

annual review 2018



ukie

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Contents

OUR INITIATIVES



askaboutgames.com



digitalschoolhouse.org.uk



games.london



ukie.org.uk/student-membership



gamesambassadors.org.uk

UK GAMES MAP
gamesmap.uk



- 4** ministerial foreword
- 6** chair's report
- 8** ceo's report
- 10** a year in Westminster and Brussels
- 14** research and data
- 16** UK games map
- 18** 2018 in numbers
- 20** acting locally, thinking globally
- 22** global trade
- 24** digital schoolhouse
- 26** inspiring talent
- 28** promoting positive games
- 30** intellectual property
- 31** business support
- 32** what our members say
- 34** our groups

The games industry is at the **cutting edge of innovation**, seamlessly combining some of the most **creative and cultural** elements of the creative industries with some of the **most advanced digital technologies** available

MARGOT JAMES MP —
MINISTER OF STATE FOR DIGITAL AND THE CREATIVE INDUSTRIES

2018: foreword

**MARGOT JAMES MP —
MINISTER OF STATE FOR DIGITAL
AND THE CREATIVE INDUSTRIES**



I consider myself incredibly privileged to have the UK games industry in my brief. It is one of the fastest growing parts of our economy, employing nearly 30,000 people in highly skilled and highly productive jobs. And it is hugely relevant to my other ministerial responsibilities as a champion of the tech sector and the creative industries, through to data protection and internet safety.

As Ukie's UK Games Map shows, it is a sector that is truly spread across the UK, helping deliver further prosperity in all regions of our country. With growth in mind I am also fascinated to see the emergence of esports in the UK. This rapidly developing part of the industry is already worth over \$1bn globally.

The video games industry is very important to our ambitions for export growth. So I am delighted that the partnership between Government and Ukie has delivered another year of successful trade and investment missions and events, with a great UK presence at shows including GDC, China Joy and Gamescom. Ukie's fantastic funfair-themed stand at Gamescom

2018 in fact hosted a record 85 games companies for the UK, helping show the world that we have the most talented and creative games developers and that the UK is the best place to make games.

Earlier this year we published the Industrial Strategy Sector Deal for the Creative Industries. This groundbreaking deal, a contract between the creative industries and government, is the blueprint for continued growth in the sector. It is far more than a document. It has established a partnership and a process through which we will build on the UK's leading position and reputation as a creative powerhouse. The games industry plays a central role in this process. It is at the cutting edge of innovation, seamlessly combining some of the most creative and cultural elements of the creative industries with some of the most advanced digital technologies available. I look forward to working closely with the sector to deliver on our sector deal's ambitions.

I was pleased through the sector deal that we were able to increase the support we are providing through the UK Games Fund, a highly successful programme

helping with access to finance, entrepreneurial skills and IP creation in the trailblazing games sector.

To date it has helped more than 75 games businesses and supported more than 170 graduates on the journey to becoming entrepreneurs. The extended UK Games Fund programme is expected to deliver GVA of £22 million, with other measurable benefits including the creation of at least another 300 jobs, development of new IP, enhanced skills and job progression and an estimated £2.5m leverage of private finance over the next two years. Meanwhile, the Video Games Tax Relief continues to make a huge impact, accounting for over £1 billion UK expenditure by games companies since it was introduced in 2014.

So we are absolutely committed in Government to helping secure the future successes of what is a fascinating and thriving industry, including through Brexit and beyond. And I look forward to working with Ukie on the continued growth and prosperity for the interactive entertainment sector.



2018: chair's report

**NOIRIN CARMODY –
COO REVOLUTION SOFTWARE**

It's been yet another exciting year for the games sector. More games being made and more players enjoying them show that the industry in the UK remains strong creatively and economically. But with continued growth comes increased scrutiny from the public, politicians and regulators and Ukie continues to be at the absolute heart of the debates and issues that the industry is facing at the moment.

The good news is that your trade body is in the very best shape to represent your voice, to promote games in all their positive and diverse forms, to present the responsible approach that the sector takes to consumers and to help support the continued growth of the UK games industry.

We have had yet another strong year financially as turnover has increased by 14% to £1,836,047, from £1,611,333 in 2017. This performance was partly as a result of yet more solid membership growth.

Ukie now has over 410 members (up from 360 this time last year), ranging from multinational publishers, platform holders, esports businesses and globally recognised studios to super-talented indie teams. We also have our incredibly strong Partner Membership whose services underpin

the sector and our growing Student Membership, helping to nurture and inspire the talented workforce of the future.

This still fast-growing membership enables us to truly represent the diverse scale of the UK games sector but with so many members we recognise the importance of being able to better engage with you all. So we have been looking at ways of improving member engagement – including investing in a new website that will be revealed soon, that has been designed to help you get the best out of your membership.

We are also looking at other ways that we can make sure we give members as many opportunities as possible to engage with the work that we do on your behalf – from influencing our strategic thinking and lobbying to developing new initiatives that will benefit UK games sector.

A strong financial result has enabled us to invest more in projects like our global trade and investment events which have helped UK games businesses generate £113m in business wins over the last twelve months. These results have also ensured that Ukie has people in key positions such as PR and Communication, to help the sector get on the front

foot with informing the media about games.

Whilst this investment has seen direct costs increase by 14% to £1,193,857, from £1,051,807 in 2017, due to strong commercial focus the team has yet again generated a profit of £74,000 that gives Ukie both operational security in uncertain times and that can be reinvested in projects that benefit Ukie's members and the wider sector.

There were also some one-off costs to note this year, including the costs of the office move. However, the overall costs of the move and the rent on the new office were negotiated to make sure that they were less than Ukie would have paid if we had stayed in the old office.

What this adds up to is that Ukie continues to have a strong foundation to represent you and offer valuable services that will help your businesses. Ukie only exists because of you, our members, so thank you all for your ongoing support. The team here is committed to championing the confident voice of the UK sector and to working tirelessly on your behalf. As the sector grows and its cultural reach expands ever further, we will see more scrutiny and more challenges but Ukie is well prepared to face these positively and openly and we will continue to do everything we can to help make the UK the best place in the world to make, sell and play games.

your **trade body**
is in the very best
shape to **represent**
your voice

and to **help support**
the continued
growth of **the UK**
games industry

NOIRIN CARMODY – COO REVOLUTION SOFTWARE

We are committed
to **making a**
difference to how
modern creative
work places are
shaped to **recruit**
and retain the right
people, **making**
even better games.

DR JO TWIST OBE – CEO UKIE

2018: ceo's report



DR JO TWIST OBE – CEO UKIE

It's been a typical year of the unexpected in the games industry, which is exactly what we expect as your trade body. Twelve months ago, Fortnite was the US spelling of two weeks, PUBG was the talk of the town, and lootboxes were something pirates had.

The WHO was a band from the 60s, Brexit was a way off and couldn't possibly mean a cliff edge. As usual, everything changes. The Ukie team has changed too. We've said farewell to brilliant team members who have moved on and welcomed new faces who are proving to be fantastically dedicated to serving the industry. The last 12 months have been intense. The weakly evidenced, premature drafting of a "gaming disorder" by the WHO combined with a hornets' nest around innovative business models demonstrate the growing pains of an industry becoming recognised as part of culture.

This year we've deployed your funds to focus on showing the world the positive impact games have on society: on mental health, science, on understanding difficult or provocative issues, like any artistic medium. We remain committed to evidenced based policy and advocacy, educating and engaging regulators, policymakers and Parliamentarians, particularly around the now pressing risks posed by Brexit, and have coordinated with

global colleagues at what is the most critical time in the industry's history. Part of this has been in collaboration with other sectors to define what a Sector Deal looks like for the Creative Industries. Investment in audiences of the future, skills, immersion and creatives clusters all benefit games and interactive businesses across UK.

We've seen the growth of UK esports, through events like the successful ESL ONE in Birmingham, and we continue to support esports as an integral part of modern entertainment. We are the confident trade body for this sector. Our international trade programme continues to grow with £113m worth of business deals done by UK businesses on Ukie-produced stands at gamescom and GDC. We've also helped to increase foreign direct investment to the UK through trade missions, introductions and other events. Earlier this year, we were delighted the Mayor of London committed a further three years' funding for Games London, which we run with Film London.

London Games Festival, a key part of the programme, grew stronger with thousands enjoying playful events across the capital, shining an international spotlight on our national expertise, creativity and culture. With Brexit threatening to further restrict access to highly skilled it's never been more

important to improve home-grown skills. We've rebooted our diversity and inclusion group and are committed to making a difference to how modern creative work places are shaped to recruit and retain the right people, making even better games.

Our Digital Schoolhouse project, powered by PlayStation and supported by SEGA and most recently Ubisoft, is committed to inspiring UK schoolchildren to learn the digital skills that the sector needs and inspire them into careers. We've recognised that we cannot lose focus on member retention and we are reviewing what we do and how we do it.

We will continue to improve the way we communicate and how we can be more effective. Our new branding and website will build on the confidence and creativity our members embody.

Thank you to my dedicated Ukie team for being so passionate, committed and incredibly hard working.

Thank you to my diverse Board of Directors who show such support for our goals and mission on behalf of the sector. Their time and expertise is invaluable.

And finally thank you to you all, our members, without whom none of the last 12 months or the next would be possible.

a year in westminster and brussels



policy and public affairs are at the core of what **Ukie** does – making sure **your voice is heard on the big issues** that affect the UK games, esports and **interactive entertainment sector.**



Over the course of the year Ukie's Public Affairs and Policy team have been engaged with a very broad programme of activity. Domestically, Brexit concerns, particularly continuing access to talent and free flow of data, have dominated whilst the development of the Creative Industries Sector Deal and the Internet Safety Strategy, have been a particularly high priority. Our efforts here have resulted in a strong showing for the games industry in the sector deal which provides a huge opportunity for further growth.

In Europe we have continued to lobby on all elements of the Digital Single Market and globally we have played a leading role in the international coalition responding to the World Health Organisation's proposed inclusion of 'gaming disorder' in their latest guidance on recognised diseases.

Speaking directly to politicians about the games sector is crucial to them building a better understanding of the interactive entertainment sector and our position on the big issues and we have continued to engage with MPs, Peers and Policy makers in Westminster and Brussels.



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

- Education Committee's inquiry on the Fourth Industrial Revolution
- DCMS Committee's inquiry on positive social impact of participation in culture
- Government Internet Safety Strategy
- Creative Europe funds in the area of values and mobility
- House of Commons Public Bill Committee on the Data Protection Bill
- Migration Advisory Committee's call for evidence
- House of Lords Select Committee on Artificial Intelligence's call for evidence

Beyond Brexit, there have been several other key issues that have dominated games policy this year.

This year we have had one-on-one conversations, round table discussions and studio tours with Ministers, MPs and peers including Chief Secretary to the Treasury Liz Truss MP; Minister for Digital Margot James MP; Daniel Zeichner MP (Cambridge); Matt Western MP (Leamington Spa); Jeremy Quin MP (Horsham); and Sir Kier Starmer MP, Shadow Brexit Secretary. Central to the conversations that we have had with all MPs is making it clear what impact Brexit could have on local businesses, as well as the potentially damaging impact of a no-deal or hard Brexit.

The World Health Organisation's inclusion of "gaming disorder" in the International Classification of Diseases (ICD-11), the WHO's most up to date diagnostic manual, threatened to create uncertainty in a range of policy spaces including internet safety, age regulations, and healthcare. Our lobbying on this issue, in conjunction with the work of our fellow games

trade bodies around the globe resulted in the WHO pushing back their final publication date by a year – a year that will allow us to further nuance the conversation, push for a more complete body of evidence, and better understand the implications of its inclusion for games makers and public services alike.

Ukie has also been actively engaged in the current developments involving loot boxes around the world, building on our previous work with the UK Gambling Commission and the DCMS. We have engaged closely with MPs, industry and policy makers, in large part to educate them around these often emotive and contentious topics and promoting the self-regulatory and responsible approach of the sector.

We have continued to advocate for improved, innovative and inspiring computing education in the UK, from primary school through to adult upskilling. In light of the threat of reduced access to highly skilled European workers as a consequence of Brexit, it has never been more important to support our talent pipeline for both creative and technically skilled individuals.

Ukie has also been working closely with DCMS to develop the government's Internet Safety Strategy and ensure it takes full account of the range of functionality in online games.

Ukie is the official secretariat for the All Party Parliamentary Group (APPG) for video games - a cross party group of MPs with a passion for games and esports. We have focused this year on building on the strong parliamentary base that we already have with our current members and reaching out to new MPs who have expressed interest in related issues.

One of our big engagement moments in the last

twelve months was our Westminster Games Day in October, which saw 25 MPS and Peers and over 100 officials and researchers attend a programme of activity across the day. In January, we engaged with ten other APPGs across the creative industries to voice concern in Parliament around losing access to freedom of movement during the Brexit process – a powerful lesson in the strength of using our collective voices.

On a smaller scale, we teamed up with the APPG for Mental Health and their respective members to host an event in Portcullis House in April on the powerful story we have to tell around games and mental health research. In June, our Westminster Summer Reception saw another strong turn out including a keynote from Minister for Digital and creative industries, Margo James MP.

LOOKING AHEAD WE ARE HOSTING THE FIRST EVER ESPORTS PARLIAMENTARY EVENT

Europe

Our relationship with Europe remains a key part of our industry and the past 12 months have seen a continuation of our efforts across a number of key files primarily concerned with the Digital Single Market. e-privacy, geo-blocking, data flows and AVMS have all featured as we have built on previous years EU Engagement.

With the uncertainty surrounding Brexit at the front of our minds, Ukie have worked hard to ensure our input to these key issues continues to be heard, both in Brussels and here at home. We have strengthened the relationship with our European trade body the ISFE expanding our engagement with them beyond Brussels to include

Esports Policy

As esports continues to grow, the firm footing established by Ukie's esports White Paper is helping to shape the way we lead on policy. Our esports policy group has explored professionalisation, regulation, age ratings and tax reliefs and we have built new relationships with Sport England and other bodies with an interest in this fast moving sector.

Looking ahead we are hosting the first ever esports Parliamentary event that will highlight the importance of esports across growth, skills and exports to members of Parliament.

TO FIND OUT MORE

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

research and data



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



To deliver Ukie's mission to make the UK the best place in the world to make and sell games, it is essential that the work we do is informed and driven by authoritative evidence and robust data. We conduct and collate an extensive library of industry research and information, ranging from headline economic measurements and geographic sectoral mapping, to consumer market valuations and demographics, as well as a wealth of facts and statistics across virtually any industry topic.

Ukie is also the home to the official UK game charts and provides access to detailed UK and European sales data. This evidence and insight powers a perceptive and highly-informed approach to Government policy, ensuring that decision-makers recognise Ukie as the leading voice for our industry. Data moulds our member services and international trade programme via qualitative and quantitative member survey feedback. By making as much of the data we hold as possible publicly available, we aim to empower the industry with easily accessible, reliable data, to provide the media and public with a credible, informed source of information and to act as a point of contact for any sectoral data-related matters.

Ukie's data initiatives include the UK Games Map, our free online map of the UK games industry, listing 2,269 active games businesses, 149 service companies and 100 education institutes offering game-related courses. Our annual UK Games Market Valuation tracks the year-on-year growth in consumer spend on games and game-related products. In 2017 the valuation showed that UK consumers spent a record £5.11bn on our sector, an increase of +12.4% from the previous year. 2017 also saw game software grow 8.3% to reach a new high of £3.56bn and game hardware eclipsed £1.4bn for the first time.

As well as our own work in research and data, Ukie also works closely with data company partners, industry bodies across both games and other sectors and directly with the Government to help build a cohesive, shared and unified approach to industry analysis, including the GfK ChartTrack service and Reflection mobile charts, our role on the steering group of the GSD project, membership of the BFI screen sector research group and as key contributors to various Creative Industries Council working groups.

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. Two years on, the map lists an impressive 2,270 games companies currently operating in the UK, a 14.3% increase since launch.

The map combines a big data and crowdsourced approach to data gathering, pulling in additional data for established companies from across the internet, as well as allowing new businesses to register themselves directly. With a further 451 historic games companies listed in the map that are no longer trading, the UK Games Map now contains an archive of 2,772 UK-based companies.

**AT NDREAMS, WE'VE FOUND
THE GAMES MAP INVALUABLE
WHEN SPEAKING TO YOUNG
PEOPLE WHO ARE KEEN TO
BREAK INTO THE GAMES
INDUSTRY**

Tamsin O'Lunaigh — nDreams

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 (617), but there are also significant games clusters in Manchester, Brighton, Guildford, Cambridge, Leamington Spa, Bristol, Dundee, Cardiff, Liverpool and Belfast to name a few. Interestingly, the highest densities of games business-

es 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 nearly 250 games courses across 100 university and academic institutions nationwide, as well as 149 "service" companies – those that don't develop or publish games themselves, but still operate in and support the industry, including PR and legal services, charities, esports companies, technical services and middleware.

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

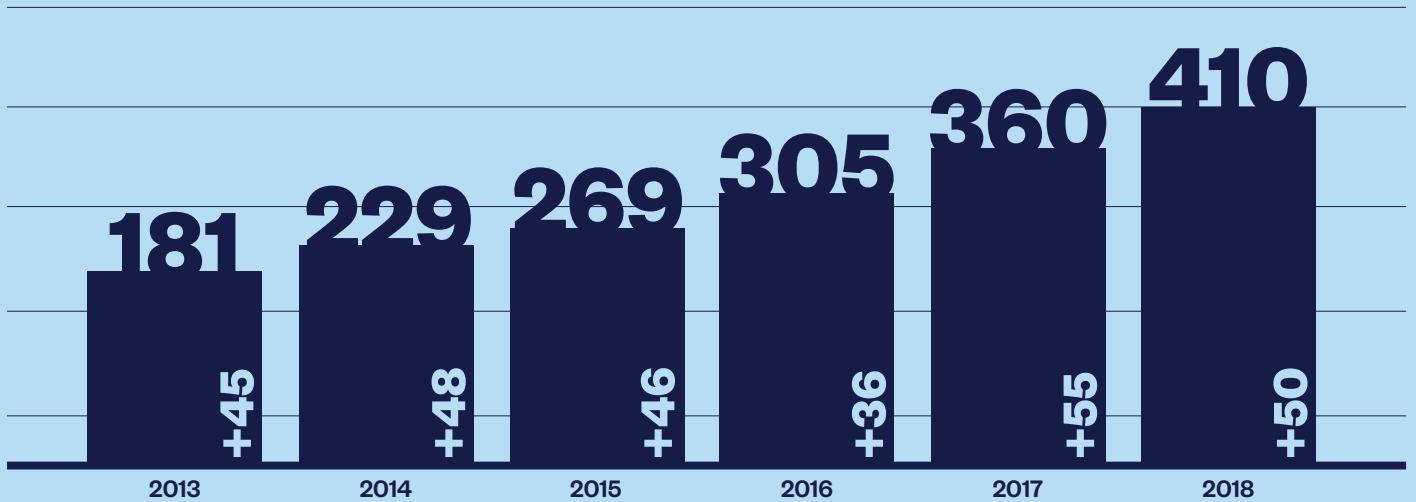
Throughout the last year, Ukie have delivered an ongoing program of updates to the UK Games Map, and we plan to further improve and expand the scope over the coming year. We will strive to maximise the effectiveness of this data and continue to build a UK Games Map that works for the industry, by the industry.

TO FIND OUT MORE

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

ukie's year in numbers

MEMBERSHIP GROWTH



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

DELIVERING VALUE FOR MEMBERS

420 ✓

ukie member meetings delivered

1150 ✓

companies attended a ukie business session

108 ✓

industry events organised + promoted



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



£180,000

in **member free** event passes

PROMOTIONS



200
over 200 news items this year

FEATURED IN



INTERNATIONAL TRADE



£115k
of DIT exhibitor grants distributed to UK companies by Ukie

160
UK games businesses exhibited at an overseas show on a Ukie managed stand

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

4,600
new business connection via trade programme

82 record number of UK exhibitors on a Ukie trade stand, gamescom 2017

£113m worth of business deals done by UK businesses on our trade stands

Increased foreign direct investment in the UK for companies that participated in the trade programme

DIGITAL SCHOOLHOUSE

SINCE WE BEGAN IN 2014, WE HAVE SUPPORTED:

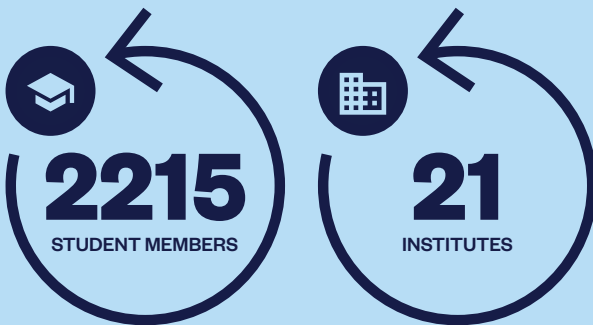
31k pupils
416 primary schools
5021 teachers
986 workshops delivered



IN 2018, WE HAVE SUPPORTED:

15k pupils
186 primary schools
2591 teachers
430 workshops delivered

STUDENT MEMBERSHIP



VIDEO GAME AMBASSADORS



2 STUDENT CONFERENCES ATTRACTED OVER **400 ATTENDEES** AND **30 TALKS**

POLITICS



35 OVER 35 POLITICIANS MET



think global act local

Continuing to deliver outstanding results.

As a proactive and energetic trade association, Ukie directly responds to the needs of its members. Some five years ago the members asked for increased support to reach international markets and Ukie responded by establishing an International Trade Programme. This expanding programme continues to deliver outstanding results with a combination of country pavilions at trade shows, inbound and outbound trade missions, investment dinners and market data.

New heights for exports

The connections made between UK and international games businesses, as a result of the programme, have driven exports to new heights. Additionally, the programme showcases the outstanding quality and creativity of UK studios which has led to significant foreign direct investment in the UK.

4,600

New business connections made

200

Over 200 UK games businesses participated in the trade programme with 160 businesses exhibiting at an overseas show on a Ukie managed stand

7500+

People visited a Ukie stand at an overseas trade show

£113m

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

TO FIND OUT MORE

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

making London the games capital of the world

Three years ago the Mayor of London backed a landmark moment for video games in the city: Ukie, in partnership with screen agency Film London, was to establish a new programme that would make London the games capital of the world and support the growth of the wider UK games sector.

That mission is now well underway, and the resulting Games London programme has been already renewed for another three years, until 2021. Games London has encouraged investment and international sales deals worth over £35m for developers in the region, creating hundreds of jobs. Its inbound trade missions have brought 20+ new VIP investors and funds to the country, introducing them to numerous leads and new contacts. The new outbound mission Games London runs to SLUSH in Helsinki has every year resulted in a deal for at least one attending company.

Most importantly: the re-established London Games Festival (LGF) has managed, in three iterations across as many years, to put the city and the wider UK on the map as a destination for games, whether that's industry audiences or cultural and consumer ones. In 2018, LGF had 65,000 people attend its events, which includes large-scale cultural engagements at places like Somerset House and Trafalgar Square, a core of B2B activity, and world-leading events from partners like BAFTA and Gamer Network.

Driving investment

Engaging with investors and connecting them with games developers in the city is a year-round job for Games London. This work all culminates every year with the Games Finance Market, the major meeting place for games businesses from all over the UK and investors during the games festival, but also informs Games London's trade missions and the training programme.

The inbound trade missions bring investors into the city to learn more about the opportunities in London and the UK. Games London has run four of these familiarisation trips now and they have proven hugely successful in raising awareness of the talent in our country, video games tax relief, and the sheer variety of games and interactive experiences made by British developers.

The outbound missions take a handful of games developers to SLUSH in Helsinki. Games London has run two of these more focused and targeted trade missions so far. It's still the only games-dedicated programme that engages with the world-famous Finnish tech event, but the opportunity is proven: deals from this part of the programme are worth over \$15m alone.

This has all gone on to inform Games London's work training and helping games companies better talk with investors. Over Games London's first three years over 150 different investors have attended or participated and the feedback has overwhelmingly pointed towards one thing: that British developers are some of the best in the world, but they don't necessarily engage perfectly with funders. So learning the ins and outs of terms sheets, different funding models, and the foibles of VCs aren't always prioritised. That's where the Games London Pitch Bootcamp comes in.

The Pitch Bootcamp has so far helped give 40 games studios a grounding in financing models, presentation skills and ways to tell their stories to people with money. This event takes place every January and everyone that successfully completes the training is given a guaranteed spot at the Games Finance Market in April during the London Games Festival.

A city of culture and play

But boosting the investment potential of games studios in London isn't enough – Games London and the London Games Festival also promotes and extends the cultural impact of games.

London Games Festival will run in early April 2019. A critical core of B2B activity, including the aforementioned Games Finance Market and LGF's own HUB event, have helped build the new Festival from the industry outwards. The event has also had continued support from the yearly presence of EGX Rezzed and the BAFTA Games Awards in the schedule - reinforcing the international credibility of the Festival. Plus the Games London team has established new initiatives, like the BAME exhibition Ensemble and the female focused W.IN, both of which promote a more diverse talentbase for our sector.

In 2019 the Festival will again deliver in a range of cultural events for wider audiences, the biggest of which is Now Play This which is held in conjunction with Somerset House. This unique event showcases and commissions innovative games ideas you just wouldn't see at any event or exhibition around the world – games with unique controllers, games about tough subject matters, or games that engage artistically with alternative themes and ideas. In 2019 we're proud to announce that extended support from Ukie directly will enable the event to run on a larger scale across the festival.

2019 also sees the return of the 'Trafalgar Square Games Festival', an exclusive one-day celebration of games at central London's biggest open space for Londoners, visitors and tourists. 20,000+ visited the event last year, and next year the plan will include more games and more iconic moments, this time as the closing day of the festival.

TO FIND OUT MORE

For more information please contact michael.french@games.london



ukie's global trade programme

—— outbound
 inbound
  ukie stand
  trade mission
  trade investment dinner



7500
 VISITORS TO UKIE STANDS

4600
 NEW CONTACTS MADE

£113m
 UK BUSINESS DONE

£115k
 DIT EXHIBITOR GRANTS
 DISTRIBUTED BY UKIE

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



**DIGITAL
SCHOOLHOUSE**



POWERED BY

PlayStation®

Ukie's Digital Schoolhouse programme, powered by PlayStation®, sponsored by SEGA, Warwickshire County Council & Ubisoft, is Ukie's ground-breaking education programme which uses play-based learning to engage pupils, whilst upskilling teachers to deliver the new computing curriculum.

Last year, SEGA and Warwickshire County Council joined PlayStation® to support DSH and enabled us to expand by 50%, with 31 Schoolhouses across England and Northern Ireland. Thanks to their support we've exceeded predictions and supported over 15000 pupils and 2500 teachers from almost 200 schools across the country this year alone. Collectively, that means we've reached over 31k pupils and 5000 teachers from over 400 schools across the country since the project first opened its doors in September 2014.

This year we are proud to announce our new partner Ubisoft. With their support we have been able to establish 36 Schoolhouses across the UK and are aiming to reach 18k pupils by July 2019.

DSH esports - transforming careers education

Our esports tournament continues to grow from strength to strength. The 2017 - 2018 tournament saw 2222 students take part as either players or by taking on one of the wider

roles such as Production Crew, Shoutcasting, Tournament Administration, Event Management or as a Community Manager. Students not only organised the tournament within their own schools, but they were also given the opportunity to meet, shadow and work alongside industry professionals during the knockout stages of the tournament. Each student was also able to claim accreditation for the skills they'd developed through the Duke of York's iDEA Award.

Working alongside Staffordshire University we examined the impact of the tournament on both schools and students. Our research revealed some incredible findings, with clear results on increased student confidence, participation and engagement within the school. Additionally, we found that 67% of students developed new friendships (with 94% maintaining or developing new friendships) during the competition. This had several knock-on benefits including 82% of students saying that they were now more likely to take part in other physical team sports as a direct result of their engagement with the tournament. Soft skills were improved across the board, with the highest gains being made in communication

and team working skills.

Digital Schoolhouse aims to help close the growing digital skills gap, and our esports tournament is clearly a step in the right direction here. 88% of students said they're more interested in a career in the video games industry and 90% of students said that taking part in the tournament made them more interested in computers/computing.

After the incredible success of the previous year we are now incredibly excited about the possibilities that lie ahead. Plans for the 2018-2019 Digital Schoolhouse National Schools Esports Tournament are already underway, and the wider programme itself continues to flourish.

TO FIND OUT MORE

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



Student Membership

Now in its 5th year, Ukie's Student Membership scheme continues to grow and bridge the gap between academia and industry. The scheme now provides over 2200 students, from 25 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 has been filled with key activity, starting off with the Ukie Student Conference North at Staffordshire University in October supported by sponsors Jagex, Epic Games, Creative Assembly and Amicus. The event attracted over 200 students from across the UK to hear from a diverse range of professionals within the games industry.

Students also received 1-2-1 advice on their portfolios, websites and interview techniques from recruitment specialists and Ukie member Amicus.

The future of the Student Membership scheme is looking strong, with a packed year of activity planned. The Student Membership programme is all about helping the next generation of talent get started in the industry and its been amazing to start to see students who have been through our Student Membership programme forming their own studios and subsequently joining Ukie as full members. This is a trend that is no doubt likely to continue and we'll be doing all we can to continue to help students understand how to make a successful career in the UK's amazing games sector.



Video Game Ambassadors

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

The VGA programme has continued to grow from strength to strength over the last 2 years with over 300 passionate industry experts now volunteering their time at events throughout the year. We are working to increase the network as well as create more ways we can get through to young people for further growth in the UK games industry.

Diversity is always key to the VGA network, and they all have a wide range of backgrounds, skills and career paths which they share with thousands of young people or career changers across the country. There is a growth of females in the network and we are committed to raising this number in future.

Speakers develop their own presentation skills and confidence too by presenting at the Ukie run Careers Bars at the biggest games expos in the country: at EGX in September 2017 and Rezzed in March 2018, which was the biggest Ukie Careers Bar to date. There is a huge range of activities that VGAs can get involved in throughout the year, including judging games jams, school scratch competitions and much more. Each activity can make a real difference in a young person's life and inspire the next generation of the UK games industry.

JOIN OUR NETWORK

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



Fellow Credit: Health 694



**promoting
a positive picture**

a ask
about
games
From The VSC Rating Board

With games being played by more and more people, it's never been more important to make sure that parents, politicians and the games playing community are fully informed about the latest issues facing the sector, the positive affect that games can have on society and what the industry is doing to promote safe and sensible game playing.

The past year has seen the UK games industry face increased scrutiny from the press and we have been very active in making sure that the UK industry's voice has been heard, fairly and accurately in the media. In particular this year Ukie has been at the centre of a global industry response to the World Health Organisation's proposed adoption of 'gaming disorder', we have worked to ensure that debates about sector's business models are as balanced as possible and made sure that the industry's views on big topics like Brexit are covered.

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

This has meant that our press clippings in the past year number over 200 and include stories with the BBC (Radio 5Live, Radio 4, BBC Click, Newsround), The Sun, Wired, The Daily Star, The Guardian, The Telegraph and many other well-known outlets.

However, in the next twelve months we will be doing even more to ensure that the full breadth and positive influence of the modern games industry is recognised through our upcoming

Positive Games campaign. This campaign will promote the positive societal and cultural impact that games and esports can have, the breadth of genres available, the billions of people that play games safely every day and what makes video games not only a fun and beneficial pastime for all, but also an essential part of the UK economy.

Askaboutgames

Askaboutgames.com is an essential part of how we communicate with the games playing public, in particular parents and carers. Run by Ukie, in partnership with the Video Standard Council (VSC), askaboutgames.com is an online resource which contains a comprehensive range of advice about PEGI ratings, online safety, family friendly gaming advice and parental controls.

Used by parents, carers, teachers, Government, and industry partners alike, it is the go to place for anyone who has questions about how to play games safely and sensibly, as well as interesting relevant news pieces and tangible career advice. In the last 12 months, askaboutgames has been featured in many mainstream articles, including references in The Sun, BBC Breakfast and The Mirror.

For 2018-19, with more industry engagement, we will be using askaboutgames to reach even more people, in line with our Positive Games campaign, to promote the many benefits of playing games and the video games industry's responsible approach to its consumers.

TO FIND OUT MORE

Find out more about educating parents & carers - askaboutgames.com

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

For press enquiries contact PR & Communications Manager - denzel@ukie.org.uk



intellectual property

Ukie's IP protection service continues to go from strength to strength, with more and more businesses signing up to the service to protect the value of their games.



Over the last year alone Ukie's web scanning service has helped remove over half a million illegal links for 50 game companies. The service also allows us to demonstrate the scale of games IP infringement, helping us to lobby for better cooperation and removal of links on social media, marketplaces and search engines. This

all further helps members protect their IP and ensuring legitimate services and sellers are more visible than illegal results.

The IP scanning service is free to members and available to non-members for a fee. Each of the 600+ titles we monitor is searched on 200 infringing websites that profit either via advertising or download revenue. The file size of "cracked" games are often a few gigabyte so a few downloads of each game will mean the uploader makes hundreds of dollars, none of that money going to the IP owners.

Reporting links, multiple times, seven days a week ensures that 70% of links are removed in less than 24 hours and 89% of everything found is removed within 30 days. This has helped shut down more than 30 sites that make games available illegally, making it harder for users to find and download files.

The worst-offending websites are reported to the City of London Police Intellectual Property Crime Unit (PIPCU) who work with their international colleagues to shut down websites and identify the brands and ad agencies placing ads on the websites. In the last 18 months there has been a major decrease in the number of big brands placing ads on the sites reported to PIPCU. The long-term goal is to ensure the brands taking their place are also discouraged from placing ads to reduce the revenue generated from advertising.

In June 2017 the major search engines introduced a "demotion" signal to demote results from infringing websites after discussions with the music and audio-visual industries chaired by the IPO (Intellectual Property Office). The voluntary agreement has helped to get the government to assign the IPO the task of arranging roundtable discussions with social media, user upload, marketplace platform owners and parties within the online advertising industry.

Ukie is ensuring that the games sector is represented in these high-level discussions and the UK is leading the global fight against IP theft to ensure all major platforms are free from infringement and safe for consumers.

TO FIND OUT MORE

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

business support

M

embership of Ukie reached a new landmark of 410 companies in September 2018. This represents a year on year increase of 50 members (14%) and a 34% increase from the September 2016 level.

This impressive growth has come from all sectors of the games industry and reflects the constant development of valuable products and services offered by the team. New activities in the past twelve months include:

Expanded events UK-wide

Ukie organised, promoted and endorsed 120 events in the past year and increased the number of its own networking events. The Hub Crawl took in 12 dates around the UK with sessions on business growth in Scotland, Wales, Northern Ireland and England in Q1 2018. Over 450 studios came to the Hub Crawl. We followed this with another tour gathering the industry's view on future Policy needs and our next tour will be at the end of 2018. Ukie also organised networking events on esports, crypto currencies, ICO and mixed reality ensuring our members are across the full range of opportunities for future commercial growth.

Ukie office and studio

The Ukie team moved to a new office this summer. This flexible office space includes a hot desk area and two meeting rooms which members can use for free. We also added a broadcast-ready studio for members to use for live streaming and podcast recording. Simply contact kirstie@ukie.org.uk to book a room or the studio.

Access to finance

This year also saw a major update to the Ukie Access to Finance guide. This living document is essential reading for any games business looking for finance. Additionally, Ukie supported and organised investment events during the London

Games Festival, the International Festival for Business in Liverpool and investment dinners at China Joy and gamescom.

Data and insight

Our members want access to more diverse sources of market data and this year we secured an exclusive UK partnership with ISFE for the new GSD data project. This will, for the first time, give games companies access to sales data on digital games content – with members receiving significant discounts on the information. When added to our GfK offering and mobile data from Reflection, this is an excellent suite of data sources. Ukie remains committed to ensuring our members are aware of market developments and trends and our new website will include a data portal as a central hub for a wide range of market data and insight.

Member communication

As membership grows there are challenges to ensure we keep our members across all the opportunities that they can access via membership. We constantly review our member communications and this year we have introduced two new communication channels. Firstly, on the first day of the month an events email is distributed to the entire Ukie membership. This details all the events Ukie are organising or promoting, complete with useful links and discount information.

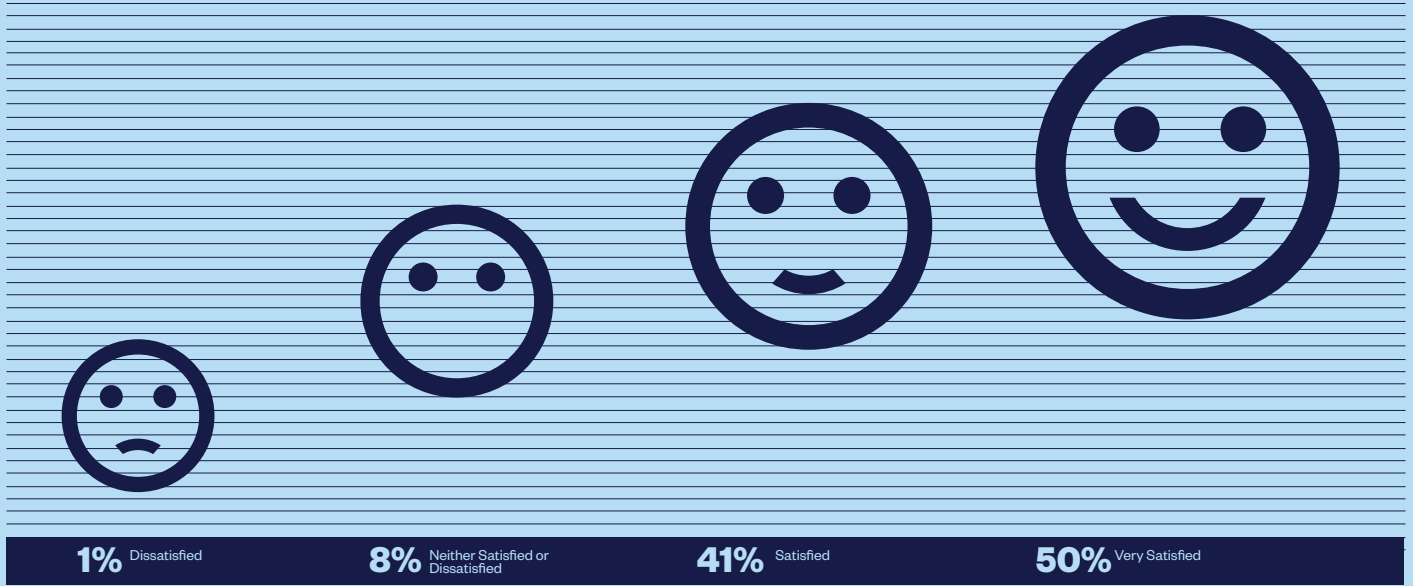
Secondly, on the fifteenth of the month the Ukie Insider is sent to members. This email newsletter highlights key considerations on commercial issues for members and highlights members who can provide services to support members. Ukie continues to be active on twitter and facebook to ensure multiple access points are available for its members.

TO FIND OUT MORE

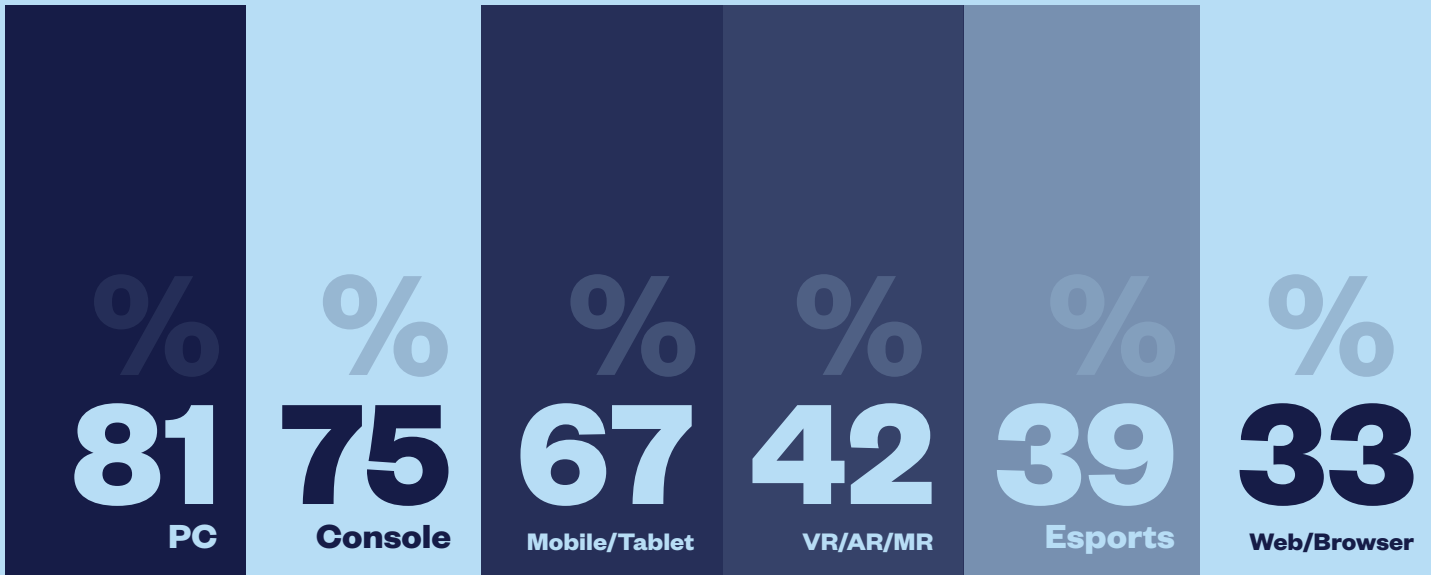
For more information on these services, and any other membership activity, contact - sam@ukie.org.uk

what our members say

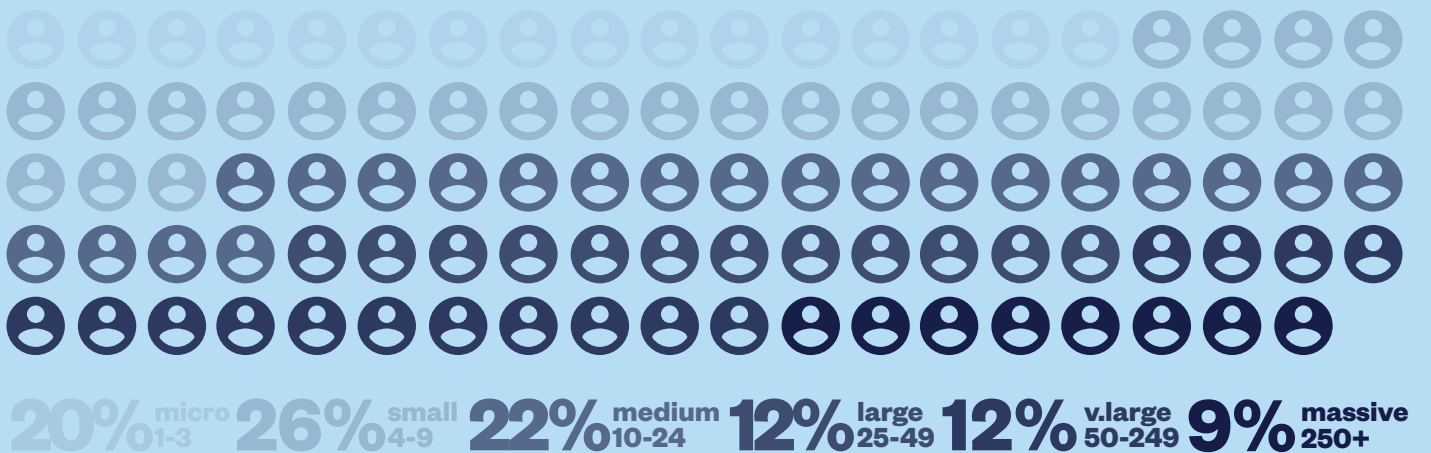
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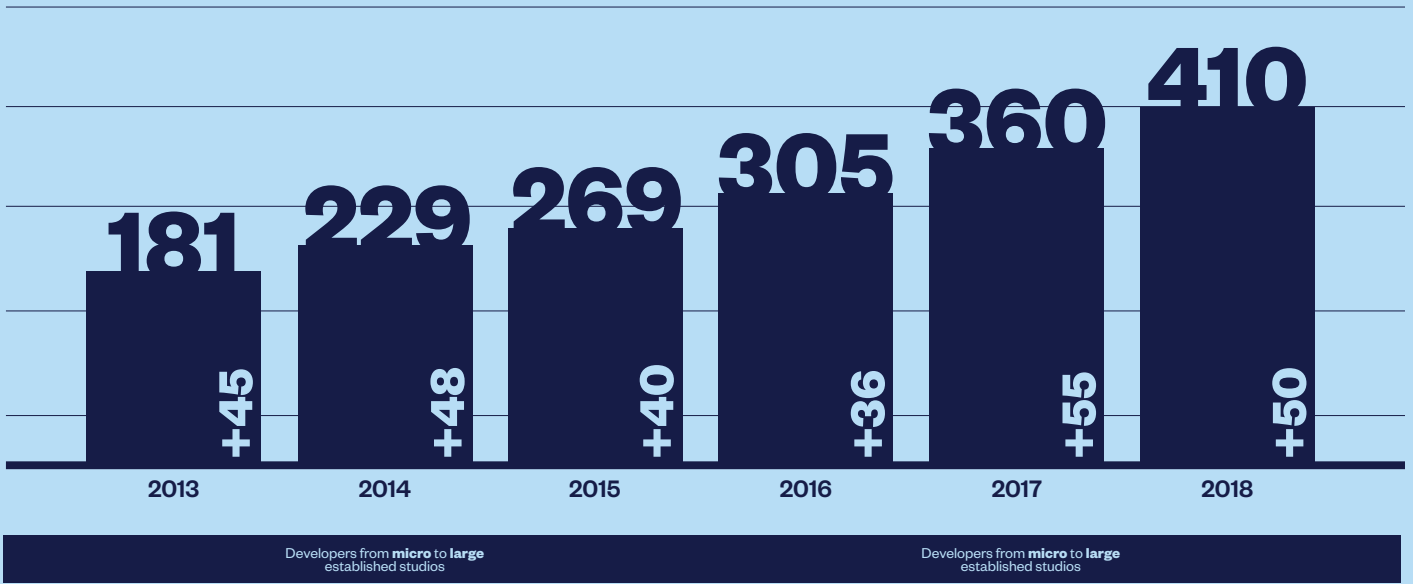
PLATFORMS BEING WORKED ON



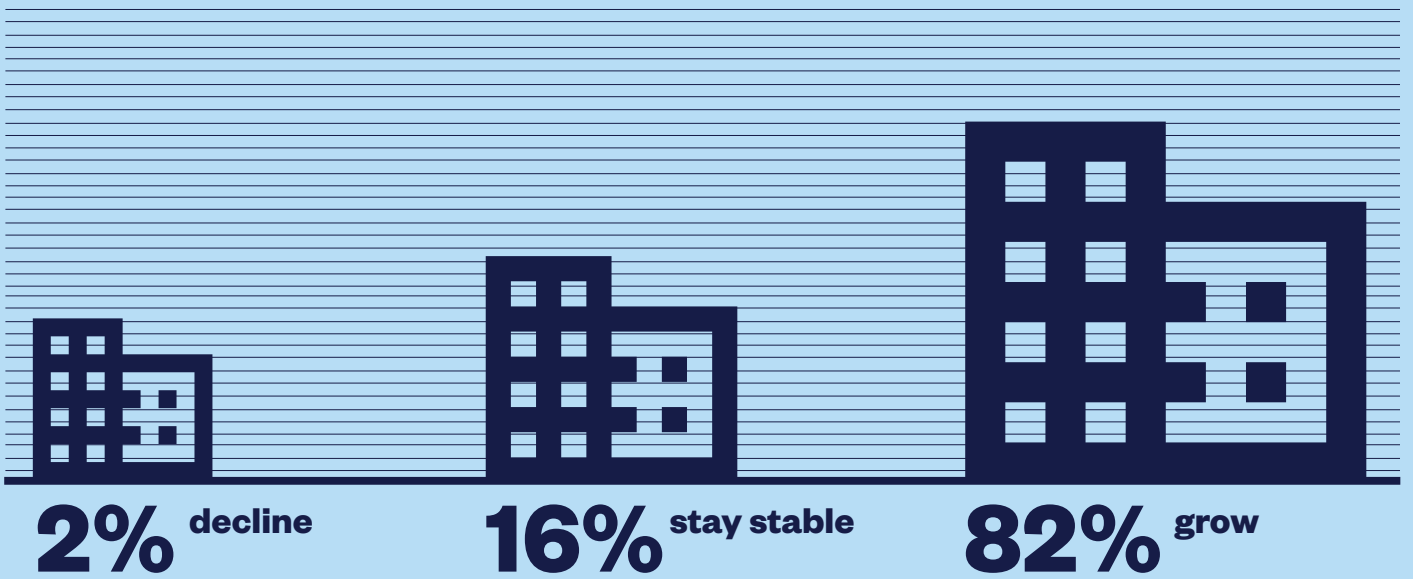
UK EMPLOYERS



MEMBERSHIP GROWTH



BUSINESS OUTLOOK FOR NEXT 12 MONTHS



Ukie are an essential ingredient to the success of the esports industry in the UK.

James Dean, ESL UK

Ukie is helping to define the shape of the modern games industry.

Neil Campbell, Viewpoint Games

Ukie continue to fight the game industry's corner, whatever the battle and are doing an absolutely amazing job of making the games industry better place to work and do business.

Mark Backler, Sketchbook Games

Ukie are best in class as a video gaming industry body.

Shaun Campbell, EA

Ukie delivered over expectations again at Gamescom with the UK Industry stand.

Rich Eddy, Jagex

We really would not have been able to pull off such a successful Gamescom activation without the significant support and assistance provided by Ukie. We will be back next year!

Jack Gallie, 505 Games

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

contact - dan@ukie.org.uk

ESPORTS POLICY

contact - tim@ukie.org.uk

EQUALITY, DIVERSITY + INCLUSION

contact - dan@ukie.org.uk

INTELLECTUAL PROPERTY

contact - mo@ukie.org.uk

MIXED REALITY

contact - luke@ukie.org.uk

POLICY

contact - tim@ukie.org.uk

PR + COMMUNICATIONS

contact - denzel@ukie.org.uk

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COO
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TIM SCOTT

Head of Policy & Public Affairs
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MO ALI

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KIRSTIE RUSSELL

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kirstie@ukie.org.uk



1939 game **3D Native** 505 Games **50cc Games** A Brave Plan **Access Sports** Activision Blizzard UK **AdRealm** AIMM **Altered Gene Studios** Amicus **Ansible PR & Communications** Ant Workshop **Antimatter Games** Antstream Games **APPbox media** AppyNation **ARM** Atomicom **Attention Seekers** Azoomer **Bandai Namco Games UK** Barog Games Labs **Bastion Beijing CrazySports Industry Management** Beijing Legend of Warrior Network **Bidstack** Big Ben Interactive **Big Games Machine** Billy Goat **Blazing Griffin** Blix **bluegfx** Born Ready Games **Boss Mode** Bossa Studios **Brightrock Games** British Chamber of Commerce Korea **British esports Association** Brown Betty **Brunel University London** Bulkhead Interactive **Burke & Best** Cambridge Game Creators Network **Cambridge Regional College** Canterbury **Christchurch University** Cape Guy **Carbon Digital** Cardboard Sword **Casual Games Association** COP Games **CE Europe** Centresoft **Charles Russell Speechlys** Cheetah Mobile **Cherry Pop Games** Chilled Mouse **ChilliConnect** Chimera **China Britain Business Council** China Language Service Centre **Climax Studios** Cloud9 **Coatsink** Code Kingdoms **Code Wizards** Codemasters **Conspexit Game Studio** Coop innovations **Cooply Solutions** Coutts Bank **Crash Lab** Crayfish **Creative Assembly** Criterion Games **Cubic Motion** Curve Digital **Dakko Dakko** Darbatron **Dashine Electronics** De Montfort University **Dead Good Media** deltaDNA **Desk Dragons Interactive** Dexerto **Digibydesign** Dimoso **DLA Piper** Dlala Studios **DNA - Digital Out-of-Home Interactive Ent. Association** Dovetail Games **DR Studios** Draw & Code **Dream Harvest Games** E Champions **East2West** Eaton Smith **ECommPay** Edge esports **Ediedo** ELC Gaming **Electronic Arts** Epic Games **epic.Ian** Escape Studios (Pearson College) **Escape Technologies** ESL esports insider **European Gaming League** Exertis Gem **Exient** FaceIT **FC Business Intelligence** Fire Hazard Games **Firebolt Games** Firebrand Games **First Light** First Touch Games **Flix Interactive** Flying Interactive **Focus Multimedia** Foot Anstey **Funsolve** Fusebox Games **Future Games of London** FuturLab **GAME Retail** GameBench **Gamer Network** Games Britannia **Games London** GamesAid **Gamewagon** Gameway **Gamification Nation** Gaming Merchandise **Genba** Games **Gfinity** GG Insurance Services **Ginx TV** Glitche.rs **Glowmade** Goldborough Studio **Goldsmiths, University of London** Good Catch **Google** Gram Games **Green Man Gaming** Ground Shatter **Halo Financial** Harbottle & Lewis **Hardlight** Heaven Media **Hi-Rez Studios** Humain Hutch **Ian Hamilton Design & Consultancy** ICO Partners **Identity Spark** Immerse Nation **Improbable** Incendium Games **Indigo Pearl** Innovation Birmingham Campus **Insert Coin** Intel International Games Developers Association **Internet Advertising Bureau** Ipsos **ISM** Jagex Johnny **Atom Productions** Joyful Works **Kabam** Kalypso Media UK **Kartridge** Keymailer **King Kiss** **Koch Media** Koei Tecmo Europe **Konami Digital Entertainment** Krotos Audio **Kuju** Kybele Studio **Lab42** Leapfrog **Lee and Thompson** Legendary Games **Lick PR** Liquid Crimson **Little Big PR** Localize Direct **London South Bank University** Lucid Games **Ludus** Magnus Magic Notion **Make Real** Marvelous Games **Matata Corporation** Matt Spall Consulting Ltd **Maximum Games** MCM Expo Group **Mechabit Media** Molecule **Mediatonic** Mercia Fund Management Merge Games **Microsoft** Mike Bithell Games **Milestone** Milky Tea **Mishcon Mobile Free To Play** Modern Dream **Mojiworks** Moov2 **Multiplay** Myriad Associates **National Film & Television School** National Student Esports **Natural Motion** NCSOFT Europe **nDreams** Nerd Monkeys **Nesta** NetEase **Network N** NewBay Media Europe **Next Gen Skills Academy** Ninja Kiwi **Nintendo UK** Northern Ireland Screen **Norwich University College of the Arts** Nosebleed Interactive **Oculus VR** Odgers Berndtson **Omni Systems** OmuK **OPM Response** Opposable Games **Osborne Clark** Oury Clark **Outright Games** Pandabox Games **PaperSeven** Pataphysics **Payload Studios** Perpetual Europe **Piggyback Interactive** Pinewood Studios Group **Pixel Toys** Plan of Attack **Playdemic** Player Research **PlayIgnite** Playmob **Playniac** Playrise Digital **PlayStack** Playtonic Games **Plus Accounting** Pole to Win Europe **Polygon&Pixel** Polystream **Pomegranate** PQube **Premier** Psytec Games **Purewal & Partners** QD Events Ltd **Quantum Soup** Queen Mary College for Commercial Law **R8 Games** Rantmedia **Rare** Raspberry Pi Foundation **Realised Realities** Reality Games **Realtime Games Ltd** Realtime UK **Reflection** Renaissance PR **Retro Games** Revolution Software **Riot Games** Ripstone **Rising Star Games** Robot Teddy **Rocabee** Rocket Flair **Rocket Lolly Games** Rogue Vector **Roll7** Rovio **Russells Solicitors** Saffery Champness **Scary Puppies** Scirra **Secret Sauce** SEGA Europe **Shark Infested Custard** Sharkbit **Sheridans** Silvertown Partnership **Simul** Six to Start **SKARA** The Blade Remains **Sketchbook Games** Skillsearch **Slingshot Cartel** Soccer Manager **Sold Out Sales & Marketing** Sony DADC **Sony Interactive Entertainment Europe** Space Ape Games **SpecialEffect** Spilt Milk Studios Spirit AI **Splash Damage** Splendy **Sportradar Sports Interactive** Square Enix **SRS Investment** Staffordshire University **State of Play** S-Tech Steel Media **Stick Sports** Storianteer **Strike Gamelabs** Studio Output Limited **Swallowtail Games** Swipe Right PR **System 3 Software** Tag games **Take 2 Interactive** Take Off **Talespinners** Tandem Events **Tangentix** Target Media **Team 17** Team Dignitas **TechData** Testology **Testronic** The Chinese Room **The Diana Award** The Games Tribe **The National University eSports League** The Secret Police **The Tall Trees** The Tiniest Shark **The Trailer Farm** THQ Nordic **Three Knots** TinyBuild **To Play For** Touch of Ginger **Tower Studios** Trailmix **Tripp Associates** TS Information Technology **TT Games** Twenty5Eight **Two Tails** U&I Entertainment **Ubisoft** Ultrahaptics **Unity Technologies** Universally Speaking **University of Abertay Dundee** University of Chester **University of East London** University of Essex **University of Leeds** University of Surrey **University of Westminster** University of York **Upload Agency** Utopian World of Sandwiches **Uzone Network Technologies** Venatus Media **Vertigo VR** Viewpoint Games **Virtual Arts** Vision Games Publishing **VooFoo Games** Warchild **Warner Bros. Interactive Entertainment** Web Sherriff **Webfibre Limited** Well Played Games **West College Scotland** Wibbu **Wicked Sick** Wired Productions **Wired Sussex** Women in Games **Woodshires** World Gaming Executives **Xiotex Studios** Yogscast **ZA / UM Studio** Zenimax Europe Ltd / Bethesda Softworks

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