

**VR/AR ASSOCIATION**

*ECOSYSTEM REPORT:*

**UNITED KINGDOM**

Q3 2019

## **14+ companies featured**

As the world's technology epicenter, the **UK** have become hotbeds for VR and AR. VRARA positions companies of all sizes to capitalize on this next major computing platform shift.

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# Foreword

I started my career seventeen years ago in Hollywood, working on film and tv productions the likes of Terminator 3 and Basic Instinct 2. I was fascinated by film and storytelling, and by the way movies were made- mobilizing a small army of writers, art directors, producers, talent etc. for six months to a year at a time. But then I was privileged to jump into the online video world, with gigs at Netflix, Dailymotion and YouTube; and there I discovered an entirely new medium. Not only were independent creators and small studios able to produce new content without the big Hollywood machine, but they were also paving a path towards a new medium. As Matt Miesnieks quotes: "inventions like the iPod, radio or streaming didn't really change the medium beyond adding quantity. But going from live to take home, or from at home to out and about, changed the experience entirely, because the context in which we experienced the content changed." VR and AR will go beyond how streaming has already changed how we consume content.

At the YouTube studios, I played with XR, producing MR livestreams with bands like the Gorillaz or Daydream VR experiences with choreographers. But with the advent of mobile VR and AR, I realised how our experiences with content were going to be drastically transformed. With XR, we're going to experience music, art, content and data in context with our lives.

A quick recce of the GOV.UK Contracts Finder site and the Digital Marketplace suggests that, in the last half-decade, there have been just 17 public-sector tenders for virtual reality projects or products. But six of these were in the first half of 2019. This includes a £700,000 project from Highways England to deliver a virtual training environment, and a three-year framework launched by housing association London and Quadrant, which will use the technology in the planning of new buildings. A wide range of universities have invested in VR or AR environments to support the teaching of engineering and other subjects. The Ministry of Defence also recently spent money on a "VR demonstrator" to showcase the technologies of the future that will play a key role in the defence sector.

As Chapter President London for the VR/AR Association, I'm lucky to be working alongside UK-based immersive tech pioneers in the media, advertising/marketing, gaming, enterprise training, computer vision, geolocation, telepresence, education, retail/e-commerce, journalism, healthcare, art/entertainment sectors, among others. Thanks to their involvement with the VRARA in the UK and beyond (over 4200 companies, brands, schools registered and over 27000 professionals), we continue to demonstrate how VR and AR will change people's lives, businesses and grow the economy through innovation. This connection and collaboration seems particularly important now, as we face the UK leaving the EU, and with the potential of VR and AR to expand into a \$60 billion market by 2023.

If you're not a member yet, please join us in creating this magical future. As Jay Samit puts it: "the best way to predict the future is to spend time with those creating it." And if you or your organisation plan on using VR and AR, then the VRARA and its members would love to hear about it, and we encourage you to get in touch. We can help.



-- David Ripert

London Chapter President, VRARA



**Summary**

4D Sight is a deep advertising company; creating embedded advertisements on live stream e-sports and 3D gaming content. Embedded advertising enables content creators and streamers to monetize their content with non intrusive ads. And for advertisers, 4D Sight creates non intrusive ad formats that avoid ad blockers and ad blindness.



**Contact**  
 Erhan Ciris  
 www.4dsight.com  
 ciris@4dsight.com

**Type of Company**  
 Software/ad tech, gaming and esports

**Customers**  
 We work with gaming content creators (including VR, AR, 3D mobile game developers) and gaming streamers on live stream gaming platforms.

**Size of Company**  
 How many employees: 9  
 Revenue: N/A

**Why are you in UK?**  
 Dublin has a great ecosystem and tax incentives for ad tech focused companies. Key customers and partners have their European HQ in Dublin which allows us to grow our client base. Proximity to New York keeps us on the same schedule with our clients in The US.

**What do you want/need/hope for/from the UK ecosystem?**  
 Though it doesn't affect us directly, more investment in e-sports infrastructure in Europe would be beneficial for the gaming ecosystem as a whole.



## Summary

At Absorb Reality, we know that great training is one of the vital drivers of success. Outstanding performance starts with a top-class training programme, and Absorb Reality training is designed to help you unlock your true potential.



### Contact

absorbreality.com  
learn@absorbreality.com



### Type of Company

Absorb Reality provides staff training delivered in Virtual Reality and Augmented Reality. Immersive learning that engages, develops and accelerates your organisational development.



### Customers

Absorb Reality training comes with years of hands-on experience. Our team of has an in-depth background in providing tailored courses to many industries across the UK, both in the public and private sectors.



### Size of Company

How many employees: N/A  
Revenue: N/A



### Why are you in UK?

We are UK based with global reach.



### What do you want/need/hope for/from the UK ecosystem?

N/A



## Summary

Emteq develops a hardware and software platform for the detection, collection, analysis and interpretation of non-verbal communication cues (facial expressions, arousal, posture). We combine an AI platform with our own bespoke hardware for the collection of emotional signals. The hardware comes both as an inset in VR HMDs and our own bespoke glasses. Our vision is to become the reference place for categorising behaviours based on the emotional triggers that influence those.



### Contact

<http://emteq.net>  
[info@emteq.net](mailto:info@emteq.net)



### Type of Company

Hardware - glasses and VR HMD insets. Software - AI engine for emotional data analysis. Service model - platform as a service. Verticals - training/simulation, market research, medical applications, social immersive spaces (workspaces, entertainment spaces).



### Customers

N/A



### Size of Company

How many employees: 15  
 Revenue: N/A



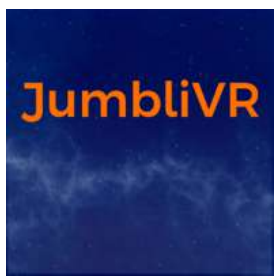
### Why are you in UK?

The company started as a spin-off from the Innovation Centre Sussex University in Brighton. While it has a global reach, it relies on the great talent available through the connection with different UK universities and R&D centers and in its initial growing stage it has benefited from winning government grants through Innovate UK.



### What do you want/need/hope for/from the UK ecosystem?

The enterprise application space which is our target needs a stronger collaboration between companies offering complementary solutions. We hope that the networking and access to clients that the UK XR ecosystem offers can lead to a more joint thinking in this space.



## JumbliVR

### Summary

JumbliVR is a solo VR developer, Brett Jackson. I am the recipient of three awards: the Amazon Sumerian AR/VR Challenge (2019), WEARVR Remastered (2018) and VRTGO VR Competition (2015). I have developed four VR games for the HTC Vive, Oculus Rift and Windows MR and been published on Steam and Oculus Home. My experience also covers webVR and mobile VR on the Oculus Go. I use my projects to explore new approaches and innovations in VR and make the most of the available hardware. With 4 years VR experience using Unreal Engine 4, Blender and Quixel, I'm always looking for challenges to help push the boundaries of this new medium. My VR titles include: Breath Tech, Dimensional, Jigsaw 360, The Relentless and Horse Arc - webVR project.



#### Contact

www.JumbliVR.com  
brett@HeadStartDesign.co.uk



#### Size of Company

How many employees: 1  
Revenue: N/A



#### Type of Company

Virtual reality games and experiences



#### Why are you in UK?

I'm proud to live and work in Sheffield in the UK.



#### Customers

My products have so far been made available directly to the public via Steam and Oculus Home.



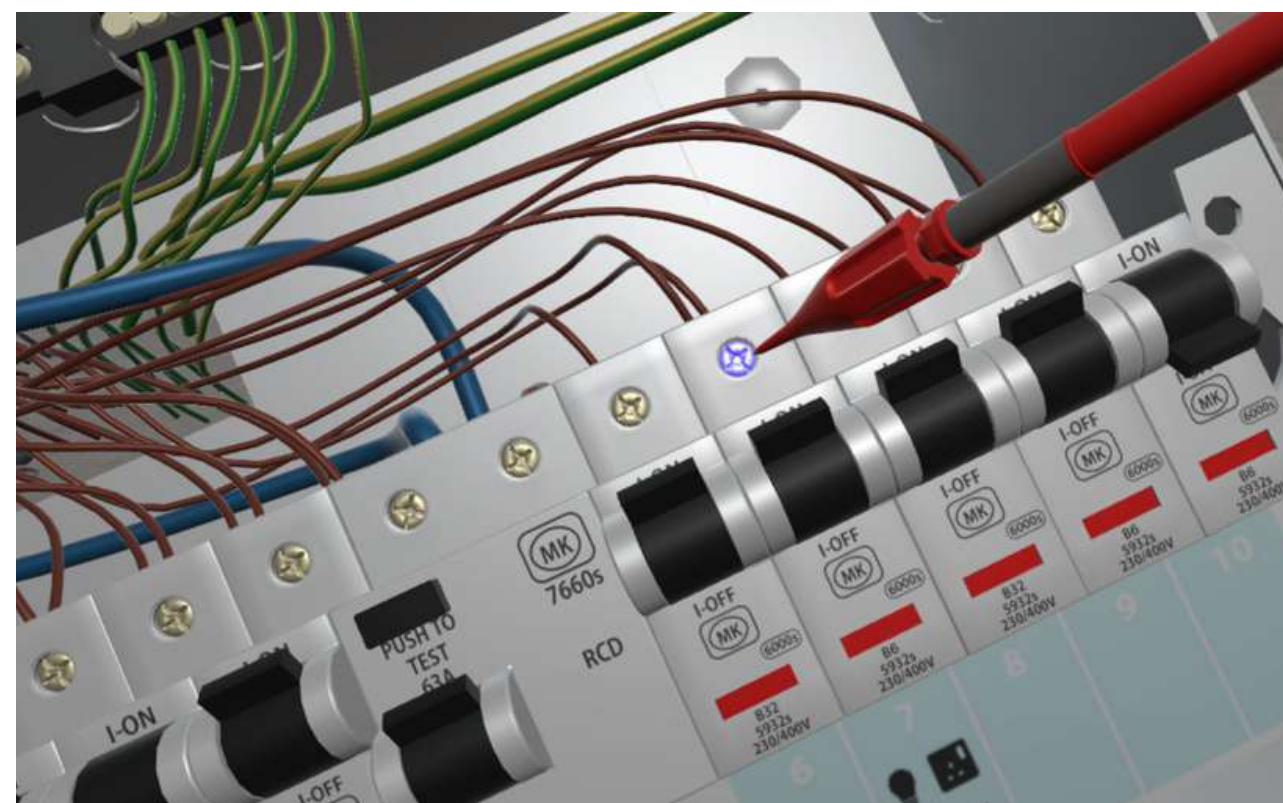
#### What do you want/need/hope for/from the UK ecosystem?

The UK is a leader in the games industry and I would like to help continue this trend and build our reputation for innovation in the VR sector. With the help of funding and opportunities to work on challenging projects I hope to become an ambassador for innovative VR solutions in the UK.

make [REAL] **Make Real**

**Summary**

Make Real is an immersive technology company providing full solutions for enterprise, education and location-based entertainment around training, simulation, learning & development and serious fun. Operating for over a decade within the immersive space, from full-flight-simulators to multi-channel projection systems to virtual and augmented reality applications, the studio team has a background in military, defence and AAA games industry sectors. Focused upon clear business and learning objectives and outcomes driving design and deployment, Make Real is solutions-first, technology-second, applying devices appropriately through considered discovery and development. Our partner workshops provide unique insight and learnings gathered from evidence-based experience of deploying over 50+ immersive technology solutions



globally, enabling a collaborative process to create champions and leaders of emerging technologies within enterprise and corporate organisations.



**Contact**

www.makereal.co.uk  
info@makereal.co.uk



**Size of Company**

How many employees: 21  
Revenue: N/A



**Type of Company**

Immersive Application solutions, hardware and software, utilities, automotive, telecommunications, financial, learning & development, training, simulation, health, safety & well-being



**Why are you in UK?**

We are based in Brighton, UK, a nationally known hub of digital and technology companies specialising in learning, web, games and emerging technologies. Whilst the majority of the studio team members are full-time employed in-house, the local digital freelance scene allows us to flex and grow with specialist project requirements accordingly.



**Customers**

Utilities: EDF Energy, Severn Trent, SSE;  
Automotive: Honda, Porsche; Financial: Lloyd's Banking Group, The Big 4 UK Consultancies, Investec;  
Telecommunications: Vodafone;  
Construction: BLSC, CIOB, CITB, Keltbray, BAM Nuttall; Simulation: CAE, L-3; Software: Oculus LLC, Unity



**What do you want/need/hope for/from the UK ecosystem?**

We are a strong believer in collaboration and partnerships to ensure British technology companies within the immersive sector are best represented globally, enabling nationwide support and growth together whilst emerging technologies mature towards wider adoption. With government funding support through AotF, CreativeXR and other Digital Catapult initiatives, we can ensure that the weight of US Silicon Valley investment start-up culture doesn't become overbearing or overshadows homegrown skillsets and talent.





## Marks & Clerk LLP

### Summary

Marks & Clerk has long been recognised as one of the leading intellectual property firms across the globe. Our team of solicitors and attorneys are committed to providing exceptional, strategically driven intellectual property advice around the world, helping clients of all sizes and from all sectors to navigate the complexities of IP, patent, trade mark, copyright and design protection and related commercial contracts. From the capture of an idea, to its registration, protection, and commercialisation, Marks & Clerk is your expert and trusted partner to ensure your IP is fully protected and exploited.



#### Contact

www.marks-clerk.com  
Simon Portman  
sportman@marks-clerk.com



#### Type of Company

Legal Services



#### Customers

We work with innovative companies of all shapes and sizes, helping them to protect their AR/VR innovations across the globe.



#### Size of Company

How many employees: 430 employees in the UK and approximately 900 internationally.  
Revenue: N/A



#### Why are you in UK?

Marks & Clerk was founded in the UK in 1887. Since then our UK practice has expanded into eight offices (London, Cambridge, Oxford, Manchester, Birmingham, Glasgow, Edinburgh and Aberdeen) making us the largest IP attorney firm in the UK, and one of the largest in Europe. Supported by our network of nine offices across Europe, North America and Asia, we pride ourselves in offering a high quality and global service.



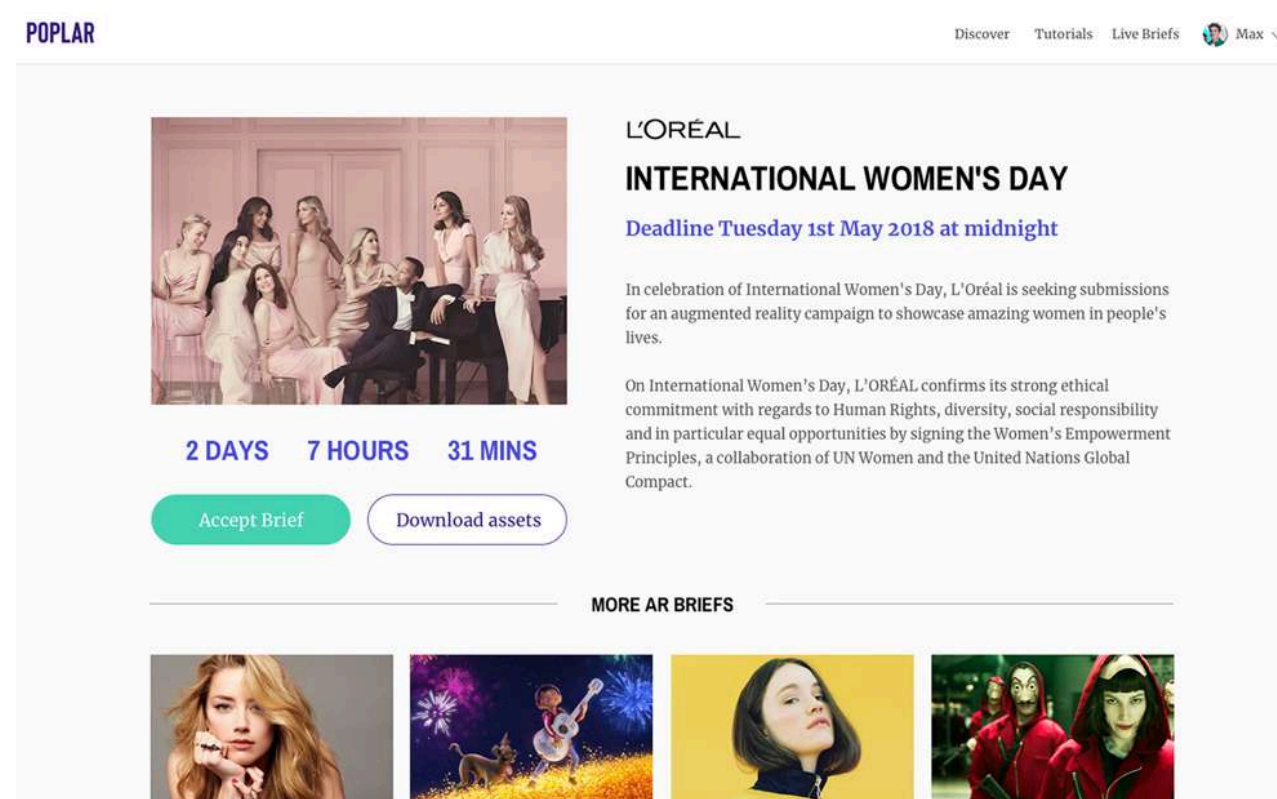
#### What do you want/need/hope for/from the UK ecosystem?

We would like the opportunity to get involved in consultation regarding any legal and regulatory issues surrounding VR/AR. We hope our involvement in the report will give us exposure to prospective individuals and/or firms who may benefit from our legal expertise.



**Summary**

Poplar (<http://poplar.studio>) is an Augmented Reality marketplace incubated within Founders Factory in London (backed by L’Oréal, the Guardian and easyJet). Poplar makes AR content creation simple. We are activating a new generation of talented AR creators to produce amazing immersive experiences on behalf of brands, faster and cheaper than an agency. Poplar bridges the physical, communication and skill gap between the brands and the AR content creators. It facilitates a smooth flow of work - providing brands with the right person for their requirements and creators with the right brands for their skill sets. The vision is to automate the marketplace and provide democratised AR tools, as well as integrate within the whole AR landscape: social platforms, branded apps, web browsers and eyewear.



**Contact**

<http://poplar.studio> or  
[info@poplar.studio](mailto:info@poplar.studio)

**Type of Company**

Content/Platform/Service/Marketplace

**Customers**

Any and every brand - big or small - that wants to leverage the power of immersive technology to become known, loved and successful. As well as AR creators (2D/3D designers and developers) who want to upskill and monetize their skills by working with these brands. We are currently working with a wide range of brands across different verticals: Universal Music, Sony Music, King Games, Warner Bros, L’Oréal, YSL and Disney, among others. Now official partners of FB and Snap.

**Size of Company**

How many employees: 4 full time employees and get support from 60 at Founders Factory.  
Revenue: N/A

**Why are you in UK?**

We are in the UK because our CEO and founder, David Ripert, is based here after 6 years at Google/YouTube in London. It’s a great base for us to serve our international clients. We also benefit from space at our start up incubator Founders Factory (based in Kensington).

**What do you want/need/hope for/from the UK ecosystem?**

We hope to be able to support UK based AR creators financially, from graduates and freelancers all the way to agencies/studios; we hope to help UK HQ’d brands build engagement with their large international audiences; and we hope to help platforms like Facebook, Instagram and Snapchat grow the amount of AR experiences available to their users- most of their product teams are based in London.



**Summary**

res.lab is a music composition and sound design collective exploring new forms of immersive audio for VR/AR. We have built a multifaceted team of both creatives and technologists. We have award winning composers and sound designers to create the audio content, as well as specialist programmers and mixers to bring this to life in a VR/AR world.

We have worked on a number of VR projects to date including 6 short films for Siemens, a VR meditation film for Intel and an abstracted fashion film for the Parisian fashion house Balmain. All these films have featured fully immersive and head tracked, 360 degree spatial audio.



We have experience working with Unreal and Unity, and use high order ambisonic plug-ins in all our work.

 **Contact**

www.res-lab.io  
hello@res-lab.io

 **Type of Company**

Immersive audio company for VR/AR

 **Customers**

Agencies, production companies, brands, creative partners

 **Size of Company**

How many employees: 4  
Revenue: N/A

 **Why are you in UK?**

The UK has a huge pool of young, creative talent that will help us grow our business and offer. We do work with international clients but 80% of our client base are currently UK based.

 **What do you want/need/hope for/from the UK ecosystem?**

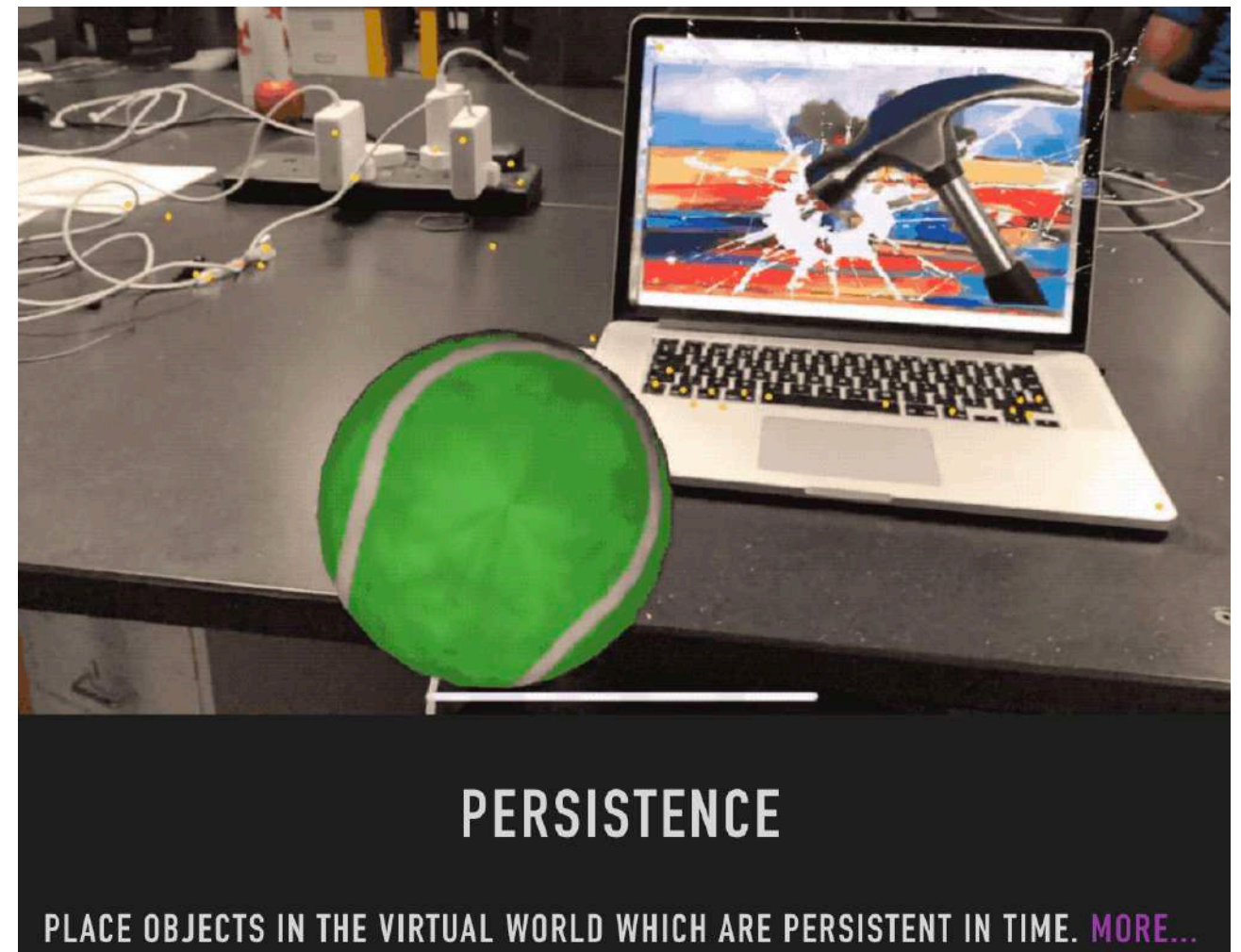
A chance to meet and collaborate with other people working in the VR sector and help push the quality and production values of audio within all areas of VR.



## Selerio

### Summary

Selerio is a spin-out from Cambridge University building the digital canvas for interactions with real objects. Similar to AR face filters, we now enable world filters. For example, a virtual spiderman can seat on a real chair using its digital canvas.



#### Contact

<http://selerio.io>



#### Type of Company

We offer a mobile SDK that packages a deep learning model to digitize physical objects.



#### Customers

Our users are developers building interactive AR experiences. This includes the largest AR products in the market and new users can get access at <http://selerio.io>.



#### Size of Company

How many employees: 20+  
Revenue: N/A



#### Why are you in UK?

As a spun-out from Cambridge University, we stayed in the UK to use our connections with the research community to maximize our tech advantage.



#### What do you want/need/hope for/from the UK ecosystem?

Increase awareness in the spatial computing market through customers and partnerships.



## Summary

At Sentireal, we create software and media platforms that turn mobile devices and headsets into smart healthcare assistants. These assistants deliver healthcare training and guidance using augmented reality (AR) and virtual reality (VR) technologies, blended with artificial intelligence (AI). This combination provides “personal immersive learning” - personalised immersive content and continuous background assessment of learning progress. Our solutions cover areas such as mental health, neurological conditions and musculoskeletal conditions.



### Contact

sentireal.com  
david.trainor@sentireal.com



### Type of Company

Software, content and services. Flagship product is “immersonal”, a software and media platform for personalised immersive training/learning.



### Customers

Education/training organizations,  
Education/training departments within enterprises



### Size of Company

How many employees: 5  
Revenue: N/A



### Why are you in UK?

Customers, Resources, Talent



### What do you want/need/hope for/from the UK ecosystem?

Collaborations and “joined-up thinking” to make the UK a world-leading region in VR/AR training.



**Summary**

Skillsearch is a market leader in recruitment across Technology, Games and Interactive skillsets

For over 25 years we have made it our mission to source top talent in niche sectors. All of our consultants across our two divisions – Games & Interactive and Enterprise Systems – are tasked with finding the most skilled candidates available and introducing them to our clients.

Animation	Back End	Blockchain
AR	Development	Business Intelligence
Art	Front End	Finance Systems
Design	Mobile	HR Systems
Production	Quality Assurance	Oracle
VFX	Ruby	Peoplesoft
VR	Unity	SaaS Technology
XR	Unreal	Workday



**Contact**

www.skillsearch.com



**Type of Company**

Skillsearch is a recruiter specialising in sourcing the best VR and AR candidates from across the globe.



**Customers**

A global spread of VR and AR clients across gaming, advertising/marketing, research, nuclear, medical and education amongst others. We don't think it proper to share specific customer information here but can offer references if requested.



**Size of Company**

How many employees: 23  
Revenue: N/A



**Why are you in UK?**

It's our historic base and we can ultimately do our job from anywhere. We are also 20 mins from Gatwick for when we need to go and meet our customers.



**What do you want/need/hope for/from the UK ecosystem?**

To be the chosen partner of the VR/AR Community and to be able to help the industry fulfill its potential by doing our bit - ie. continuing to source and place great candidates from anywhere in the world who can make the magic happen.



## Vismedia

### Summary

Vismedia help our clients own their audiences' attention span. We create compelling, immersive experiences that can be delivered via desktop, tablet and mobile. We have won multiple industry awards, continuously innovating and deploying cutting-edge solutions. We specialise in Immersive 360°/VR/AR/MR/Video/Animation/CGI/Interactive web development/App creation/Photography. Our 360° photographic or CGI environments are rich and engaging immersive experiences with multiple layers of interactivity. They are designed for desktop, tablet and mobile and they are ready for use in VR headsets if required. Engagement can be tracked and measured with deep analytics. We have worked with over 30% of the FTSE 100 and partner with many agencies and communications and marketing specialists.



#### Contact

www.vismedia.agency  
hello@vismdia.agency



#### Type of Company

Creative Technologists



#### Customers

Barclays, InterContinental Hotels Group, Coats, Unilever, Rhubarb Group, AkzoNobel, Drax Power, Cancer Research UK, Cory Riverside Energy, Aviva, HSBC, GSK, AstraZeneca, KPMG, EY



#### Size of Company

How many employees: 15-20  
Revenue: N/A



#### Why are you in UK?

Customers, Resources and Talent.



#### What do you want/need/hope for/from the UK ecosystem?

Collaboration within the industry and investment to continue a high rate of technology development and R&D.



**VividQ**

VIVIDQ

**Summary**

VividQ is a deep tech software company with world-leading expertise in 3D holography, founded in 2017 in Cambridge (UK). The company offers a patented software framework for holographic display to enable mass adoption of the technology in AR/VR/MR headsets, smart glasses, automotive HUDs, and consumer electronics.

Technical co-founders of VividQ include engineers, mathematicians and computer scientists from the University of Cambridge, Oxford, and St Andrews. With seed funding, VividQ has grown its Cambridge and London-based teams, made a complete release of their software framework, and established the holographic display ecosystem through partnerships with



chipmakers, display and hardware manufacturers in the US, Taiwan and Europe. In March 2019, VividQ announced Suir Valley Ventures as the lead of their £3m investment round in The Times and Business Weekly.



**Contact**

www.vivid-q.com  
info@vivid-q.com



**Size of Company**

How many employees: 15  
Revenue: Revenue positive from August 2018



**Type of Company**

Provider of patented software solutions for holographic display.



**Why are you in UK?**

With the technical and research teams based in Cambridge (UK), VividQ benefits from the rich academic network of the University of Cambridge. Thanks to its London-based commercial office, VividQ has significantly developed its customer and investment networks, and has taken advantage of the EIS incentive. In just 2 years, VividQ has achieved wide recognition amongst the new technologies community and adopters worldwide, exhibiting its revolutionary solutions at WebSummit, Augmented World Expo EU and US, and CES amongst others.



**Customers**

VividQ offers its patented software framework to hardware manufacturers (AR/VR/MR head-sets, automotive Head-Up Displays, next generation consumer electronics) and embedded systems manufacturers (micro-displays, processing units, and ASICs). VividQ builds a holographic display ecosystems through partnerships with world-leading tech companies such as Intel, Himax and Compound Photonics.



**What do you want/need/hope for/from the UK ecosystem?**

VividQ is looking to advance its software solutions' adoption significantly in the next 12-18 month, both in the UK and abroad - especially in the American and Chinese markets. The company hopes to take advantage of international trade support and business development programmes. At the same time, VividQ is looking for support from the extensive UK-based investment network, in raising series A investment in 2020 from deep-tech focused international funds.





## Summary

Founded in 2013, vTime is a leading augmented, virtual and mixed reality engagement company developing immersive communication experiences across new realities. Founded by games industry veteran Martin Kenwright, the studio is based in Liverpool's Baltic Triangle and employs over 40 people.

vTime's flagship product vTime XR - a cross-platform sociable network that allows anyone, anywhere to socialise in AR and VR - is used in over 190 countries with almost a million downloads since 2015.

vTime secured Series A funding of £5.4 million in 2018, and is currently developing a new AR product, set to launch in 2019.



### Contact

www.vtime.net  
hello@vtime.net



### Type of Company

VR and AR Software



### Customers

The primary business of vTime is B2C, however the company's technology and products also have use cases in B2B sectors including online meetings, health & wellbeing and entertainment.



### Size of Company

How many employees: 40+  
Revenue: N/A



### Why are you in UK?

vTime has both a UK and a US subsidiary with vTime Inc, however we believe the mix of talent pool, resources, R&D tax credits and investment schemes such as EIS here in the UK continues to be the envy of many places around the world. Historically, all previous successes that key team members have been involved in (Motorstorm, Wipeout, Formula 1, WRC) have also been produced in the UK.



### What do you want/need/hope for/from the UK ecosystem?

While the AR/VR consumer market continues to form, the UK ecosystem will need continued investment and support from all major players in the ecosystem (VCs, format holders, etc) to ensure we maintain a high rate of technology development, R&D, acquiring know-how and expertise and leading the world in immersive technologies.

## Other Companies

Other UK Companies

Login to our theDirectory to access all 100+ UK companies <http://thedirectory.thevrara.com>

If you would like to get featured in future reports, email [info@thevrara.com](mailto:info@thevrara.com)