

North West Creative and Media Industries plc 2009

The Videogames & Animation industry
October 2009

Background to these reports

This is the third publication in a series of six sector specific reports studying the marketing services and media communities of the North West.

The series has been undertaken with the support of Business Link Northwest. Additional research for this report has been provided by business data information company Experian. Three further sector-specific reports are planned for publication over the next few months: the other reports will focus on **Publishing, Advertising and Broadcasting.**

The NWDA estimates that over 140,000 people across the North West are employed in the creative and media industries. Despite the current challenging economic circumstances, many of these sectors are widely acknowledged to be in areas which are forecast to enjoy above average levels of growth over the coming years. And yet, it is difficult to obtain a comprehensive or even clear understanding of the relative size and strengths and weaknesses of these key sectors – and their likely future impact on employment and business growth.

With this in mind, How-Do and Business Link Northwest have joined forces to develop this initiative which we believe helps to illustrate with more depth and clarity, the size and scale of these sectors in the region – and their contribution to wealth generation in the North West. We believe this has been the first serious attempt of its kind to provide such a revealing snapshot of the state of the sector here in the region.

Introduction

FOR many of us, even those enlightened members of the Space Invaders generation, the closest we get to the gaming and animation industry is turning on the Nintendo Wii or Xbox 360 to take on family members and friends at virtual tennis or desperately trying to prove we really could be the next soul diva by indulging wholeheartedly in a drunken, red-faced session of PlayStation's 'Singstar' karaoke. Some, of course, are more immersed.

The author of this report freely admits to spending a disconcerting number of hours arguing online with freckly American twentysomethings called 'SickSniper' or 'Stealthmeister' over who got the most 'headshots' in the previous 'Deathmatch' encounter on Activision's ridiculously addictive Call of Duty: World At War game. But this author has an excuse. The author has to review videogames for a living. Not that, it seems, excuses are needed these days.

The videogames industry and its closely associated animation business, is a multi-billion-dollar worldwide phenomenon which contributes hugely to the global economy. No longer is it an 'underground' niche occupied solely by spotty, anorak-wearing, socially-challenged teenagers who wouldn't know what the real world looked like were it not depicted in pixels on an HD TV screen.

These days it's big, big business – in many ways, certainly financially – and it's comparable with the movie industry. You can't escape videogames in the 21st century. Even the most sought-after new mobile smart-phones all come with built in videogames to keep CEO's entertained in Pendolino First Class.

The people creating the huge variety of games we play – once considered by the pinstriped business establishment to be red-eyed social outcasts scared of exposing themselves to natural daylight for fear of a Bram Stoker-like meltdown - are now among the biggest earners on the international stage. Budgets for new games have skyrocketed as production values and consumer expectation have risen beyond all forecast.

The pinstripes might not fully understand the new boy in the new media playground but they are mocking him no more. He's worth too much money to poke fun at these days.

Overview

IN 2008 UK consumers spent a mind-boggling £4 billion on videogames product, - games, consoles and peripherals - according to data from ELSPA, the Entertainment and Leisure Software Publishers Association.

With around 280 firms based in the UK, the country is a global hub for game development, employing around 30,000 staff nationally.

Gaming is now one of Britain's biggest creative industries. Globally, the UK was ranked as the third largest producer of computer games until 2006, when it dropped into fourth place and was overtaken by Canada.

However, the sector still remained competitive in an industry which is worth around £20 billion worldwide. Total sales of videogame software was over £1.9 billion during 2008, a rise of 23 per cent over 2007, while console sales accounted for £1.4 billion, up 14 per cent.

Revenue from peripherals increased 82 per cent, reaching sales of £549 million. Almost a quarter of all software sales were for Nintendo's Wii, with over 20 million games sold for the system in the UK, an increase of 153 per cent compared to the prior year. Revenue from Wii software sales rose 112 per cent, to £481 million, compared to £227 million in 2007.

Software sales for Nintendo's handheld DS series reached 19.1 million units, compared to 14.9 million in 2007, a growth of 28 per cent. Revenue from DS software increased 17 per cent, from £314 million to £481 million.

Sales of Microsoft's Xbox 360 software also climbed 51 per cent, with a total of 14.9 million units sold, compared to 9.8 million in 2007. Revenue was up 38 per cent, to £443 million. And Sony's PlayStation 3 software generated £334 million in software sales during 2008, as unit sales rose 145 per cent to 10.4 million. "Videogaming is increasingly bringing families together with the introduction of so many outstanding family-based console titles," said

Michael Rawlinson, MD of ELSPA. “These have really opened up the market to those who may never have even considered playing a videogame before.”

The national picture

For the last 30 years, Britain has had the third most successful video games industry in the world, behind the United States and Japan. It has created many worldwide hits such as Tomb Raider and the box-office busting, uber-controversial Grand Theft Auto series.

Industry campaigners say that due to a lack of government assistance, Britain has now slipped from third place in the face of harsh competition from France and Canada, where there is considerable state support for games staff.

The Canadian government, which is keen to create a booming games industry, not only offers tax breaks but also fast tracks any immigration procedures for games workers. Richard Wilson, the chief executive of Tiga, the UK trade association that represents independent games developers, is one of several key industry figures lobbying the government for investment to keep the sector in its successful position.

Lord Stephen Carter, Britain’s Communications Minister, who wrote the recent Digital Britain report, is understood to be considering options for government assistance for the games industry, despite missing the sector out of his interim report, earlier this year. He is meant to be evaluating whether support can be best given through direct government intervention or tax changes.

The computer games industry contributes more than £1 billion to Britain’s gross domestic product. This is more than the film industry, which receives support in the form of tax breaks. About a third of the members of Tiga took part in a recent and hugely enlightening survey. One key finding was that 53 percent of participants said the UK government’s policy towards the game industry was either unfavourable or very unfavourable, while only three percent thought it was favourable. Tiga

itself was “disappointed” with chancellor Alistair Darling’s most recent Budget for “once again” failing to support the industry strongly enough. 38 percent of Tiga respondents said they were less optimistic about their business’s prospects now than they were six months earlier, while 31 percent were more optimistic.

Developers also said that they were less optimistic about the outlook for investment than they were six months previously, while their ability to access bank finance is also said to be down over the same period.

However, 68 percent of developers said they believe that their business is currently performing well and 47 percent expect the trend in their business’s net profits to increase over the next six months. In relation to their business’s development, 78 percent of respondents expect their business will get either a little or a lot better over the next 12 months, while 75 percent of respondents expect to grow their organisation’s workforce in the coming six months. “Whatever the current economic difficulties, UK developers are optimistic about the future,” Tiga concluded. Despite the huge profits being made in the global industry, the UK is facing a squeeze as it battles to combat subsidised competition from abroad.

The UK videogames industry, according to the official line, is a rare example of Britain punching above its weight. That may be the popular perception but, a brief chat with any independent British games developer will uncover a far less rosy outlook.

Recently, the situation has become so fraught that a coalition of British development studios, backed by both Tiga and ELSPA, has launched a campaign to lobby the government, entitled “Games Up?” The lobby group wants tax breaks for UK developers in line with those enjoyed by the film industry. It also demands institutional change in universities, designed to re-establish a flow of graduates with skills that are relevant to the game development process.

Ian Livingstone, creative director and head of acquisitions at gaming giants Eidos, said recently: “We’re now the most expensive country in the world in which to develop. Other countries offer salary subsidies. Canada

saw games as a clear opportunity to invest in the future, as traditional manufacturing was disappearing, and made a conscious decision to invest in games. They don't see it as a handout but as an investment. They have actually given out, in salary subsidies, 37.5% to every employee in games companies.

“The difference between there and here is that our government clearly sees any state support as a handout, not an investment. It seems to me the UK government would rather see our great industry go into decline than help it maintain its prominent position in the world, and that is madness.”

Livingstone paints a bleak picture of the future of UK games development. “In the past six years, half of the independent UK development studios have already closed or been bought by foreign publishers who see more value in our studios and intellectual property than we do ourselves. We'll end up being a work-for-hire nation. The inherent intellectual property that is created at those studios will be foreign-owned, and they can move that IP to be produced wherever they want in the world, if it suits them.”

Richard Wilson, chief executive of Tiga, is the spokesman for the Games Up? campaign. He said: “The Government understands that UK games developers are not competing on a level playing field but is reluctant to introduce tax breaks for games production unless it can be shown that there is an issue of market failure or that there are strong cultural reasons for supporting UK games developers.” Don Foster, Liberal Democrat spokesman on culture and media, believes the games industry suffers from an unjustifiably poor image: He said:

“I hardly play any games – I'm not from that generation – but because of my job, I had to research the industry. The vast majority of my parliamentary colleagues always want to ban the latest game, but they don't know the details of the industry. Few people in this country realise how important it is to the UK economy.” Livingstone agrees: “We're still seen as the red-headed stepchild of the creative industries, one notch up from pornography in the eyes of most of the establishment. They forget that half of the world and half of the UK's population play games. Games help define who we are as human beings – they are as important, culturally and socially, as music and films.” There's another problem, though,

which Foster highlights: a shortage of university graduates with the requisite skills. There are 81 videogames courses on offer at UK universities, but only four are accredited by Skillset and therefore taken seriously by the games industry. Livingstone says: “These universities are churning out people who know a bit about games design and the history of games, but what we need are computer programmers, artists and animators: people with real skills who can start work tomorrow.”

The Industry in the North West

According to statistics from business data information company Experian, the total number of employees in the North West gaming and animation industries currently stands at an extremely healthy 12,866. That's around one in every six of the UK's entire gaming and animation workers who are based in the region, or 17% of the total industry workforce. Experian also believes that the total turnover for the industry in the North West comprises a substantial portion of the UK's £4bn plus turnover. Certainly enough to buy a few new anoraks, if not a small Caribbean island. But as the recession started to bite last year the early signs weren't positive for the industry up north. Few would call it coincidence that, on the same day that the UK officially entered recession, **Eidos**, one of the UK's most successful videogames companies – they gave us Lara Croft and Tomb Raider - closed the doors of its Manchester based development arm in summer 2008.

It certainly didn't bode well for the future of gaming and animation in the North West. Yet despite the **Eidos** body-blow there have been a number of successes for videogames developers and animators in the region. The next big shift in the videogames industry may even be determined by a not insignificant piece of software conceived in the region and currently being developed in Manchester. But more of that later.

Recent stories of redundancies and the uncertainty of the credit crunch has created as much negativity and posturing around the animation industry as it has its

videogames cousin in the region. However, evidence has shown that companies across the North West are still creating projects that have gained regional and national recognition.

Enda Carey, head of games and digital content at Northwest Vision and Media (NWVM), said: “With the borders between media genres becoming a blur and the fast paced industry forever changing, animation companies have learnt that they must quickly evolve and explore other options if they are to survive.” Games companies have felt the pinch too. There isn’t as much risk-taking in the industry at the moment. People are playing it safe in the current economic climate.



Enda Carey

“There are a number of smaller companies in the region who rely on outsourcing work from the bigger players in the industry. That is – the bigger games developers sub-contracting work to smaller companies for specific areas of games development. But we have been hearing that much of that outsourcing is now going back ‘in-house’. Clearly that’s a shift that has financial roots because the bigger developments want to save money by doing as much in-house as they can. “Fortunately, other than the loss of **Eidos** there haven’t been any significant closures in the industry within the region since. I would say the industry is in a fairly healthy state here although, like in every business in the current climate, times have been better.” NWVM works on behalf of the TV, film, radio and digital content industries in the region to grow a world-class media economy in the region. It is a strong advocate for those brave souls forging an existence in videogames and animation in the North West.

Enda can’t speak highly enough of the companies that are making a success here. “There is **Sony Liverpool**, the company’s biggest games development site in the UK – right here in the North West. They have been responsible for some huge videogames

titles, not the least of which was the massive selling WipEout games and all the external development for huge games like Killzone 2, Little Big Planet – it’s all been done at Sony Liverpool.” “**Travellers Tales** in Knutsford is also a big player with 120+ people employed there. They are responsible for the Lego series of games, like Lego Star Wars, which have been acclaimed and so successful across the world. They are currently working on Lego Harry Potter at the studio. **Bizarre Creations**, also based in Liverpool and recently bought out by the gaming megabrand that is Activision, is responsible for massive chart-topping console games like the Project Gotham Racing Series and The Club.”

“**Magenta Software**, another Liverpool based games studio, has made its name – and fortune - developing games for Playstation 2 and 3, Xbox 360 and Nintendo Wii. **Playbox**, also in Liverpool, are doing really well making games for the DS handheld console too.” Generally, the North West region contributes far above its weight to the national and international industry. A handful of the truly big players in the industry are based here. Liverpool, according to Enda, is right at the top of the videogames production tree in the UK and is one of the big players on the world gaming scene too.

It has competition of course – Guildford and Brighton have strong games development bases these days and Dundee, because of its first-rate gaming degree courses, is always up there in the mix as is the South West. But there can be difficulties being based in the North West for those wanting to grow in gaming and animation. Enda said: “The difficulty we have in the region is that we don’t know where the next big producer or independent development house is going to come from. “Certainly for the gaming industry here there is no middle layer now so a lot of the smaller companies do not have the expertise or contacts who can help them get a foothold in the market.

“The animation industry in the region has one or two big players too but, to a large degree, has the whole freelance ethic is firmly in place in the animation realm here. There are companies like **Realtime UK, The Box, Red Vision, Studio Distract, Milky Tea, Tickle**

3D and **Kilogramme** who are all doing well here. But most of the workforce, outside those companies, is freelance.” But, much as the UK punches above its weight in global terms, the North West outboxes its division in the national ring. “We are certainly in the Top 3 in the UK games development chart,” says Enda. “The North West is consistent too. We have a regular, high-quality output but we do not have a worldwide hit title like Grand Theft Auto to shout about yet.” And there are North West firms currently making waves in animation too, despite the economic climate.

Production company **Red Vision**, based in Manchester, has branched out into adult animation for TV and film, having recently won awards for creating satirical animation series *Headcases* for ITV, dubbed as the modern day Spitting Image.

Red Vision director David Mousley told us: “Manchester is our headquarters. It’s a ‘human scale city’, big enough to have all the benefits of a large, modern, urban environment, but still personal. It’s got great communication networks and transport links, and a fantastic creative culture, supported by the vast technical resources from the universities. It’s in a league of its own when it comes to running a business like ours.” David is equally excited about new developments on the horizon for the region’s creative industries, like the Media City complex currently under construction at Salford Quays. “Media City is the missing piece in the region’s industry. It will attract major global players to Manchester, who want large, prestigious facilities. This means established SMEs will grow, and new ones will develop, to supply the growing demand,” he said.

Regional case studies

The Neighbourhood

One success story is creative agency, **The Neighbourhood**, which specialises in the direction and production of animation, illustration and film. Based in the heart of Manchester’s Northern Quarter, the company, established just two years ago, is lead by managing director, Ben Davies, who along with some colleagues left his previous agency to

set up The Neighbourhood. Their aim was to create a company that not only had talented people that produced good quality, creative and innovative work, but also an environment that staff enjoyed working in. Ben and his team have a very strong ethos that it is as much about a person’s personality as their skills. Ben said: “For us attitude and approach is very important. Skills can be taught later, but a person’s attitude comes with them. It is important that the team can work well together and have a similar outlook and desire to create great work, but still maintain their individuality, thus building a “Neighbourhood” of creative people.”

It’s this approach to their work that has helped The Neighbourhood attract some high profile clients including Sony Europe, Manchester City Football Club, TBWA and Heston Blumenthal. Along with the likes of big hitters Red Vision and Realtime UK, who work for the likes of Audi, Sony, Disney and Jaguar, The Neighbourhood is showing that the North West animation industry is here to stay. “We currently have 11 permanent employees and range from being busy, very busy to ridiculously busy, taking on freelancers when we need an extra pair of hands. In fact the biggest issue we have is finding space in the office for everyone to work,” Ben added.

Realtime UK

Animation House **Realtime UK** is another huge regional player with a profile firmly established both nationally and on the world stage. With the help of Business Link, Realtime – which creates stunning computer-generated 3D imagery and animations and is based in Westby, near Blackpool in Lancashire - believe the industry maybe seeing the first signs of green shoot recovery after a tough year in the market. Realtime’s managing director Tony Prosser said: “The side of the business that has been advertising-related (commercials and digital advertising) has been in slowdown for the last few months because there are a number of projects which have been put on hold or rolled down because advertising budgets have been reduced. “But in the last two or three months, the bigger brands who had put things on hold have wanted to start pushing bigger projects again. And the use of animation is increasing quarter by quarter. The last couple of months

has definitely seen a renewed confidence. Everyone got scared and started tightening budgets but now we are starting to see commissions again.”



Tony Prosser

Realtime UK works mainly for the videogames industry using 3d animation for marketing trailers, downloads and pre-rendered animations for games intros. Among its impressive client list are some of the biggest players in the games industry. Developers like Disney’s Brighton studios, Sega in Surrey, Rockstar in Scotland, Sony Liverpool, Evolution Studios in Runcorn and Warrington-based Juice (part of THQ) are all regulars at their Lancashire HQ. Tony Prosser elaborates: “Currently we are in the Top three in the world in our field. Our latest work has been for Disney – a next-gen driving game called ‘Split Second’ which is due out at the end of this year. “We also specialise in X Movies. X Movies are pre-rendered target movies with three purposes. Firstly, to drive what the finished game will look like two years down the line – we will push the visuals and animation quality and the ‘movie’ will be delivered to the game’s development team to work towards as a target.”

One of the early X Movies Realtime were responsible for was used to drive (excuse the pun) the hit driving game Motorstorm in 2005. Tony says: “When it hit E3 (the world’s big trade conference for the games industry) that year it was surrounded by hype. What Sony loved about it was that they believed the quality of the finished game was as high as it was because Evolution Studios in Runcorn, who produced the game, met the standard of the X Movie we produced.”

Realtime were also responsible for the hugely impressive website for the funky PSP Go handheld console. “We used animated robot characters to represent each of the accessories you can buy for the PSP. Digital advertising is a growing area for companies like us. Agencies and their clients are requesting more and more elaborate animation – animated TV

commercials and image-rich visual journeys through their websites.”

But what must be galling for Tony and his team is that when the big production houses who aren’t aware of Realtime’s credentials see the company’s quality of work they assume they must be based in a capital city. “Yes, the big London production houses assume we must be based in London or Los Angeles. But there really is such incredible world class talent in the North West because we have to be at the top of our game just to take work out of London. That makes the recruitment side of things potentially difficult because the top talent tends to be very London centric. We have ‘grown’ a world-class staff here. “The entire animation industry is London centric because all the ad agencies and big production companies tend to be based there. Therefore the advertising-related work we do tends to be quite a small part of our business and we have to work very hard in the North West to get that work at all.” Realtime’s work with Business Link stretches right back to the company’s start-up some 13 years ago.

Tony says: “They have helped put us in touch with consultants when we needed them. They’ve also helped us get grants to develop our studios and linked us with North West Vision and Media. They’ve also been a consultative signposting service for us, introducing us to people outside our specialist area and helping provide us with things like training for management skills. They’ve always been there when we needed them.”

Dark Energy Digital

Dark Energy Digital, based around the corner from The Lowry Hotel in the heart of Manchester, is a developer and publisher of videogame software renowned for innovation and ground-breaking technological advancements. The company, currently employing 43 full-time staff and still recruiting, develop and publish for all the major gaming platforms including Xbox 360, Playstation 3, Sony PSP, Nintendo DS, Nintendo Wii, PC and Mobile Phones. And the company is sitting on two pieces of software - groundbreaking technology InfiniteWorlds and HydroEngine – which could soon revolutionise the way that videogames are made. After a brief

look at both pieces of software in action the influential 360 Gamer magazine was moved enough to publish the following glowing tribute: “Undeniably, HydroEngine and InfiniteWorlds are both incredible pieces of technology. In fact, they’re probably the first truly next-gen tool sets.” Powerful words indeed. But ask anyone who works at Dark Energy and they are a little more matter-of-fact about the potential gaming timebombs they are sitting on. “We know we have something very special here,” says Dark Energy’s Joint Managing director Pete Jones. “Until now AAA video games titles have all been released on the disc format but our InfiniteWorlds technology makes it possible to massively reduce the file-size needed to store all the game’s information on, making it possible to now download next-gen titles instead of paying premium prices for disc versions and all the packaging and other associated costs.”



A typical game for Nintendo’s industry-slaying Wii games console is about six or seven gigabytes in size. Dark Energy’s Infinite World’s games creation system makes it possible to store the same information on a file just one-third of a gig in size.

It doesn’t take a rocket scientist to work out the economics. Like in the music business, which in the last five years has seen a huge sea-change from compact disc sales to downloads because of the ability to compress music into tiny file sizes – making them easier to access and store and, crucially, cheaper to buy because the added costs of packaging and printing, retail overheads and the like disappear when music is bought electronically – Dark Energy could well be holding the key to unlocking the next big development in gaming.

Imagine if the latest next-gen blockbuster game could be downloaded across Xbox Live Arcade or PlayStation Network and stored on your console’s hard-drive and only cost a quarter of their current retail price? You won’t have to imagine for long because that’s exactly what Dark Energy has in mind. Initially they are

hoping to roll out the first of these next-gen titles – their own game called Hydrophobia – across the Xbox Live Arcade. Currently, gamers can download pixilated retro games across XBLA and store them on their console’s hard-drive but they’ve never been able to do the same with a genuine next-gen title. It’s quick to download too because of the tiny file size with no compromise in the quality of graphics or gameplay.

Pete Jones is equally buoyant about their HydroEngine technology which, for the first time in videogames history realistically maps the movement and fluidity of water. “It’s the world’s first fluid dynamic engine for games. We have developed it so that it does exactly what water would do in the real world. With that and InfiniteWorlds things are looking very exciting for us at the moment. We are looking to apply this technology to other games developers too. Our own game, Hydrophobia, is designed to show it all off.”

Pete has been holding talks with Business Link about ‘black boxing’ the whole project and getting it out to other developers so that it can be integrated into pretty much any game. “This is the first time we have used Business Link and they have been incredibly helpful. Ultimately we want them to help us get a grant to produce this software as middleware so it can be used by any games developer out there.” Imagine the motor industry as an analogy. Petroleum prices have risen by up to ten times and, at that moment someone comes along with a realistic electric alternative to the petrol engine. That’s how big this little piece Dark Energy software could be. And, best of all, it’s been conceived and developed right here in the North-west.

Adviser profile

Steve Mulvaney, one of Business Link Northwest's leading Advisers for the gaming industry, has been working at Business Link for over 10 years. One of his first roles was to work on the Millennium Bug 'threat'.



Steve Mulvaney

Steve, who is based at Business Link's Merseyside office, has worked specifically as an ICT Adviser to SMEs, has managed a team of general advisers and is now working with clients in the digital and creative sector. He has worked with high tech. start-ups, newspaper companies, a variety of web developers and new media companies and many more involved with cutting edge technology.

One of Steve's main roles now is working with games development companies, peripheral producers and 3D graphics companies who produce photorealistic virtual worlds with real world physics. Many of these businesses require access to funding for Research & Development or to access assistance in training staff. Many have a strong relationship with a publisher so the games developer really has no need of other, often used, services such as sales and marketing/PR. Some also have staffing issues which need expert help and advice.

Steve is soon to launch a series of dialogues with Enda Carey, head of games for North West Vision and Media, where they'll be discussing the needs of the gaming industry in the North West and how both parties can support the games businesses here. And he has his own opinions on the current state of the industry here in the North West. He said: "Good programmers are in demand all over the world and can be a migrant workforce. There are certainly some strong arguments for tax relief here in the UK. The number of people employed in the UK games industry fell during the last year and a number of developers are no longer in business. Tax incentives may

be a part of a solution but I don't believe that tax incentives alone are the answer. "Dare I suggest that games companies need to be as innovative with their business practices as they are with their product! For example, outsourcing elements of their development and even self publishing. More could be done too to 'hot house' developers and programmers too."

Should any company in the gaming or animation industries of the North West wish to contact Business Link to discuss ways in which they might access Business services and support, please contact one of the following Business link advisors:

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Or call their information team on 0845 00 66 888, email at info@businesslinknw.co.uk and visit the website at www.businesslink.gov.uk/northwest



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