Blizzard UK **AdRealm** Aim Awards **AIME** All Brandz **Altered Gene Studios** Altergaze Virtual Reality **Alzheimer's Research UK** Amazon **Amicus** Ansible PR & Communications **Ant Workshop** Antimatter Games **Antstream** AppBox Media Plc **AppyNation** ARM **Atomic Entertainment** Atomicom **Attention Seekers** Auroch Digital **Autistica** Avid.ly **Azomee** Bandai Namco Entertainment UK **Barog Game Labs** Bastion **Beijing CrazySports Industry Management** Bidstack **Big Ben Interactive** Big Games Machine **Billy Goat Entertainment Ltd** Bird & Bird **Biz Media** Blazing Griffin **Blicx**Bluegfx (London) **Born Ready Games** Boss Mode **Bossa Studios** Brightrook Games **British Chamber of Commerce Korea** British esports Association **Brown Betty** Brunel University London **Buckinghamshire College Group** Bulkhead Interactive **Burke & Best** Caffeine TV **Cambridge Game Creators Network** Cambridge Regional College **Canterbury Christchurch University** Cape Guy **Carbon Digital** Cardboard Sword **Casual Games Association** CCP Games **CE Europe** Centresoft **Charles Russell Speechlys LLP (London)** Checkpoint **Cheetah Mobile** Cherry Pop Games **Chilled Mouse** ChilliConnect **Chimaera** China Britain Business Council **China Language Service Centre** Climax Studios **Cloud Imperium** Cloud9 **Coatsink** Code Kingdoms **Codemasters** Codewizards **Coding Land Education (Beijing) Technology Co. Ltd.** Connor Broadley Ltd. **Conspexit Games Studio** Contact Sales **Coop innovations** Cooply Solutions **Coutts** Crayfish **Creative Assembly** Criterion Games **Cubic Motion** Curve Digital **Dakko Dakko** Darbotron **De Montfort University** Dead Good Media **deltaDNA** Desk Dragons Interactive **Dexerto** Dimoso **DLA Piper** Dlala Studios **DNA: Digital Out-of-Home Interactive Entertainment Network Association** Dovetail Games **DR Studios** Draw & Code **Dream Harvest** E Champions **East2West** Eaton Smith **ECommPay** Edge esports **Ediedo** Edinburgh Napier University **EGL (European Gaming League) Xseries Ltd** ELC Gaming **Electronic Arts** Endpoint esports Ltd **Epic Games UK** epic.lan **Escape Studios (Pearson College)** Escape Technology **ESL UK** esports insider **Etch Play** Exertis Gem **Exient** FacelT **Fallen Planet** Fansensus **Fayju** Finstock Capital **Fire Hazard Games** Firebolt Games Limited **Firebrand Games** First Light **First Touch Games** Five Aces Publishing Ltd **Flix Interactive** Flying Interactive Ltd **Focus Multimedia** Foot Anstey **Fortitude Games** Funsolve **Fusebox Games** Future Games of London **FuturLab** Game Dragons **GAME Retail** GameBench **GameFace Labs** Gamer Network **Games Jobs Direct** Games London **GamesAid** Gamewagon **Gamification Nation** Gateway College **Genba Digital** Gfinity **GG Insurance** Ginx TV **Glitche.rs** Globalstep **Glowmade** Goldborough Studio **Goldsmiths, University of London** Good Catch **Google** Gram Games **Green Man Gaming** Ground Shatter **Halo Financial** Harbottle & Lewis LLP **Hardlight** Heaven Media **Hi-Rez Studios** Humain **Hutch Games** Ian Hamilton Design & Consultancy **ICO Partners** Identity Spark **Improbable Worlds** Incendium Games **Incomm** Indigo Pearl **InGame** Innovation Birmingham Campus **Intel** Interacting Games **International Games Developers Association** Internet Advertising Bureau **Ipsos Connect** ISM (Interactive Studio Mgt) **Jagex** Johnny Atom Productions **Joyful Works** Kabam **Kalypso Media Digital Ltd** Keymailer **King** Kiss **Koch Media** Koei Tecmo Europe **Konami Digital Entertainment** Kotori Studios **Koyo Store** Kuju Entertainment **Lab42** Leapfrog **Lee and Thompson** Legendary Games **Lick PR** Lionbridge **Liquid Crimson** Little Big PR **Localize Direct** London South Bank University **Lucid Games** Ludus Magnus **Luton & Son Limited** Magic Notion **Magnetic Arcade** Make Real **Marchsreiter Communications** Marvelous Games **Matata Corporation** Matt Spall Consulting Ltd **Maximum Games** MCM Expo Group **Mechabit** Media Molecule **Mediatonic** Mercia Fund Management **Merge Games** Microsoft **Middlesbrough College** Mike Bithell Games **Milestone** Milky Tea **Milton Keynes College** Mimram Media **Mishcon** Mobile Free To Play **Modern Dream** Modsquad **Mojiworks** Mujo Games Ltd **Multiplay** Myriad Associates **N ational Film & Television School** National Student Esports Ltd **NaturalMotion Games** NCSOFT Europe Ltd. **nDreams** Nerd Monkeys **Nesta** NetEase **Network N** Next Gen Skills Academy **Niffler** Nineteen Eleven Games **Ninja Kiwi Europe** Nintendo UK **North East Surrey College of Technology** Northern Ireland Screen **Norwich University College of the Arts** Nosebleed Interactive **Odgers Berndtson** Omni Systems **OMUK** OPM Response **Oury Clark** Outright Games **Pandabox Games** PaperSeven **Pataphysics** Payload Studios **Perpetual Europe** Piggyback Interactive **Pixel Toys** Plan of Attack **Platform Ltd** Play Ignite **Playdemic** Player Lands **Playground games** Playmob **Playniac** PlayStack **Playtonic Games** Playtra **Plus Accounting** Pole to Win Europe **Polygon&Pixel** Polystream **Pomegranate** PQube **Premier** Purewal & Partners **QD Events** Quantum Soup Studios **Queen Mary College for Commercial Law** R8 Games **Rantmedia Games** Rare **Raspberry Pi Foundation** Ravensbourne University **Realised Realities** Reality Games **Realtime Games Ltd** RealtimeUK **Reflection.io** Renaissance PR **Retro Games** Revolution Software **Riot Games** Ripstone **Rising Star Games Limited** Roblox Corporation **Robot Teddy** Rocabee **Rocket Lolly** Rogue Vector **Roll7** RSM UK **Rubylabs** Russells Solicitors **Saffrey Champness** Scirra **Secret Sauce** S EGA Europe **Shark Infested Custard** Sheffield College **Sheridans** Silvertown **Simple Animation** Simul **Six to Start** Skara - The Blade Remains **Sketchbook Games** Skillsearch **Skybound Games** Skyhook Games **Slingshot Cartel** Soccer Manager **Sold Out Sales & Marketing** Sony DADC **Sony Interactive Entertainment Europe** South & City College Birmingham **South Devon College** Southern Regional College **Space Ape Games** SpecialEffect **Spilt Milk Studios** Spiral Circus Ltd **SpiritAI** Sportgrail **Sportradar** Sports Interactive **Square Enix** SRS Investment **St Helens College** Staffordshire University **State of Play Games** S-Tech **Steel Media** Stick Sports **Storienteer** Strike Gamelabs **Studio Output** Super Spline Studios **Swallowtail Games** Swipe Right **S system 3 Software** Tag games **TAKEOFF Creative** Take-Two Interactive Software Europe **Talespinners** Tandem Events **Tangentix** Target Media **Team17** Terra Virtua **Testronic** The Academy of Contemporary Music **The Chinese Room** The Diana Award **The Games Tribe** The Irregular Corporation **The Multiplayer Guys** The NUEL Esports Ltd **The Polygon Loft** The Secret Police **The Tall Trees** The Tiniest Shark **The Trailer Farm** Third Kind Games **This is Alpha** THQ Nordic **Three Knots** Thumb Food **TinyBuild** To Play For **Touch of Ginger** Tower Studios **Trailmix Games** Tripp Associates **T ruro and Penwith College** TSIT **TT Games** Two Points Studios **Two Tails** U&I Entertainment **U bisoft** UCL School of Management **Ultrahaptics** Unity Technologies **Universally Speaking** University of Abertay Dundee **University of Brighton** University of Chester **University of East London** University of Essex **University of Leeds** University of Sunderland **University of Surrey** University of Westminster **University of York** Upload Agency **UPLTV** Utopian World of Sandwiches **Uxbridge College** Uzone Network Technologies **Venatus Media** Vertigo VR **Viewpoint Games** Virtual Arts **Vision Games Publishing** Warchild **Wargaming UK** Warner Bros. Interactive Entertainment **Warp Digital** Warwickshire College **Webfibre Limited** Well Played Games **West College Scotland** West Suffolk College **Westminster Kingsway College** Wibbu **Wicked Sick** Wired Productions **Wired Sussex** Women in Games **World Gaming Executives** WXY Social Limited **Xiotex Studios** Yogscast **ZA/UM Studio** ZeniMax Europe

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