

annual review

2020



ukie

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OUR INITIATIVES





Chair's Report

Stuart Dinsey - Chairman, Curve Digital

This is my first report to you all as chair of Ukie and it comes at the end of a turbulent period for the games industry.

Throughout the past 12 months, the board and I have strived to support our excellent day-to-day team as they adapted their working practices due to COVID-19, kept in constant conversation with regulators, dealt with on-going public relations tasks and launched numerous positive initiatives across the sector.

And whilst this has been a uniquely challenging period for the sector, Ukie has continued to grow both in size and in reputation along the way. Indeed, the organisation has delivered another year of growth in overall membership, rising from 466 to 496 companies since last year's report. Plans for this year's GDC were cancelled as the pandemic struck and we quickly provided full refunds for all the members who were due to appear on our booth. Despite this, overall turnover for the year increased six per cent to £2.45m, whilst a marginal and expected loss was incurred

as a result of additional spending on the Get Smart About PLAY consumer education campaign and the appointment of a specialist public affairs agency. It is only natural that our £4 billion industry faces relentless scrutiny - we're huge, successful and high profile. Amidst this, the Ukie team have represented us all with enthusiasm, focus and professionalism. They have worked hard to ensure our voice is heard in Government, the media and beyond, whilst launching a series of new initiatives that promote business, encourage inclusion and keep us on the front foot.

The board itself also continues to evolve. Our on-going task is to provide the best guidance, advice and accountability possible. We must represent all corners of the business - whilst ensuring that all members have access to valuable services and indeed the opportunity to help shape our future. With this in mind, and following last year's decision to introduce term limits, we're saying goodbye to more directors than usual.

An enormous thank you must go out to Andy Payne OBE and Ian Livingstone CBE, who have served as chair and vice chair respectively during their many years' brilliant service on the board, plus a fond farewell and huge gratitude goes to the departing Rob Cooper, Neil Boyd, Miles Jacobson, Simon Barratt, Shaun Campbell, Veronique Lallier and Harvey Eagle. I am now very much looking forward to welcoming a number of new faces and continuing the excellent work done by their predecessors.

There has never been a time where games have been considered more important, more culturally relevant and more economically significant than they are today. This presents a real opportunity for us all to thrive together as a sector and I will work hard with the team, all of the board directors and you, the members, to achieve that.

This has been a uniquely challenging period for the sector, Ukie has continued to grow both in size and reputation along the way

STUART DINSEY - CHAIRMAN, CURVE DIGITAL



CEO's Report

Dr. Jo Twist OBE – CEO, UKIE

It may be easier for me to start this year's report with a breakdown of what didn't happen in the past 12 months. Since September 2019, we've had to deal with a range of challenges quite unlike anything we've ever seen in the history of our industry – and indeed society.

Political scrutiny of the sector reached new heights with the publication of the Department of Digital, Culture, Media and Sport (DCMS) Select Committee's interestingly titled **Immersive and Addictive Technologies** report, a powerful rebuke of games that necessitated response. The media also took a much stronger interest in the games we make, the ways we work and the way our sector is structured, applying and exerting pressure on digital consumer platforms, including games, to demonstrate responsibility to consumers and protection measures digital platforms of all kinds have in place.

The industry over the last year has undergone a great deal of internal critique on a range of issues, but focus on diversity, inclusivity, and player safety in games. And this has all come without mentioning **COVID-19** and the way it overturned our personal lives, transformed the way we worked professionally and shifted the world with it. This has been one of the most challenging years in the history of the games industry. That's why I'm so proud

to report how we have risen to the challenge, with your continued support.

The industry's response to criticisms from government have been strongly compassionate. Our **Get Smart About P.L.A.Y campaign** has shown the care we have for our players, while meaningful changes in age rating and platform policies have helped to protect players more than ever before at a global level.

The pioneering work of the **University of Sheffield** on the world class **Games Industry Diversity Census** revealed uncomfortable truths about our sector, but sparked action including the widespread support for the industry-led **#RaiseTheGame** pledge which was launched with the Census in February.

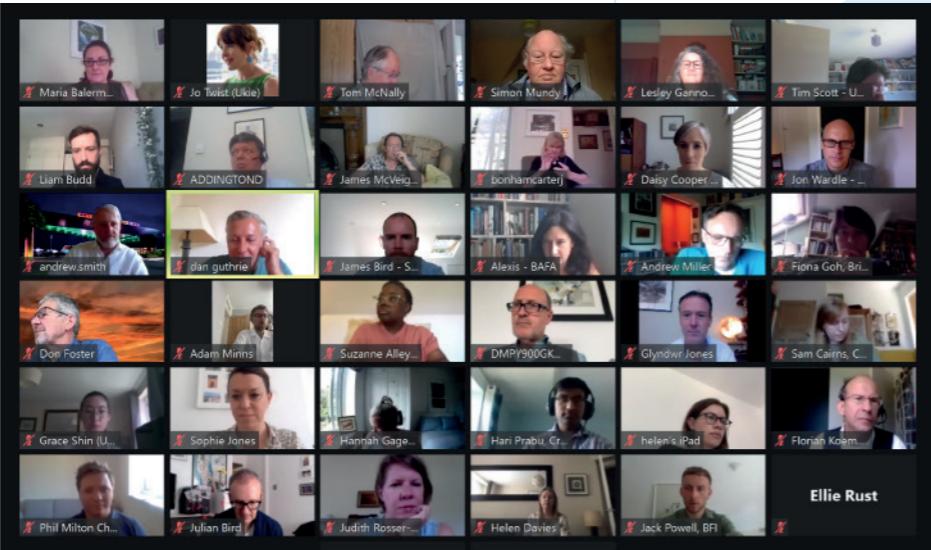
The sector's enormously generous response to the **COVID-19** crisis has also shown the power of games as a social force for good. From donating thousands of games to NHS workers through the **Games for Carers campaign** in May, to promoting **public health messaging** and the innumerable **fundraisers** for a range of causes, the sector played its part and this has not gone unnoticed by the press and Government – even by the WHO.

There is always more to do. We need to focus carefully on **mental health**, especially as the COVID crisis rumbles on. Our **duty to our players** will continue to evolve and **diversifying our sector** is absolutely crucial to the future good health not to mention competitiveness of the UK industry. We will continue to evolve how we support the ambitions of companies of all sizes through our **trade and investment support** to make sure the UK continues to be a leader globally as we navigate the next few uncertain months.

The Ukie team has been beyond brilliant at working together apart and pivoting what we do in this new reality, and they cannot do this without our members' continued faith and support. Thank you to them, to you, to all our fantastic Board members – particularly to our Chair, Stuart Disney, and all those who step down this year after many years of service - who support and shape what we do for you. With your support, we will continue to serve you, the industry, the best we can.

This has been one of the most challenging year's in the history of the games industry. That's why I'm so proud to say we have risen to the challenge

DR JO TWIST - CEO UKIE



Policy and Public Affairs Update

It has once again been an active year in the world of policy. Since the last annual review, we have continued to champion our industry across the political spectrum and in particular its commitment to protecting players in our engagements with policy makers and regulators.

We have built upon existing relationships whilst establishing new ones, such as with Ofcom. There is a growing recognition of the value of our industry, partially thanks to the popularity of games during the COVID-19 lockdown. We will work to iterate on this and will continue to stress our responsibilities to our communities.

Online Safety

Online safety has remained a crucial topic in the past year. Over the last 12 months, we have continued our dialogue with the Information Commissioner's Office following its finalisation of the Age Appropriate Design Code, and have facilitated engagement between the ICO and our members.

We have also connected with academics with interest in this area as we continue to provide robust independent evidence to our policy making. We have also reached out to our sister bodies and sectors to amplify our similar

concerns with the Code through one unified voice. Our cooperation with the ICO has proven fruitful with noticeable positive changes in the final code, however, there are still issues which we will continue to highlight.

In related developments, the much-awaited Online Harms legislation continues to develop with significant implications for our sector. In the early Spring the Government released an interim report stating it is ' minded' to appoint Ofcom as its online harms regulator. We have begun to develop relationships with Ofcom and look forward to continuing to work with them and government as the legislation is developed.

The past year saw the publication of The Digital, Culture Media and Sport (DCMS) Select Committee's inquiry into Immersive and Addictive Technologies, as well as the Government's response.

Whilst the committee's report continued the agenda based and evidence light tone of the inquiry we were pleased to see that the Government response recognised our calls for establishing a robust and informed evidence base before legislating and we aim to cooperate with the Gambling Act review later this year.

Europe

Amidst all of this, we have not forgotten Brexit. When a no deal Brexit was a real possibility late 2019, we worked with The Department for International Trade to develop a dedicated suite of guides for the UK games industry to help them be prepared. We have also responded to the Migration Advisory Committee's consultations on the Shortage Occupation List, a Points-Based System and Salary Thresholds throughout the past year and taken part in numerous roundtable forums across the games and creative industries.

In these, we have stressed how imperative it is that UK games companies can continue to access diverse and international talent – not only to fill the ongoing domestic skills gap, but also for the invaluable creative impact such talent has on our games. We have also continued to push the importance of securing a Data Adequacy Agreement with the EU; the free flow of data is crucial to our industry, and its importance has been further highlighted thanks to the COVID-19 lockdown.

Aside from Brexit we also continue to work with ISFE and European national trade bodies on developments affecting the industry. Together, we have worked on the developing issues across Europe including gambling and addiction as well as best practice concerning safe and sensible play and family settings.

Political Engagement and Covid 19

Covid-19 introduced a new challenge , the likes of which were unprecedented but as with the majority of the games industry we adapted quickly. Physical engagements have

had to shift to virtual and our Westminster Games Day has unfortunately been postponed. But that has not prevented us continuing to engage directly with key MPs, peers and policy makers to ensure the games industry's voice is heard in Parliament and beyond.

Over the past year and during lockdown we have met with many MPs including **Secretary of State for DCMS Oliver Dowden, Minister for Digital and Culture Caroline Dinenage MP, Matt Warman MP, Matt Western MP, Daniel Zeichner MP, Dehenna Davison MP, Dr Rosena Allin-Khan MP, and more.** This has been on top of all of our usual engagements with DCMS, Gambling Commission, the World Health Organisation, and so on.

Our All-Party Parliamentary Group for Video Games and Esports has seen an increase of membership and ran its first virtual event earlier this year focused on the incredible response of the sector to COVID-19. This was combined with the APPG's publication of a mini-report outlining the various campaigns and initiatives that have been undertaken sector-wide during lockdown.

In all our meetings, including our APPG event, we have proudly emphasised the resilient nature of the UK games industry and highlighted its potential to be a significant contributor to rebuilding the UK economy post-COVID-19.

Thanks to its regional spread across the UK nations, supporting the UK games industry will truly lead to a 'levelling up' of the entire UK. We are confident the industry will emerge stronger than ever, and if sufficiently supported, will equally enable the wider UK to thrive.



 The positive response to the campaign in press, policy circles and amongst parents has shown why we must collectively encourage responsible play 

Communications

Campaigning on behalf of the industry

The UK games industry had to face a number of challenging stories in the media in the past 12 months. Between September 2019 and December 2019, the industry came under sustained attack on a number of different fronts – each of which demanded a different response from the sector.

The DCMS Select Committee's Immersive and Addictive Technologies report was in many places damning of the industry, putting pressure on the sector. This was further compounded by the Children's Commissioner's Report of October 2019 and the opening of an NHS gaming disorder clinic, which heaped further opprobrium on games.

And while TaxWatch's investigation into Video Game Tax Relief shone a light on company finances in an unfair and sensational manner, it nevertheless contributed to creating a negative

perception of games that had to be countered. The Ukie team's priority has been to face up to these challenges, find a constructive way to respond and offer a publicly positive response to them that showed the fantastic nature of our sector.

Across 2020, we believe the sector has done that. The launch of our responsible play campaign with Rio Ferdinand helped to turn an openly hostile debate into a nuanced conversation.

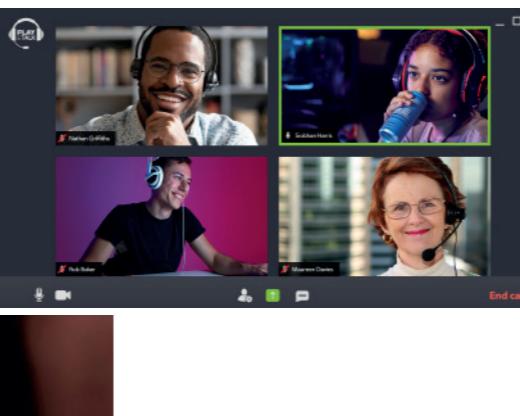
Our work launching the first ever industry census with the #RaiseTheGame pledge and regional economic impact report showed to many that the industry is thinking deeply about the communities it is embedded in (and where it must progress to serve them better).

And crucially, the industry's enormously positive response to the COVID-19 crisis has shifted perception of us. Whether

it was donating thousands of games to NHS workers through Games for Carers, including public health messaging in games or running fundraisers, teaming up with mental health charities or running pioneering research into the relationship between games and literacy, we were able to show the conscience and power in games.

There will always be moments where the industry is under pressure and there will be times we don't get everything right. But this year has shown that if we engage positively, proactively and constructively on issues that do affect us, we can get a fair – even decent – hearing.

We must continue to make the positive case for games together and ensure our wonderfully creative sector is seen as such from the outside.



Get Smart About PLAY

In January 2020, we launched our **Get Smart About P.L.A.Y.** campaign to encourage families to engage in the games their children play and use family controls to manage play in the way that works for their families.

We started the campaign following polling we conducted with YouGov which showed that 56% of parents were concerned about screen time or spend in game, but that only 20% were using controls on devices to limit them.

P.L.A.Y. launched successfully with the help of ex-footballer Rio Ferdinand, who went on national radio and television to discuss how his family played and why he thought it was important to use controls. Importantly, the campaign has continued since then. The P.L.A.Y. campaign has driven new energy into our existing family responsibility site askaboutgames.com, with advice on managing screen time, spend and setting ground rules augmenting existing work on age appropriate and balanced play being viewed hundreds of thousands of times through the course of the year.

The campaign also supported the beta launch of the **Family Game Database** at the end of March. Brought forward to support families during the COVID-19 crisis, the database – which curates games and provides information on age ratings, game content and in-game purchasing – has been accessed successfully by tens of thousands of families.

The P.L.A.Y. campaign has also adapted to encompass player welfare across age groups. **The Play&Talk weekend** in the middle of June brought together responsible play messages and the value of playing together, leading to 60 companies and a number of influencers supporting our government backed loneliness battling campaign.

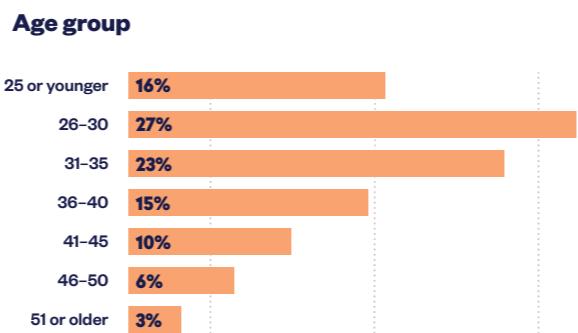
The positive response to the overarching P.L.A.Y. campaign in press, policy circles and amongst families has shown why we must collectively continue to encourage responsible play. The campaign will carry on throughout 2020, with the new console generation identified as a particularly good opportunity to engage families and players.



Key Communications Facts

- Ukie, or its initiatives, were mentioned in the press on 1022 different occasions in the past 12 months
- That means that we, on average, get the voice of the industry heard in 20 different publications each and every week
- Ukie initiatives have been featured across the mainstream media, with repeated features in outlets such as the BBC News, The Guardian, The Telegraph, Forbes, The Hollywood Reporter and more.

 The Census survey was completed by over 3,200 games workers, or around 20% of the overall workforce, building a truly representative sample of people working across the sector 



Insight and Innovation

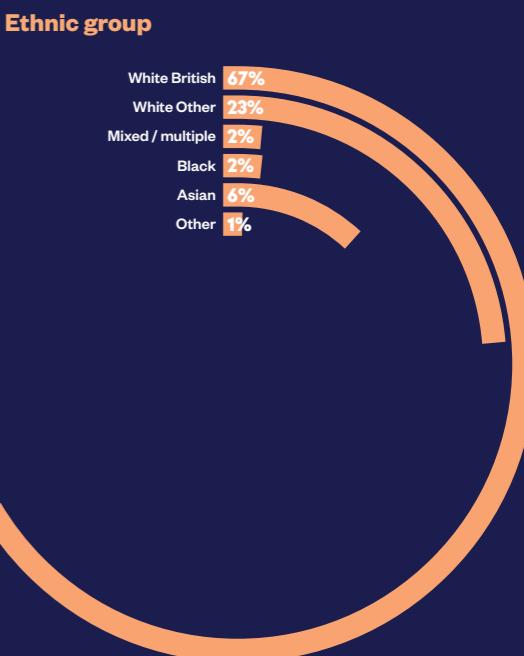
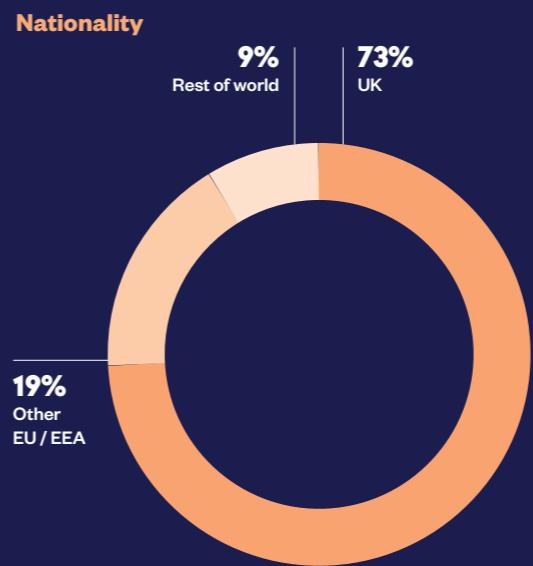
Understanding the UK games industry

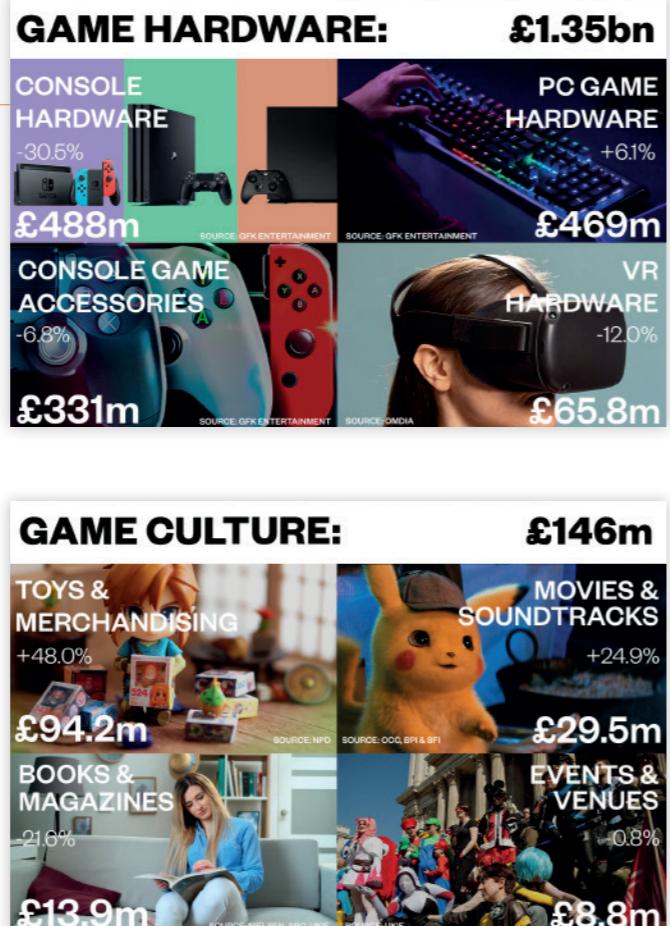
Robust evidence and authoritative data sit at the heart of Ukie's work. It forms the bedrock of our policy and political engagement work, provides crucial market data and analysis to our membership, informs our strategic thinking and is key to our communication.

Not only is it important that we build and expand the insight available about our sector, but we must also develop improved ways of disseminating that information to an ever-widening audience. Over the last 12 months, we are pleased to have achieved significant progress in both these areas.

Published in February 2020, the **UK Games Industry Diversity Census** was a first-of-its-kind, deep-dive analysis into building a holistic picture of the broad diversity of people who make up our games industry workforce.

Written by Dr. Mark Taylor of the University of Sheffield and funded via the Arts & Humanities Research Council, this independent analysis focused on three main areas: the kinds of work that games industry workers do, their personal characteristics, and their backgrounds.





💡 **Think Global, Create Local** paints a clear view that the UK games sector is well represented throughout the UK and brings significant benefits to local economies 💡

Launched at the Ukie AGM and Member's Day in September 2019, the Census survey was completed by over 3,200 games workers, or around 20% of the overall workforce, building a truly representative sample of people working across the sector using both open and targeted recruitment methods.

Structured around comparable datasets from other sectors and national datasets, and by digging into how multiple characteristics interact, we were able to gain a very clear view of both areas where games can celebrate and where clear challenges lie.

As well as for the first time providing reliable key metrics such as the gender balance within our sector, representation of black and minority ethnic people and the international makeup of our workforce, the Census also gives us a wealth of insights into more detailed measures around areas such as mental health, education and socio-economic factors, as well as a more nuanced view from intersectional analysis.

While the Census has provided greater insight into our workforce, we have also gained a far more detailed view of the geographic distribution and local economic impacts of our sector via the release of our **Think Global, Create Local report**.

Released in January 2020, this analysis builds on the findings from the BFI's 'Screen Business' report (BFI, 2018), providing a detailed breakdown of the number of jobs (FTEs) and the contribution to UK GVA (gross value added) generated by games companies across the towns, cities, and devolved nations of the UK.

Much as our previous work with the UK Games Map has shown, Think Global, Create Local paints a clear view that the UK games sector is well represented throughout the UK and brings significant benefits to local economies, as well as on the national stage.

The report also highlights the diversities of scale in UK games businesses, but shows how the collective multitude of smaller businesses generate a comparable impact to the very largest employers.

Throughout the year, we have also continued to gather the opinions, feedback and experiences of our membership to better inform our work.

In 2020, as the Coronavirus pandemic took hold, the insight and feedback we received in our related surveying and industry roundtables was critical in our reaction to the crisis, enabling us to rapidly pivot in our support and, in July, release the Playing On report highlighting the ongoing needs and opportunities for our sector.

As we have grown our collective insight and data about the games industry, whether that mentioned above, regular research such as our annual UK Consumer Games Market Valuation, or just from the various reports and updates from across the vast global sector, it became clear that we needed to improve the way we made this important information available, to improve access and discoverability of the insight at everyone's fingertips.

That's why we launched a new resource, **Ukiepedia**, which has designed as a one-stop-shop for all industry insight and data needs - collating information, resources, facts and links across a wealth of industry topics.

We also have more resource-focused pages, providing directories of UK game developer meet ups or games media outlets, or broader topics, such as a glossary of games industry terminology and a history of the UK games sector.

Ukiepedia can be found at [ukiepedia.ukie.org.uk](https://ukie.org.uk/ukiepedia) and we encourage you to take a look and submit some topics.

As we head into the coming year, we believe that with a renewed focus on robust data gathering and improved tools to help us distribute it, in 2021 Ukie will continue to deliver an essential research service for the UK games industry.



Membership and Commercial

Growing and supporting the games business

Membership of UKIE reached a new landmark of 496 companies by September 2020. As we close in on 500 members, it's striking to think that when ELSPA transitioned into UKIE we had a comparatively modest 42 businesses in our membership. This incredible growth demonstrates just how far we've come and it's great for us here at UKIE to

be able to support so many people and companies within this industry. As our membership grows, so do the products and services we offer. With development studios, academic institutions and service suppliers joining UKIE, we've continually successfully re-invented our offering to help support our members and will continue to do so.

Key facts from the past 12 months

- Over 250 UK games businesses participated in the trade programme with 151 businesses exhibiting at an overseas show on a UKIE managed stand
- 8000+ trade visitors came to a UKIE stand at an overseas trade show
- £80m worth of business deals done by UK businesses on our trade stands
- Estimated further £10m of exports secured on trade missions
- 4,500 new business connections made

Business Support during COVID-19

The pandemic caused crises within every industry, and despite the incredible resilience of the UK games industry, UKIE sought to ensure its members were listened to and had access to the support they needed. The annual UKIE Hotline, an initiative that allows members to get free commercial and business advice, was brought forward. This saw 33 partner members across various disciplines put up their time and services, from legal and marketing, to finance and recruitment, completely free of charge.

Our Navigating the Now & Beyond series also supported the industry by providing informative technical and practical advice for games companies in navigating working during the crisis. This initiative, supported by Sports Interactive, was born out of the roundtable consultations with UKIE members.

UKIE changed its communications approach to provide additional relevant practical business support. The UKIE Insider, normally a monthly email, was delivered on a weekly basis. This meant we could very quickly tailor the content to ensure members were aware of support within the UKIE network.

We also worked alongside the Department for International Trade to create a new video bank filled with useful and practical talks from industry experts. This resource has over 100 videos, covering a range of topics to help our members get access to great advice quickly.

UKIE has also partnered up with Creative England to provide mentorship for ambitious businesses that are ready to grow. The Games Scale Up Programme will support games companies based across the UK with advice, mentoring and workshops, with applications for the scheme closing at the end of August 2020.

Expanded events UK wide and Online

UKIE organised, promoted and endorsed 200 events in the past year and increased the number of its own networking events to ensure members are across the full range of opportunities for future growth.

UKIE is a national trade body and is committed to deliver events all around the UK. Our Hub Crawl 2020 focussed on educating local studios on how to raise the profile of their

business and games, taking our experts to 12 UK locations to speak to over 500 businesses. We also delivered an online version of the Hub Crawl, which had over 1,000 viewers – something that is guiding our thinking for our 2021 tour which we are planning now.

COVID-19 has also seen us pioneer interesting new ways to promote the work of our members. In a first, UKIE delivered a live game showcase via Twitch, Twitter, Facebook and YouTube. The success of this activity in providing an audience of engaged press, investors and publishers paved the way for the first ever virtual UK Game of the Show and the inaugural EuroPlay games contest during gamescom.

The world is your oyster

Games continue to sell around the world, even in the age of COVID-19. But while the world remains open to you, greater competition means you may need help succeeding. That's where we step in. Our award winning International Trade Programme has been creating opportunities for distribution and collaboration with overseas companies for seven years.

The results continue to be excellent, with over 250 companies taking part in the programme in the past 12 months and export business wins of over £80m achieved. We have also seen an increase in investment from overseas into UK studios, supported through introductions made within the International Trade Programme.

We had a record breaking year at gamescom in 2019, with our stand hitting new heights (and lengths and widths) to accommodate 95 exhibitors. Our week-long mission to China Joy in Shanghai further cemented the relationship between UK and Chinese games companies.

Indeed, despite the disruption, we have redoubled our efforts over the summer and actually increased the number of trade opportunities for our members through digital means. This has included bespoke game showcases with a European and US audience, a new four-event series focussed on UK-China relationship and increased access to gamescom and devcom in Germany.

Despite the challenges presented to us, the global market is still there for UK companies to approach and we will continue to help you reach it.



Games London & London Games Festival

💡 The Games London team turned the event into a suite of key B2B and cultural programming in new formats in just a matter of days 💡

Naturally, a global pandemic and national lockdown are not ideal circumstances for an agenda-setting cultural and business festival that opens up the industry to the world and brings people together... but the **London Games Festival** was one of the first major events in the whole country to migrate to a digital-only offering in March this year.

The Games London team turned the event into a suite of key B2B and cultural programming in new formats in just a matter of days.

Culturally, Games London's flagship exhibition Ensemble, showcasing BAME talent, debuted as the opening moment for the festival with mainstream press support. On the B2B front, the **Games Finance Market and Business Hub** facilitated thousands of video meetings and pitches, creating £12m in business for nearly 500 participating companies. Meanwhile Now Play This organised a series of insightful moments broadcast from within games like Animal Crossing, Half-Life and No Man's Sky.

Overall, work on the B2B strand was so well received we did it again with

the Summer Business Hub in July – acting in lieu of a physical trade mission – including 150 companies and a business pipeline of £5m.

In the meantime, Games London has devised a roadmap of new programmes and activity, nearly all of it online-only that leads up to the 2021 LGF:

Games London Accelerator

The UK's first games-specific start-up accelerator, where a cohort of studios will be given weekly networking and mentoring opportunities, exclusive access to investors, and fast-tracked towards successful partnerships.

Ensemble Salons

A series of online events with each of the creatives from the Ensemble 2020 programme, supported by PlayStation. The Ensemble Salons will let audiences log on and hear more about these stars' careers.

Virtual Photo Challenge

Launching officially in October 2020, the Games London Virtual Photo Challenge will offer anyone the chance to submit their best in-game virtual photography works – with winning

choices exhibited at London Games Festival 2021.

Games London Connections

A continuation of Games London's work facilitating 1,000s of introductions and pitch meetings between developers and investors – with a rolling offer to connect London studios to publishing and funding partners.

Sustainability Initiative

Using the UN's 2019 Playing For The Planet report as a jumping off point, Games London will be looking at ways to help businesses in the city better understand sustainability targets, looking towards an action launched at the 2021 festival.

Lastly, planning for the 2021 London Games Festival is well underway. As ever, the event will showcase London and the UK as a leading hub for games business. Full dates and the first wave of events will be announced in the autumn with key events such as the Games Finance Market, Business Hub, BAFTA Games Awards, Now Play This, and festival fringe all expected to return in late March.



#RaiseTheGame



The **#RaiseTheGame diversity pledge** is a holistic industry driven initiative managed and facilitated by Ukie, that aims to increase equality, diversity and inclusion in the games industry.

Supported by our founding partners - EA, Facebook Gaming, Jagex, King and Xbox - the pledge is aimed at helping the entire UK games industry improve in all areas of diversity and inclusion.

Any games company can sign up to the pledge, provided they detail how the company plans to improve its diversity against at least one of the three practical pledge pillars that guide #RaiseTheGame.

Even if a company is at the start of their diversity and inclusion journey or think their company is too small to make a difference - all companies no matter their size or where they are in their diversity & inclusion journey are welcome.

They are:

- Creating a diverse workforce** - by recruiting as fairly and widely as possible.

2. Shaping inclusive and welcoming places to work - by educating and inspiring people to take more personal responsibility for fostering and promoting diversity and inclusion.

3. Reflecting greater diversity in our work - by striving for this in everything we do, from game design and development, through to marketing and other support services.

Once a company is accepted onto the pledge, they are given access to guidance and practical advice through a range of documents, events and activities to support their work. Importantly, this advice is flexible for any size company at any point on their EDI journey. All companies are welcome to join, no matter what their size or previous history with EDI work, provided they're willing to put in the essential work to improve EDI in the industry.

Companies are also asked to provide information on how they met the pledge commitments once a year, to foster accountability and to ensure that best practice amongst businesses is easily shared – driving the pledge further forward.

So far, the pledge is on course to hit its target of reaching 200 businesses and covering half the industry work force by the end of 2021. Over 75 companies have signed up as pledge partners and supporters, building up a community of committed organisations to drive EDI further forward across the UK games industry.

But we need even more companies to join. If you'd like to sign your business up to **#RaiseTheGame** and haven't already, head to raisethegame.com to join the movement.




**education for everyone
inspiring all ages, at every level.**



VIDEO GAMES
AMBASSADORS

ukie.org.uk/education

Digital Schoolhouse



This year has been filled with landmark moments for Digital Schoolhouse (DSH), as the award-winning programme continues to gain momentum, inspiring the next generation of talent with creative computing and immersive careers education across the UK, and beyond.

This year, DSH successfully delivered **617 workshops to 16,593 pupils and 1931 teachers** before school closures.

Digital Schoolhouse and Nintendo UK

It was an explosive start to the academic year following the announcement of the programme's partnership with Nintendo UK, in addition to the debut DSH Super Smash Bros. Ultimate Team Battle which achieved global coverage, including 459 million online readerships.

For the first time, DSH invited non-members of the programme to participate in the national tournament, which gained huge traction across all corners of the UK. With 69 participating schools and colleges, Digital Schoolhouse has reached approximately **10,000 students and 1000 + teams** - our biggest esports tournament yet.

Digital Schoolhouse also published a new report which found that parents rated quite highly on their confidence

to keep themselves safe online and their confidence in their child's ability in keeping themselves safe. Online Safety: A Parent's Perspective reported that 85% of parents speak to their children about the importance of online safety.

Responding to Coronavirus (COVID-19): Computing at home

Since lockdown was enforced, Digital Schoolhouse has delivered 27 live workshops to over 600 households across the globe.

This brand-new content, streamed via Twitch and available on YouTube, is just one part of our blended teaching model which is specifically designed for parents and carers who are responsible for home-schooling.

Alongside live Computing workshops, the team have developed a bank of 50+ curriculum-aligned videos for learners 5 through to 16 years that deliver fun, out-of-the-box computing. DSH's computing at home series sits alongside the programme's

One Minute Mentors - another popular resource - which seeks to connect young people with careers opportunities through one-minute videos submitted by industry professionals, about their role in industry.

DSH also supported a couple of innovative activities to engage students at home. It helped support the creation of the **Ukie colouring book** with the help of artists from across the industry, while also running its Superheroes Unite! creative writing competition at the end of August.

Ukie education's new look

Ukie's education initiatives are uniting under the new Ukie education brand to strengthen its collective proposition for its respective audiences in Education.

From families to schools, and universities to industry professionals, all our initiatives aim to inspire and nurture those who are passionate about a career in games.





Engaging the next generation

Ukie Student Membership

The Ukie Student Membership programme is now in its seventh year and continues to provide higher education (HE) and further education (FE) students with invaluable opportunities and insights into the industry.

The programme now supports over 3,000 students across 44 of the UK's foremost games courses, providing them with exclusive opportunities, events, resources, insight, internships and industry discounts to bring them closer to their first job within the industry.

Over the last 12 months, Ukie delivered three student conferences, one at Staffordshire University, Abertay University and for the first time an online conference during London Games Festival. These conferences were attended by over 1,000 students, 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. Ukie would like to say a special thanks to them and our other student conference partners Playground Games, Epic Games and Tag Games.

This year's Student Game Jam had an important focus on the environment and sustainability. With the help of Ukie members, Space Ape Games, Playmob, Tag Games, All Brandz and Epic Games, a record 380 students competed to be crowned this year's winners, with prizes ranging from internships to a £2,000 scholarship fund from the wonderful Rabin Ezra Scholarship Trust.

Looking to the future, we have some exciting times ahead. The programme will be undergoing a rebrand and we're planning to expand the activities to reach even more students, especially over the next 12 challenging months for them.



35 Schools signed up as opportunity providers with a potential reach to 40,000 students between them

260 New VGA's signed up

Video Game Ambassadors

The Video Game Ambassador scheme relaunched in March 2020 with a live launch on Twitch, just before lockdown. Rebranded and managed by Into Games, the scheme aims to recruit ambassadors from as diverse a range of careers and backgrounds as possible.

So far, over 250 people from industry have signed up to the scheme to provide their time for careers talks and advice to schools.

But like so much of our work, it has had to adapt to the new realities of the COVID-19 era – substituting physical visits for virtual alternatives.

This has, however, led to some magnificently creative outreach to schools instead.

Slack mentoring through the Into Games platform has proven a great way to connect industry to students one to one; Zoom assemblies are becoming all the rage; class interview projects have never been made easier for industry as a result of video calls.

While schools are steadily returning to normal, the reality is that it may be some time before the VGAs can resume face to face visits.

But as the industry has shown, we're able to find plenty of ways to make remote work work for us and our ambassadors are just the same.

If you'd like to find out more about the scheme and sign up as an ambassador, head to gamesambassadors.org.uk

74 Activities taken part in

**OVER
3500** young people inspired so far

Ukie esports

!! Our members make up the biggest network of esports businesses in the UK !!



Ukie esports

Our members make up the biggest network of esports businesses in the UK, including multinational IP owners, teams, platforms, hardware providers, event companies, media outlets, tournament holders, service providers, grass roots organisations and student leagues.

Building government support

We work to make sure that government recognises the opportunity that esports presents to the UK, economically, culturally and socially.

Having supportive policy makers, in Westminster and regionally, can help maintain a sensible and stable regulatory landscape, help improve how current processes like immigration can be improved, as well as improve funding and support bids to host major tournaments in the UK.

So we were pleased to see the government's recent response to a report by the Digital, Culture, Media and Sport Select Committee, that Ukie and our members contributed evidence to, saying that "Esports has the potential to develop as an area of real national strength in the UK". We continue to inform policy makers about the sector, particularly the challenges presented by the COVID-19 lockdown to live events businesses, and will be working closely with government to further support the sector.

Global Principles of Esports Engagement

One of the key areas that government would like to work with the sector on is the health and wellbeing of players, teams and audiences.

That's why we worked with a global coalition of other esports organisations to publish a set of principles that are applicable across all aspects of the global esports environment: safety and well-being, integrity and fair play, respect and diversity, and positive and enriching game play. We were pleased to see the UK government welcome the principles and will be continuing to work with them and our members to promote esports that are fun, fair, and enjoyed by players around the world in an open and inclusive environment.

Evidence and insight - a fast growing sector

Evidence lies at the heart of what Ukie esports does. We have previously produced thought leadership papers like our **Esports Whitepaper** and academic studies such as **Esports: Engaging Education**. Our latest bit of esports research is into the economic impact of esports in the UK – it showed:

- The UK's esports industry grew at an annual average rate of 8-9% between 2016 and 2019
- Overall economic impact: the UK's esports sector generated an estimated **1,214 Full time employees (FTEs)** of total employment and **£111.5m in GVA** for the UK economy in 2019.

Ukie IP Protection services

Supporting your intellectual property

The IP scanning service has been more vital than ever in helping members protect their IP, with an increase in traffic to IP infringing websites taking place during the worst of the COVID-19 lockdown period.

Traffic increased by over 30% - 50% to most of the popular game download sites over the last few months, with site operators responding by making more game titles available. Our scanning service, which operates 24/7, found and removed 80% of unauthorised links - preventing most people who accessed these services from ever downloading the files.

The IP service's impact is also growing as our membership of it increases. In the last year we have reported over half a million links, compared to one million links in the first three years. With over 60 members using the

service and protecting over 500 games titles, we're causing major disruption to infringers - including shutting down over 50 infringing websites.

To ensure members receive a full range of services, we have also developed tools to find unauthorised listings on marketplace platforms selling in-game items and Family Sharing Accounts.

We hope to offer the service to more members, as we've already managed to remove listings valued over £2 million in the first few months.

Members can also use our YouTube scanning service to identify videos claiming to offer free downloads or posting leaked content. Accessed via the Content Manager tool, videos are removed in seconds rather than hours

which prevents the uploader profiting from ad revenue or clicks to infringing websites. Protecting older game titles is just as important and we are working with members to takedown unauthorised sellers on marketplace and social media platforms.

We saw a rise in older games appearing on game download sites during lockdown, which is why it is important for us all to stay vigilant against possible infringement.

Ukie is ensuring that the games sector is represented, 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, contact mo@ukie.org.uk



In the last year
we have reported
over half a million links,
compared to one million
links in the first
three years

Working Groups

Ukie's working groups allow full members to contribute ideas and oversight to the inner workings of the organisation.

These groups are run by individual members of the team. They provide regular communications and updates on that team's work, while also hosting regular meetings to allow Ukie members to offer input, guidance and feedback into the topics that you want Ukie to tackle. Ukie currently administers the following working groups. You can request to join by emailing the contact below.

Communications

The Communications group looks at Ukie's communications output, with particular focus on how the organisation interacts with press and manages publicity campaigns.

Administered by: George Osborn
Contact: george@ukie.org.uk

Education

The newly formed Education working group will allow members to contribute their thoughts about all aspects of Ukie Education, including Digital Schoolhouse, Ukie Students and more.

Administered by: Shahneila Saaed
Contact: shaneila@ukie.org.uk

Esports

The Esports group shapes Ukie's position on the growing sector, helping to drive policy recommendations, engage with policy makers and build a specific strategy for esports.

Administered by: Daniel Wood
Contact: daniel@ukie.org.uk

Equality, Diversity and Inclusion (EDI)

The EDI group is dedicated to improving equality, diversity and inclusion within the industry and shapes Ukie's approach on EDI matters by informing, suggesting and getting involved in activities and initiatives like the #RaiseTheGame diversity pledge.

Administered by: Dom Shaw
Contact: dom@ukie.org.uk

Human Resources (HR)

The HR Group is a forum enabling the sharing of ideas and best practice between Ukie and Human Resources (HR) teams, while also allowing HR, Legal, Operations and/or

Recruitment professionals within the group to discuss in confidence concerns, issues and trending topics around the work they do and/or the overall video games industry.

Administered by: Dom Shaw, Sophie Mangara and Grace Shin
Contact: grace@ukie.org.uk

Intellectual Property (IP)

The IP group helps shape Ukie's work supporting and protecting the Intellectual Property of games businesses operating in the UK.

Administered by: Mo Ali
Contact: mo@ukie.org.uk

Mixed Reality (MR)

The Mixed Reality group explores Ukie's work within the Virtual Reality (VR) and Augmented Reality (AR) sectors.

Administered by: Luke Hebblethwaite
Contact: luke@ukie.org.uk

Policy and Public Affairs

The Policy and Public Affairs group feeds into Ukie's work with policy makers and provides information about developments in industry policy.

Administered by: Tim Scott and Grace Shin
Contact: grace@ukie.org.uk

UKIE STAFF 2020



DR JO TWIST
CEO
jo@ukie.org.uk
 doctoe



LAURA MARTIN
Communications & Programme Manager
Digital Schoolhouse - laura@ukie.org.uk
 ukielaura



SOPHIE MANGARA
Senior Operations Manager
sophie@ukie.org.uk
 sophieukie



KATIE DAVIES
Accounts and Finance Officer
katie@ukie.org.uk



SAM COLLINS
Head of Membership
sam@ukie.org.uk
 ukiesam



JOHN PARRY
Digital Marketing & Communications Officer
john@ukie.org.uk
 johnukie



GEORGE OSBORN
Head of Communications
george@ukie.org.uk
 ukie_george



GRACE SHIN
Policy & Events Officer
grace@ukie.org.uk
 ukie_grace



TIM SCOTT
Head of Policy & Public Affairs
tim@ukie.org.uk
 ukietim



SOPHIA AKER
Programme Coordinator
Digital Schoolhouse - sophia@ukie.org.uk
 ukiesoph



SHAHNEILA SAEED
Director Head of Education
Digital Schoolhouse - shahneila@ukie.org.uk
 shahneila1



ESTELLE ASHMAN
Curriculum Content Developer
estelle@ukie.org.uk
 compsci_geek



LUKE HEBBLETHWAITE
Insight & Innovation Manager
luke@ukie.org.uk
 ukieluке



MO ALI
IP Coordinator
mo@ukie.org.uk
 ukieluke



LEON CLIFF
Member's Relations Manager
leon@ukie.org.uk
 ukieleon



DAN WOOD
Special Projects Lead
daniel@ukie.org.uk
 damelw



DOMINIC SHAW
Office Manager
dom@ukie.org.uk
 dominicshaw94

1939 game • 39 Pictures • 3dnative • 505 Games • 50cc Games • A Brave Plan • Aardman Animations Ltd • Aardvark Swift Recruitment • Abertay University • Absolutely Games • Access Creative College • Access Sports • Accumed Consulting • Actioncy • Activision Blizzard UK • AdRealm ADVNCR • Aim Awards • AIME • Akolyte Esports Coaching • All Brandz • Alpha Games • Altered Gene Studios • Alzheimer's Research UK • Amazon Amiqus • Ansible PR & Communications • Ant Workshop • Antstream • AppBox Media Plc • ARM • Association for Continuing Education in Esports (ACES) • Atomic Entertainment • Atomicom • AudioMob • Auroch Digital • Autistica • Avid.ly • Azoomee • Bandai Namco Entertainment UK • Barclays UK Ventures • Barog Game Labs • Bastion • BBC Studios • Beijing CrazySports Industry Management • BetaJester Ltd • BGI • Bidstack • Big Games Machine Billy Goat Entertainment Ltd • Binary Spiders LTD • Bird & Bird LLP • bitmap bureau Ltd • Biz Media • Blazing Griffin • Blicx • Bluegfx (London) • Born Ready Games • Boss Mode • Bossa Studios • Branching Narrative Ltd • Brightrock Games • British Chamber of Commerce Korea • British esports Association Brown Betty • Brunel University London • Buckinghamshire College Group • Bulkhead Interactive • Bungie • Cambridge Game Creators Network • Cambridge Global Payments • Cape Guy • Carbon Digital • Cardboard Sword • Casual Games Association • Caxton FX • CCP Games • CE Europe Centresoft • Charles Russell Speechlys LLP (London) • Cheetah Mobile • Cherry Pop Games • Chilled Mouse ChilliConnect • China Britain Business Council Climax Studios • Cloud Imperium Games • Cloud9 • Coatsink • Code Kingdoms • Codemasters Codewizards • Coding Land Education Technology Co. 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