

Annual Report of the German Games Industry





Dear readers,

The past year was particularly challenging for games companies. Many companies around the world had to cut jobs, and in some cases game development studios shut down entirely. There are a number of reasons behind this. While many games markets largely maintained their high level of growth after the Covid-19 pandemic, the trajectory in other countries dipped slightly. At the same time, the investment climate has worsened significantly, due in part to the war in Ukraine, months of high inflation and the resulting high interest rates. The rash of postponements in the years of the pandemic contributed to more top-class games being released in 2023 than ever before in a twelve-month period. This abundance on the market meant that many games – even some with top ratings – fell short of the sales success that the studios had hoped for.

All of these factors have left their mark on German games companies. A look at our game industry barometer shows just how difficult the companies consider the situation to be. According to this survey, only 12 per cent of them expect the German games industry to develop positively in 2024, as compared to 48 per cent a year earlier. This is because the deterioration in the international investment climate is hitting development locations like Germany especially hard. If the general conditions for game development in Germany are barely competitive internationally, times like these make it even tougher for studios here to attract collaborating partners and publishers. This illustrates yet again the great importance of reliable, predictable and internationally competitive framework conditions.

We are still a long way from achieving this – as indicated by the international comparative study of games locations carried out on behalf of game jointly by Nordicity and Goldmedia, in cooperation with Games Germany, the association of state-level game networks and funding bodies. Even without the current funding application freeze, Germany's games funding situation would still place undue constraints on our competitiveness. This follows from the uncertainty in the sector caused by the ongoing lack of clarity around the availability of already-approved funding. All of which stands seemingly at odds with the evaluation of the funding programme by the Federal Ministry for Economic Affairs and Climate Action showing unequivocally that the games industry has delivered. A summary of the findings of the study with regard to the effects of games funding to date: more games developed, more employees hired and more sales achieved.

The fiscal policymakers in the German Bundestag are well aware of the importance of the funding for games companies when it comes to Germany's standing as a games location. Despite these financially demanding times, they have appropriated additional games funding for the second time in a row – in the amount of 33 million euros per year! This clear signal in turn calls for action by Minister of State for Culture and the Media Claudia Roth, whose ministry, in an unexpected change, is the one to have received the funds. We now finally need answers to the questions of how and when these funds are to be allocated to games companies.

Even in the face of the major challenges currently facing the companies, the medium-term prospects for the games industry remain good. While the current wave of consolidation has also affected studios in Germany, employment figures show that its overall impact here has been less severe than in other locations. One reason for this is that many games companies in Germany are currently in the middle of projects that have received funding. This is clearly a stabilising factor. A look at game markets globally offers additional reason for hope. The post-pandemic growth slump now appears to have been overcome and forecasts indicate an upward trend. The German games market made strong gains again in 2023. Sales of games, games hardware and corresponding online services increased by a solid 6 per cent, to 9.97 billion euros. Among the largest drivers of this growth are game consoles and related accessories, as well as in-game and in-app purchases.

A further reason to look to the future with optimism was gamescom 2023, which once again made a huge leap forward. In established areas of strength, it went on to set new records, drawing more exhibitors from more countries than ever before and reaching millions of people all over the world. The global relevance of gamescom is also demonstrated by the many internationally renowned industry leaders who were there in person. gamescom 2023 had attracted over 330 million digital views, with some 320,000 visitors attending on-site in Cologne.

In recent years in particular, international attention for gamescom has increased significantly. Together with our partner Koelnmesse, we aim to take yet greater advantage of this global appeal. As of June 2024, gamescom asia in Singapore has been joined by a second international satellite event: gamescom latam in São Paulo, which is tailored to the particularly dynamic and fast-growing games market in South America. In keeping with our conviction that games are an emotional and social medium, we see continued importance for on-site events in the games industry, even in times of widespread live-streaming. Anyone who has been to gamescom has experienced the unique community feeling, the positive apprehension of the here and now and the hunger for the future that it fosters. In these times, especially, you can never get enough of that.

This annual report offers an overview of these and many other developments in the games industry in Germany.

I wish you enjoyable reading and interesting insights.

Felix Falk
Managing Director of game –
The German Games Industry Association

01 Video game players in Germany



Around 6 in 10 people in Germany play video games, making games an integral part of Germans' media consumption. The games community is also extremely diverse.

The average age of video game players has risen to over 38 years for the first time.

The gender ratio among video game players has been balanced for years, with women now making up 48 per cent and men 52 per cent. In addition, in 2023, the average age of players in Germany exceeded 38 for the first time, rising to 38.2 years. This compares to an average age of 33.6 just ten years ago. One reason for this continuous increase is that many people who began playing in the 1980s and 1990s have remained devoted players as they age. A further

interesting fact: around three quarters of players in Germany are over the age of 18. Contrary to the widespread image of games as a hobby of children and teenagers, many people of all ages in this country routinely reach for their controller, smartphone or PC to play.

The diversity of video game players in Germany is also reflected in platform usage. The smartphone is the most popular gaming platform among German players, 22.7 million of whom used their smartphones to play in 2023. This figure remains almost unchanged from 2022, when the total was 22.8 million. The tablet computer, on the other hand, lost approximately 200,000 players from 2022 to 2023, when about 10 million people used it as a game platform. The tablet has nonetheless consistently remained above the 10-million mark since 2021. The overlapping use of smartphones and tablets shows the unbroken interest in mobile games. Altogether, around 24.6 million people in Germany play mobile games on smartphones, tablets or both devices. In

This is how diverse video game players are in Germany



58%
of 6- to
69-year-olds
play video
games



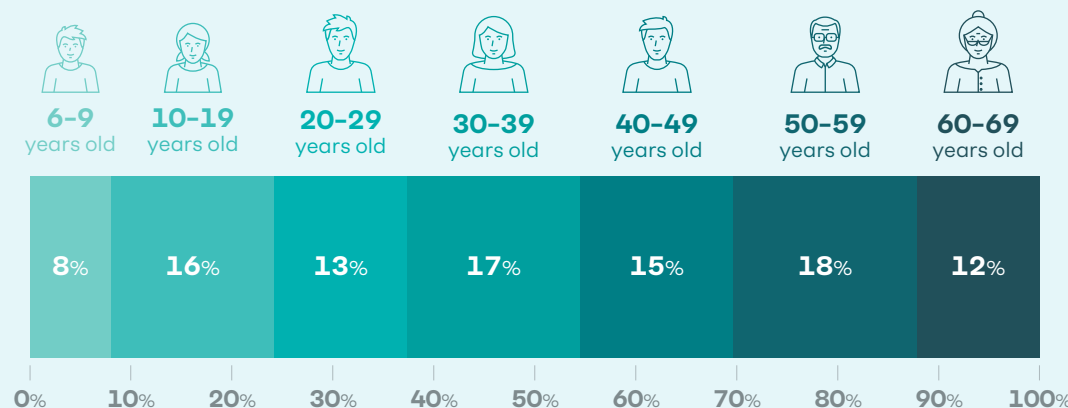
38.2
is the average age
of video game
players



48%
of all video
game players
are female

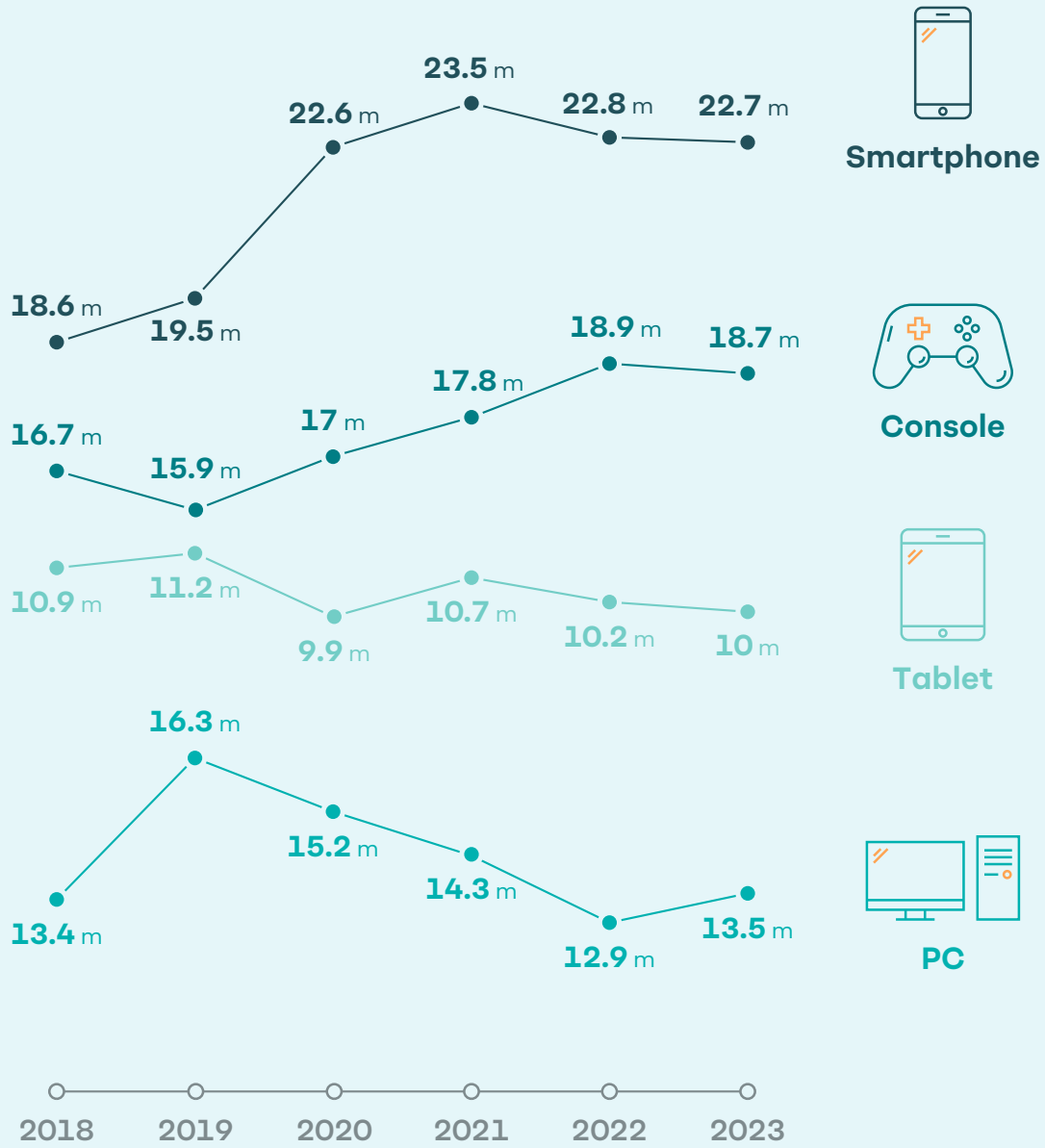


78%
of all video game
players are at
least 18 years old



Source: Calculations based on GfK Consumer Panel Services (2023/2024, n=25,000). Numbers refer to video game players in Germany. © game 2024

The most popular gaming platforms in Germany: smartphone most widely used, PC is catching up again



Source: Calculations based on Consumer Panel Services GfK (n=25.000). All figures refer to the number of video game players in Germany. © game 2024



The smartphone once again asserts itself as the most popular gaming platform among German players.

In addition, for the first time since 2019, the PC reversed its decline as a gaming platform, gaining some 600,000 players from 2022 to 2023, for a total of 13.5 million. With around 18.7 million players, the console retains its place as the second-most-used gaming platform among Germans. After a steep increase in console players over the last four years, from 15.9 to 18.9 million, the number ultimately declined again, by 200,000, in 2023. It should be emphasised that the majority of video game players in Germany don't limit themselves to a single platform such as a smartphone, console, tablet or PC; 18.3 million play games on more than one platform.

game's official charts show which games and genres are especially popular with players in Germany. The best-selling video game of 2023 was the soccer simulation *EA SPORTS FC 24* (Electronic Arts). This sports game was released last year for the first time under the new title of the game series, which was previously known as *EA SPORTS FIFA*. The open-world game *Hogwarts Legacy* (Warner Bros. Games), from the *Harry Potter* universe, captured second place in the annual charts. It was followed in third place by the long-awaited *Diablo IV* (Activision Blizzard), the latest instalment in the RPG series of the same name. The first-person shooter *Call of Duty: Modern Warfare III* (Activision Blizzard) took fourth place, and fifth place went to the action adventure *The Legend of Zelda: Tears of the Kingdom* (Nintendo), which continues the story of the well-known protagonists Link and Princess Zelda. A video game developed in Germany also made it into the charts: *Anno 1800: Console Edition* (Ubisoft), a version of the city-building strategy game specially reworked for the console gaming experience. A particularly large number of outstanding blockbuster games was thus offered across all genres in 2023, much to the excitement of every video game fan in Germany.

The top 20 newly released PC and console games in Germany in 2023

1	EA SPORTS FC 24	Electronic Arts
2	Hogwarts Legacy	Warner Bros. Games
3	Diablo IV	Activision Blizzard
4	Call Of Duty: Modern Warfare III	Activision Blizzard
5	The Legend of Zelda: Tears of the Kingdom	Nintendo
6	Super Mario Bros. Wonder	Nintendo
7	Star Wars Jedi: Survivor	Electronic Arts
8	Assassin's Creed Mirage	Ubisoft
9	Marvel's Spider-Man 2	Sony Interactive Entertainment
10	EA SPORTS F1 23	Electronic Arts
11	Resident Evil 4	Capcom
12	Dead Space	Electronic Arts
13	Starfield	Bethesda Softworks
14	Final Fantasy XVI	Square Enix
15	Dead Island 2	Deep Silver
16	The Crew Motofest	Ubisoft
17	NBA 2K24	2K
18	Avatar: Frontiers of Pandora	Ubisoft
19	WWE 2K23	2K
20	Anno 1800: Console Edition	Ubisoft

Source: Game Sales Data (GSD), Video Games Europe (VGE). The charts show the new games for PCs and game consoles that were most often sold – physically and digitally, across platforms – in Germany in 2023. Digital sales of Nintendo titles from the Nintendo eShop are not included. As the respective publishers are not currently participating in GSD, the games *Alan Wake 2* and *Baldur's Gate 3* are not included.

The top 20 most downloaded mobile games in Germany in 2023

1	Royal Match	Dream Games
2	MONOPOLY GO!	Scopely
3	Block Blast Adventure Master	Hungry Studio
4	ROBLOX	Roblox
5	Subway Surfers	Tencent
6	My Perfect Hotel	SayGames
7	Gardenscapes	Playrix
8	Stumble Guys	Scopely
9	Triple Tile	Tripledote
10	Honkai: Star Rail	miHoYo
11	Magic Tiles 3	Amanotes
12	Candy Crush Saga	Activision Blizzard
13	Woodoku	Tripledote
14	UNO	Mattel163
15	Fishdom	Playrix
16	EA SPORTS FC MOBILE 24	Electronic Arts
17	Chess - Play and Learn	Chess.com
18	Going Balls	Unity Technologies
19	Attack Hole	Homa
20	Dice Dreams	Superplay

Source: Ranking based on data.ai (a Sensor Tower company). The list shows the most-downloaded mobile games for Android and iOS in Germany in 2023. © game 2024

02

German video games market



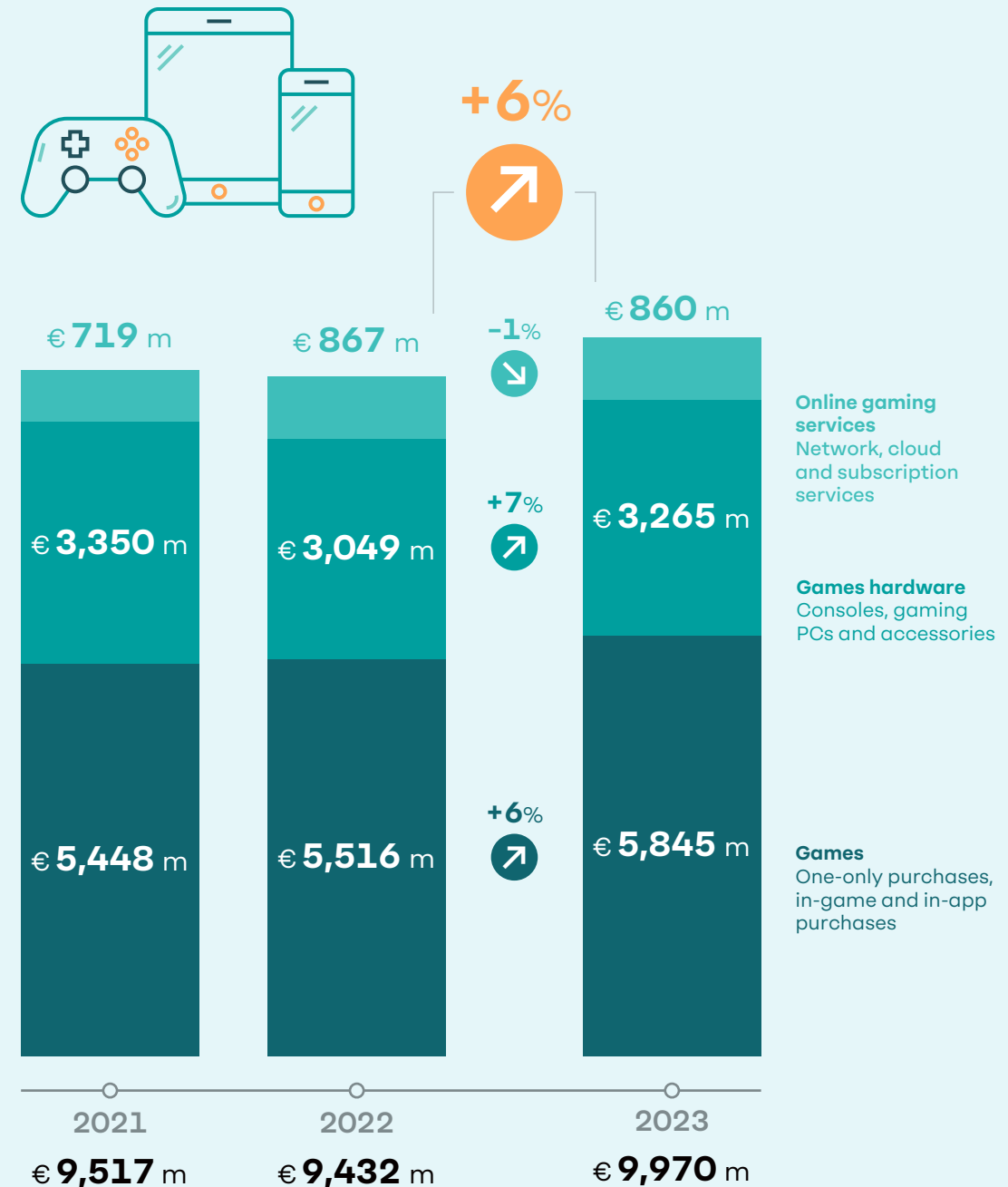
The German games market achieved significant overall growth in 2023. Sales revenue from games, gaming hardware and on-line gaming services rose by 6 per cent, to around 9.97 billion euros.

Sales of games, games hardware and online gaming services rose by 6% to around 9.97 billion euros.

A substantial gain following a revenue increase of just 1 per cent in the preceding year. The biggest growth drivers included game consoles and related accessories as well as in-game and in-app purchases. The German games market thus remains the strongest in Europe in terms of sales revenue and ranks fifth internationally.

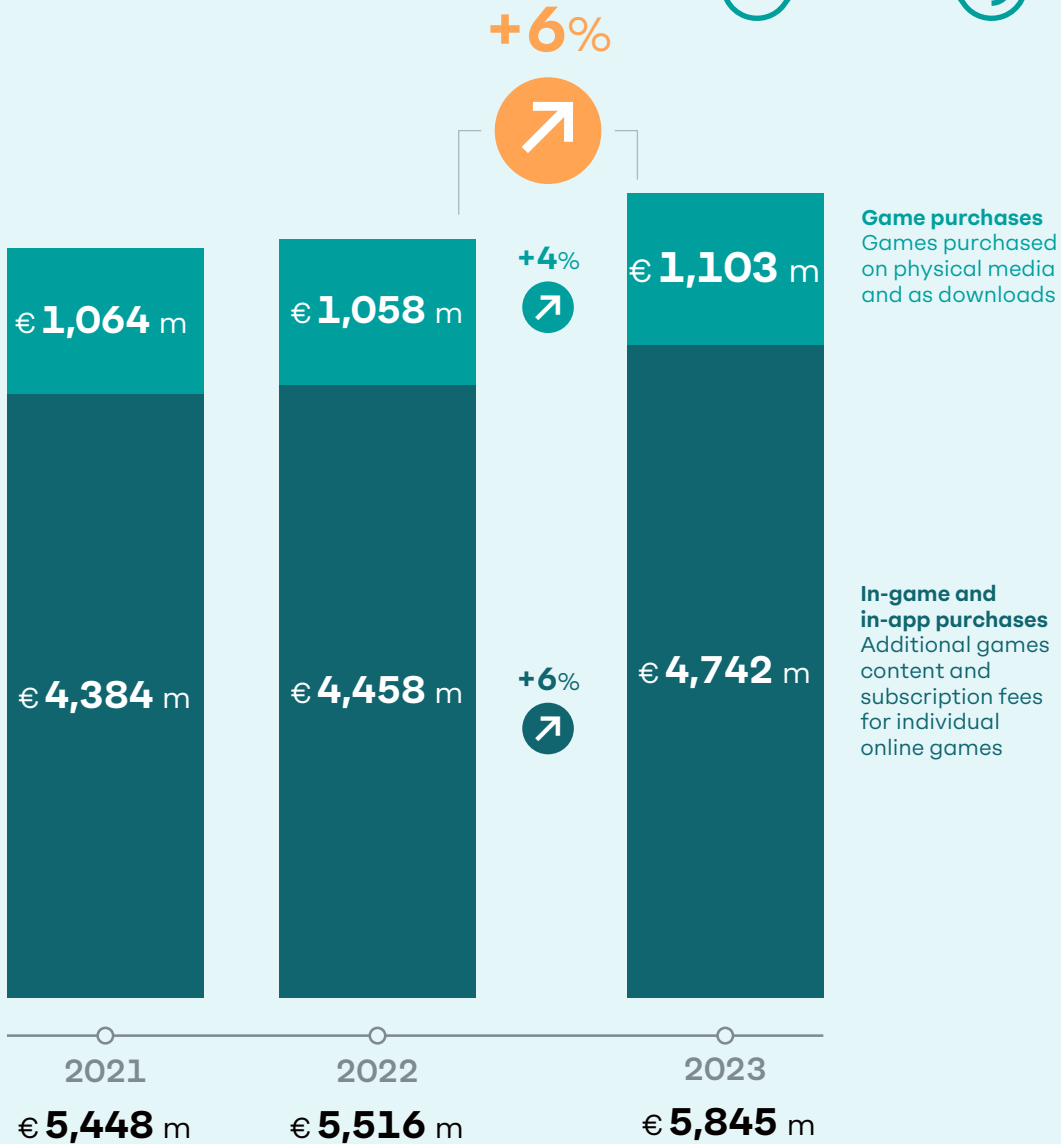
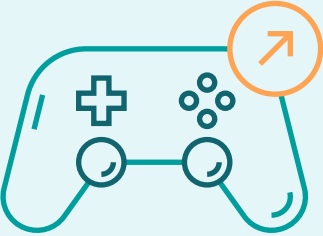
Across all platforms, purchases of computer and video games generated 4 per cent more revenue than in the year before. In total, sales revenue here rose to around 1.1 billion euros, representing a positive development in the market segment. Despite the wealth of top-flight titles, however, the number of games sold fell by 8 per cent. Many players seem to have bought top-class titles directly on release last year rather than waiting for the first discounts. Accordingly, the growth in revenue here is attributable to higher average prices. Additionally, because many of the top titles in 2023 are especially time-intensive to play, they didn't leave room for players to acquire a large number of games. The market development for in-game and in-app purchases was significantly

German games market grows by six percent in 2023

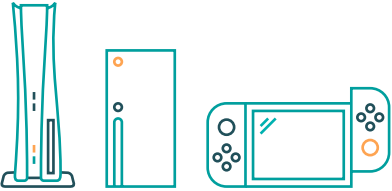


Source: Calculations based on the GfK Consumer Panel Services (2023/2024; n=25,000) and data.ai. Consumer sales in Germany are shown. © game 2024

Sales of computer and video games continue to rise



more positive, showing a revenue increase of about 6 per cent, to 4.7 billion euros. The playing time of a given title is increasingly being individualised or extended through supplemental content – whether this be an armour upgrade for your character, a completely new campaign or a “season pass” with lots of extra features. This development continues one of the defining trends of recent years: on top of the traditional sale of individual games, additional paid content has become standard, particularly in free-to-play and live-service games. The active communities around such games are thereby continually offered new content and game-playing experiences. Game companies benefit from the great popularity of this business model as well. With the success of a title no longer solely dependent on one-off game sales, the studio can generate revenue through in-game and in-app purchases of additional content that adapts the game on an ongoing basis. This serves the interests of the community while also reducing the economic risk posed by considerably increased production costs in the last few decades.



Games consoles are among the most important growth drivers.

A large share of game sales revenue in Germany continues to be generated by games apps for smartphones and tablet computers. The market for mobile games remains on course for success. Within a year, revenue from games apps rose by a further 4 per cent, to 2.9 billion euros. This part of the games market has almost doubled since 2018, when revenues amounted to 1.49 billion euros. The great popularity of mobile games is due on the one hand to their accessibility and the availability of a large selection of casual games for everyone. On the other, the offerings for mobile devices have also included complex games and even esports titles for a long time now.

Source: Calculations based on the GfK Consumer Panel Services (2023/2024; n=25,000) and data.ai. Consumer sales in Germany are shown. © game 2024



In 2023, a total of around 2.9 billion euros in sales revenue was generated with games for smartphones and tablets. This puts mobile devices in the leading position. Revenue from games for consoles amounted to around 2 billion euros, and the third-highest revenue, about 1.7 billion euros, was generated with games for PCs and laptops. With regard to business models, consumer behaviour varies greatly between the gaming platforms. For example, 98 per cent of revenue on smartphones and tablets was

After years of strong growth, turnover from on-line gaming services has stabilized at a high level.

achieved through in-app purchases, which is partly due to the high prevalence of free-to-play games for mobile devices. On game consoles, in contrast, 40 per cent of revenue was generated through the purchase of games and around another third through online gaming services, which can now be subscribed to on every console. On PCs and laptops, in-game purchases accounted for around two thirds of sales revenue.

After a number of years of strong growth, sales revenue from online gaming services plateaued at a high level in 2023. Revenue from these services fell slightly, by 1 per cent, to 860 million euros. Among the categories in this segment are fee-based subscription services that provide access to a large selection of games, cloud-based games, online multiplayer functions and the ability to save game progress in the cloud. Examples of such services include EA Play, Nintendo Switch Online, PlayStation Plus, Ubisoft+ and Xbox Game Pass.

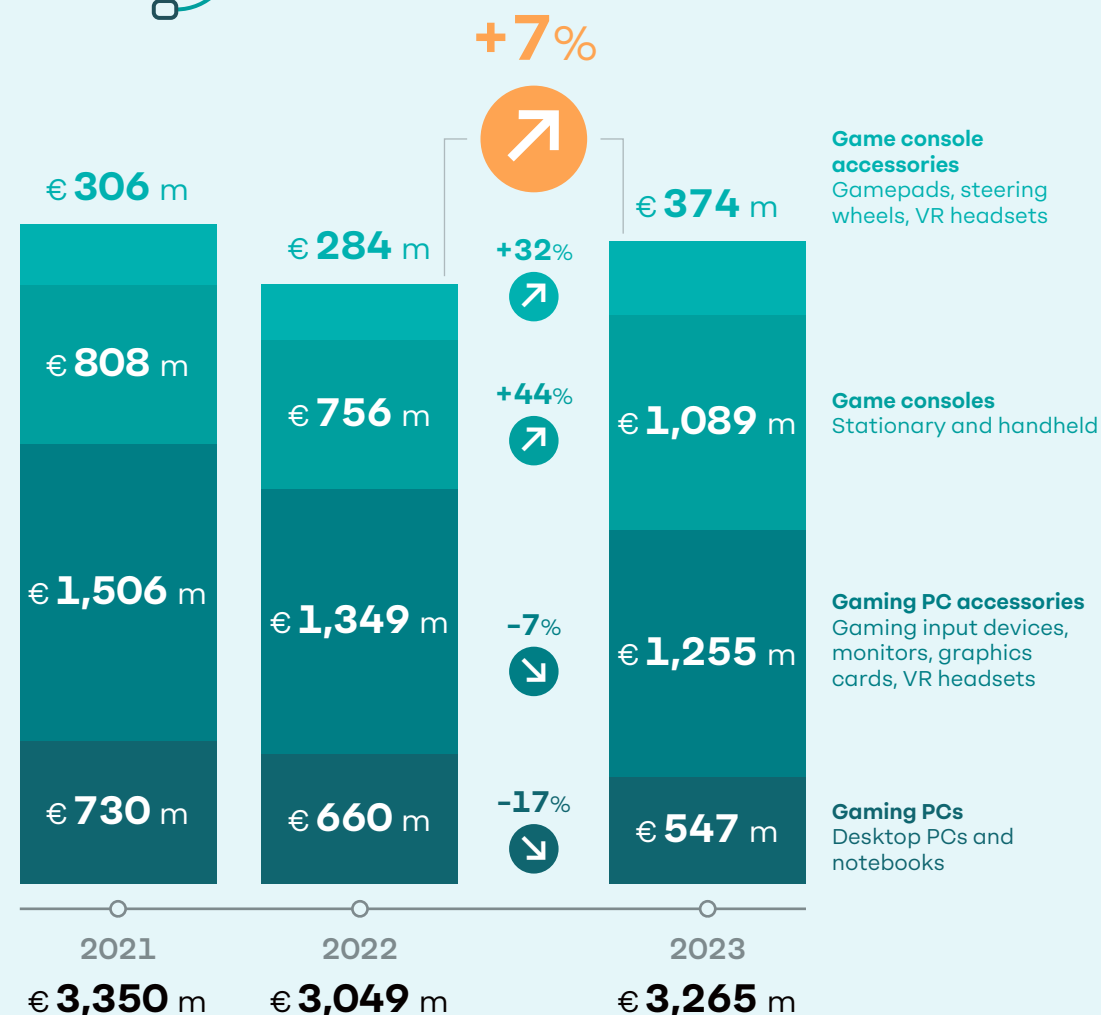
Sales revenues from various categories of games hardware, such as game consoles, PCs and accessories, developed very differently in 2023. Game consoles were among the most important growth drivers, showing a total increase in revenue of 44 per cent and, at 1.1 billion euros, even breaking the billion-euro threshold. There was also strong demand for accessories for game consoles. Sales revenue in this area jumped 32 per cent, to 374 million euros. In sharp contrast, gaming PCs showed a significant decline, as revenue from sales of PCs and laptops marketed specifically for gaming fell by 17 per cent, to 547 million euros. The trend for gaming PC accessories, such as special input devices and graphics cards, was only slightly better, with sales dropping by 7 per cent, to just under 1.3 billion euros.



For the first time, the share of PC and console games purchased as downloads in 2023 in Germany rose to 60 percent.

In Germany, video games are most frequently purchased as downloads. In 2023, the share of PC and console games purchased as downloads here even rose to 60 per cent for the first time. Download purchases of games thus remained at the high level they have maintained since 2020, the first year of the Covid-19 pandemic, when the share of downloads jumped from 45 to 58 per cent. But a closer look reveals

Sales of game consoles drive growth in games hardware



Source: Calculations based on the GfK Consumer Panel Services (2023/2024; n=25,000) and data.ai. Consumer sales in Germany are shown. Please note: Hardware sales deviate from the previously communicated figures due to a fundamentally revised categorization of gaming PCs and laptops. © game 2024

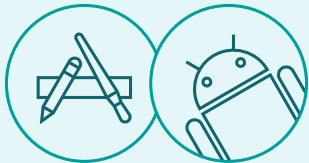
More players, more revenue: mobile games for smartphones and tablets are particularly popular with Germans



24.6 million Germans play mobile games

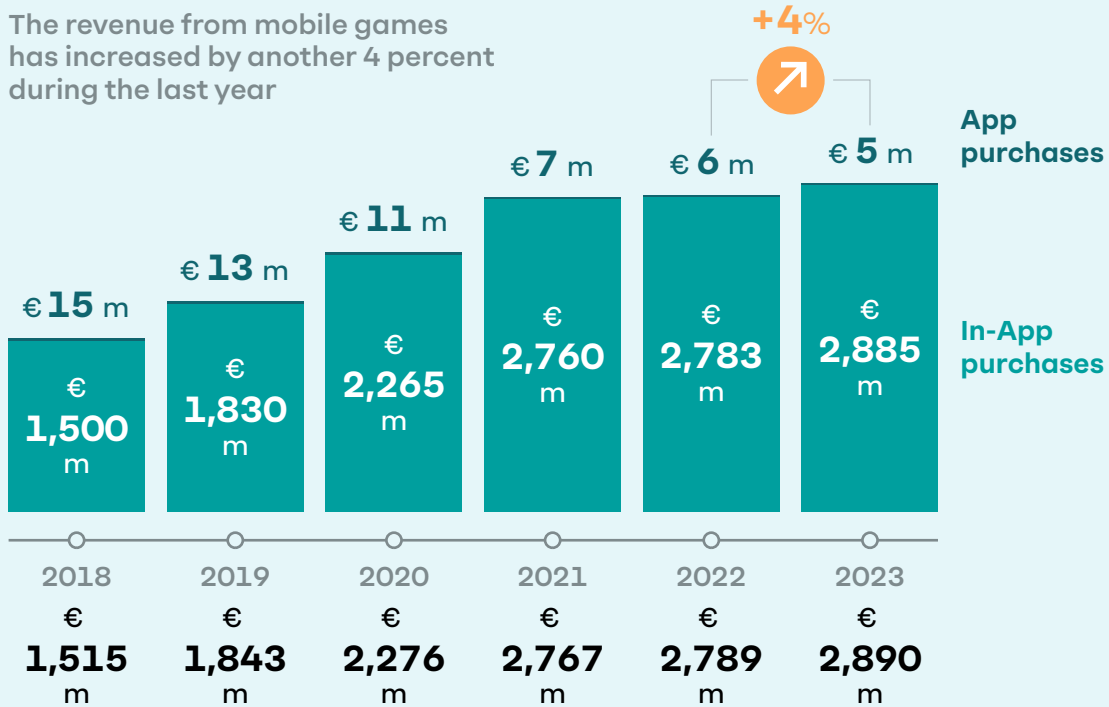


Mobile game players are 40 years old on average



52% of mobile game players are female

The revenue from mobile games has increased by another 4 percent during the last year



Source: Calculations based on GfK Consumer Panel Services (2023/2024, n=25,000) and data.ai (a Sensor Tower company). All data refers to the video game players and revenue in Germany. © game 2024

major differences between the individual gaming platforms. In 2023, download purchases were most prevalent among PC gamers, who now buy nearly all of their games – 98 per cent – in this way. This was a slight rise from the 2022 figure of 97 per cent. Consoles are a different story, however. Most console players prefer to buy games as physical media. While the majority of console games – 60 per cent – were still purchased on data carriers in 2023, this marked a slight decline, of 3 percentage points, from the previous year.

Age also plays a role in how games are purchased in Germany. In 2023, younger players bought their games predominantly via download. This was true especially for players aged 20 to 29, who acquired more than 7 in 10 games for PC or console as downloads. But growing numbers of older players are now also turning to downloads. Those in the 50- to 59-year age group bought around 6 out of 10 games as downloads, whereas just a year earlier, they purchased 53 per cent of their games on data carriers. Purchases on physical media are most popular among players over 60. This group bought more than half of their games in this way in 2023 – which, however, represents a 12 per cent drop compared to 2022.

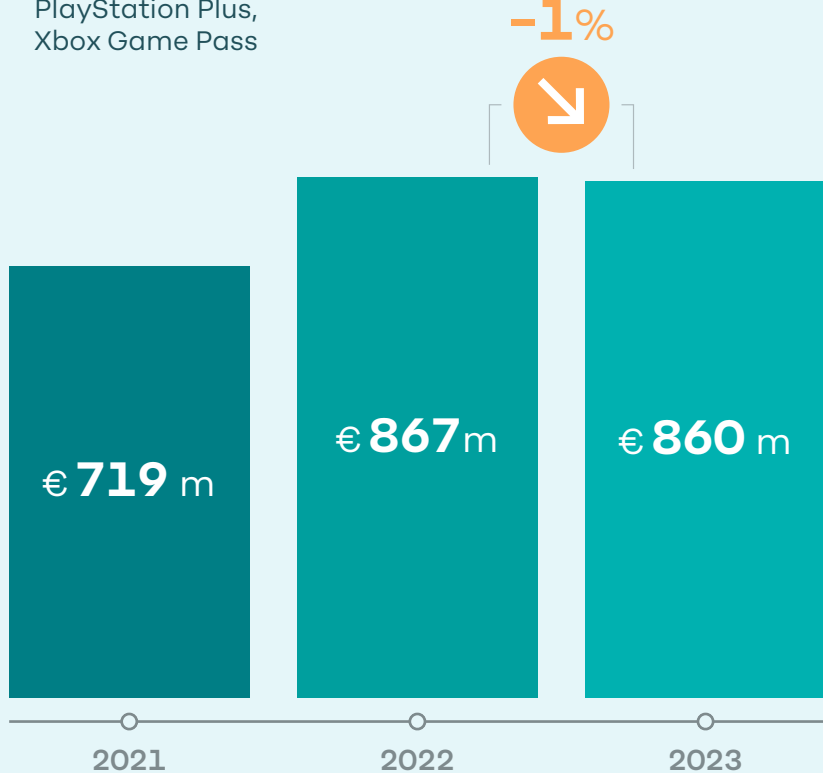


The majority of console gamers prefer to buy games as physical copies.

Revenue from online gaming services remains at previous year's level



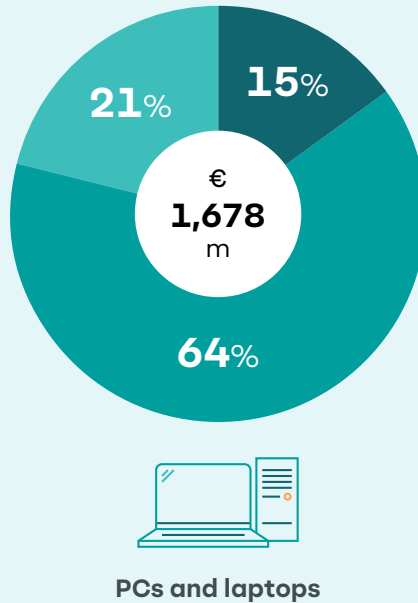
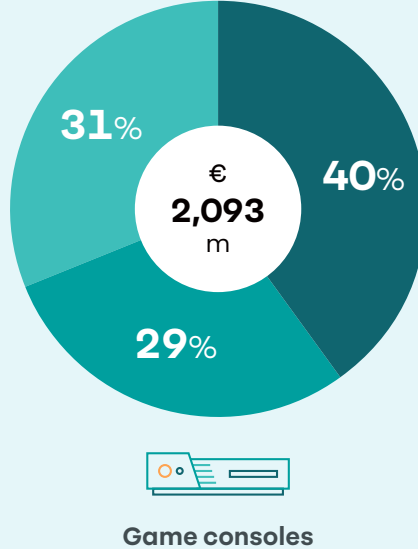
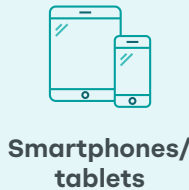
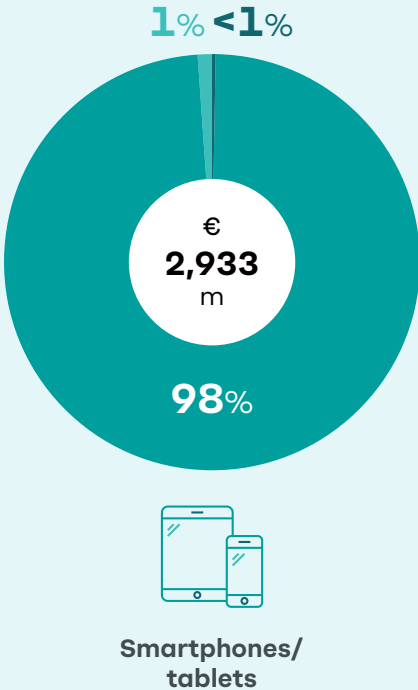
Online gaming services
 e. g. Nintendo Switch Online,
 Nvidia GeForce NOW,
 PlayStation Plus,
 Xbox Game Pass



Source: Calculations based on the GfK Consumer Panel Services (2023/2024; n=25,000). Consumer sales in Germany are shown. © game 2024

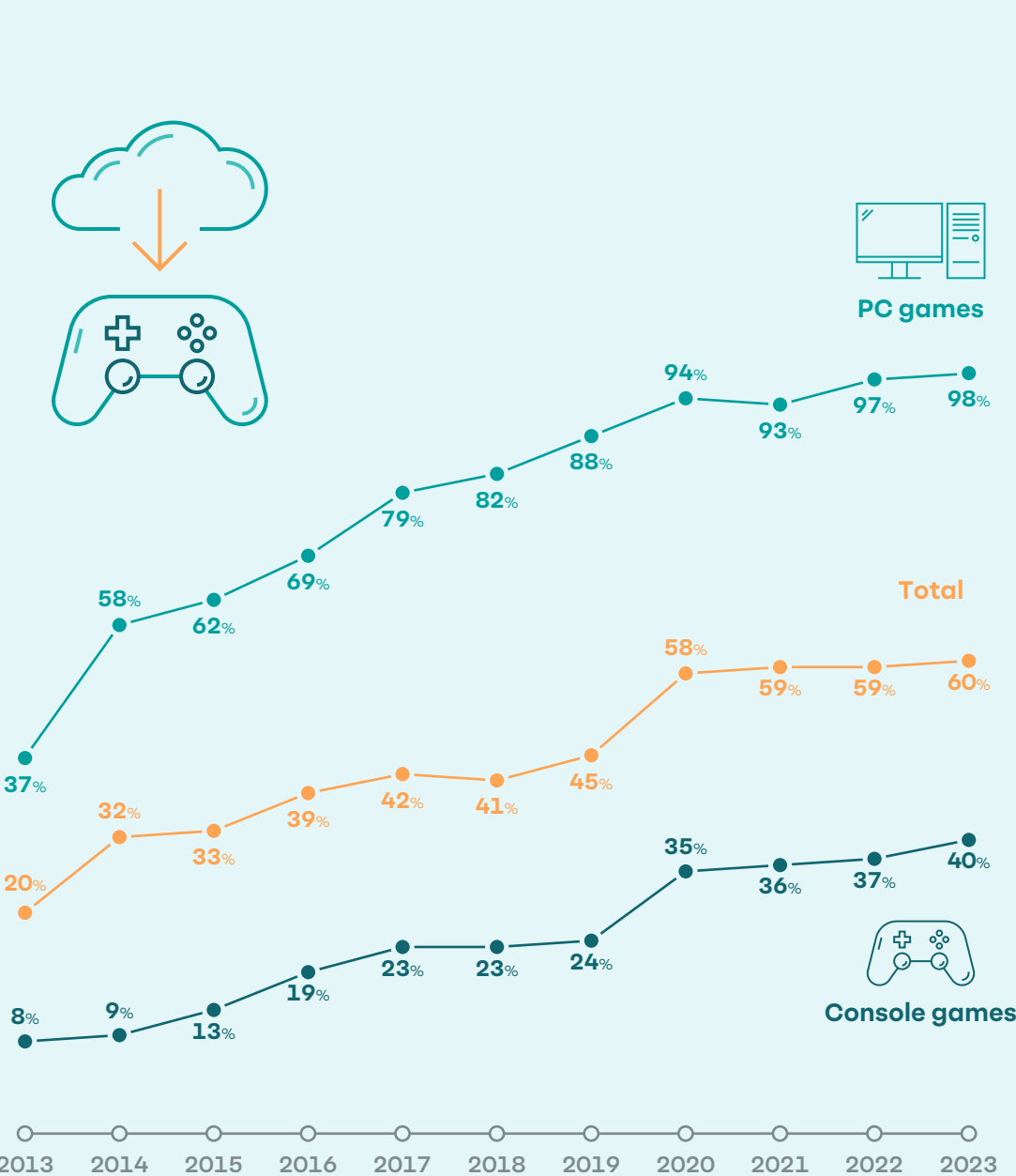
Consumer behavior varies greatly between gaming platforms

- Game purchases
- In-game/in-app purchases
- Online gaming services



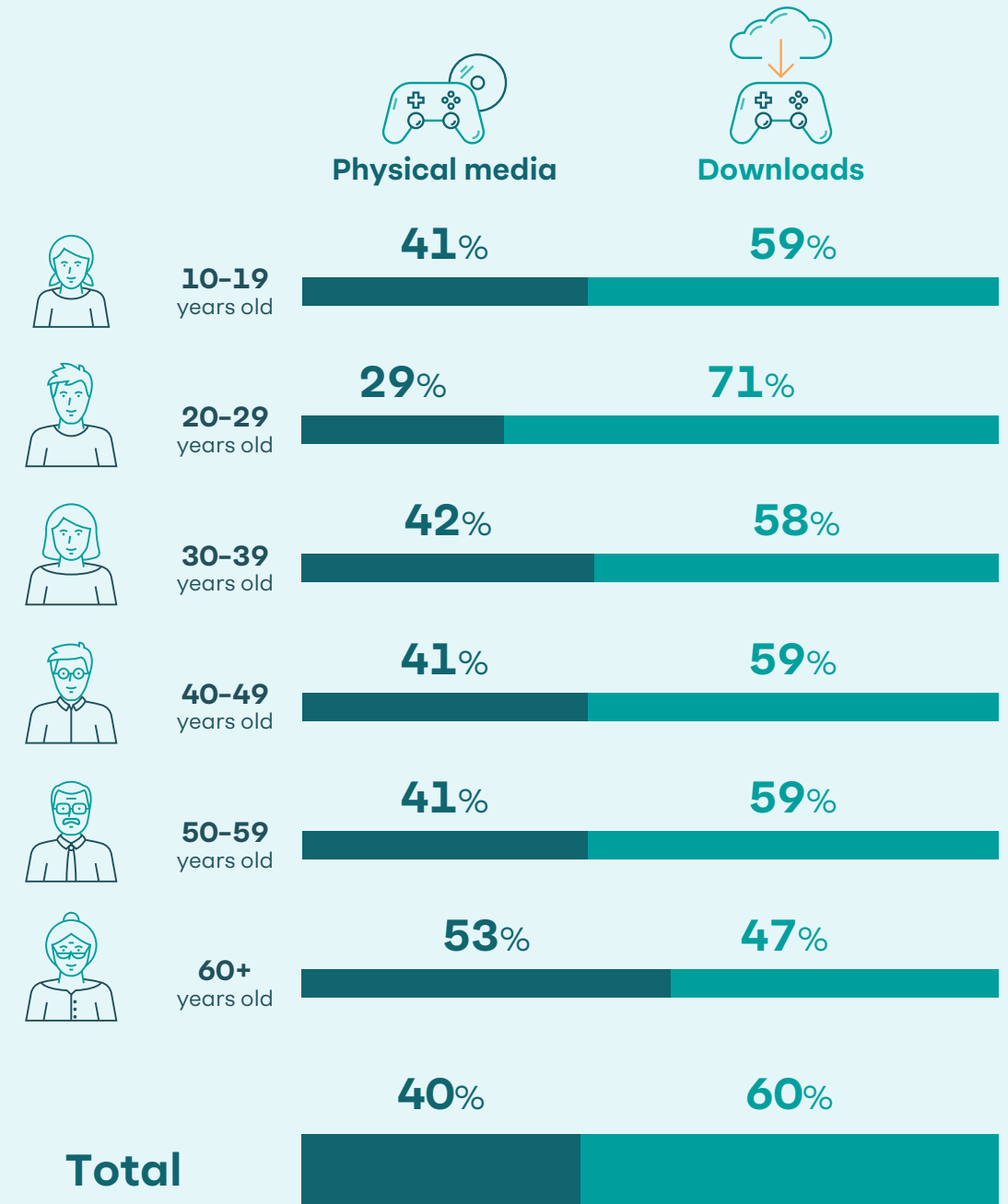
Source: Calculations based on the GfK Consumer Panel Services (2023/2024; n=25,000). Consumer sales in Germany are shown. © game 2024

Buying games as downloads is more popular than ever in Germany



Source: Calculations based on GfK Consumer Panel Services (2023/2024, n=25,000). All data refers to the ratio of games bought in Germany. © game 2024

The age of video game players also impacts how games are bought



Source: Calculations based on GfK Consumer Panel Services (2023/2024, n=25,000). All data refers to the ratio of games bought in Germany. © game 2024

03

The games industry in Germany

Last year brought a mix of both light and shade in the international game sector. While a remarkably large number of high-quality games were released, this also prevented some of these titles from attracting the expected level of attention.

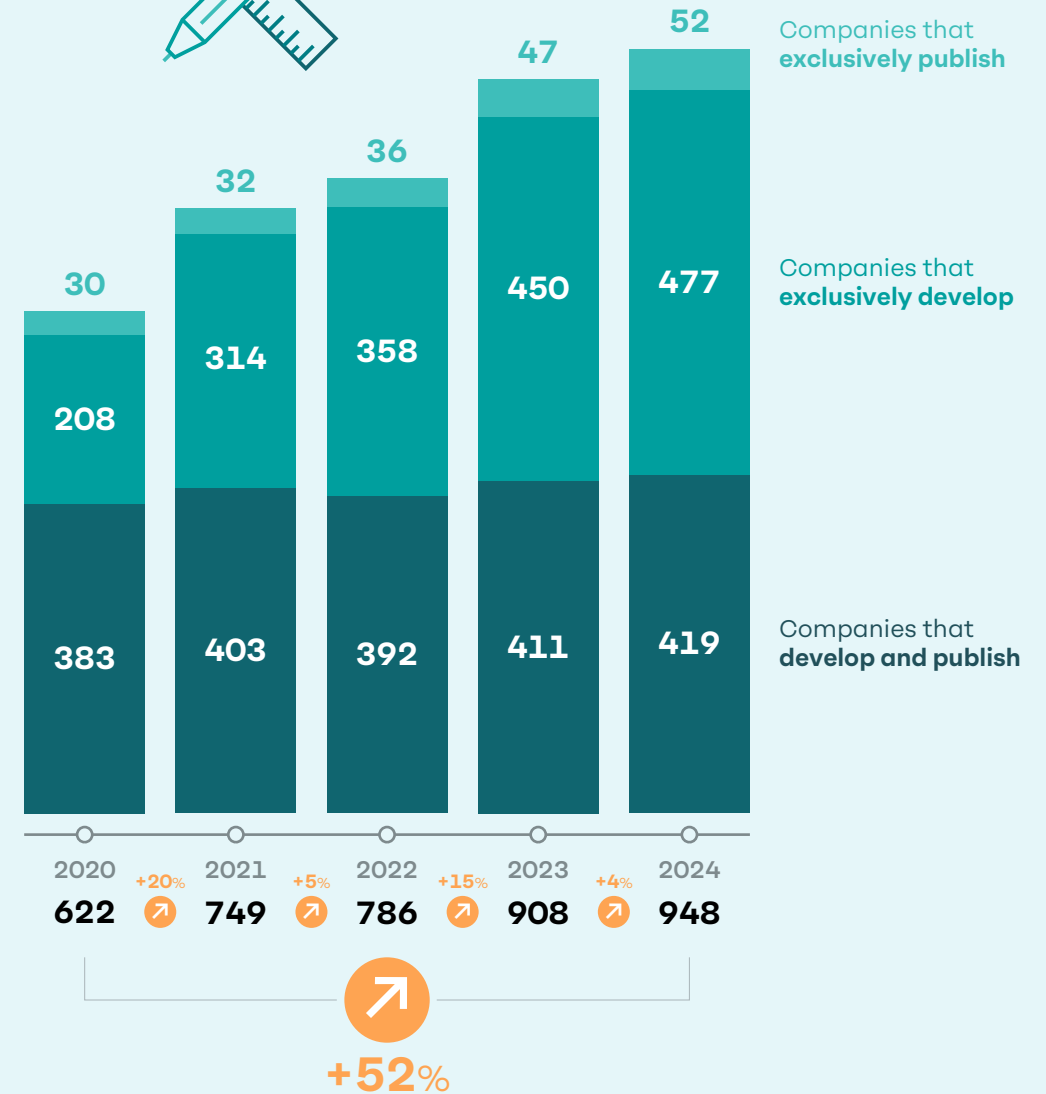
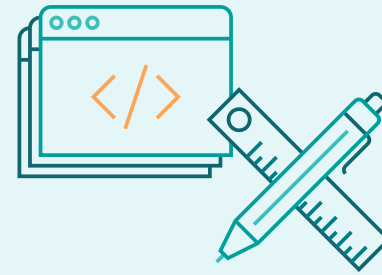
At the same time, a generally overcast economy and a slowdown in investment made for a worsened business outlook. As a result, the industry saw a rise in lay-offs and, in isolated cases, even studio closures over a several-month period. These increasingly difficult economic circumstances, in combination with the uncertainty surrounding federal-level games funding, pose a challenge for German games companies as well. This is reflected by game's industry barometer, which shows that only 12 per cent of games companies expect a very positive or somewhat positive development in the German games industry in 2024, as compared to 48 per cent one year ago. Companies are significantly more optimistic when it comes to their own prospects, however: one in two games companies (50 per cent) anticipate a positive or somewhat positive development in their own business.

Overall, the medium-term economic outlook is good. After sales revenue from games dropped off in some markets in 2022 - Germany, in contrast, registered a slight increase -, the worldwide games market subsequently picked up again, growing by 0.5 per cent in 2023 according to the market research company Newzoo. The global games market is expected to grow from 183.9 billion US dollars in 2023 to 207 billion US dollars by 2027.



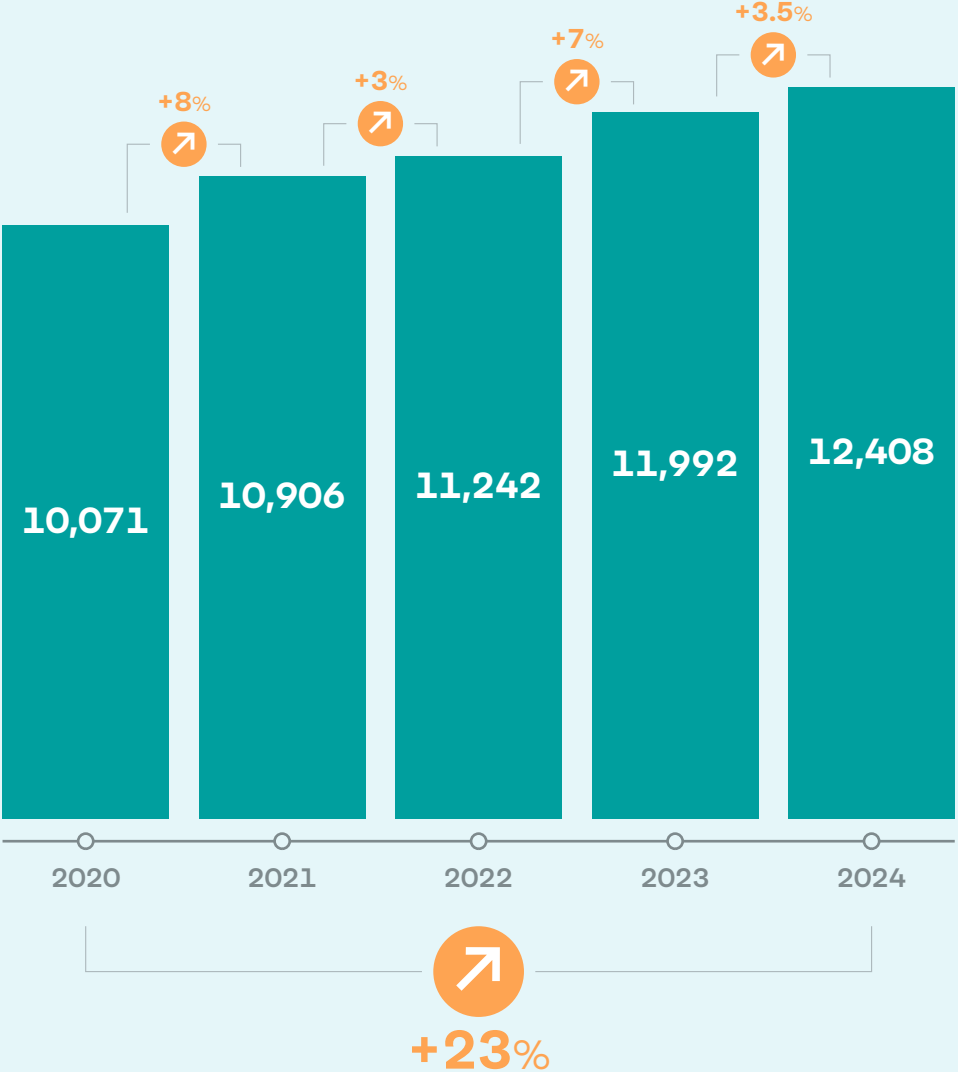
Every second games company in Germany expects its own business operations to develop positively in 2024.

948 companies in Germany develop and publish games



Source: Calculations based on gamesmap.de; as of June 2024. © game 2024

Slower growth: employment of developers and publishers up only 3.5%



Source: Calculations based on gamesmap.de; as of June 2024. © game 2024

03.1 Companies and employment figures

The strong upward trend in the German games industry in recent years has weakened considerably. Whereas a 15 per cent rise in the number of games companies was recorded a year ago, this growth rate has slowed to just 4 per cent in the past twelve months. The pace of growth in the number of employees in the German games industry has also declined, from 7 per cent a year ago to just 3.5 per cent currently. Against the backdrop of a difficult economic situation and the consolidation in the international games industry, the flatter yet still positive trend appears contradictory at first glance. This is attributable in part to the fact that, while the application freeze for federal games funding has hampered new project development for over a year, many German games companies are still in the midst of projects supported by previously received federal funds. This has softened the impact of the consolidation wave and stabilised the German industry as a whole – showing once again how important predictable and reliable framework conditions are in order for Germany to assert itself against the international competition as a game location.

In the last twelve months, the number of companies developing and publishing computer and video games in Germany has risen to 948. The number of companies exclusively developing games has increased in particular – by 6 per cent in 2023 to 477 this year. A further 52 companies in Germany work solely in game publishing. And a total of 419 companies are active in both development and publishing.

The positive trend has continued also in terms of employment numbers. Development studios and publishers now employ 12,408 people, as compared to 11,992 last year. In addition to those involved in game development and publishing, an estimated 20,000 further workers are employed in the games industry in Germany. The industry thus provides well over 30,000 jobs in the country, including for skilled professionals in educational institutions, the media, the public sector and retail.

A closer look at the figures for games start-ups reveals how much the upward trend in the German games industry has cooled off recently. While the introduction of federal games funding in 2020 brought a surge in games start-ups, this wave has since levelled off considerably, as indicated by the game start-up report conducted by Goldmedia on behalf of game. The report shows the number of newly founded games companies in Germany to have fallen by around 65 per cent



In addition to publishing and development, it is estimated that a further 20,000 people in Germany are professionally involved in games.

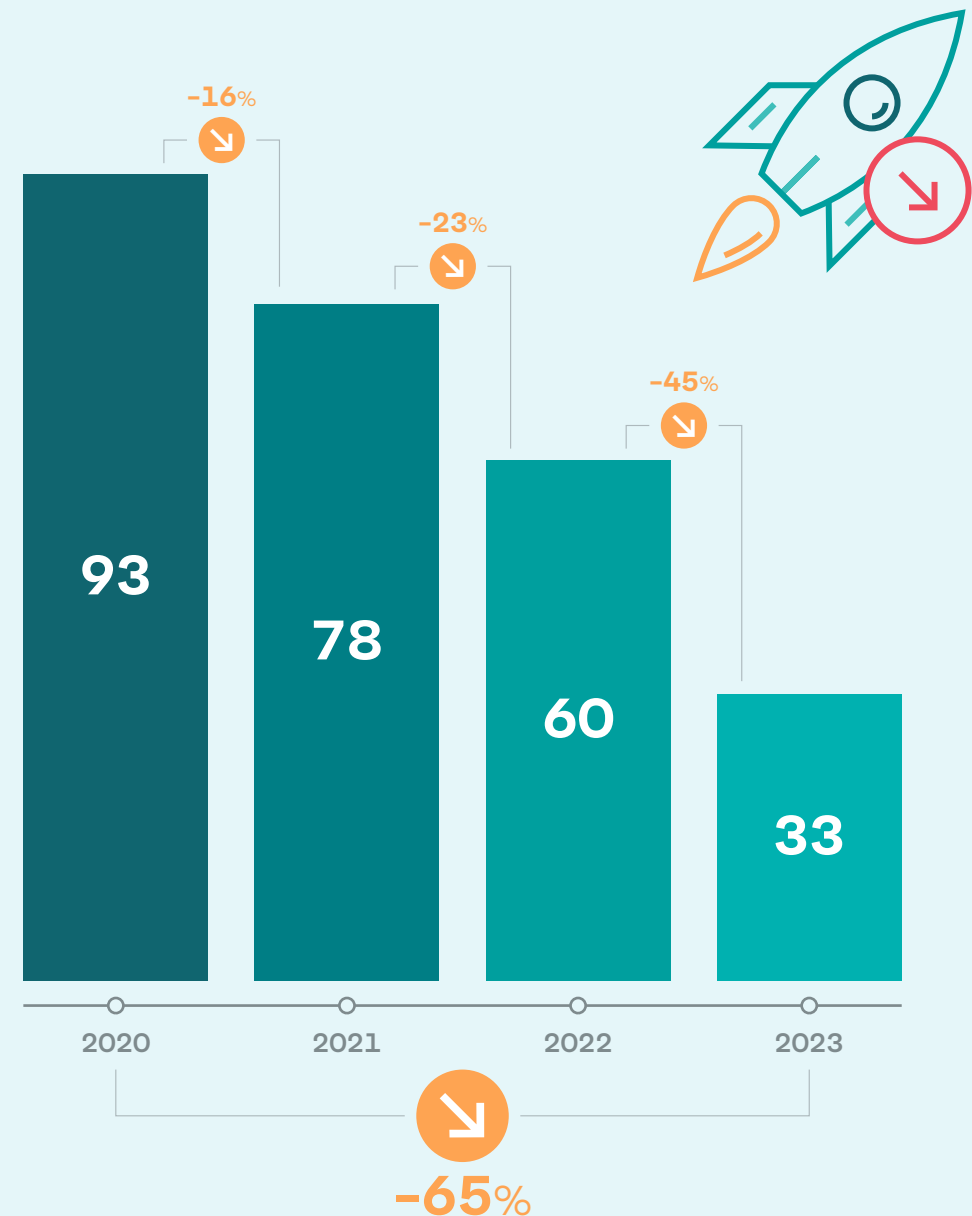


from 2020 to 2023, from 93 to 33. These companies, however, have proven surprisingly stable. Despite the difficult investment climate in the international games industry, the insolvency rate for games companies founded in Germany since 2020 is just 6.6 per cent.

Compared to the games companies that have been in existence for some time in Germany, more start-ups are headed by women.

The newly founded games companies show an uneven geographical distribution: Bavaria (62), Berlin (57) and North Rhine-Westphalia (38) take the top positions. By comparison, in the same period, only three games companies were founded in Schleswig-Holstein and only one in Thuringia. In relation to their previous numbers, however, some lower-ranking locations such as Brandenburg, Saxony and Rhineland-Palatinate showed stronger growth in terms of percentage than did the leading locations. At the same time, the major differences in games policy at the state level become apparent, which is also reflected in game's industry barometer. An additional point of interest: compared to games companies in Germany that have been established for a longer period, recent start-ups are more frequently headed by women. About 18 per cent of development studios and publishers founded since 2020 have female executives – or 5 per cent more than the rate at older games companies.

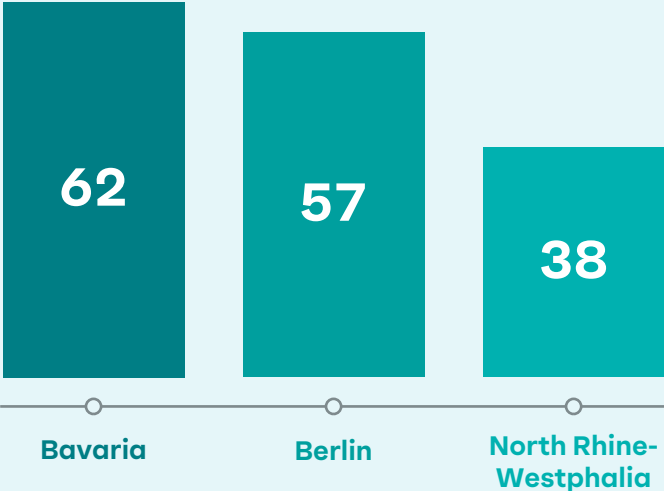
Number of newly founded games companies in Germany declines significantly



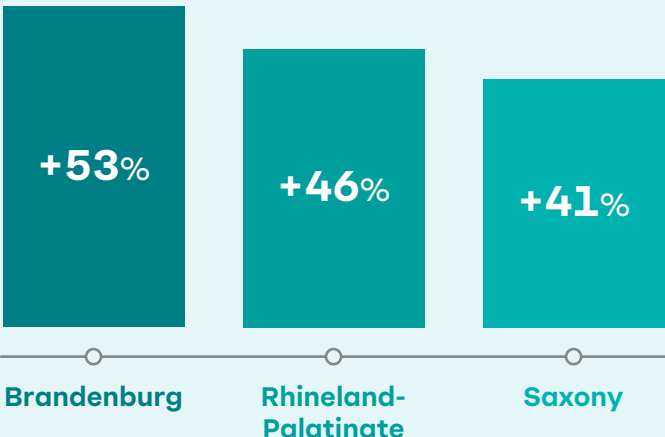
Source: The data is based on a survey conducted by Goldmedia on the basis of entries on gamesmap.de on behalf of game - The German Games Industry Association with the cut-off date 14.6.2024. www.gamesmap.de. © game 2024

Since 2020, most games companies have been founded in Bavaria, Berlin and North Rhine-Westphalia

Federal states with the most newly founded games companies since 2020 ...



... but smaller locations are also benefiting from the growth, for example:



Source: The data is based on a survey conducted by Goldmedia on the basis of entries on gamesmap.de on behalf of game - Association of the German Games Industry with the cut-off date 14.6.2024. www.gamesmap.de. © game 2024

The largest games companies in Germany

Number of employees in Germany

Rank	Company	Location	Number of Employees
1	Nintendo of Europe	Hesse	935
2	Ubisoft	Berlin, North Rhine-Westphalia, Rhineland-Palatinate	729
3	Crytek	Hesse	404
4	InnoGames	Hamburg	350
5	wooga	Berlin	325
6	GAMEFORGE 4D	Baden-Württemberg	300
7	Goodgame Studios - Stillfront Germany	Hamburg	270
8	PLAION	Bavaria	253
9	GameDuell	Berlin	137
10	YAGER Development	Berlin	135
11	Electronic Arts	North Rhine-Westphalia	130
	Kolibri Games	Berlin	
13	gamigo	Hamburg	125
14	Travian Games	Bavaria	120
15	KING Art	Bremen	110
	upjers	Bavaria	
17	Kalypso Media Group	Rhineland-Palatinate	108
18	Aeria Games	Berlin	107
	BIGPOINT	Hamburg	
	CipSoft	Bavaria	
19	Klang Games	Berlin	100
	Limbic Entertainment	Hesse	
	SOFTGAMES Mobile Entertainment Services	Berlin	

Source: gamesmap.de. Figures include employees subject to social security contributions and marginally employed persons.

03.2 Games funding

The past year has brought a number of important changes in the area of federal games funding. With the funding application freeze that took effect in May 2023 – the second since the federal games funding launch in 2020 – still in force, there have been almost as many months under this freeze as there have been months in which applications could actually be submitted. The Federal Ministry for Economic Affairs and Climate Action had to announce the first application freeze in October 2022, as the 50 million euros available in funds for that year had already

been used up. This was a result of the wave of start-ups set in motion by the introduction of federal games funding, without the necessary accompanying ongoing adjustment of the funding budgets. From 2020 to 2024, the number of companies developing and publishing games in Germany grew by 52 per cent. Many new teams arose, as the improved framework funding conditions helped to enable an internationally competitive level of financing. This comes as no surprise, because the funding helps in multiple

ways. For one, it reduces the development costs the companies must bear themselves by 25 to 50 per cent, depending on the production budget. In addition, this cost advantage significantly enhances the attractiveness and therefore the negotiating position of domestic developers vis-à-vis potential business partners and publishers. However, the funding application freeze in October 2022 meant that, suddenly and unexpectedly, no new projects could be supported. Companies in Germany that hadn't already obtained funding approval or been able to submit their application before the freeze were thus subject to the internationally uncompetitive location conditions that had been in effect before the introduction of the federal games funding – with cost disadvantages of around 30 per cent compared to other locations.

Policymakers themselves recognised that, without a reliably level playing field, the federal government's declared goal of developing Germany into a leading market for the games industry couldn't be achieved. The budgetary committee of the German Bundestag responded by providing additional funding in its budget adjustment session of November 2022. This increased games funding to 70 million euros – unfortunately only enough to lift the stop on applications from January to May 2023. A second freeze followed, but this time not just for the rest of the year. Because the vast majority of funded games require several years of development, the funds for 2024 had already been reserved. But stopping applications until the end of 2024 – that is, for a year and a half – would have meant slamming on the brakes in Germany's race to catch up with the top international game development locations.



The introduction of games funding at federal level triggered a veritable wave of start-ups.

Once again, the Bundestag stepped in. An additional 33 million euros per year were made available in the budgetary committee's budget adjustment session. However, this new funding was not allocated to the Federal Ministry for Economic Affairs and Climate Action, as it had been previously, but as a separate budget for the Federal Government Commissioner for Culture and the Media, Claudia Roth. This allocation came as a surprise to the games industry. It brought new challenges, leading to a delay in the disbursement of the funds by the two ministries, with no resolution yet found as of July 2024. This state of unclarity for games companies only further emphasises the need for an ambitious, systematic and consistent games policy that ensures funding from a single source, and it again significantly weakens the international perception of Germany as a games location in the wake of the funding application freezes.

Despite these challenges, the federal games funding policy is having an impact, as an external evaluation shows. Three years after the funding launch, the auditing firm PricewaterhouseCoopers (PwC) was commissioned by the Federal Economic Ministry to more closely examine the results of the programme. It found that the goals of the funding had essentially been achieved: an increase in the number of games developed, in games industry employment figures and in sales revenue. For example, 72 per cent of the games developed in Germany would not have been realised without the funding, and the funds enabled 34 per cent of games to be implemented on a much larger scale than they would have been otherwise. A large majority of games companies that received funding were able to create significantly more jobs than those that did not in the same period. The funding also had a positive impact on companies' overall development: almost half of them (45 per cent) achieved additional sales revenue over and above that generated by the funded projects themselves. However, the evaluation also concluded that Germany's current approach to games funding stands in stark contrast to that taken by other countries worldwide.

Game-funding policies in locations that are particularly successful internationally frequently utilise tax credits. The international comparison also shows that the proportion of employees in the games industry as a share of the overall labour force and the number of games companies per million inhabitants are still significantly lower in Germany than in other countries. This clearly indicates that Germany still has not tapped its full potential as a games location. The fact that, even at 50 million euros, Germany's total provision of games funding represents less than a quarter of the average per-capita amount of the other countries in the analysis speaks for itself. And it helps explain the gap between Germany and more successful games locations around the world.



72 percent of game developments in Germany would not have been realized without the funding.

International comparison of games funding models

	 Germany 2022	 Canada 2021	 Ireland 2021/22	 United Kingdom 2022/23	 Australia 2021/22	 France 2021/22	 USA 2020	
		 Quebec	 British Columbia				 Texas	
Game Companies	878	937	-	2,200	102	1,200	1,958	
Employees	11,800	32,000	2,000	74,000	2,100	32,000	143,000	
Funding measures	Direct funding	Tax credit		Tax credit	Tax credit	Tax credit	Tax credit	
Tax credits/ Funding rate	✗ N/A	✓ 37.5%	✓ 17.5%	✓ 32%	✓ 34%	✓ 30%	✓ 30%	✓ 7.5-22.5%
Guaranteed funding (if eligible for funding)	✗	✓	✓	✓	✓	✓	✓	✓
Cap on annual funding	✗ € 50 m ¹	✓ unlimited	✓ unlimited	✓ unlimited	✓ unlimited	✓ unlimited	✓ unlimited	✓ unlimited

¹ The annual budget for federal games funding in Germany was increased to 70 million euros for 2023 only.
² The French government budgeted 31 million euros for the video game tax credit in 2023. However, there is no specified annual cap and the estimated amount returned to companies through the tax credit varies strongly from year to year.

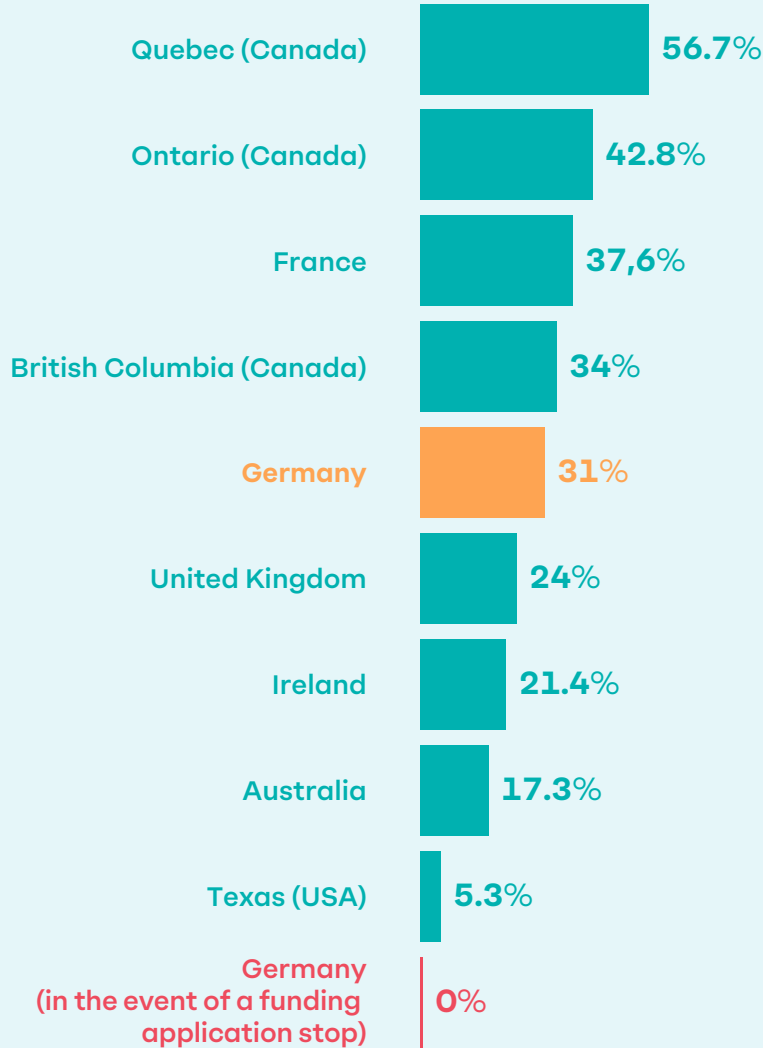
Source: Nordicity in cooperation with Goldmedia on behalf of game - The German Games Industry Association. © game 2023

Germany ranks far below top international games industry locations

Effective German funding rates are at best mid-table in an international comparison

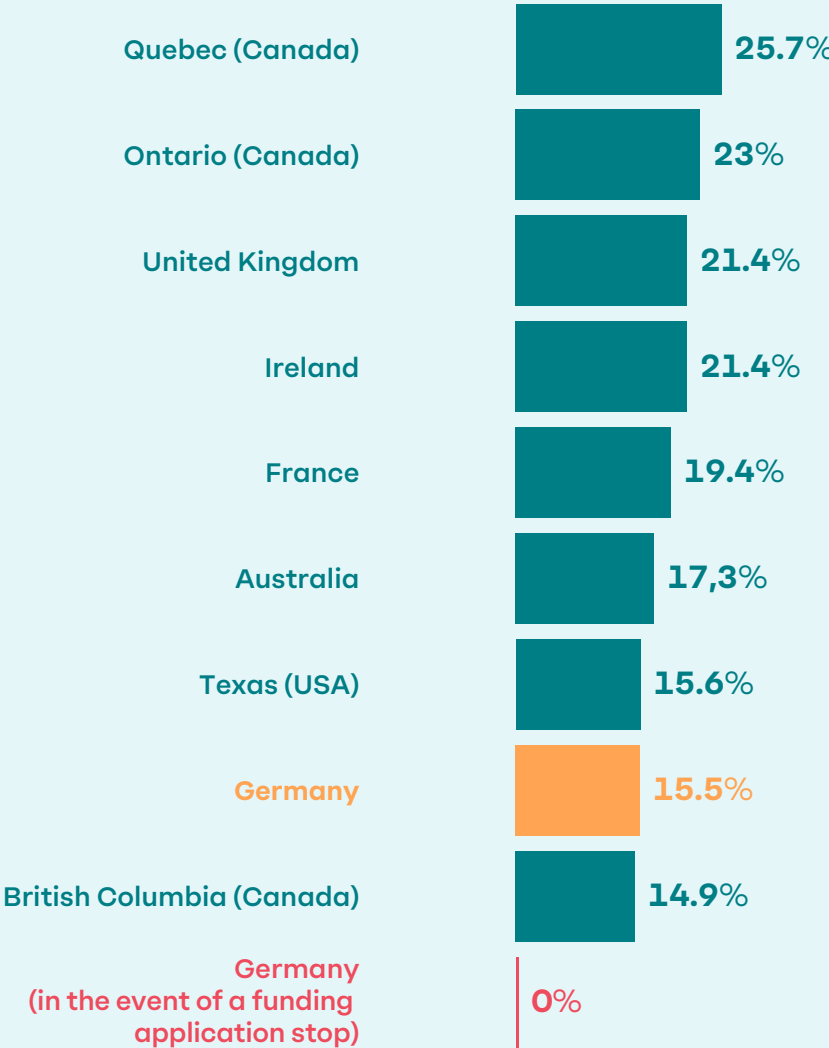
€ 1 m

Project volume



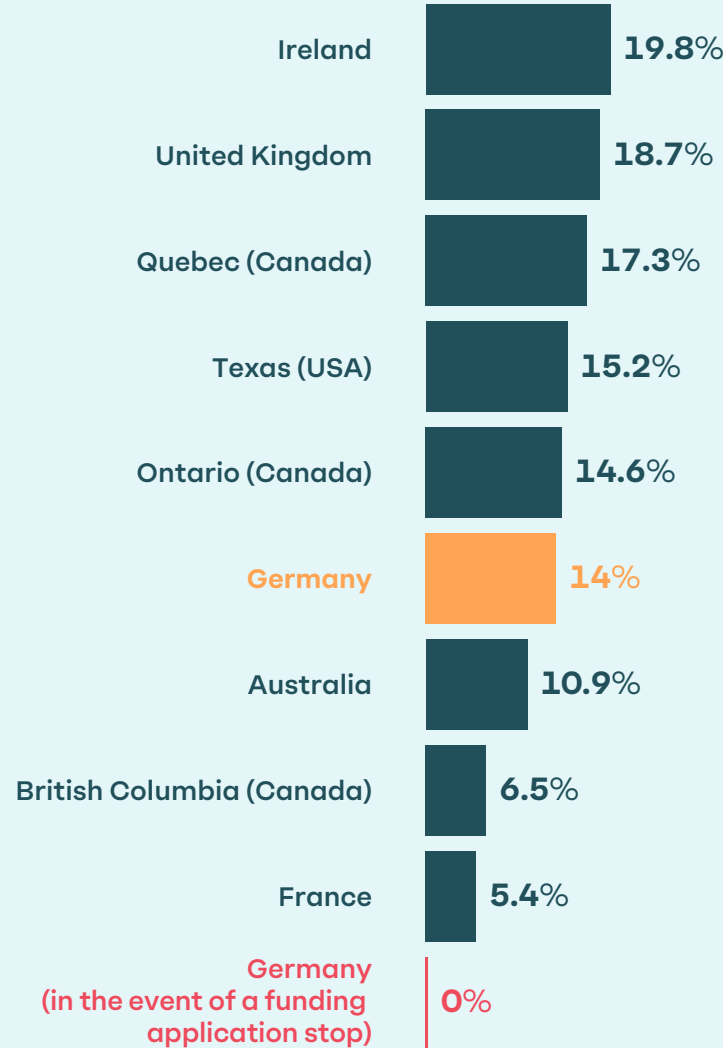
€ 10 m

Project volume



€ 100 m

Project volume



Source: Study The German Games Funding in International Comparison by Nordicity in cooperation with Goldmedia. © game 2023



Games funding is permanently available in the countries with tax credits and is therefore more predictable and more reliable.

This is also the conclusion of the study *Die deutsche Games-Förderung im internationalen Vergleich (German games funding in an international comparison)*, which was commissioned by game and carried out by Nordicity (Canada) in collaboration with Goldmedia (Germany) as well as Games Germany, an association of state-level funding organisations and networks. One of the study's findings is that the funding systems employed in top international locations differ significantly from the games funding programme in Germany. Established production locations such as Canada, France and the UK place a deliberate emphasis on tax credits for game development. In most cases, this eliminates

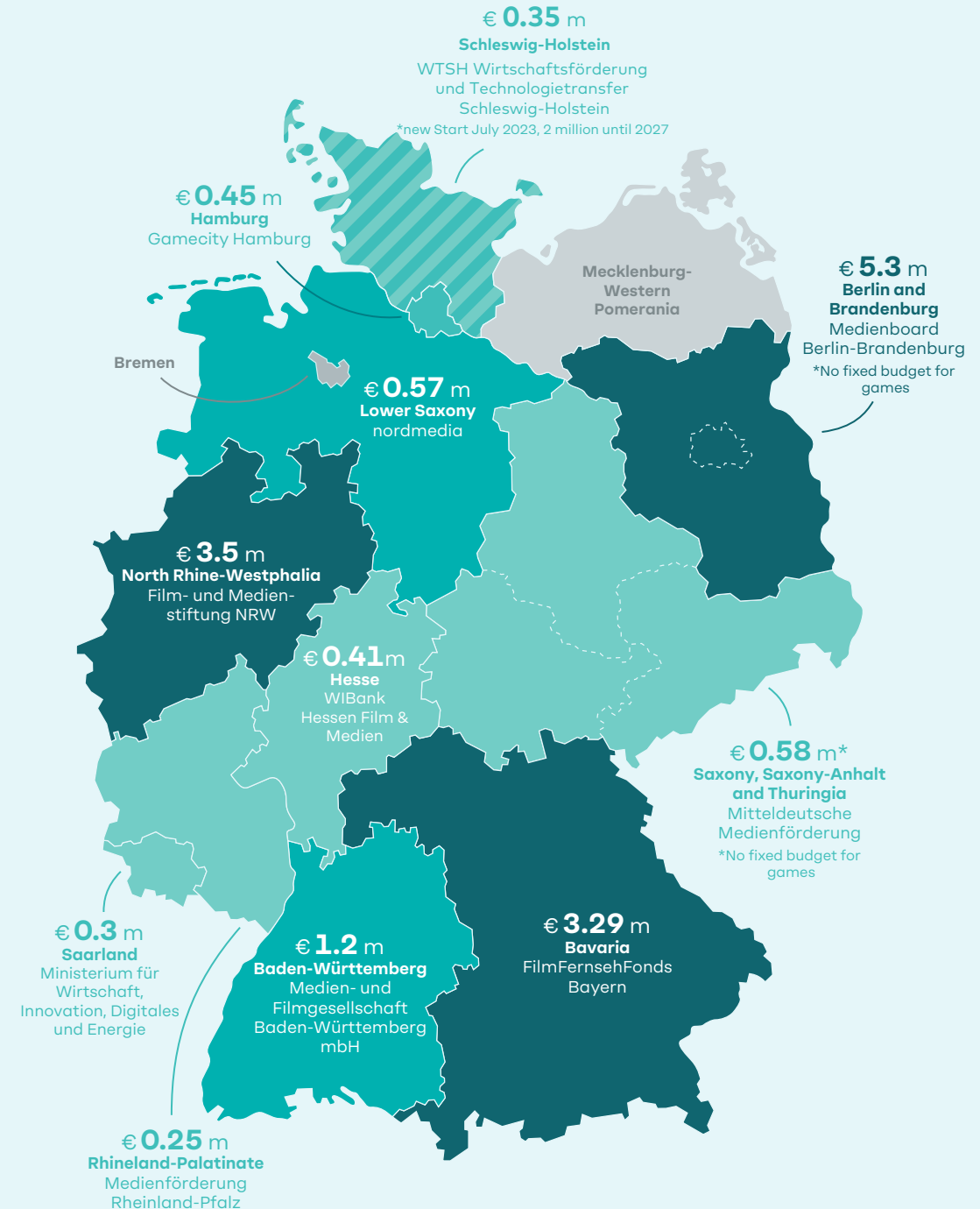
the need to designate fixed amounts of funding in the budget which can be exhausted if the funds required exceed those made available. In contrast, in countries with tax-incentivised funding models, games funding is permanently available and therefore more predictable and reliable. This approach works so well that locations that want to play a greater role in game development internationally, like Ireland and Australia, have also adopted it. Germany, on the other hand, has opted for a fund-based model with a fixed annual budget. This model brings with it the risk of renewed funding application

freezes if sufficient funds aren't made available by the government. Because companies don't know whether funding will be accessible when needed, games funding in Germany can't be reliably planned.

An economic model was used to analyse the significance of the differences between the countries, taking three typical game-production budgets as examples. The results show that with existing funding – but only then – Germany currently ranks mid-table internationally, both for smaller productions and for game projects with budgets in the tens or even hundreds of millions of euros. For periods in which funding applications were frozen, however, Germany ranks last in the field. The comparison shows that reliable funding on the basis of sufficient budgets is indispensable in order to be competitive. In the absence of a level playing field in the area of funding, Germany can hardly take advantage of its numerous positive location factors.

There have been improvements for games companies in a number of Germany's federal states. Again in 2023, growing numbers of states launched their own funding programmes or further increased funding levels. State funding programmes are also providing additional funds in an effort to help meet the increased demand due to the funding application freeze at the federal level – even though they can't nearly compensate for the lacking federal funds. Berlin and Brandenburg, for example, distributed record amounts for game development: studios received funding totalling 5.3 million euros. In addition, numerous further projects and plans are being supported by Berlin's state government – a

Regional games funding programs in Germany



The best games industry locations in Germany

Rated by companies in the games industry



- 1. North Rhine-Westphalia (3)

- 2. Hamburg (4)
Berlin (2)

- 3. Bavaria (1)

- 4. Baden-Württemberg (5)

- 5. Brandenburg (8)

- 6. Lower Saxony (7)

- 7. Rhineland-Palatinate (9)

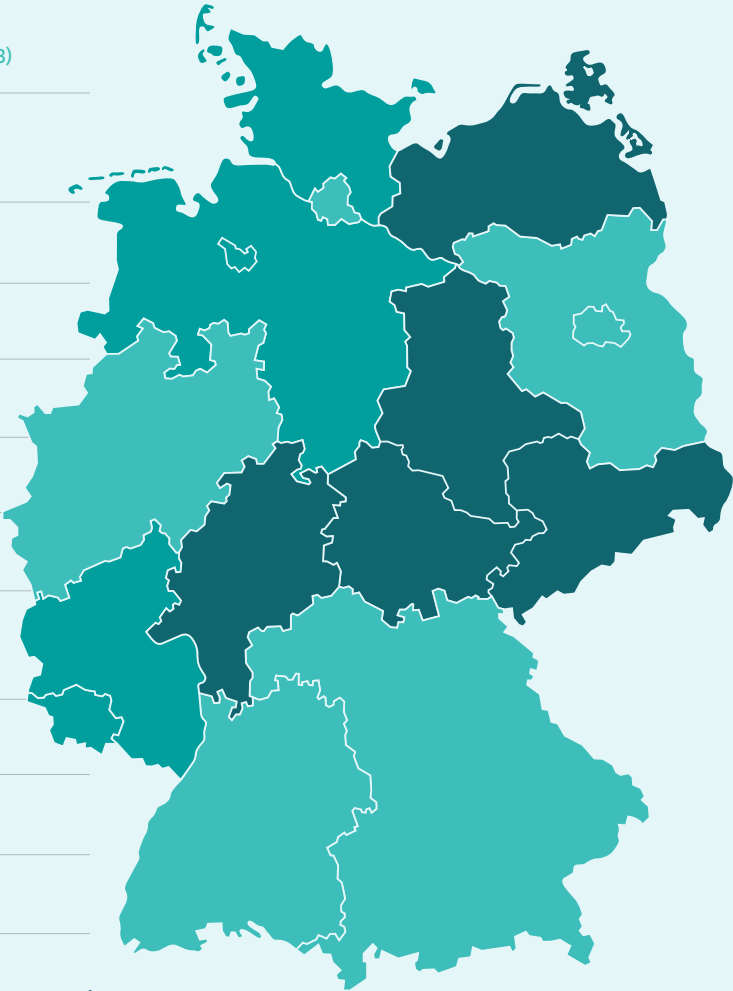
- 8. Saarland (6)
Schleswig-Holstein (10)

- 9. Bremen (11)

- 10. Hesse (11)

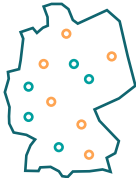
- 11. Saxony-Anhalt (11)

- 12. Thuringia (12)
Mecklenburg-Western Pomerania (13)
Saxony (12)



Note: previous ranking from August 2021 in brackets.
Source: member survey (11/2022). © game 2023

coalition of CDU and SPD – from the House of Games to the Computer Games Museum and the International Computer Game Collection, the latter of which is to be the first of its kind in the world at its size. The Bavarian state government is distributing funds of around 3.3 million euros in total. With the new game hub DIE GAMEREI – a recipient of 560,000 euros in funding – as well as the Level Up accelerator programme and the gaming event GG Bavaria, the state is providing additional support to the companies in the region. Baden-Wuerttemberg, Hamburg, Hesse and Saxony have all increased their funding budgets for 2024 as well. In Saarland, the state games funding programme has been transferred to the Ministry of Economic Affairs, Innovation, Digital Affairs and Energy and allocated a total of 300,000 euros in the 2024 budget – also an increase over the previous amount. Mecklenburg-Western Pomerania brings up the rear as the last remaining federal state without regional game funding, although the prospect of such a programme was held out in the coalition agreement between the governing parties SPD and Die Linke.



The games companies register the different efforts of the individual federal states to create the respective framework conditions very closely.

Games companies closely monitor the efforts that are made by the various states with regard to the respective relevant framework conditions. At the beginning of 2023, the game industry barometer showed very clearly that North Rhine-Westphalia was perceived most positively as a games location. With this result, Germany’s most populous state climbed from third place in the 2021 survey to first place. Hamburg also made a leap forward, from fourth to second place, sharing this ranking with Berlin, which held firm in its 2021 position. Bavaria, which topped the list in 2021, achieved only third-place status at the start of 2023 as three other states overtook it.

03.3 The ten demands of the German games industry

game – The German Games Industry Association works for the comprehensive improvement of conditions for the games industry in Germany, true to its mission *Together we are making Germany the heart of gaming worldwide*. From this follow the ten principal demands:

1.

Promote Germany as a game location for the long term

Computer and video games are a cultural asset, an economic factor and a guarantee for digital innovation. If we aim to benefit from the resulting opportunities for the economy and society in this country, Germany as a game location must catch up with the international competition. The federal government's strategy for the game sector provides an important basis for further progress and the realisation of potential in many areas. The government wants to see Germany become a leading market for game development. In accordance with this ambition to keep up internationally and generate significantly more innovation, growth and production of creative games, strong and targeted efforts are needed to improve the country's conditions as a game development location.

Competitiveness in game funding

The most important pillar for Germany as a successful game development location is internationally competitive games funding that will allow the country to catch up with the leading game locations worldwide. While the federal government's games funding programme has so far proved generally successful, it has also been unpredictable, as a lack of concrete resources has led to funding application freezes over long periods. The funding programme is therefore in urgent need of further development. Key to this is the transition to a hybrid system with additional tax-based games funding – a long-established practice in the world's leading locations – alongside an assistance fund for smaller development budgets. All measures must follow a long-term and need-based approach and be implemented in an unbureaucratic, plannable and transparent manner. This also applies to support measures of the federal states, which play an important complementary role. A dedicated funding scheme for start-up teams completes the game development funding structure. In all cases, tax revenues must be invested responsibly. Accordingly, studies are essential to regularly evaluate the effects, developments and positive leverage for the economy that emanate from a strong games industry.

Campaign for Germany as a game location

For Germany to become a top game production location, good visibility and strong networking are vital, both at home and abroad. This calls for a prominent location marketing concept that attracts skilled professionals, investors and companies. An integral part of this are the German Computer Game Awards, which together with the games industry must be further developed to achieve the highest international standard.

Building infrastructures for game development

Game hubs with incubator and accelerator programmes serve as an important corporate home for start-ups and provide opportunities for regional business locations. They promote communication between game companies and cooperation with other sectors that seek to benefit from the potential of game development. Support from the federal states and local authorities is essential in bringing these economic and innovation-linked effects into play.

2.

Reinforce Germany's commitment to game specialists

The German games industry is lacking in highly specialised, experienced professionals. Given this scarcity, training opportunities must be improved, and it must be made easier for these professionals to move here from abroad. It is important that the Federal Employment Agency and other public authorities take the occupational profiles of the games industry into account in career guidance and job placement. At the same time, a welcoming institutional culture is needed that supports incoming professionals in a positive and service-oriented manner.

3.

Strengthen games in science, research, teaching and training

Game-related research and teaching must be recognised and academically instituted as an independent scientific discipline, and must also be accorded a place, above the university level, in the canon of established sciences. This will require more and better-equipped professorships, degree programmes and research clusters, support for educational and research networks, uniform accreditation standards, doctoral and post-doctoral opportunities and the founding of a beacon institution, a *Games University*, for game research and teaching in Germany that fulfils the highest international standards.

4.

Use games to enhance learning, in school and throughout life

Computer and video games are more than entertainment. They support people in virtually all spheres, open up new approaches, are easily accessible, encourage social interaction and serve to enhance performance in many ways. Their use should therefore be promoted in all areas of life. Our education system must take advantage of the opportunities games offer for digital education in schools, vocational schools, universities and continuing training, and for lifelong learning. The development of games for use in education must be promoted and advanced in a targeted manner. Media literacy and programming knowledge are fundamental for school pupils in the digital age and must be a compulsory area of school curricula.

5.

Youth protection legislation: modern, convergent and internationally compatible

The responsibilities of the federal and state governments must be fundamentally put to the test to enable a modern system for the protection of the youth in Germany. Only in this way can standardised, modern and convergent statutory youth protection provisions be created that are aligned with the media reality of children and young people and guarantee international compatibility. Many systems and technical solutions from the games industry offer a role model for the protection of children and young people in the digital world.

6.

Provide investment certainty, create value

Games are becoming ever broader in scope and the range on offer to users is becoming ever larger and more diverse. We in the games industry are developing innovative business models for refinancing, such as in-game purchases, that are primarily geared to the needs of video game players and to digital practicability, and that take users' trust in games into account as a key success factor. Many other industries are taking inspiration from these innovations and adapting them. New digital business models need ample latitude to develop, however, so a fair balance of interests between consumer rights and entrepreneurial freedom must be found in the digital world, as elsewhere. Strengthening empowered and confident users must take precedence over new regulation.

7.

Preserve games as a cultural heritage

The International Computer Game Collection (ICS) could become a global beacon for Germany as a game location. Upon its opening, it would already be the world's largest collection of computer games, with more than 60,000 game titles, along with extensive hardware. However, this great cultural treasure is currently spread over various locations and cannot be used by the public. Brought together at one site, this cultural property could be safeguarded, made accessible for research and become a unique setting for testing in the area of digital cultural asset protection. Establishing this public location will require institutional funding from the federal government in partnership with the state of Berlin.

8.

Provide digital infrastructure for all

As a game location, Germany must have blanket gigabit capability to ensure the successful development of games and to serve the millions of video game players in the country. This applies to high-performance broadband internet connections as well as to a strong 5G network. Germany needs to catch up quickly across all distribution channels and must make future-proof digital infrastructure accessible to all. Only then will the special innovative power of games come to full fruition in this country.

9.

No space for haters, trolls or piracy: bring security authorities up to speed digitally

In the game sector, we champion diversity and tolerance each and every day. All industry actors must come together to robustly confront hate speech as well as immoral and, in certain cases, illegal behaviour in our digital society. The digital competencies of the authorities must be expanded to create flexible and targeted solutions.

10.

Seize the opportunities created by esports: talent, tournaments and the public interest

Germany should be one of the most important locations for esports. Given their high societal, cultural and economic relevance, optimal framework conditions must be created for esports. In particular, the valuable work of the organisations that offer esports should be promoted rather than further disadvantaged. These organisations thus must be accorded not-for-profit status in tax legislation. Whether or not esports are sport in a narrower sense is not a decisive factor here. As with other major events, hosting municipalities and their local economies benefit when esports tournaments are held. More local economic development agencies should therefore actively apply to host and support esports events. Esports thrive from talented players who perform at a world-class level, gain wide recognition and become ambassadors for the values of esports and their home country. Germany therefore has a natural interest in providing the best possible conditions and targeted support for esports talent in order to achieve a leading position in esports and present Germany as an attractive esports location.

04

gamescom und devcom

gamescom

Bigger, more international and more diverse than ever before – that was gamescom 2023. Hundreds of thousands of games fans on-site in Cologne were joined by millions online from all continents to celebrate games culture at the world's largest games event.

For the first time, gamescom was opened by Vice Chancellor and Federal Minister for Economic Affairs and Climate Action Robert Habeck. gamescom 2023 additionally enjoyed the highest proportion of international exhibitors and trade visitors in the event's history, along with the strong presence of global games industry heavyweights. All of this once again underlined gamescom's increased international importance.

With around 320,000 visitors from over 110 countries at the Cologne exhibition grounds, gamescom 2023 was the highlight of the year for scores of video game enthusiasts. The event drew more than 1,200 exhibitors – a new record – who delighted visitors with exciting games, innovations and technologies from the game sector. The largest gamescom indie area to date, with its diverse range of game titles from many indie studios, again proved to be one of the most popular attractions. Once more, in its unique festival spirit, gamescom offered a broad entertainment programme – from exciting community meet-ups and a mobile esports tournament in the event arena to the gamescom city festival in central Cologne. All who joined in online could view numerous entertaining shows and formats, such as live streams from gamescom's partners or the gamescom studio. The interactive online quest *gamescom epix* also invited visitors to take part, drawing a great deal of interest with more than 120,000

players. One of the absolute highlights was the event's grand kick-off, gamescom Opening Night Live, in which the community enjoyed not only exciting game trailers, but also live appearances by world-famous game developers like Todd Howard and Sam Lake, as well as actors behind the voices of popular game characters, such as Troy Baker. With its online formats, gamescom once again expanded its international reach, setting another record with more than 330 million digital hits worldwide, including 20 million for the opening show. The international appeal of the world's largest games event was yet further underlined by the guiding theme of gamescom 2023: *World class games*. After all, games are the cultural medium that inspires people globally, across all borders, and innovations in this sector have a decisive influence on all other fields. This was reflected in gamescom's enormous diversity. Cosplay, anime, manga and esports, as well as streaming services such as Disney+ and Netflix and world-famous brands like LEGO and MINI – which have long recognised the world-class stature of games and their community – were all represented.

Another great success was the gamescom business area. Here, 31,000 trade visitors, half of them from abroad, met in the exhibition halls to make new contacts and present their projects and products. This figure marked a roughly 25 per cent increase in trade visitors over the previous year. More than two thirds of them additionally used the digital matchmaking platform gamescom biz, which not only extends the networking experience beyond gamescom, but also connects the communities of the devcom Developer Conference and the gamescom business area.

gamescom also led the way in terms of social responsibility, with more topical examples and a broader range of offerings than ever. The sustainability initiative gamescom goes green, for instance, was expanded in 2023 to encompass further environmental protection measures, including in particular the gamescom forest and new activities in the areas of energy and stand construction. The gamescom cares platform, which brings together the exhibiting companies' efforts in spheres like diversity, education and health, created visibility for a number of initiatives in 2023. These included *Antura and the Letters*, a language-learning game for refugee children; Gaming Aid, a non-profit association that helps people in need; Gaming without Borders, a project for more accessibility in games; DKMS, the organisation for stem cell donations; and gamescom and devcom's joint campaign to support Ukrainian game developers.



With its online formats, gamescom once again expanded its international reach and celebrated another record.



With around 320,000 visitors from over 110 countries, gamescom was the games highlight for numerous gamers.

gamescom 2023 in numbers



330 m+

Views in online formats, including more than 70 million on gamescom's own channels



3,400

Trade visitors at the devcom Developer Conference 2023



31,000

Trade visitors to the gamescom business area, half of them from abroad



320,000

Visitors from 116 countries plus 31,000 trade visitors



25%

more trade visitors than in the previous year



1,200+

Exhibitors from 63 countries in over 230,000 square metres of exhibition space



126,000

gamescom epix players and more than 400,000 completed quests



9,500

Live streams on 4,300 different channels

Source: www.gamescom.global



The leading conference on the economic, cultural and social potential of games in Europe, gamescom congress, was a repeat success. More than 100 experts from Germany and abroad presented 50 programme items on how games help to drive innovation and develop potential in a wide variety of areas. Around 800 guests followed the exciting talks and presentations on-site in Cologne, and more than 170,000 users watched the live stream online. The political highlight to close the day of the congress was the Debatt(l)e Royale, in which Berlin's senator for economic affairs, Franziska Giffey (SPD), the media minister of North

Rhine-Westphalia, Nathanael Liminski (CDU), the political managing director of BÜNDNIS 90/DIE GRÜNEN, Emily Büning, and the secretary general of the FDP, Bijan Djir-Sarai, took stances on the most important topics concerning games and digital policy.

Around 270 other politicians additionally took advantage of gamescom 2023 to exchange ideas with professionals from the games industry and gain an overview of trends and current developments. gamescom was opened by Vice Chancellor and Federal Minister for Economic Affairs Robert Habeck, North Rhine-Westphalia's minister president, Hendrik Wüst, and Henriette Reker, mayor of Cologne. From the official opening to the Debatt(l)e Royale and the numerous tours by politicians, gamescom was marked by a broad consensus on the immense importance of the game sector as an economic factor, cultural asset and driver of innovation. Accordingly, a frequently stated goal was a further increase in the strength and competitiveness of Germany as a location for game development. gamescom thus also sent a clear political signal and once again confirmed its status as one of the most important platforms for exchange between the games industry and policymakers.

Further information is available on www.gamescom.global



Further information is available on www.gamescom.global

devcom

The devcom Developer Conference is the official event for games industry experts during gamescom and Europe's largest industry conference for game developers. With a 28 per cent increase in participants, devcom set a new attendance record last year.

In 2023, 3,400 industry experts took part in the conference on-site in Cologne. Participant numbers for the new partner events brought total attendance to over 5,900. A closer look at the participants reveals another success: experts in senior positions now account for around 80 per cent of visitors, an increase of 14 per cent. In 160 sessions on 13 stages, more than 250 speakers presented a wide range of informative analyses on current topics like artificial intelligence in game development, mental health, leadership, corporate culture and brand building.

devcom offers a unique forum for professionals to discuss the latest trends, innovations and business opportunities in the games industry. Beyond the numerous talks and workshops, the programme also offered such exciting exchange formats as the Networking Dinner and networking parties, the FLINTA* Meetup and the devcom Pitch it! with a revised concept, along with Game Night with tabletop games, held in cooperation with partners, and a game showcase. Its wide variety of topics and formats as well as its focus on networking make devcom the perfect start to the gamescom week.



devcom offers a unique opportunity for professionals to discuss the latest trends, innovations and business opportunities in the games industry.



Further information is available on www.devcom.global

The satellite strategy of gamescom



Stefan Heikhaus

Stefan Heikhaus is Head of gamescom & Events at game and is primarily responsible for the further development of gamescom and its satellite and content formats such as gamescom asia, gamescom latam and gamescom LAN.

With two satellite events overseas, gamescom is now reaching an even larger part of the games world. gamescom asia has been held annually in Singapore since 2021, and the first edition of gamescom latam kicked off in São Paulo, Brazil, on 26 June 2024. In addition to these two gatherings, the world's largest games event also held its first big LAN party, gamescom LAN, in Cologne in March, which was attended by numerous players and creators.

In this interview, Stefan Heikhaus, Director of gamescom & Events at game, explains what drives gamescom's satellite strategy.

Since its premiere in 2009, gamescom in Cologne has developed into the world's largest games event. So why do we need events in Singapore and São Paulo under the gamescom brand?

We firmly believe that the games industry needs events like gamescom that bring the entire games ecosystem together in one place – the community, game developers, publishers, investors, creators and esports organisers. Given that gamescom is the world's largest games event, we already reach a large global community – not least via the established digital formats. But even the most thrilling digital content can't compare with the unique festival atmosphere and the emotional intensity of the on-site event. We want to bring this singular experience to an even larger community and expand the great gamescom concept to other exciting game locations. So,



The satellite events further strengthen the global appeal of gamescom additionally.

as the brand owner, we're working with Koelnmesse and our local partners to establish the satellite formats gamescom asia and, as of this year, gamescom latam. This further strengthens gamescom's global appeal.

Can the gamescom concept simply be transferred to other locations and markets?

gamescom can't just be copied in other cities the way it's done in Cologne. Games culture and the local communities in the different corners of the world are incredibly diverse – and so are the needs of game companies and video game players in the individual regions, whether it be in Southeast Asia or South America. This places high demands on us, which we're able to meet thanks in large part to the good cooperation we enjoy with local event partners and industry experts. This collaboration is essential to helping the games industry to open up these two emergent regions and their vibrant communities. And on the other hand, this framework also helps local game developers to participate more effectively in the global industry and present their games to a wider audience, including potential partners. At the same time, the gamescom satellites pose new opportunities for German game companies as well, who can introduce themselves and their games more easily than before to two of the world's most dynamically developing regions.



The gamescom satellites also open up additional opportunities for German games companies.

How does the new gamescom LAN format fit into the satellite strategy?

More than any other event, gamescom embodies the passion of the entire games community. That's why gamescom LAN, with its strong focus on the video game players, is a perfect fit with the gamescom brand. Ultimately, this is what gamescom and all its satellite and content formats are about – celebrating the great games culture together, across all borders.

05

German Computer Game Awards

At the German Computer Game Awards 2024, held in Munich, the best German computer and video games of the year and their creative teams were festively honoured.

This celebration of top-quality games and their makers featured great entertainment and was attended by numerous guests from the games industry and the cultural, media and political spheres. In addition, hundreds of thousands of people watched the award ceremony at home via live stream. Together, Katrin Bauerfeind and Uke Bosse hosted the ceremony at Eisbach Studios. A total of 800,000 euros in cash prizes was given out. The outer-space game EVERSPACE 2 by ROCKFISH Games claimed title of *Best German Game*. With their survival horror game Ad Infinitum, the up-and-coming team from Hekate took home the most honours this year, winning in three categories. The *Studio of the Year* distinction went to Pixel Maniacs.

The German Computer Game Awards, established in 2009, are the most important awards for the German games industry. They are presented to the makers of Germany's best computer and video games by the Federal Ministry for Economic Affairs and Climate Action (on behalf of the Federal Republic of Germany) and game - The German Games Industry Association. The German Computer Game Awards are supported by the Foundation for Digital Games Culture. The aim of the awards is to spotlight the creative minds behind the games and their outstanding achievements in order to bring them the publicity they deserve.

The German Computer Game Awards are given in 15 categories. The winners are selected by a main jury and specialist juries made up of games experts and representatives of the political, media, academic and cultural spheres

whose work has a connection to video games. They evaluate the submitted games according to criteria such as quality, degree of innovation, playing enjoyment and cultural and educational value. The jury chairwoman is Prof. Mareike Ottrand of the Interactive Illustration and Games lab at HAW Hamburg.



Further information is available on www.deutscher-computerspielpreis.de/?lang=en

All the winners of the German Computer Game Awards 2024

NEWCOMER AWARD -
BEST DEBUT

Ad Infinitum

Hekate / NACON

PLAYER OF THE YEAR

**Maurice
Weber**

BEST FAMILY GAME

**Spells &
Secrets**

Alchemist Interactive /
rokaplay

BEST STORY

Ad Infinitum

Hekate / NACON

BEST GERMAN GAME

EVERSPACE 2

ROCKFISH Games

STUDIO OF THE YEAR

Pixel Maniacs

Nürnberg

BEST MOBILE GAME

**Cat Rescue
Story**

Tivola Games

BEST INNOVATION AND
TECHNOLOGY

Marble Maze

Fox-Assembly

BEST GRAPHIC DESIGN

**The Bear - A
Story from the
World of Gra**

Mucks! Games

BEST SERIOUS GAME

**Friedrich
Ebert -
Der Weg zur
Demokratie**

Playing History/Stiftung
Reichspräsident-Friedrich-
Ebert-Gedenkstätte

BEST INTERNATIONAL GAME

**Baldur's
Gate 3**

Larian Studios

NEWCOMER AWARD -
BEST PROTOTYPE

Misgiven

Symmetry Break Studio

BEST AUDIO DESIGN

Ad Infinitum

Hekate / NACON

SPECIAL JURY AWARD

**Gaming ohne
Grenzen**

BEST GAME DESIGN

Lose CTRL

Play from Your Heart

06

Entertainment Software Self-Regulation Body

With its comprehensive knowledge in the field of games, the USK works on behalf of projects for the promotion of media literacy and the safe use of games. To mark International Safer Internet Day 2023, for example, the USK again brought parents and guardians together for a digital parents' evening, which was attended by over 30 participants. The USK has also become a partner of the [Elternguide.online](https://www.elternguide.de) initiative, which supports parents in educating their children about media, including games. As the official youth protection partner of gamescom, the USK again assumed an advisory role regarding the age-appropriate and family-friendly implementation of the event, at which it was present with its own stand.



Further information is available on www.usk.de/en

The Entertainment Software Self-Regulation Body (Unterhaltungssoftware Selbstkontrolle, USK) has been committed to the protection of minors in the game sector for 30 years. As the games industry's organisation for voluntary self-monitoring, the USK is the responsible authority for the assessment of video games in Germany.

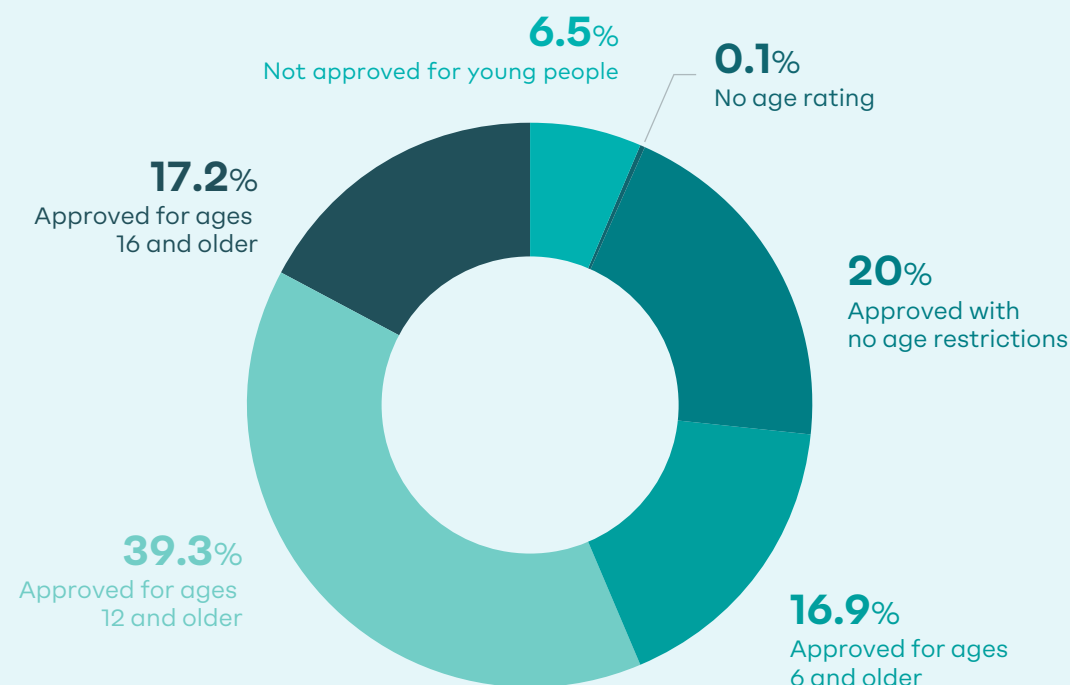


Since 1994, the USK has conducted more than 51,000 evaluations of video games.

The familiar USK age ratings – 0, 6, 12, 16 and 18 years and above – indicate at a glance the age from which a game is safe from a youth protection standpoint, and thus provide an important guide for parents and educators. The USK is a non-profit organisation. game – The German Games Industry Association is its sole stakeholder.

Since it was established in 1994, the USK has conducted more than 51,000 evaluations of computer and video games. In 2023 alone, 1,876 games were assessed. The USK also assigns age ratings in the framework of the International Age Rating Coalition (IARC) for apps and games that can be purchased online. In addition, over 50 games companies have joined USK.online. As an institution of voluntary self-regulation recognised under the German Interstate Treaty on the Protection of Minors (JMStV), USK.online supports member companies in the practical implementation of legal provisions in the context of their online offerings. USK.online also conducts approval processes regarding technical measures for the protection of minors in the media environment.

Proportions of USK age ratings 2023



Source: USK 2024

New test criteria for the age rating of games

Since 1 January 2023, the USK has been applying new test rules for the age rating of games in accordance with the amended German Protection of Young Persons Act of 2021. Elisabeth Secker, Managing Director of the USK, explains in an interview how the adjusted criteria are setting the standard for greater protection of minors in games.



Elisabeth Secker

Elisabeth Secker has been Managing Director of the USK since January 2018. As part of her role, she is a member of the Board of the International Age Rating Coalition (IARC). Previously, she was deputy head of the youth media protection division at die medienanstalten. Elisabeth is also an active member of the advisory board of the Digital Games Culture Foundation and the Safer Advisory Board of an international games platform.

What changes has the USK made following the amendment of the Protection of Young Persons Act in order to increase the protection of minors in games?

The USK has worked together with the supreme state youth authorities – that is, the state-level ministries responsible for the protection of minors – to develop new test criteria that for the first time take into account so-called usage risks in games. These include, for example, purchase functions like in-game purchases, loot box mechanics, gambling-like mechanisms, mechanisms that encourage excessive media use or chat functions. Additional notices – so-called descriptors – have also been introduced to provide information on the basic reasons for the respective age rating and on possible risks of use. These descriptors are printed on the game packaging and also displayed in online stores.

Have many games been given a new age rating due to the new test criteria?

The USK's adjusted testing rules are having a clear effect. In 2023, around 30 per cent of the games tested with online functions were given a higher age rating because of risks of use. For the other 70 per cent, the additional descriptors

about the risks or the protective measures built into the games proved to be sufficient – for example, the option of reporting or restricting inappropriate communication, limiting playing time, deactivating purchase options or setting spending limits.

How does the USK work with developers, publishers and other games companies on this subject?

In the course of these changes, we've worked intensively to prepare game providers for the new review criteria. Overall, we've seen that companies in the games industry recognise active youth media protection to be an important contribution to society. In addition to awarding age ratings, the USK has been working since 2011 to ensure that youth protection measures are integrated into the development process of games from the outset. This includes advising on and further developing technical youth protection programmes as well as carrying out recognition procedures in the field of technical youth media protection. Almost all the major game and console manufacturers are now members of USK.online and are working together with us on modern and sustainable means of protecting minors in games.

How does the protection of minors in games in Germany compare internationally?

The German standard for the protection of young people is one of the highest internationally. Age ratings for video games, for example, are enshrined in law here, unlike in other countries. Representatives of the state are also involved in the process, which is why the German system is considered particularly binding. In the age rating process, we draw on the expertise of around 50 independent youth protection experts from the fields of child and youth services and media education. This puts us in a good position to identify new potential risks in games and incorporate this knowledge into youth protection practice.



The German standard for the protection of minors is one of the highest in international comparison. For example, the age rating for digital games in Germany is enshrined in law, unlike in other countries.

07

Foundation for Digital Games Culture

Games connect people, drive innovation and form the heart of a vibrant popular culture. In short, games change the world.

The Foundation for Digital Games Culture invites actors from the political and academic spheres and from civil society to participate in shaping this change. On the basis of formats for exchange, model projects and studies, it demonstrates how games create social added value for culture, education and research. As an opportunity ambassador for games, the foundation is the centre of a cross-industry network dedicated to the potential of games *beyond entertainment*. It was founded jointly by the German Bundestag and the German games industry in 2012. Its work is supported by a high-calibre advisory council comprised of 14 members from the games industry, federal ministries, youth protection agencies, cultural and academic institutions and other organisations. game – The German Games Industry Association is the sole stakeholder of the foundation.

In 2023, with funding from the Federal Government Commissioner for Culture and the Media and the Berlin Senate Chancellery, the foundation initiated the establishment of the International Computer Game Collection (ICS) as an independent company. The ICS was founded in October 2023 with the Computer Games Museum, the Förderverein für Jugend und Sozialarbeit (Association to promote youth and social work), game, the USK and the foundation as shareholders. On completion of this first phase in the course of 2024, the foundation will transfer the ICS into independent operation.

The education initiative *Stärker mit Games 2 (Stronger with games 2)* has enjoyed great popularity since its launch in November 2022, with all project funds having already been committed until the end of 2025. Supported by funding from the Federal Ministry of Education and Research, the initiative forms alliances with non-profit organisations at the local level to provide children and young people with cultural education through games. The



The foundation is the result of a joint initiative by the German Bundestag and the German games industry.

GamesTalente (Games talents) youth promotion programme, which is run in cooperation with the talent promotion centre Bildung & Begabung, celebrated its fifth anniversary in 2023 and is to be continued in modified form from 2024. The Foundation for Digital Games Culture realised three further projects with funding from Medienboard Berlin-Brandenburg: *Projektstage Games (Game project days)* gave pupils at 12 schools in Brandenburg insights into learning with games. The second round of the programme Start-up: Games Entrepreneurs assisted the initial business steps of 15 regional company founders. And the symposium *Kollisionsabfrage (Collision detection)* engaged participants in a discussion on lowering barriers in gaming for people with disabilities.

As part of the research project *Let's Remember! Erinnerungskultur mit Games vor Ort (Cultivating commemoration with games on-site)*, the foundation has been testing the use of games in museums and memorials in cooperation with the Deutscher Kulturrat since April 2023. The two-year undertaking is funded by the Foundation Remembrance, Responsibility and Future (EVZ Foundation) and the Federal Ministry of Finance. In the model project *Games und Wertebildung (Games and values education)*, which is funded by the Federal Office for Migration and Refugees, activities over the course of the year included developing criteria and approaches for the use of games in integration processes as well as leading visitors on a correspondingly themed tour of gamescom. And the end of the year marked the conclusion of the Federal Foreign Office-funded pilot project *Auswärtsspiel (Away game)*, which had worked at the intersection of foreign policy and games since November 2022.

In the field of games culture, the foundation also serves as the office responsible for the submission and jury process for two prestigious prizes: the German Computer Game Awards, hosted by the German government and game, and the gamescom award – the official distinction bestowed by the world's largest game event.



With *Let's Remember! Erinnerungskultur mit Games vor Ort*, the foundation has been testing the use of games in museums and memorials in cooperation with the Deutscher Kulturrat.



Further information is available on www.stiftung-digitale-spielekultur.de/en



The esports player foundation is already assuming a leading role globally.

Esports have come a long way in Germany. A pursuit that began with private LAN parties and events in the 1990s has grown into a mass phenomenon.

The number of people who play esports as a hobby has been rising in Germany for many years now. Today there are numerous esports clubs, departments, university groups and organisations throughout the country where esports enthusiasts can enjoy their pastime. And the community of esports professionals in Germany – the elite players who are paid to compete at the highest level – is growing as well.

To ensure that established as well as up-and-coming esports professionals enjoy the best possible support, the esports player foundation (epf) was launched in Cologne in January 2020. The epf is the world's first initiative of its kind, with the mission of providing current and future top players with a comprehensive support programme like those offered in conventional sports – something that is completely new in the esports field.

Recognising that success in competitive gaming requires years of balanced professional training, the epf seeks to close this support gap. It works with players from the junior right up to the semi-professional and professional levels. It not only promotes their gaming skills, but also assumes responsibility for the time after their esports career, or for the possibility that they don't reach the professional echelon. Ensuring a healthy balance between their competitive careers and school, job training, professional development and work is therefore a top priority.

The epf is already assuming a leading role globally in many areas. Its offerings range from intensive support in the area of sports

psychology to a fitness programme, nutrition consulting and sports medicine exams, to assistance with contractual matters and targeted career guidance. And in each case, these services are tailored to the respective player's individual situation and provided by a non-profit organisation. In the context of esports, the programme has yet to be matched anywhere in the world. It additionally teaches the values of good sportsmanship, and participants are empowered to serve as positive role models for millions of ambitious players.



The epf is also committed to other topics in esports such as diversity, fair play and mental health.

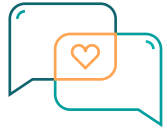
The epf's talent development programme has gained the support of numerous companies which, through their sponsorship, are contributing to the growth of the esports ecosystem in Germany. These include Deutsche Telekom AG, CosmosDirekt, DKB, Techniker Krankenkasse, Deutsche Bahn and Xantaro. Further companies, such as Cherry XTRFY, TERRA, AOC and Arcus Kliniken, help directly with their products and services.

The esports player foundation currently works with over 200 players of the titles *Counter-Strike 2*, *League of Legends*, *Brawl Stars*, *Valorant* and *EA SPORTS FC*. In the future, the foundation hopes to be able to provide comprehensive support to every talented player in every relevant esports game.

To lay the cornerstone for this, the epf and Deutsche Kreditbank (DKB) jointly established the DKB Diamonds, a *League of Legends* free-agent team, at the beginning of 2022. In early 2024, the team merged with the talent incubator XPERION NXT and is now operating under the name DKB XPERION NXT. It is intended to enable young talent to gain match practice and attract attention through competition in the Prime League (analogous to German football's Bundesliga), in which it is now playing in the second division. The DKB Diamonds' early success led to the creation of an Academy Team at the start of 2023, consisting of very young players who will likewise seek to prove themselves in the Prime League.

At the end of 2022, North Rhine-Westphalia, in cooperation with the epf, also decided to expand its involvement in esports and provide targeted support to talent from the state. The Esports Academy NRW was then founded and 30 esports players from NRW were admitted to its promotional programme in the titles *EA SPORTS FC*, *League of Legends* and *Brawl Stars*.

In addition to promoting players, the epf is also committed to other topics in esports. In 2021, it launched the Equal eSports initiative together with Deutsche Telekom and SK Gaming to advance diversity and equal opportunity in esports. Equal eSports encompasses not only the promotion of talent, but also the



Equal eSports Council, which is made up of female experts and executives and acts as a kind of supervisory board for the initiative. The initiative further includes the Equal eSports Festival and, since 2023, the Equal eSports Cup, a *League of Legends* tournament for women and non-binary people.

With the *Speak Up Esports* campaign, the esports player foundation is campaigning against hate speech and toxicity in esports.

The epf also publicly takes on the issue of hate speech and toxicity on the internet on a regular basis. In its campaign *Speak Up Esports*, the epf and esports protagonists weigh in against this problem in the digital sphere. Another campaign in this context is the Fairplay Guide for EA SPORTS FC, which was created in collaboration with Deutsche Telekom. Jointly designed by Germany's most prominent players of EA SPORTS FC and its creators and community, the guide advises players on game-related behaviour for this esports title. These activities are complemented by mental-health campaigns conducted in cooperation with the insurance provider Techniker Krankenkasse, epf's official partner in the field of health.

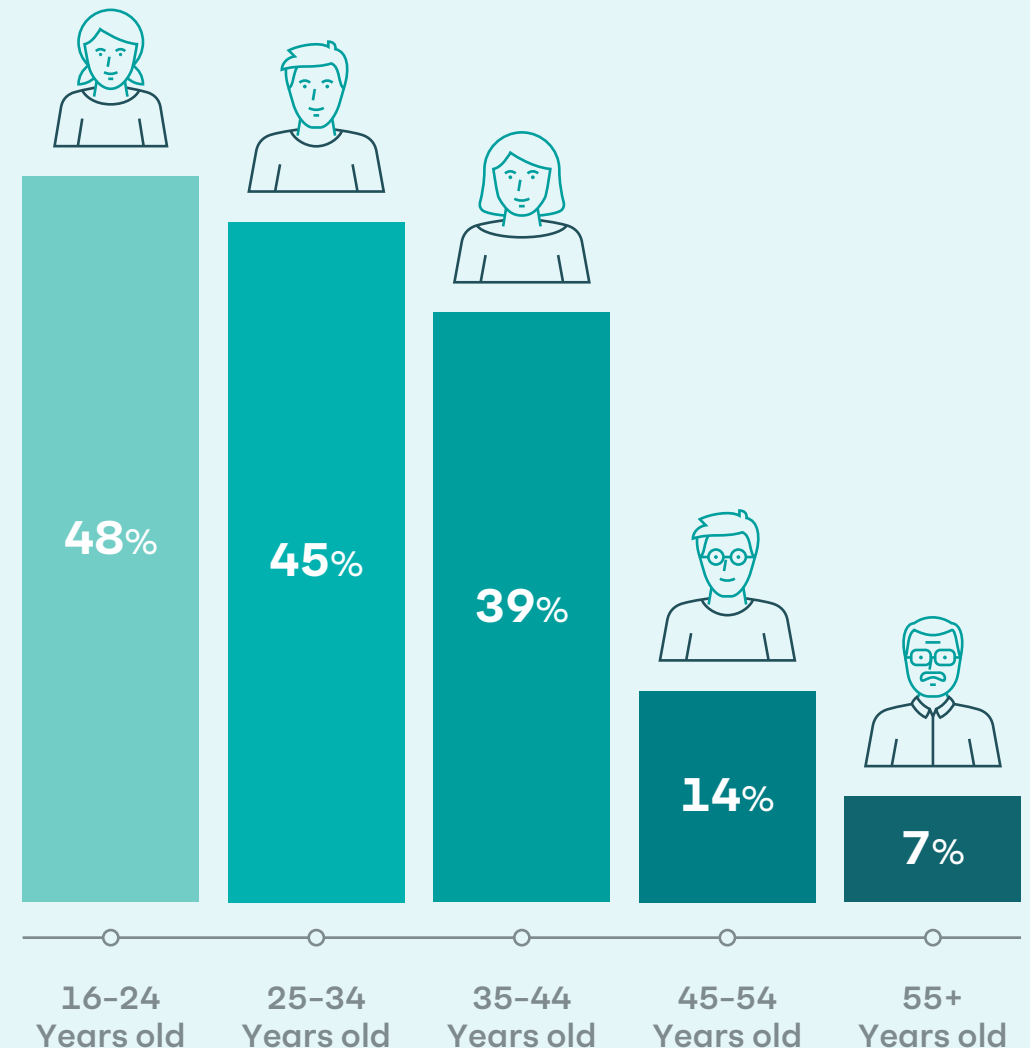
A further milestone for EA SPORTS FC is the ComosDirekt eFootball Arena, launched in cooperation with the epf at XPERION in Cologne. Here, young players are given professional coaching and the opportunity to exchange ideas with like-minded people.

In order to offer young talent sustainable future prospects alongside a career in esports, the epf advocates for a dual career path. In 2023, in collaboration with the epf, Deutsche Bahn enabled an initial group of 20 promising esports players to pursue a professional career in esports alongside an apprenticeship with the company. The selected candidates were assisted with a grant from the epf. The campaign was such a success that it is being continued in 2024. Xantaro, another partner in the initiative, is also committed to supporting a "second career" for retired professional esports players. It offers five talented individuals from the epf not only financial support and game-specific services through an individual grant, but also the opportunity to take on internships and jobs, or even to start their post-esports careers at Xantaro.

Millions of Germans tune in to esports



Around 16 million Germans have already watched esports tournaments



Source: The figure shows the proportion of Germans who have already watched esports tournaments. Representative YouGov survey (n= 2,053; 16+). © game 2023

09

About game – The German Games Industry Association



With games, we enrich the lives of all people.



Together we are making Germany the heart of gaming worldwide.

game is the association of the German games industry. Its over 500 members represent the entire video game ecosystem, from development studios and publishers to esports event organisers, educational establishments and other institutions.

As a joint organiser of gamescom, game is responsible for the world’s biggest games event which takes place every year in Cologne in late August. As the gamescom trademark holder, game is also actively involved in the satellite events gamescom asia, gamescom latam and gamescom LAN. game’s association office is located in the Berlin district of Mitte, in close proximity to the government district and the German Bundestag. Game is a stakeholder in the Entertainment Software Self-Regulation Body (USK), the Foundation for Digital Games Culture, the esports player foundation and the collecting society VHG, as well as co-host of the German Computer Game Awards. In addition, game events GmbH (formerly devcom), which organises the successful devcom Developer Conference, is a subsidiary of game. As an expert partner for media and for political and social institutions, game answers all questions on topics such as market development, game culture and media literacy.

The members of game participate in various working groups that formulate the association’s positions on topics such as market research, law, funding, communication and skilled workers. game’s members also regularly exchange views on current topics in the industry in other formats conducted by the association, like round tables or webinars. Members who are actively involved in the esports field additionally belong to the game esports. A wide range of stakeholders in the esports ecosystem are represented here, including game developers, publishers, event organisers and agencies.

Lars Janssen, CEO of Deck 13 Interactive is the Chairman of the Executive Board at game. His deputy is Julia Pfiffer, Co-Managing Director of astragon Entertainment. Other members of the Board are Johanna Janiszewski, Founder and CEO Tiny Crocodile Studios; Clemens Mayer-Wegelin, European General Counsel and Senior Director Nintendo of Europe; and Ralf Wirsing, Managing Director Europe Ubisoft. As the strong, united voice of the entire German games industry, game has also established many regional offices throughout Germany – most recently in 2023, when the former gamearea-HESSEN became game’s regional office for the state of Hesse.



Further information is available on www.game.de/en

game in numbers

25

points of contact at the regional offices

500+

More than 500 members, including developers, publishers, esports organizers, educational institutions and service providers



VHG

Shareholder of the USK, the Foundation for Digital Games Culture, the esports player foundation, game events and the collecting society VHG

22

employees at the central office in the political heart of Berlin

Diversity in the German games industry



The games industry is justifiably proud of how incredibly diverse its games and its communities are. More than 3 billion people around the world play video games – regardless of age, gender, nationality, religion or sexual orientation. And the thousands of game developers around the world are just as diverse.

In December 2019, the German games industry launched the initiative *Hier spielt Vielfalt (Diversity plays here)* with the goal of further bolstering its commitment to an open, diverse game culture. A joint declaration on the subject has thus far been signed by more than 1,600 individuals, companies and organisations.

To yet further raise awareness of the issue of diversity, game published the *Best Practice Guide Diversity*. It provides all readers with concrete tips, best-practice examples and advice for building diverse teams and games communities, and it is constantly being expanded. For example, it offers a guideline for respectful interaction with one another as well as legal tips for achieving greater diversity in companies. In addition, game takes part in various discussions, talks and events on diversity, provides numerous contacts in this area and contributes experience from the games industry.



Further information is available on www.game.de/en/diversity and www.hier-spielt-vielfalt.de/en

Interview

Diversity and fair play in esports



Clara Dietrich

Clara Dietrich has worked at the esports player foundation since 2020 and is now Team Lead Marketing and Communications. Her passion for esports was sparked by a lecture in her master's degree programme. Before joining the epf, she worked for four years at a performance marketing agency, where she headed the social media marketing team for three years.

Millions of people in Germany are esports enthusiasts, and ever more video game players in this country are active in esports themselves – at LAN parties, in online leagues or at the professional level in major esports tournaments. Diversity, inclusion and fair play are essential for the long-term success of esports and for the full and accurate representation of the esports community. But how can diversity in esports be made more visible? Clara Dietrich, Team Lead Marketing and Communications at the esports player foundation, in an interview:

Often, you see mainly men playing esports. How diverse are esports and what role do values such as diversity and equal opportunity play?

On the one hand, there's great diversity in esports. That's certainly true for the game community, because people of all genders and backgrounds play games around the world. On the other hand, the non-male part of the esports community still isn't visible enough. Our industry and esports, with their young audience of millions, have an important responsibility here, to create an inclusive environment for all players and set an example. Also, esports can only be socially and economically successful in the long term if the entire community participates. For example, the fact that around half of players worldwide are women, but only

a small proportion of them are visible in esports, just shows how much potential is still going untapped. Fortunately, more and more esports companies are showing a strong commitment and starting to market to these diverse target groups.

How can diversity in esports be made more visible?

There are lots of different ways to make diversity in esports more visible and promote a more inclusive community. Even small steps count – the important thing is to get started. One example: here at the esports player foundation, we worked with Deutsche Telekom and SK Gaming in the Equal eSports initiative to set up a unique promotional programme for women and non-binary people in esports that offers them an additional “stage” for their skills. The programme is already supporting two diverse esports teams. And this is about creating role models for society as well, and paving the way for further diverse talent to pursue a professional career. Making diversity in esports more visible also goes hand in hand with communicating values. Because unfortunately, an open culture can also run into aggressive opposition – for example, in the form of hate speech. Values like fair play are extremely important in countering these loud, toxic minorities in the games community.

What can game companies in the esports sector and the teams themselves do to combat hate speech and promote fair play?

Like other popular digital media, games and esports are affected by the larger societal challenge of hate speech online. To take on this problem, we’ve joined forces with partners from the government and business worlds to launch the Speak Up Esports campaign. Together with well-known video game and esports players and other experts, we’ve taken a strong, loud stance against hate speech online. To combat it, esports organisations need to put measures such as clear codes of conduct for fair and respectful interaction – like the one in our Fairplay Guide for EA SPORTS FC – on their long-term agenda, along with trainings and inclusive events and activities. This has to include transparent external communication that shows that a company is taking a strong stance against toxicity and hate speech and doesn’t offer a breeding ground for it.



Read more about the work of the esports player foundation on page 62.



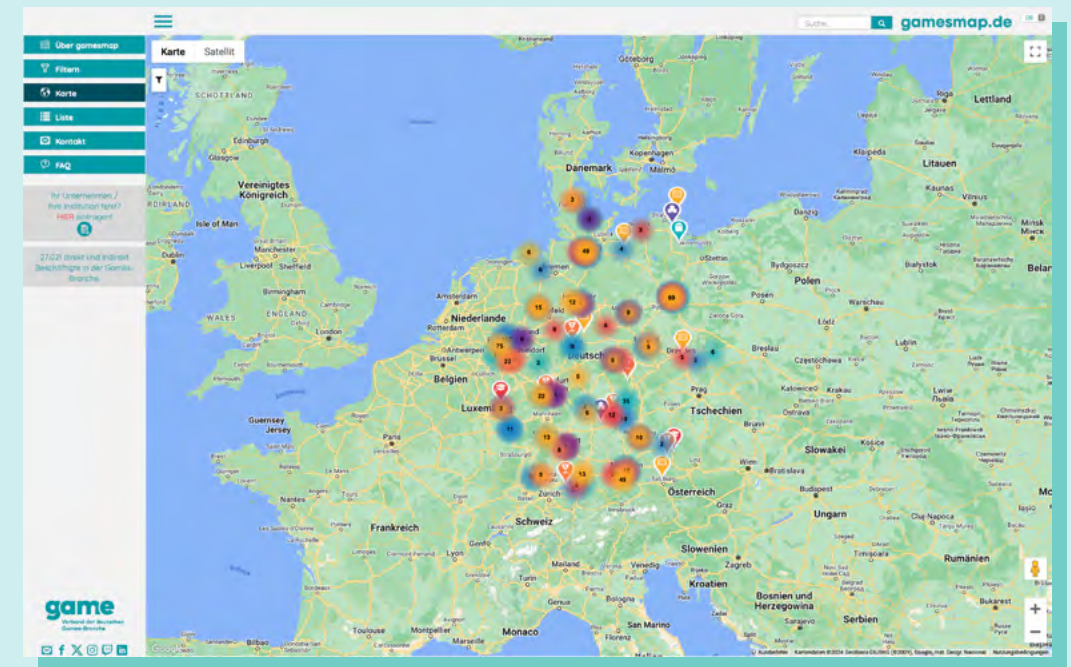
Further information is available on www.esportsplayerfoundation.org/en

gamesmap.de

game – The German Games Industry Association launched its online directory of the games industry with gamesmap.de. gamesmap.de uses an interactive map to visualise over 1,800 entries, including more than 950 game developers and publishers, 700 media, technical and financial service providers and some 150 educational institutions that offer courses relevant to the games industry.



Further information is available on www.gamesmap.de/en



Environmental and climate protection in the games industry

The consequences of the climate crisis are already very noticeable today. We have all been made aware of what will happen if businesses, governments and society at large don't act quickly to stop the crisis from intensifying further.

The games industry takes its social responsibility in this area very seriously. In Germany alone, 76 per cent of games companies are already taking concrete action to operate even more sustainably, including, for example, implementing savings measures in the areas of energy and heating and using green electricity. And around the world, growing numbers of games companies have committed to far-reaching environmental strategies.

game, too, is doing its part to protect the environment. The association and its subsidiaries – the Entertainment Software Self-Regulation Body (USK), the Foundation for Digital Games Culture, the esports player foundation, the collecting society VHG and game events – are completely climate-neutral. In addition, in June 2021, game became an associate member of the *Playing for the Planet Alliance*, an environmental partnership between the UN and the games industry. In joining the alliance, game committed to measuring its environmental impact annually, implementing measures to achieve complete climate neutrality – which it has already accomplished – and informing games companies as to how they can reduce their impact on the environment. One way game does this is by publishing a free guide on environmental and climate protection. In early 2022, game joined forces with gamescom co-organiser Koelnmesse to launch the *gamescom goes green* sustainability initiative. The new sustainability concept made gamescom the first climate-friendly game event of this size. Every year, further steps are taken to avoid and reduce CO2 emissions, and all remaining emissions from the principal event are 100 per cent offset in cooperation with the climate experts at ClimatePartner. Furthermore, gamescom has launched *gamescom forest*, a sustainability project with the goal of reforesting a climate-stable mixed woodland near Bayreuth, financed in part through donations from the community as well as exhibiting companies at gamescom.



Further information is available on www.game.de/en/game-environmental-guide

Interview

Environmental commitment at Playing for the Planet Alliance



Lisa Pak

Lisa is a consultant at the United Nations Environment Programme and Head of Operations at Playing for the Planet. Her mission is to accelerate the speed at which the game industry and its players take action for the environment. She has been active in the game and advertising industry for over ten years and has expertise in various areas, including strategic partnerships, ad monetisation and user acquisition.

Games companies from around the world have joined the Playing for The Planet Alliance, an initiative launched by the United Nations in 2019, to combine efforts for the environment. In this interview, Lisa Pak from Playing for the Planet explains which environmental protection measures are particularly effective and how companies in the game industry can get even more involved in the fight against climate change.

What is the goal of the Playing for The Planet Alliance? How do you work together with game companies?

At Playing for the Planet, we aim to build a community where studios collaborate rather than compete, providing them with knowledge, guidance and tools for their environmental journey. Members make specific, measurable commitments on sustainability, from reducing carbon emissions to integrating green activations in games. Progress is measured annually in our Impact Report.

Which measures have been particularly successful to date?

Carbon footprinting can be complex, and many studios seek support. Our report, *Untangling the carbon complexities of the video gaming industry*, created jointly with the Carbon Trust, lays the foundation for our industry-specific carbon calculator, which is set to launch in 2025. The Green Game Jam, where studios collaborate on environmental goals, has also been successful. Over the past four years, participating games have planted over 2.5 million trees and raised over USD 1.5 million for environmental causes.

What can games companies do to help protect the environment?

The games industry's superpower is its reach, with 3.3 billion players globally. Studios can creatively engage players on environmental issues. Internally, companies can appoint sustainability leads, offer more plant-based meals and allow employees to opt out of company goodies, to name just a few of the easiest steps. Measuring, reducing and offsetting carbon emissions is essential for every organisation.

What can policymakers do to increase environmental protection efforts in the game industry?

Introducing new policies such as the CSRD regulation is helping to ensure that there is a level playing field with clear expectations as to what the digital economy should deliver. That is helpful, and it is triggering action from studios that before may have been unsure what they could do or should do. But there is always more that can be done. Often the challenge isn't creating new guidance but hopping over the fence to transfer knowledge and best practices from one sector to another.



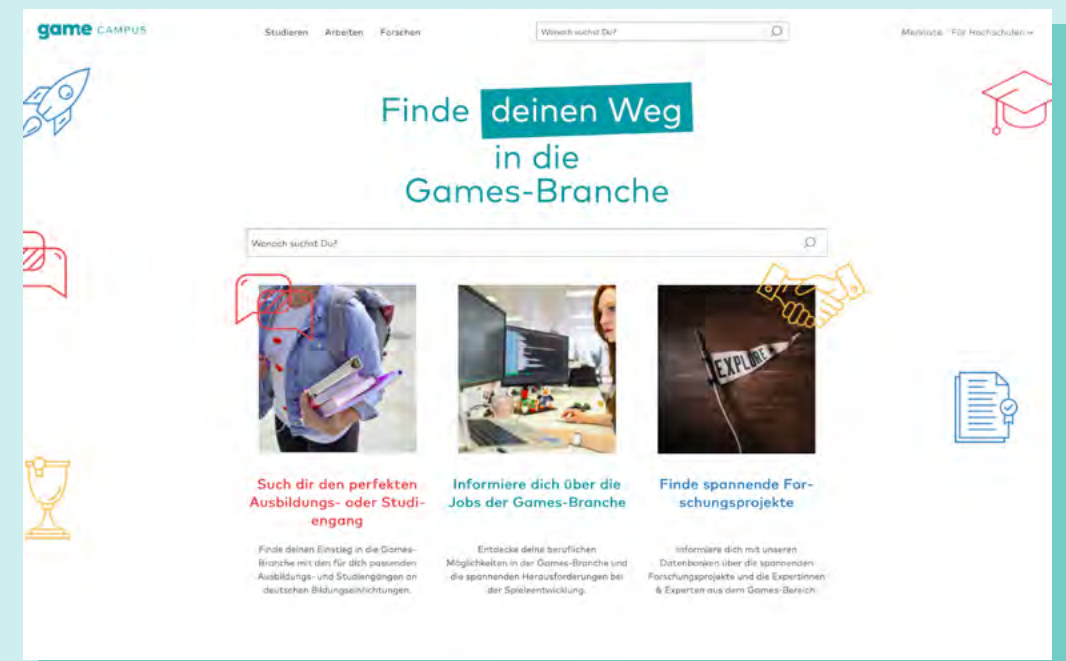
Further information is available on www.playing4theplanet.org

gamecampus.de

With gamecampus, game offers a comprehensive view of the working world of game development and points the way to a career in the games industry. The Studieren (Studies) section provides an overview of educational opportunities in Germany related to games. It includes a map showing the study and training opportunities that exist at the respective locations, and which subject areas the educational institutions specialise in. Under Arbeiten (Work), you will find profiles for jobs in the game industry, facts and figures on the game market, our comprehensive *Start-UP! Guide* with valuable tips on founding a studio, information on the diversity initiative Hier spielt Vielfalt and our gamesmap, the interactive map of all companies and institutions in the German games industry. The Forschen (Research) section shows the potential of games beyond their entertainment value, outlines the exciting research projects currently being carried out in this field and introduces the experts working with the potentials and possible applications of video games.



Further information is available on www.gamecampus.de



Our 500+ members

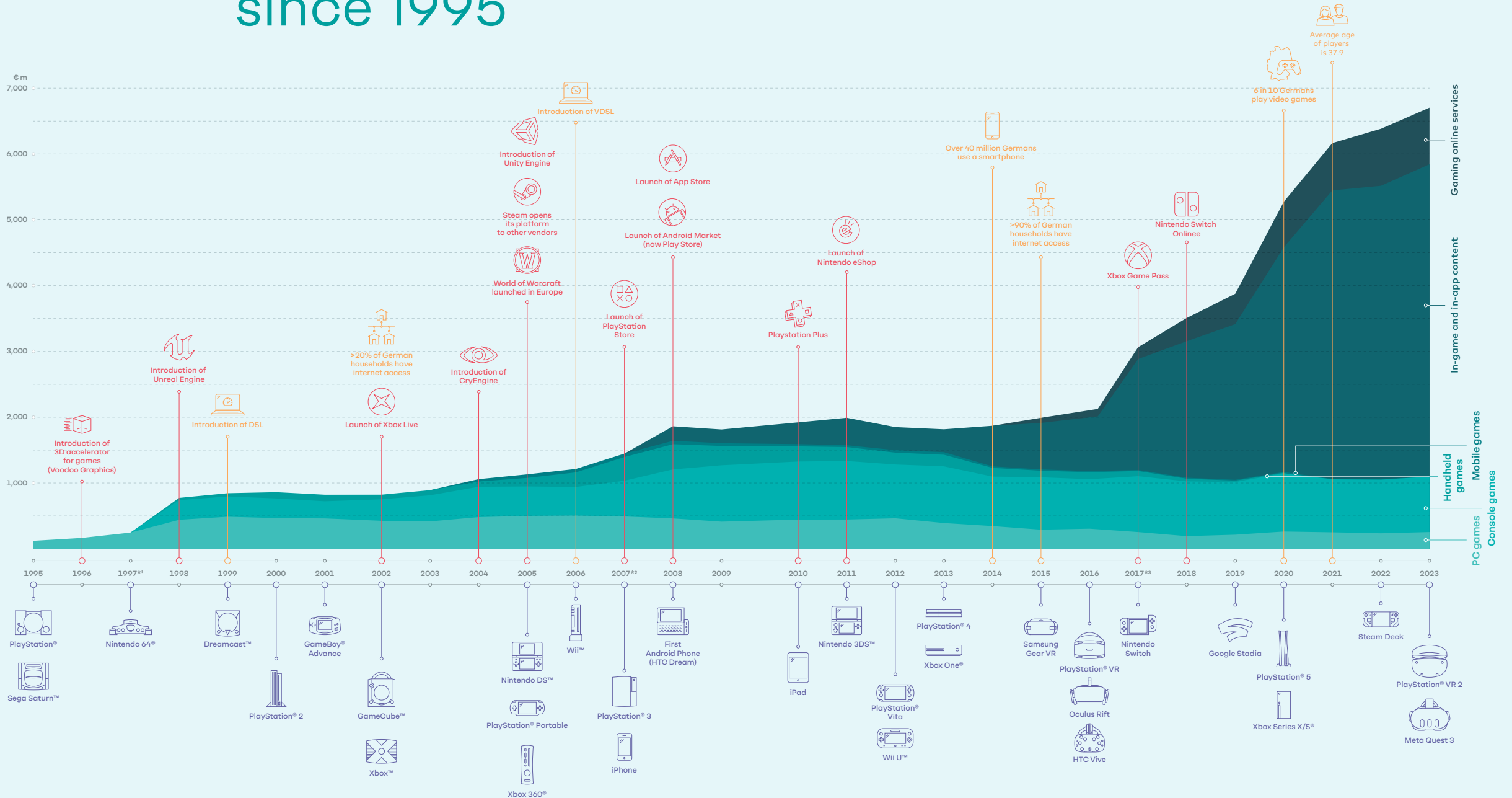


TUP Management 2Cap 2ndWave 2tainment 4Players 4-Real Intermedia 505 Games
A MAZE Abenteuerpakete Acid Mines Software Activision Blizzard Deutschland Actrio Studio
ad-artists adspree media ADVANT Beiten Rechtsanwaltsgesellschaft mbH Aeria Games Aerosoft
Aesir Interactive Ahoi Entertainment Airborn Studios aktronic Software & Services Alchemical Works
Altagram Altigi Andarion Games Anderie Management AnotherWorld VR Application Systems
Heidelberg ARTANA PartG articy Software Assemble Entertainment astragon Entertainment Audiency
AudioCreatures Awesome Prototype AWS Amazon Web Services EMEA SARL Baker McKenzie Rechts-
anwaltsgesellschaft mbH von Rechtsanwälten und Steuerberatern Bandai Namco Entertainment
Germany Barrel Roll Games BaseStack Bäumer Berger Nikutta BeamNG Beardshaker Games
Bedenk Design Benjamin Lochmann New Media Pixel Maniacs BenQ Deutschland Beyond Worlds
bib International College Bigpoint bildundtonfabrik btF - Berlin BIMM University Berlin Binary Impact
b-interaktive Bippinbits Birnchen Interactive Birnchen Studios bitComposer Interactive Bitfall Studios
Bitteschön.tv Brückner Brückner Black Forest Games Black Screen Records Blankhans Blossom Seeker
BlueBottle bm - gesellschaft für bildung in medienberufen mbh -School of Games- Boehmert und
Boehmert Anwaltspartnerschaft Booster Space Events und Consulting Boxelware Brainseed Factory
Brehm und v. Moers Rechtsanwälte Buchwald Interactive Bunlysh Studios BUNTSPECHT Film & Digitales
BXDXOMarketing Services ByteRockers Games Bytro Labs Caipirinha Games Capcom Entertainment
Germany Capcy Europe celrage Centigrade Chasing Carrots Chimera Entertainment Chronos North
Chronos Unterhaltungssoftware CipSoft Cloud Imperium Games Limited CMS Hasche Sigle Coast-
Games Codeularity ColdFire Games Cologne Institute for Information Systems Com2uS Europe
ComputeC Media Copy Paste Games CoreCraft Crayon Games Creative Exhibitions Promotions
CreativeMod CreneticStudios Crit Crew Crunchy Leaf Games Crytek Cubidoo Entertainment
Curatomic Curvature Games Cyber Manatee DACS Labs Daedalic Entertainment Deck 13 Interactive
Demigod Dynamics Designakademie Rostock Dico Deutschland DigiTales Interactive DIPLOMA
Hochschule DOTW EarReality EdenSpiel EGOSOFT Electronic Arts ELEET GAMES Elysium Game
Studio Emergo Entertainment Encurio Endava Envision Entertainment Epic Games Germany ESBD -
eSport-Bund Deutschland ESL Gaming EVENT.Spaces Evil Grog Games Exit Games explore Studio
Facebook Germany FAKT Software Fantastic Foe Farbspiel Interactive FDG Entertainment Fein
Games Fiery Things Filmakademie Baden-Württemberg FISHLABS fivefingergames Flow Fire Games
Flying Sheep Studios Follow - Agentur für Social Media FSM Food for Thoht Media Force of Disruption
Freaks 4U Gaming FULL STEAM Funatics Software Fusion CampusGames Kompetenzzentrum Fusion-
Play gaertner pr GALLAFILZ - Agentur für Kommunikation und Fundraising Game Farm Game Seer
Venture Partners Gamebook Studio HQ GameBoot GameDuell GameExPro Gamefairly GameFlow
Studios Gameforge AG Gameloft GamerGrid Games & XR Mitteldeutschland GAMES ACADEMY
Games Foundation Games Ground Games Industry Network GAIN games.nrw GamesCoin Group
GameUp! Software- und Gamesforum Rheinland-Pfalz Gamify Now! Gamigo Advertising gamigo AG
gamigo Portals gamigo Publishing AG Gaming Minds Studios Gaming-Aid Gamma Minus GCRadix
Gentle Troll Entertainment GentleNerds Gentlymad Studios Gen-Up GIANTS Software Entertainment
Glome GLÜCK Berlin Werbeagentur Godewind Google Germany GoraGames GoVersity GRAEF
Rechtsanwälte Grimbart Tales grownarts GvW Graf von Westphalen GZM Cosplay Management
halbautomaten Kommunikationsdesign Halycon Media Hamburg Kreativ Gesellschaft Hammer Labs
Happy Tuesday HAW - Hochschule für Angewandte Wissenschaften Hamburg Headup High Passion
Studios Hochschule Asburg Hochschule Bonn-Rhein-Sieg Hochschule Darmstadt Fachbereich Media
Hochschule der Medien Stuttgart Hochschule Harz Hochschule Macromedia Campus Berlin Hochschule
Macromedia Campus LeipzigMacromedia Hochschule Macromedia Campus Stuttgart Hochschule
Mittweida University of Applied Sciences Hochschule Neu-Ulm Hochschule Offenburg Holocafe
HOLOGATE holotide Horizont Computergrafik HTW Berlin - Hochschule für Technik und Wirtschaft
Berlin - Hochschule id Software UK Limited IHDE und Partner Rechtsanwälte ILOVIT IME - Interactive
Media & Entertainment In a nutshell - kurzgesagt INBEX Systems INDIE Hub Initium InnoGames
inSight gg INSTINCT3 INVR.SPACE Ipsos Irox Games it Matters Games IU Internationale Hochschule
Ivy Juice Games Jan Wagner JiW-Games JMG Brands & Talents Joindots Jörg Müller-Lietzkow Jumpy

Bit Jung von Matt NERD K5 Factory Kabuto Deutschland kaleidoscube Kalypso Media Group Keen
Games Key17 Games keySquare Network KIDS Interactive King Art Kitto Klang Games Koelnmesse
Kolibri Games Konami Digital Entertainment Konsole Game Labs Konsonautic Entertainment Korion
Interactive kr3m media Kreative Kraut LAB132 Leipziger Messe Letsplay4Charity Lighthouse Entertain-
ment Limbic Entertainment Lingoona Linked Dimensions Lionmoon LITE Games LOOK BEHIND YOU
Barbat & Neumann LootBoy Lootzif Lost The Game Studios Lyrebird Game and Audio Mad About
Pandas marbis Marchsreiter Communications Marketpoint Markt und Technik Verlag Markus
Wiemker Game Design & Game Studies Maschinen-Mensch Massive Miniteam maxupport Media-
design Hochschule für Design und Informatik Mediakraft Networks medianet berlinbrandenburg
Mediatrust Mediencampus Dieburg Hochschule MegaDev Megagon Industries Meister Cody Metaboli
metricminds Microsoft Deutschland Midasplayer MINKZ Gaming Mirebound Interactive Misc Games
AS mixed.world MobiusCode Monokel Monster Computer Technology Mooneye Moonlit Games
Motek Production Mothership Talents MSM.digital Communications Mucks! Games MYI Entertainment
Navel Neox Studios NERDIC NerdStar nesemann & grambeck Steuerberatungsgesellschaft netmin
games NightinGames Nimrod Rechtsanwälte Nintendo of Europe Nordemann Czychowski und Partner
nordmedia - Film- und Mediengesellschaft Niedersachsen und Bremen Nukklea NVIDIA OCIRIS Off The
Beaten Track OMG FUSE OneManOnMars Art and Games Only Sound opticool gaming studio Osborne
Clarke Rechtsanwälte Steuerberater Partnerschaft Osmotic Studios Ostfalia Hochschule Fakultät
Verkehr-Sport-Tourismus-Medien Painless Developments Paintbucket Games PandaBee Studios
Pangolin Park Perfuse Entertainment Pfeffermind Consulting Piranha Bytes Pixelsplit Pixeltown PIXL
VISN | media arts academy PLAION planetlan Playata Playersjourney Playing History Playtonic
playzo Pockethost PONG.Li Studios Pro Gamers Group Project Sunset Promotion Software Pumper-
nickel Studio Quantumfrog Quinke Networks Radical Fish Games rain productions Rappbit Games
Rat King Entertainment Realgames Realmforge Studios remote control productions Resilient TechEd
RetroBrain R&D Rho-Labyrinths Riot Games Services Rocket Beans Entertainment ROCKFISH Games
rokaplay ROTxBLAU Rubin-Games Studios S4G School for Games SAE Institute Samsung Electronics
Sandbox Interactive seal Media Second Stage Secret Item Games Selkies Interactive Serious Brothers
SideQuest Studios SilentFuture Silver Seed Games simulogics SisyFox Sky-E Red Skyward Assembly
Sleepy Seed Slow Bros Slgerfly Smyrking Floop Studios Snowprint Studios Germany Soapbox Interac-
tive Soba Studios SOFTGAMES Mobile Entertainment Services Sony Interactive Entertainment Deutsch-
land Soulvén Spaceflower Sparrow Games Spellgarden Games SpielFabrique 360° Spiellabor der
Hochschule Furtwangen Spoonful Games Square Enix SRH Hochschule Heidelberg Stellar Cartography
Interactive Sticky Stone Studio Stonebrick Studios Storyeller Stratosphere Games Studio Fizbin
Studio Seufz Enterprises Studio Sterneck Super Crowd Entertainment Super Fantasy Games Sviper
TaKeTV Take-Two Interactive Taylor Wessing Partnerschaftsgesellschaft TCI Rechtsanwälte Partner-
schaft Schmidt TeamSpeak Systems Technische Hochschule Köln - Cologne Game Lab Technische
Universität Darmstadt Fachgebiet Multimediale Kommunikation Serious Games Gruppe Telescope Game
Studios Tencent Games Terovania the Good Evil TheGamingvan Thera Bytes THREAKS ThreeDee
Thunderful Publishing Tikaro TikTok Germany Tiny Crocodile Studios Tiny Roar Tivola Games tobspr IT
Solutions ToLL Relations Tom Putzki Consulting toneworx Toplitz Productions Torched Hill Torpor
Games Totally Not Aliens Toukana Interactive tox² interactive Trapped Predator Travian Games
Treibrad Games Trollgames Trusted Events Turtle Knight Games Twin Drums Twitch Interactive
Germany Ubisoft Blue Byte Ubisoft UKE BOSSE UniGlow Entertainment United Games Entertainment
University of Europe for Applied Sciences Upjers Upright Games Valve Vest Games VIL Virtual Reality
Berlin Brandenburg Vizta Digital Vogel und Partner Rechtsanwälte VoodooDuck Walk The Frog Walking
Tree Games Warner Bros. Entertainment Water waza! Web Media Publishing Webedia Gaming well
played bars weltenbauer. Software Entwicklung Werkmeister & Company WhalesDontFly H&F Wild
River Games WOLFGANG WALK Wolpertinger Games Wooga Wunderfax Xsolla Berlin XYRALITY
Yager Development Yet Another Indie Game Studio Zeitland media and games ZeniMax Germany
Z-Software

10

Development of the German games market since 1995



Source: GfK, App Annie, Statista, Wikipedia.

*1 Measurement game consoles and handhelds started in 1997.

*2 Measurement subscriptions and virtual goods and additional content started in 2007.


*3 Measurement converted for mobile games in 2017. © game 2024

**game - The German Games
Industry Association**


Friedrichstraße 165
10117 Berlin


+49 30 2408779 0


info@game.de
www.game.de/en

 [game_verband](#)

 [game.verband](#)

 [game_verband](#)

 [game_verband](#)

 [game-verband](#)