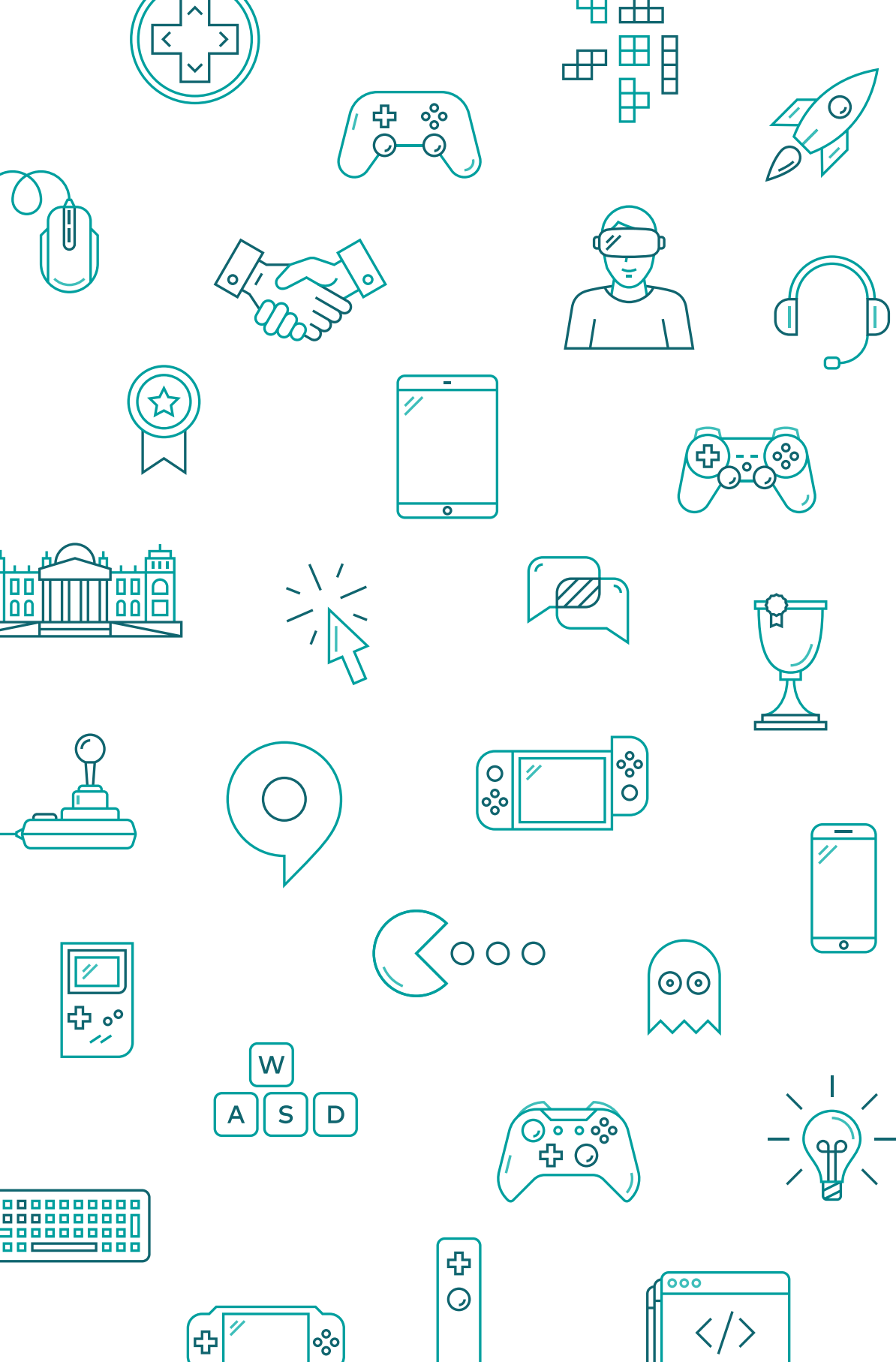


# Annual Report of the German Games Industry 2022





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Dear readers,

From the ongoing Covid-19 pandemic to the parliamentary elections, 2021 was an eventful year for the games industry in Germany. Computer and video game development initially continued on a positive path as people began working from home at the beginning of the pandemic, but as time went on, the inability of teams to do their creative work together in person presented significant challenges, and growing numbers of titles were delayed. At the same time, many games industry events were either cancelled or only took place online in 2021. Consequently, all-important networking and the search for publishers and investors was still difficult for many companies, particularly small ones.

But alongside these challenges, there were a number of highly positive developments: for example, the German games market managed to continue the impressively strong growth from 2020. Sales revenue from purchases of games and gaming accessories grew by 17 per cent, to about 9.8 billion euros. One year earlier, the industry experienced extremely high growth of 32 per cent. One of the primary reasons for the sharp upsurge is the increased number of players. Their numbers had already grown by 5 per cent in 2020; in 2021, even more players joined their ranks. During the pandemic (both the first and second year), computer and video games played entirely to their strengths as a social medium – while we all quickly tired of the endless video calls, games offered a much more exciting form of social interaction. App versions of classic board games and card games, shared experiences of epic adventures in online role-playing games or even digital tournaments: millions of Germans took advantage of the incredible diversity of games to keep in touch with friends and family and spend time having fun together. Today, six out of every ten Germans play games.

The central theme of gamescom 2021 was a perfect fit for this development: *Games: The New Normal*. Once again, the world's biggest event for computer and video games couldn't be held on location in Cologne, but that didn't put a damper on the community's enjoyment of gamescom;

people in more than 180 different countries followed the events in 2021. The grand opening show *gamescom: Opening Night Live* reached around 5.8 million live viewers. In all, 13 million people watched gamescom shows in 2021 – an increase of 30 per cent compared to the previous year.

2021 was also an important year for the German games industry in political terms. The German parliamentary elections in September resulted in the formation of the first governing coalition between the political parties SPD, Bündnis 90/Die Grünen and FDP. For the games industry, this meant a move from the Federal Ministry of Transport and Digital Infrastructure to the Federal Ministry for Economic Affairs and Climate Action, headed by Vice Chancellor Robert Habeck. This change in leadership also affects the government's games department, which was only just founded in 2021 and worked in close consultation with the games industry to develop the federal government's first games strategy. All we have to do is take a look at the games industry to see how important these developments actually are. Along with the introduction of games funding at the federal level, these changes have made significant improvements to the underlying situation for games companies, and they are already having a noticeable effect. For example, after the 20 per cent jump in 2020, the total number of games companies grew by a further 5 per cent within a single year,

to 786. At the same time, however, games companies still rate Germany's international competitiveness in the industry as relatively low, as our game industry barometer indicated in mid-2021. As we can see: with federal games funding, the government games department, the games strategy and numerous improvements at the state level, we have made enormous progress in the past few years in making Germany a top location for the games industry. But Germany still lags behind other games locations – countries like France, Canada and England already began providing strategic support to their games industries many years ago. If we want to tap the full cultural, economic and technological potential of the games industry in Germany, we still have a lot of work ahead of us. But the German games industry expects good things to come of this new federal government, as our game industry barometer also indicates. Consequently, the country is in a strong position for further positive growth.

This annual report provides an overview of the various developments in the games industry in Germany.

I hope you find it to be an enjoyable read.

Felix Falk  
*Managing Director of game –  
the German Games Industry Association*

# 01 Players in Germany



Games are more popular in Germany than ever before: around six out of every ten Germans play computer and video games. 59 per cent of the population between the ages of 6 and 69 reach for their PC, console, smartphone or tablet to dive into the digital world of games.

**The past two years witnessed a significant increase in player numbers, with some 6 per cent more people playing games than in 2019.**

Taken together, the past two years witnessed a significant increase in player numbers, with some 6 per cent more people playing games than in 2019 – that's a record-breaking number of Germans playing games. And the genders are essentially equal here: 48 per cent of players are women and 52 per cent are men. The continuous increase in the number of players demonstrates that, even after the sharp spike during the pandemic in 2020, millions of Germans are still passionate about games.

50- to 59-year-olds continue to make up one of the largest groups of gamers: approximately one fifth of German video game players are in this age bracket. Along with the over-60s, they make up nearly a third of the video game players in Germany. Many people who played games in the 1980s and 1990s have stayed true to games in old age. In recent years, this effect has led to a consistent increase in the average age of video game players in Germany, which rose from 37.4 in 2020 to 37.6 in 2021.

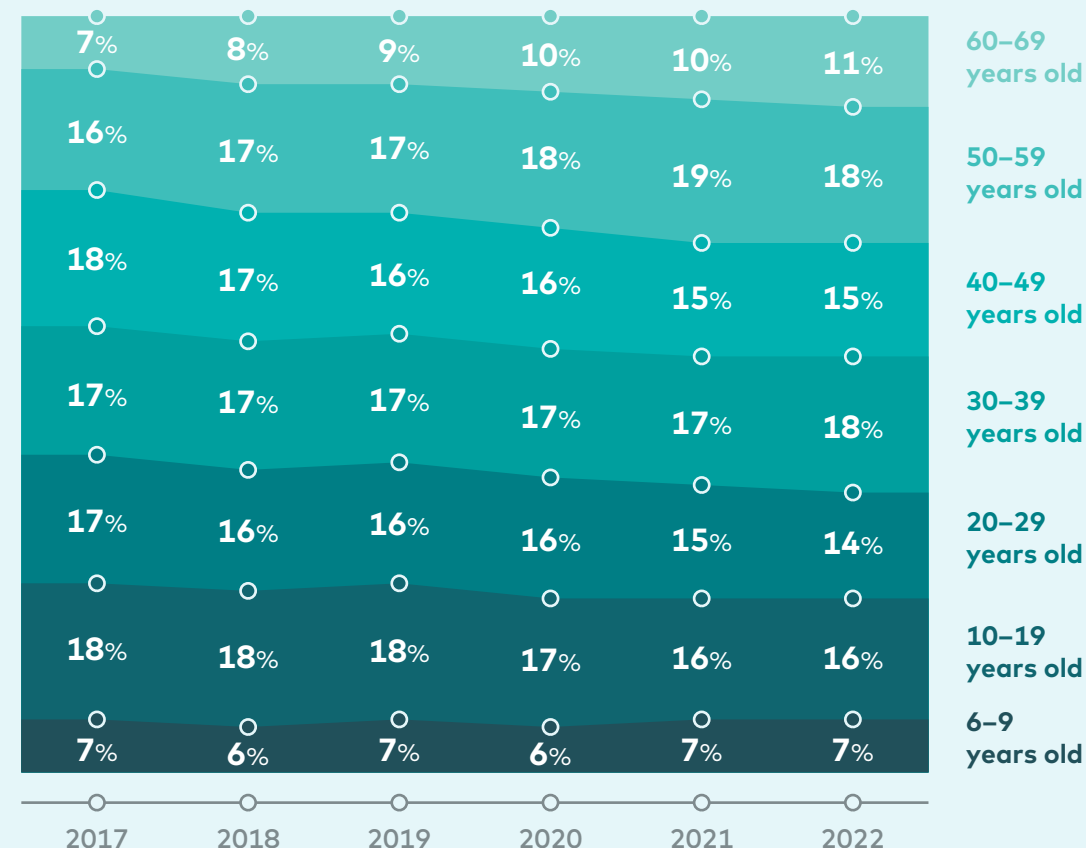
Players in Germany most frequently reach for mobile devices to play games. Smartphones expanded their lead as the most-used gaming platform, gaining an additional 900,000 new players last year. Approximately 23.5 million gamers play on their smartphones.

## Around 6 in 10 Germans play video games

Players who play at least occasionally



**59%**  
of Germans play  
computer and  
video games



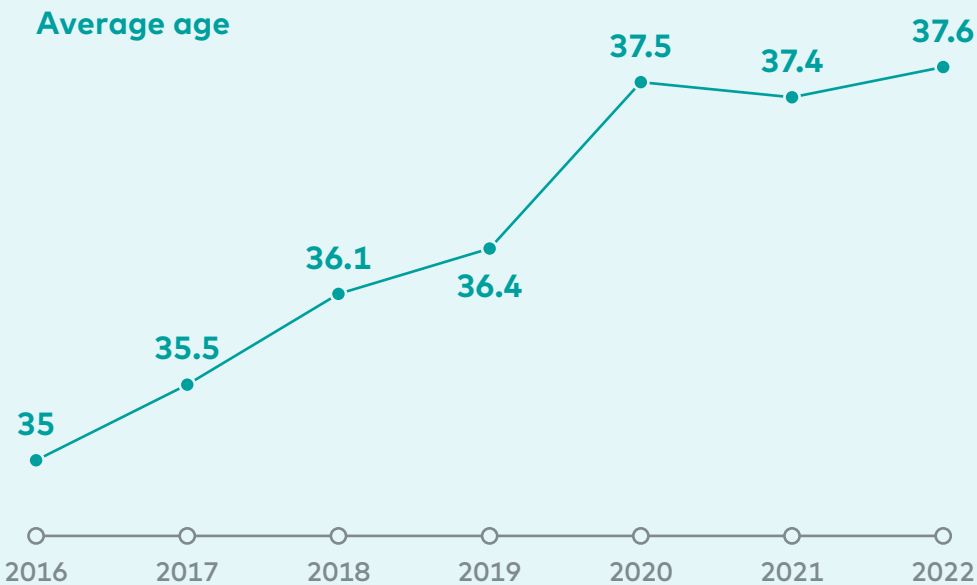
Please note: for better international demographic comparability, the age range taken as a basis for determining the share of players in the overall population was adjusted to 6-69 years.  
Source: GfK. © game 2022

# Players are over 37 years old on average



48%

52%



Source: GfK ©. game 2022



Players in the 50–69 age range makes up one third of all German video game players.

After dropping from 11.2 to 9.9 million players in 2020, tablet computers also regained some of their popularity. A total of 10.7 million people in Germany used tablets as gaming devices in 2021 – an increase of 800,000 new players compared to the previous year. On smartphones and tablets alike, mobile gaming is extremely popular, with around 27.3 million enthusiasts across Germany. Video game consoles also gained ground, successfully maintaining their 2020 ranking as the second-most widely used platform: 17.8 million people played on consoles such as the Nintendo Switch, PlayStation or Xbox in 2021, 800,000 more than the previous year. PCs, however, were once again in less demand among video game players. In 2021, there were just 14.3 million PC gamers instead of 15.2 million – a further loss of 900,000 players.

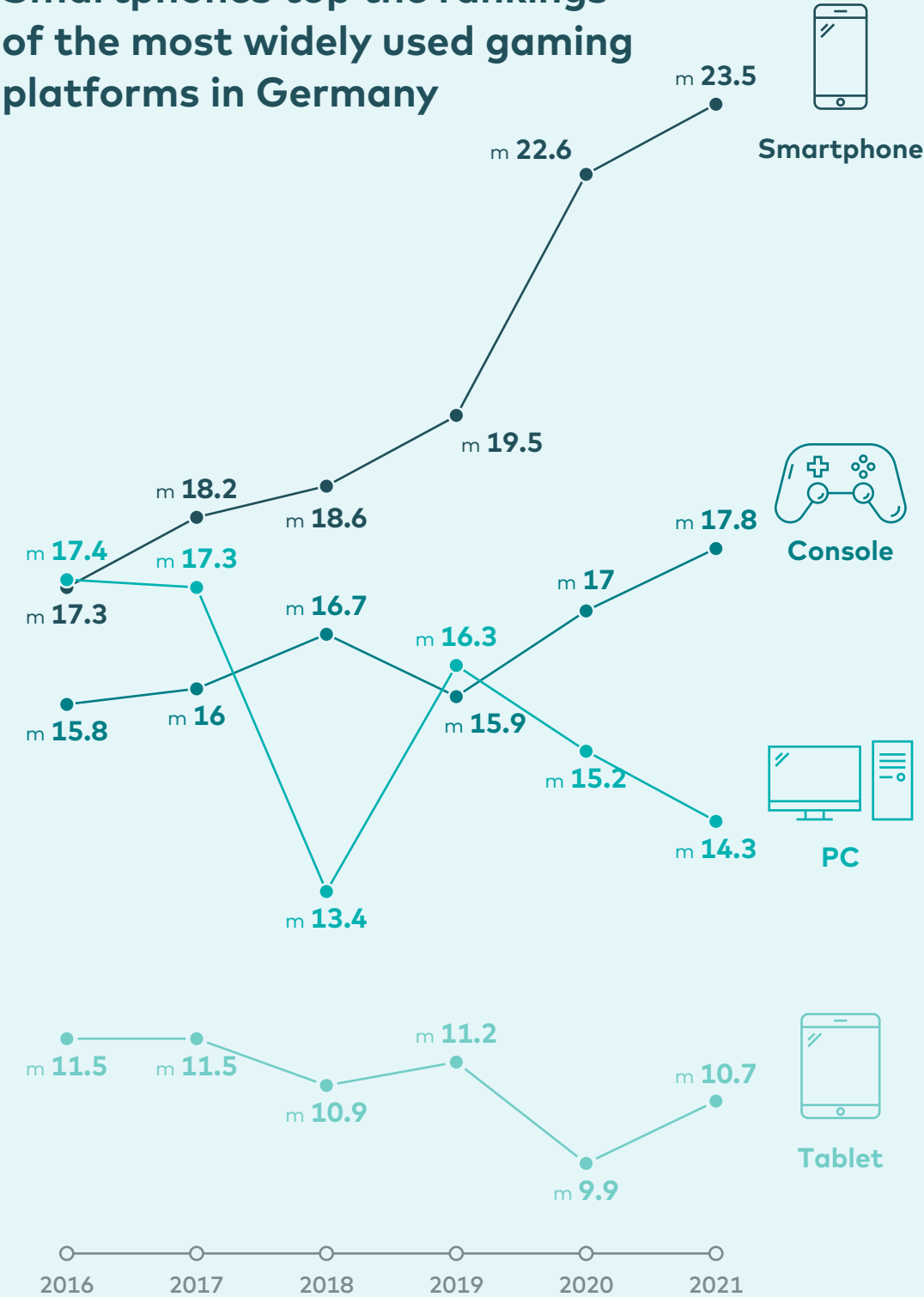
game's top 20 charts show which games and game genres players in Germany love most: once again, the top spot of the bestselling PC and console games in 2021 was taken by the latest edition of the EA football simulator – *EA SPORTS FIFA 22* (EA), followed by the open-world game *GTA V* (Rockstar Games) in second place. In third place was the racing game *Mario Kart 8 Deluxe* (Nintendo). Fourth and fifth place were held by *Farming Simulator 22* (Giants Software) and *Minecraft* (Microsoft). This continues a trend from the previous year: games with multiplayer modes that allow players to play with or against one another were at the top of the PC and console game charts once again in 2021. The games were purchased both as physical media and as downloads.

# The 20 best-selling PC and console games in Germany in 2021

|    |                                      |                     |
|----|--------------------------------------|---------------------|
| 1  | EA SPORTS FIFA 22                    | Electronic Arts     |
| 2  | Grand Theft Auto V                   | Rockstar Games      |
| 3  | Mario Kart 8 Deluxe                  | Nintendo            |
| 4  | Farming Simulator 22                 | Giants Software     |
| 5  | Minecraft                            | Microsoft           |
| 6  | Super Mario 3D World + Bowser's Fury | Nintendo            |
| 7  | EA SPORTS FIFA 21                    | Electronic Arts     |
| 8  | Mario Party Superstars               | Nintendo            |
| 9  | Ring Fit Adventure                   | Nintendo            |
| 10 | Call of Duty: Black Ops Cold War     | Activision Blizzard |
| 11 | Call of Duty: Vanguard               | Activision Blizzard |
| 12 | Pokémon Brilliant Diamond            | Nintendo            |
| 13 | Red Dead Redemption 2                | Rockstar Games      |
| 14 | Far Cry 6                            | Ubisoft             |
| 15 | Battlefield 2042                     | Electronic Arts     |
| 16 | Assassin's Creed Valhalla            | Ubisoft             |
| 17 | F1 2021                              | Electronic Arts     |
| 18 | Super Mario Party                    | Nintendo            |
| 19 | Animal Crossing: New Horizons        | Nintendo            |
| 20 | New Super Mario Bros. U Deluxe       | Nintendo            |

Source: Game Sales Data (GSD), ISFE  
This chart lists the games most often sold, physically and digitally, across platforms, for PCs and games consoles in Germany in 2021.

# Smartphones top the rankings of the most widely used gaming platforms in Germany



Source: GfK. © game 2022



# 02

## German market for computer and video games

The German games market's sales revenue record in 2020 was immediately followed by another record-breaking year in 2021. The industry achieved total sales revenue of approximately 9.8 billion euros from computer and video games and associated hardware, meaning that sales revenue grew by 17 per cent within one year.



**The German games market remains the largest in Europe and the fifth-largest in the world by global sales revenue.**

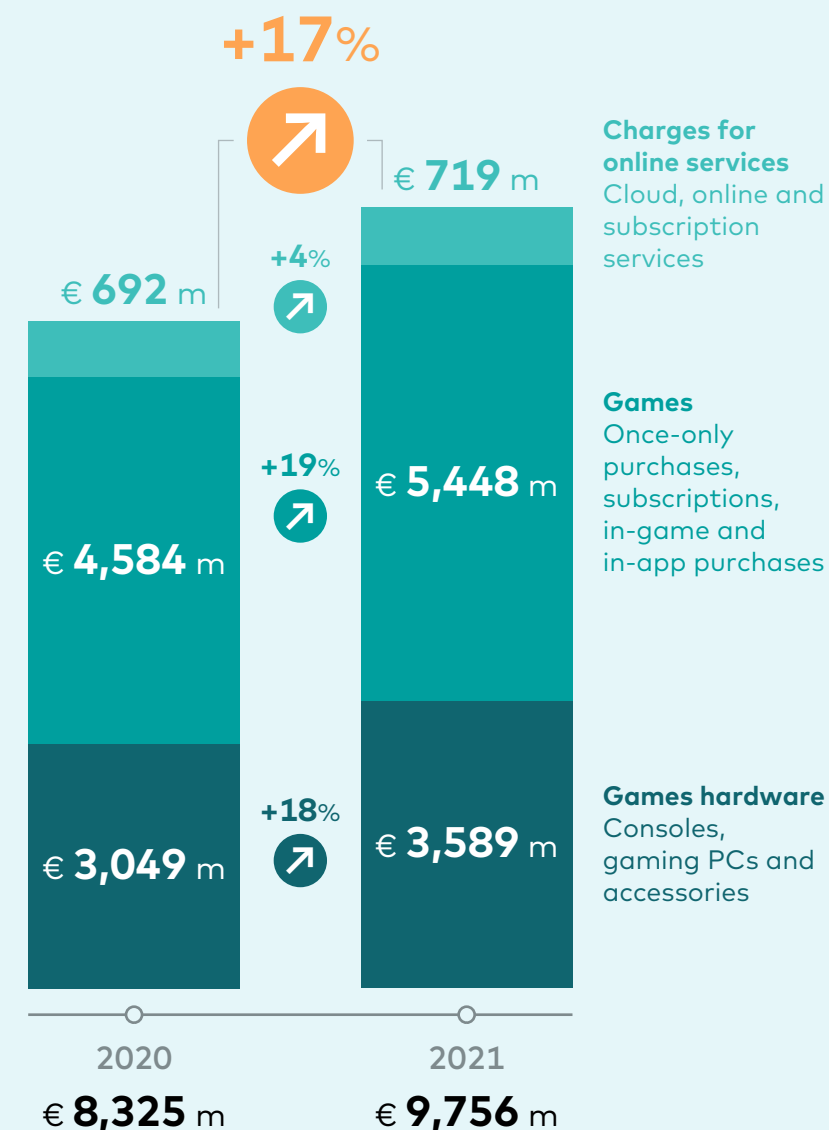
The demand for games hardware, particularly for video game consoles (+23 per cent) and accessories for gaming PCs (+22 per cent), as well as in-game and in-app purchases (+30 per cent), was the biggest driver of growth.

The German games market remains the largest in Europe and the fifth-largest in the world by global sales revenue. Games, games hardware and charges for online services: all three market segments posted growth once again.

Sales revenue from games hardware grew by 18 per cent overall to about 3.6 billion euros. Video game consoles were in particular demand in

2021: although retailers were often sold out of some models, sales revenue still managed to increase by 23 per cent to 808 million euros. Without delivery bottlenecks, this growth likely would have

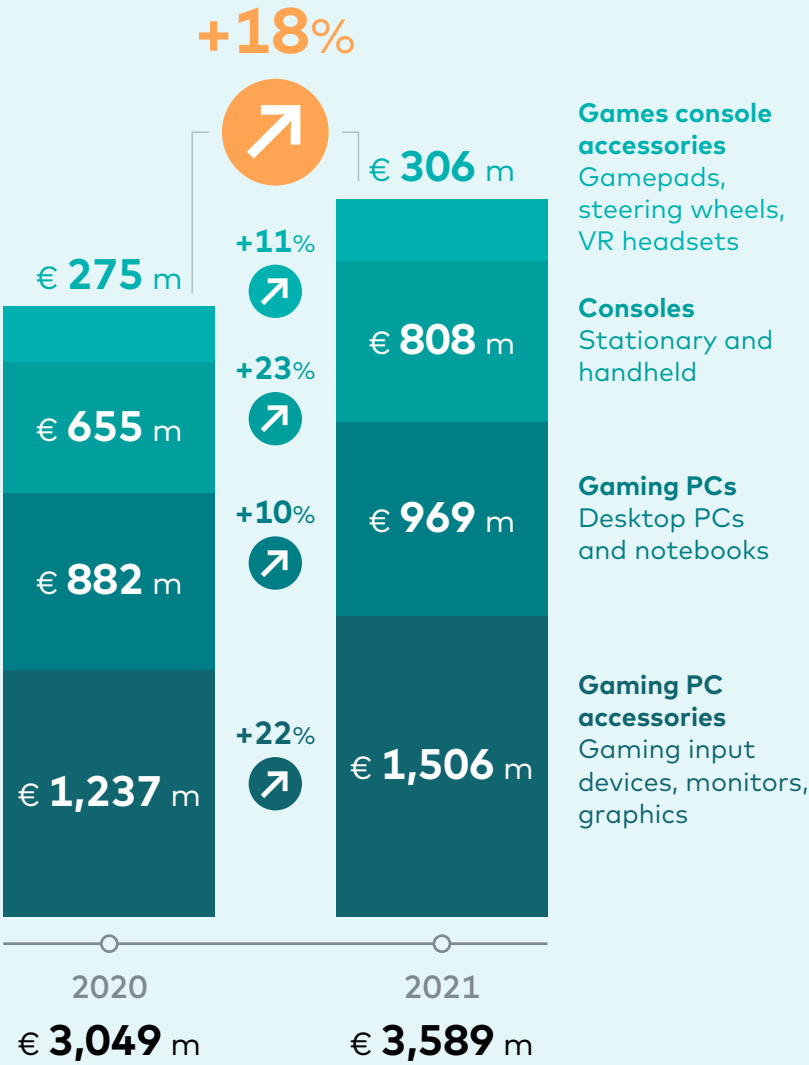
## German games market enjoys another growth spurt in sales revenue in 2021



**Please note:** the figures for sales revenue from games hardware in 2020 are different to those communicated the previous year. This is because GfK has modified the definition.  
**Source:** calculations based on the GfK Consumer Panel (2020/2021; n = 25,000), GfK Entertainment, GfK POS Measurement and data.io. © game 2022



# Sales revenue of games hardware in Germany rising significantly

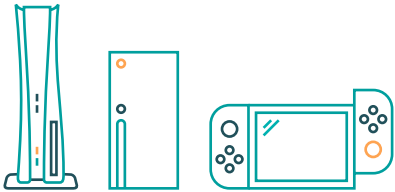


Please note: the figures for sales revenue from games hardware in 2020 are different to those communicated the previous year. This is because GfK has modified the definition.  
Source: calculations based on the GfK Consumer Panel (2020/2021; n = 25,000), GfK Entertainment and GfK POS Measurement. © game 2022

been even more significant. Approximately 1 billion euros were generated from sales of gaming PCs – both desktops and laptops. This is an increase of 10 per cent compared to the previous year. More and more video game players are also investing in accessories to make their experience even better. Demand for graphics cards, keyboards, mice, monitors and VR headsets for gaming is especially strong. Sales revenue from purchases of gaming PC accessories grew by 22 per cent to about 1.5 billion euros. In this segment, too, supply could not always match demand, particularly for graphics cards. Many items were available for purchase, but the price was generally far above the manufacturer's suggested retail price. Sales revenue from accessories for video game consoles increased by 11 per cent to 306 million euros in 2021.

In 2020, online services for gaming were among the top drivers of growth in the overall games market, with growth of 50 per cent. This level remained consistent in 2021. Sales revenue in this segment increased by a further 4 per cent to a total of 720 million euros. Gaming subscription services such as the Xbox Game Pass, EA Play and Ubisoft+ made a key contribution to this growth, with their sales revenue increasing by 22 per cent to 220 million euros. With these services, subscribers pay a monthly fee for access to large libraries of games that they can either download or play as a stream without installing them, depending on the service in question. Purely cloud-based gaming services, on the other hand, experienced a decline of 13 per cent to 63 million euros. One of the reasons for this is the fact that some cloud gaming functions have been integrated into other services free of charge, meaning that no independent sales revenues are generated for these functions.

On the whole, this relatively young market sector still seems to be in flux. For example, there are significant differences in the scope of services offered by the individual cloud gaming providers. Some of them only provide gaming-capable hardware in the cloud, whilst others serve as a platform where games have to be purchased on an individual basis. Other services in this sector are based on a subscriber model: for a fixed monthly price, subscribers can access an extensive library of games. At the moment, it's impossible to predict if one of these models will eventually outlast the others – and if so, which one. Other major companies, on the other hand, are just getting started with cloud gaming. Amazon, for example, launched Luna in early 2022; the service is not yet available in Europe. Sales revenue from online gaming services also fell by 2 million euros, to 437 million euros. These services are frequently offered for various games consoles and include – depending on the specific offer – free monthly



**Video game consoles were in particular demand in 2021: although retailers were often sold out of some models, sales revenue still managed to increase by 23 per cent to 808 million euros.**

games, games discounts, the ability to play online, or even cloud storage for saved games. Examples include PlayStation Plus from Sony Interactive Entertainment, Nintendo Switch Online or Xbox Live Gold from Microsoft.

Sales revenue from purchases of computer and video games grew by 19 per cent to about 5.4 billion euros in 2021. However, the individual segments of the sector developed very differently. Sales revenue from one-off purchases of games, for example, fell by 9 per cent to about 1.1 billion euros. Sales revenue from monthly subscription charges for individual games – a model that is common among online role-playing games such as *World of Warcraft* from Activision Blizzard or *Final Fantasy XIV* from Square Enix – also fell, by 11 per cent to 145 million euros. In-game and in-app purchases, on the other hand, were once again among the strongest growth drivers: sales revenue in this area grew by 30 per cent to about 4.2 billion euros.



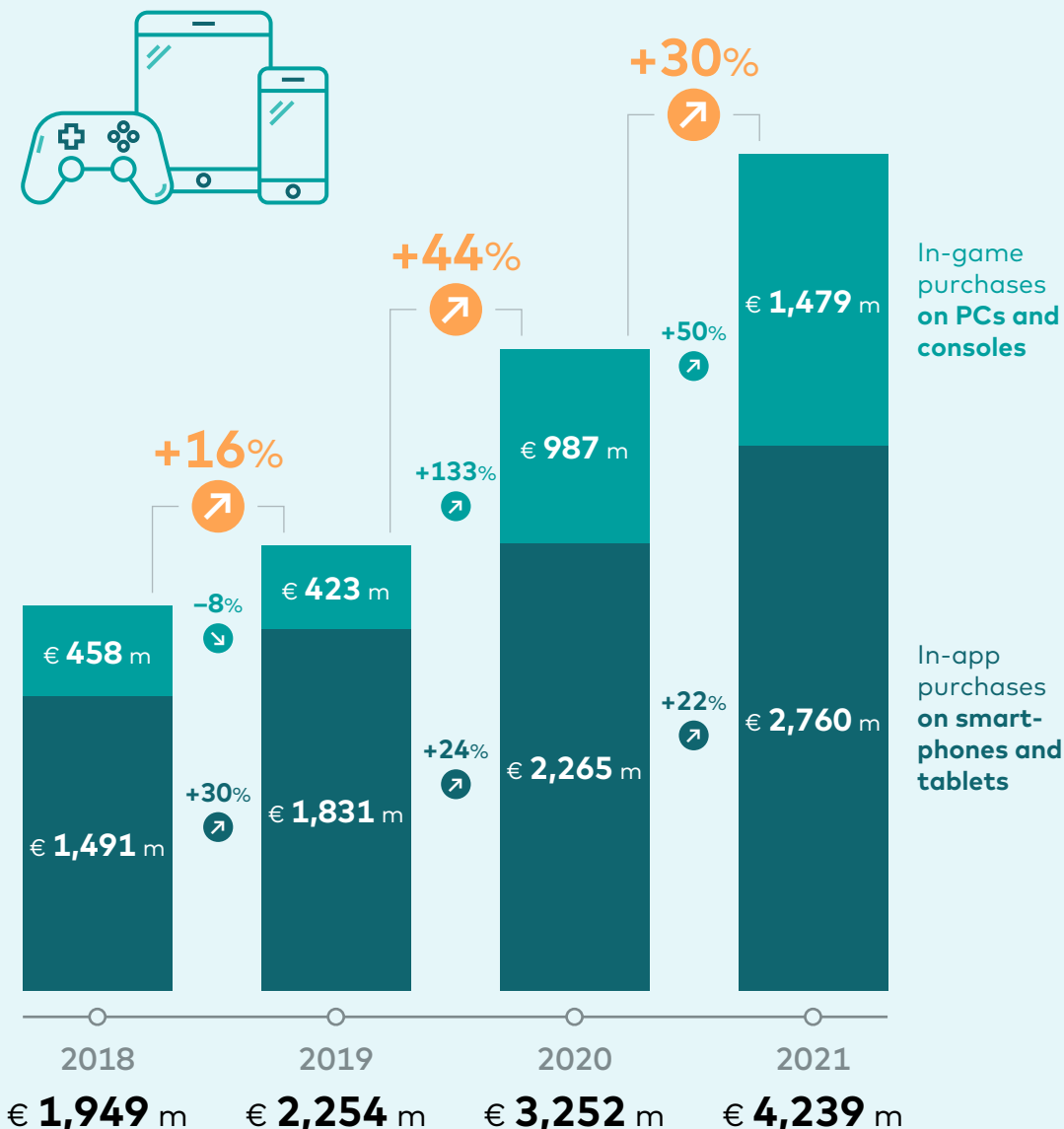
**The sharp increase in sales revenue from in-game and in-app purchases is a result of increasingly larger content packages being sold within the titles.**

The growth in sales revenue from computer and video games reflects a number of different developments: for example, larger games companies are publishing fewer titles in total, not least because developing new AAA games is much more expensive (as a result of the significant technological investment required) and, consequently, much riskier. However, for successful games that already have a community to build on, companies today tend to provide updates and new content for much longer. Added to that is the continuing trend towards free-to-play games. If these titles are accepted by the community, they also receive new content for

much longer periods of time; this content is sold within the game or within the app. And this content is no longer mere cosmetic items for a few euros. The sharp increase in sales revenue from in-game and in-app purchases is a result of increasingly larger content packages being sold within the titles. Examples of these content packages include battle passes or season passes containing numerous cosmetic items lasting for several months, or sometimes even whole new single-player campaigns for hours of enjoyable gameplay.

Mobile games also hold a particularly large share of the in-game and in-app purchase submarket. Be it casual puzzle games, familiar PC and console games adapted for mobile use, or location-based games like *Pokémon Go* or *Jurassic World Live*, the popularity of game apps is undiminished. Sales revenue from these games for smartphones and tablets continued to grow in 2021, by 22 per cent to approximately 2.8 billion euros. This growth is a continuation of the impressive trend in recent years, as sales revenue in 2020 had already risen by 23 per cent.

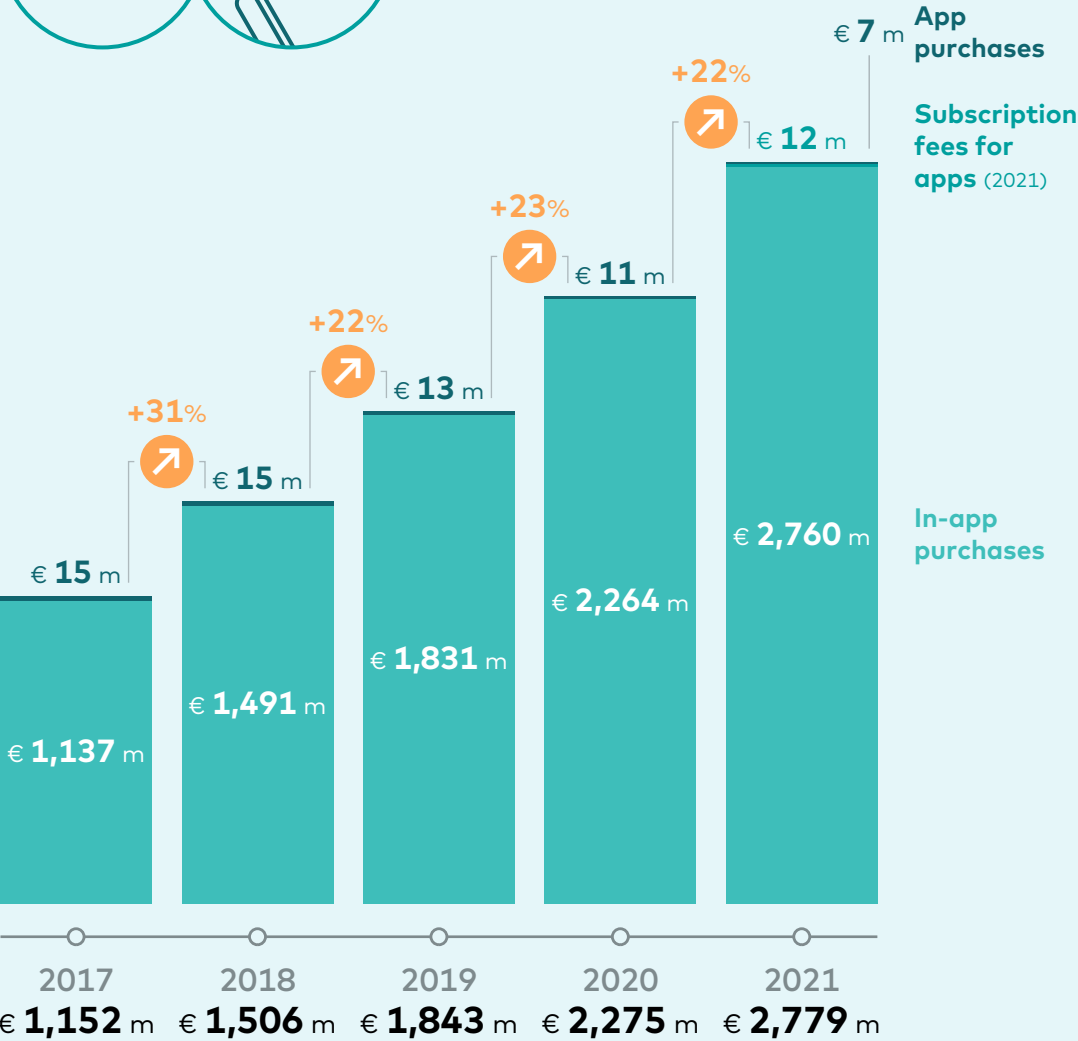
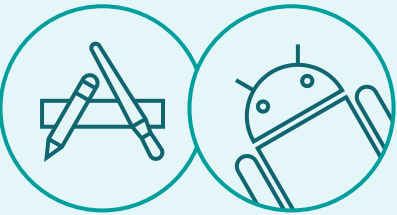
## In-game and in-app purchases continue to be key drivers of growth



Source: calculations based on the GfK Consumer Panel and data.io (2020/2021; n = 25,000). © game 2022

# German mobile games market grows by 22 per cent

Sales revenue for app purchases, in-app purchases and subscription fees for apps in Germany



Source: data.ai and GfK. © game 2022

In-app purchases continue to drive revenue growth in the mobile games market, accounting for approximately 99 per cent of total sales revenue in this segment in 2021. This submarket enjoyed yet another year of significant growth, increasing by 22 per cent from about 2.3 billion euros in 2020 to nearly 2.8 billion euros in 2021. Sales revenue generated by game apps offered for purchase, on the other hand, continued to decline, amounting to just 7 million euros in 2021. Subscription fees for apps like the Apple Arcade and Google Play Pass services generated 12 million euros in sales revenue, an increase of 200 per cent compared to the previous year. The success of in-app purchases in mobile games is largely due to free-to-play games. The low barriers to entry make this form of monetisation ideal for smartphones and tablets – players can download and use game apps at any time. And if the players enjoy the game, they can buy additional content such as extra levels and new skins for their own avatars.

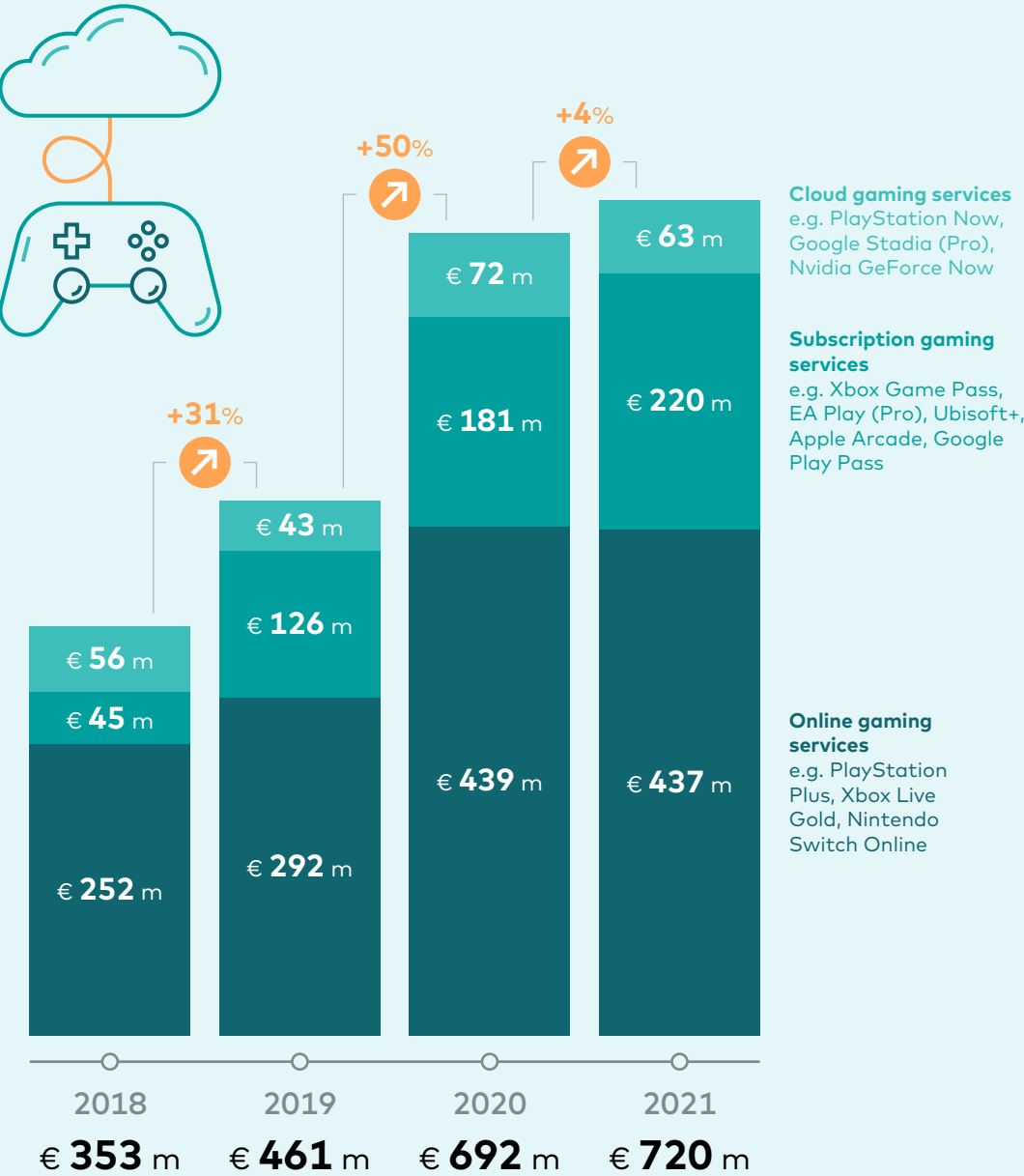


Another development that began during the first year of the Covid-19 pandemic stabilised during the following year: following a sharp increase in 2020, the share of games purchased as downloads remained essentially the same in 2021.

Another development that began during the first year of the Covid-19 pandemic stabilised during the following year: following a sharp increase in 2020, the share of games purchased as downloads remained essentially the same in 2021. The share of all PC and console games sold in Germany that were purchased as downloads increased by just one percentage point to 59 per cent. This means that roughly 6 in 10 computer and video games were once again purchased as downloads last year.

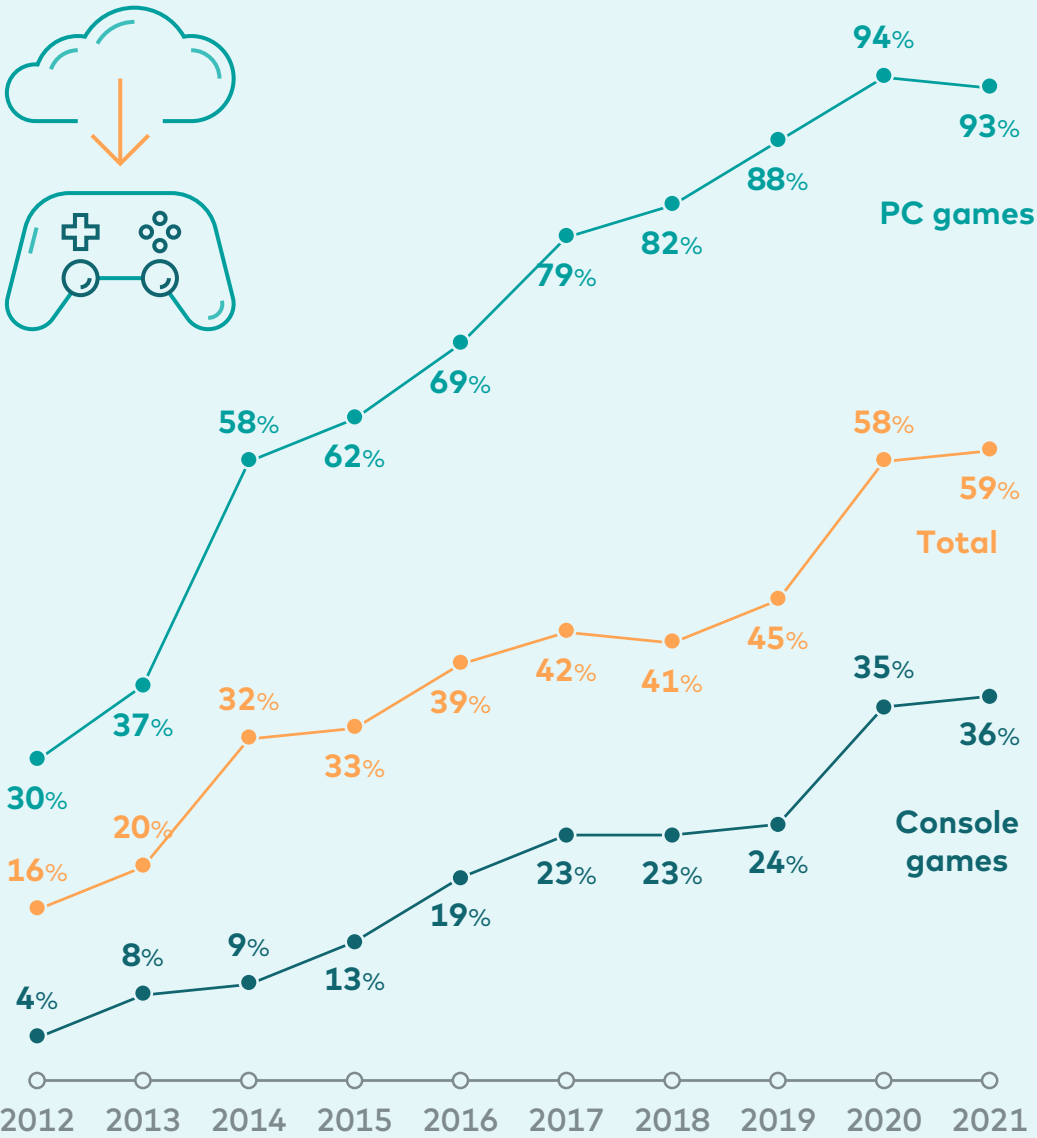
There were major differences in the share of downloads for different platforms and price categories, with downloaded games making up a particularly large percentage of the lower-priced titles. Approximately 8 in 10 games priced up to 30 euros were purchased as downloads. Higher-priced titles were more likely to have been purchased on physical media, with players buying 68 per cent of all games costing over 30 euros on physical media from online shops or bricks-and-mortar stores in 2021. Players of PC games, in particular, again relied on downloads from portals such as Origin or Steam. As a result, downloads accounted for around 93 per cent of PC game sales. Nearly two thirds (64 per cent) of all games for video game consoles such as Nintendo Switch, PlayStation and Xbox, on the other hand, were purchased on physical media. Thanks to their excellent accessibility, download purchases have largely established themselves as the preferred choice of many players.

# Online gaming services enjoy modest year-on-year growth



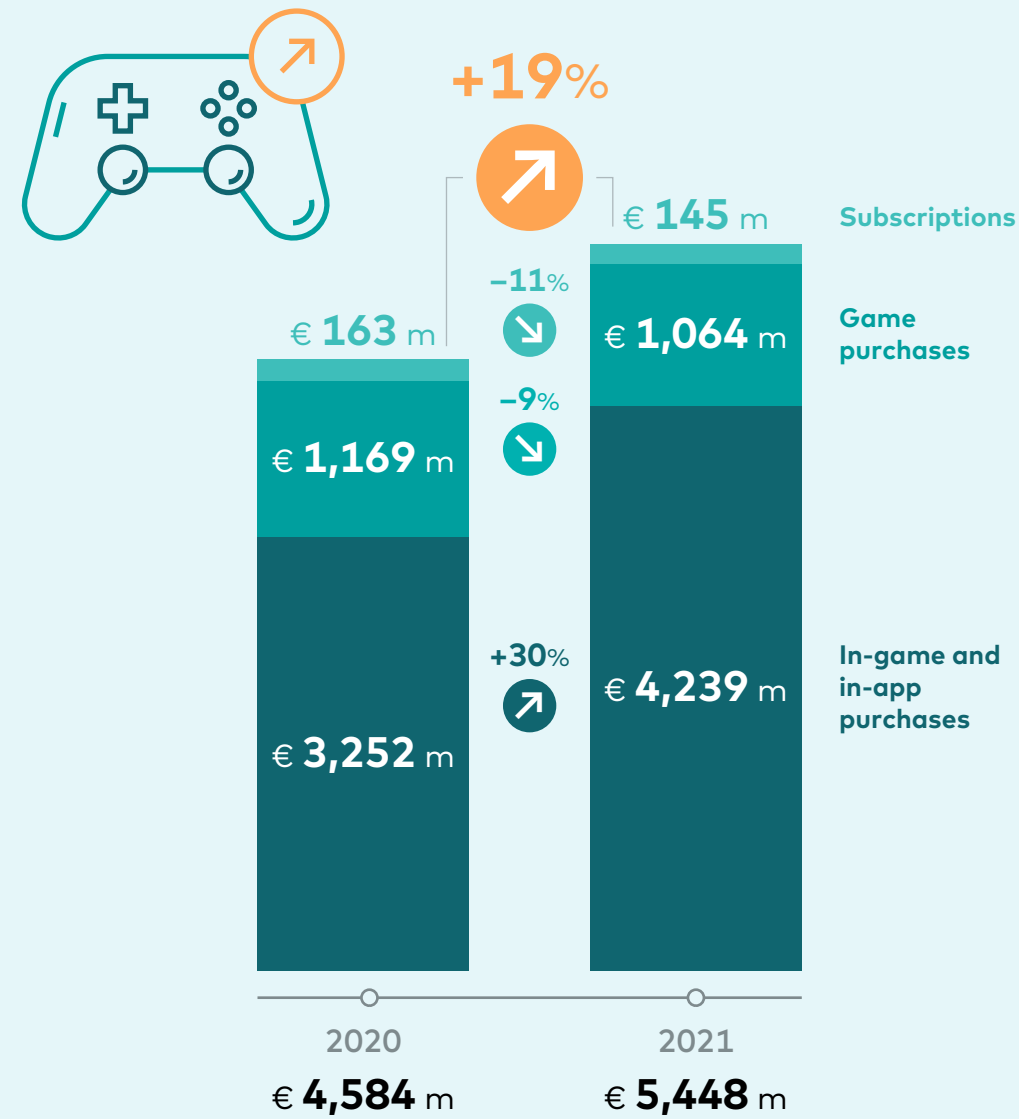
Source: calculations based on the GfK Consumer Panel (2020/2021; n = 25,000). © game 2022

# 6 in 10 PC and console games sold in 2021 in Germany were purchased as downloads



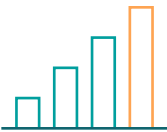
Source: data.ai and GfK. © game 2022

# Sales revenue from games in Germany grows by 19 per cent



Source: calculations based on the GfK Consumer Panel and data.io (2020/2021; n = 25,000). © game 2022

The German games market added another impressive chapter to its success story in 2021. After historically strong growth in 2020, an equally impressive 17 per cent increase in sales revenue followed in 2021. Once again, in-game and in-app purchases were major drivers of growth in the games market. The strong growth in games hardware is a particularly encouraging trend. No matter whether they are using video game consoles or gaming PCs, Germany's video game players once again invested considerable sums in their equipment to ensure that they would be able to continue enjoying their games in the best possible quality in future. In fact, demand in some cases exceeded supply, meaning that an even greater increase in sales revenue would have been theoretically possible.



The German games market added another impressive chapter to its success story in 2021. After historically strong growth in 2020, an equally impressive 17 per cent increase in sales revenue followed in 2021.

# 03

## The games industry in Germany

More players, more revenue – the impressive upward trend of the games industry continued in 2021, and signs point to further growth in future. Yet in many different segments of the games industry, the full potential for innovation has yet to be tapped. This demonstrates that the games industry is once again fulfilling its role as an important cultural asset, a driver of economic growth and an agile innovation factory.

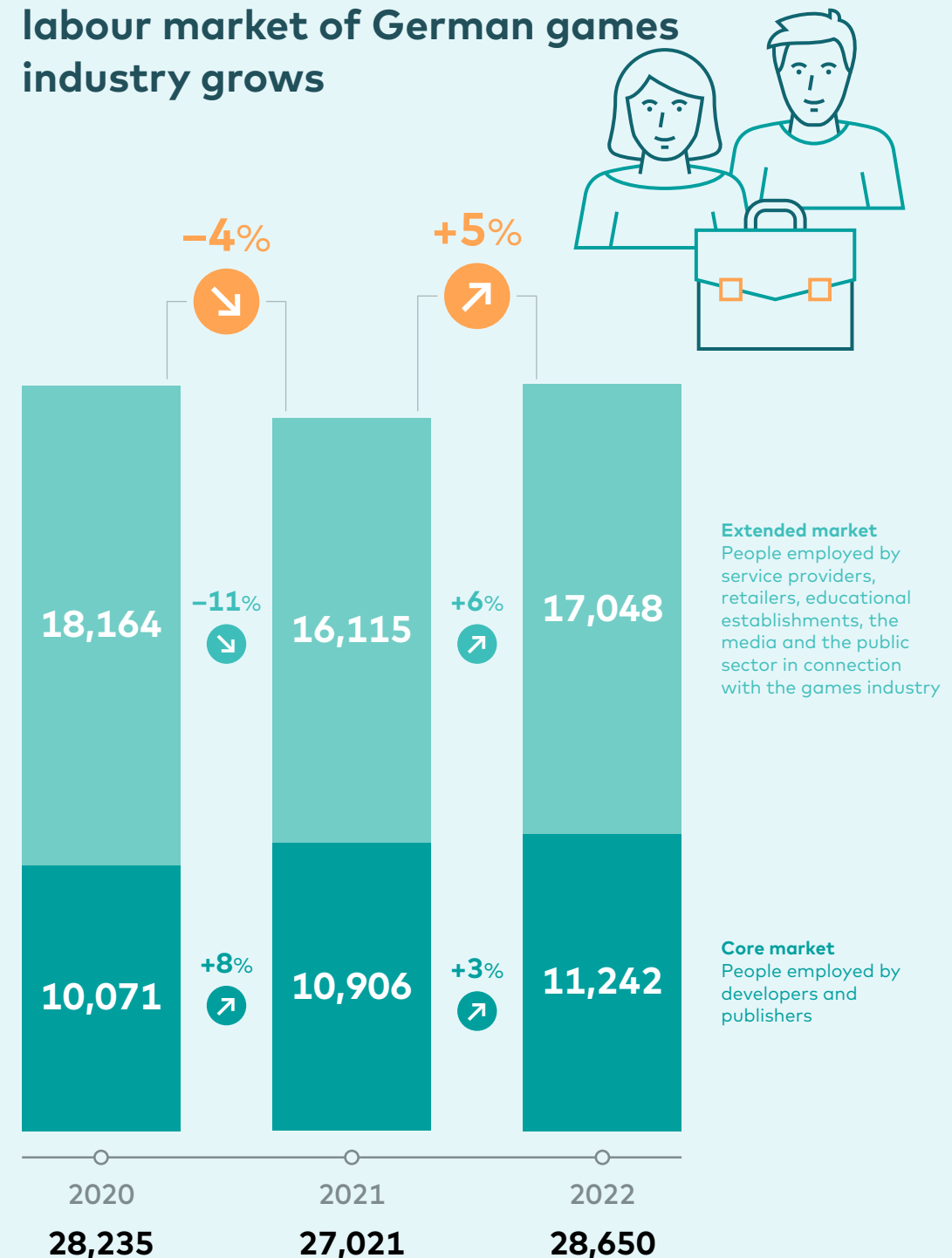


**More than 3 billion people around the world are playing computer and video games.**

The market researchers at Newzoo also predict further international growth for 2022: the number of game players around the world is expected to increase by more than 4 per cent to over 3 billion people. And the revenue generated by games is set to rise by more than 5 per cent to over 203 billion US dollars – cracking the 200-billion-US-dollar mark for the first time. This data underscores that the games industry still boasts highly vibrant growth, not just in Germany, but around the globe. And this momentum is actually increasing, as evidenced by

a new record number of acquisitions. In 2021, the value of mergers and acquisitions in the international games industry totalled approximately 85 billion US dollars. And the next wave came right at the beginning of 2022, when Microsoft made a takeover bid for Activision Blizzard amounting to 68.7 billion US dollars. Take-Two Interactive hopes to acquire mobile games provider Zynga for around 12.7 billion US dollars, and Sony Interactive Entertainment has its sights set on games developer Bungie for approximately 3.6 billion US dollars. This wave of acquisitions has continued in Germany as well: British publisher Team17 acquired astragon

## Number of people employed in labour market of German games industry grows



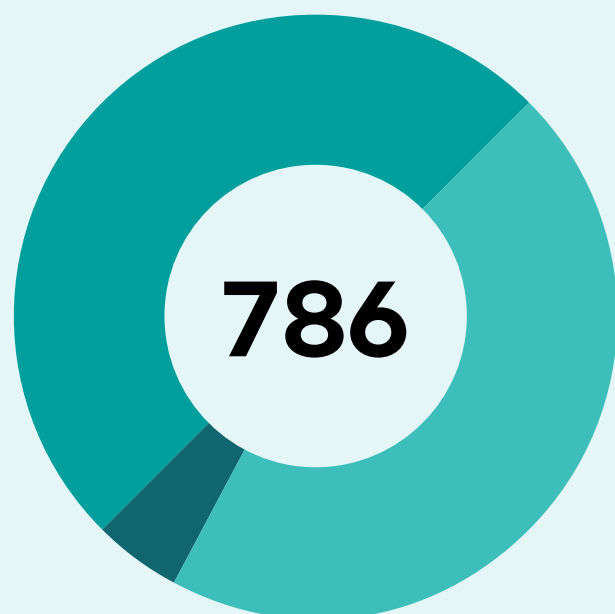
Source: projection based on industry observations (www.gamesmap.de). © game 2022

# 786 companies in Germany develop and distribute Games



**358**

companies develop exclusively



**36**

companies publish exclusively

**392**

companies both publish and develop



Source: gamesmap.de; industry observations; projections. © game 2022

Entertainment for 100 million euros, and French publisher Nacon bought Daedalic Entertainment for 53 million euros. And those are just a few examples of the numerous mergers and acquisitions that have taken place recently. Whilst in other countries, local companies are both buying and being bought, the situation in Germany is relatively one-sided: companies tend to get acquired rather than make their own acquisitions.

At the same time, however, the German games industry is relatively young, agile and on the rise, as the results of the study *Die Games-Branche in Deutschland 2018/19/20* (The games industry in Germany 2018/19/20) conducted by the HMS Hamburg Media School indicate. The average games company in Germany is just 7 years old, and half of games companies are less than 5 years old. Consequently, most companies are correspondingly small: 7 out of 10 employ less than 10 people. Despite the large number of small and relatively new companies, however, employment in the games industry is much more stable than in other creative and cultural industries. For example, 8 out of 10 employees hold positions that are subject to social insurance contributions, 7 out of 10 are employed full time, and 8 out of 10 are on unlimited contracts. Additionally, the games industry is particularly diverse. The percentage of women in the industry still needs to grow, but at 25 per cent, it is already much higher than in other sectors of the digital economy. The high percentage of employees without German citizenship is another positive standout: whilst in other sectors of the cultural and creative industry this figure is only 17 per cent, it is an impressive 27 per cent in the games industry. One reason for this is the fact that the industry has to meet some of its demand for highly specialised employees by hiring experts from abroad. The particularly globalised nature of games companies also plays a role here. 47 per cent of games are exported – far more than the 7 per cent export ratio in film and television production, approximately 9 per cent in the books market and 10 per cent in the music industry.



**The export quota of German games companies at 47 per cent is significantly higher than the 7 per cent of the cinema and TV production industry, the 9 per cent of the book market and the 10 per cent of the music industry.**

## 03.1 Employment figures and companies

The German games industry is exhibiting a strong upward trend. Significant increases in the number of German games companies and employees in 2021 are being followed up by further growth in both figures in 2022. This positive trend in the industry is partly due to the strong overall growth in the market. At the same time, however, we





## gamesmap.de

game – the German Games Industry Association launched its online directory of the games industry with [gamesmap.de](https://gamesmap.de). [gamesmap.de](https://gamesmap.de) uses an interactive map to visualise over 1,600 entries, including more than 750 game developers and publishers, 700 media, technical and financial service providers and some 150 educational institutions that offer courses relevant to the games industry.

[www.gamesmap.de](https://www.gamesmap.de)

are also seeing the first effects of games funding. We are not yet seeing its full impact, as the Germany-wide funding scheme has only been in place since 2019, and the development of complex computer and video games itself often takes several years. However, the improved conditions in Germany have changed the mood in the industry, leading to a strong increase in the number of companies. There are currently approximately 786 companies in Germany that are involved in the development and marketing of computer and video games or are active in one of these two areas. This is about 5 per cent more than in 2021 and represents an increase of approximately 26 per cent in the number of games companies in Germany within the last two years. A majority of

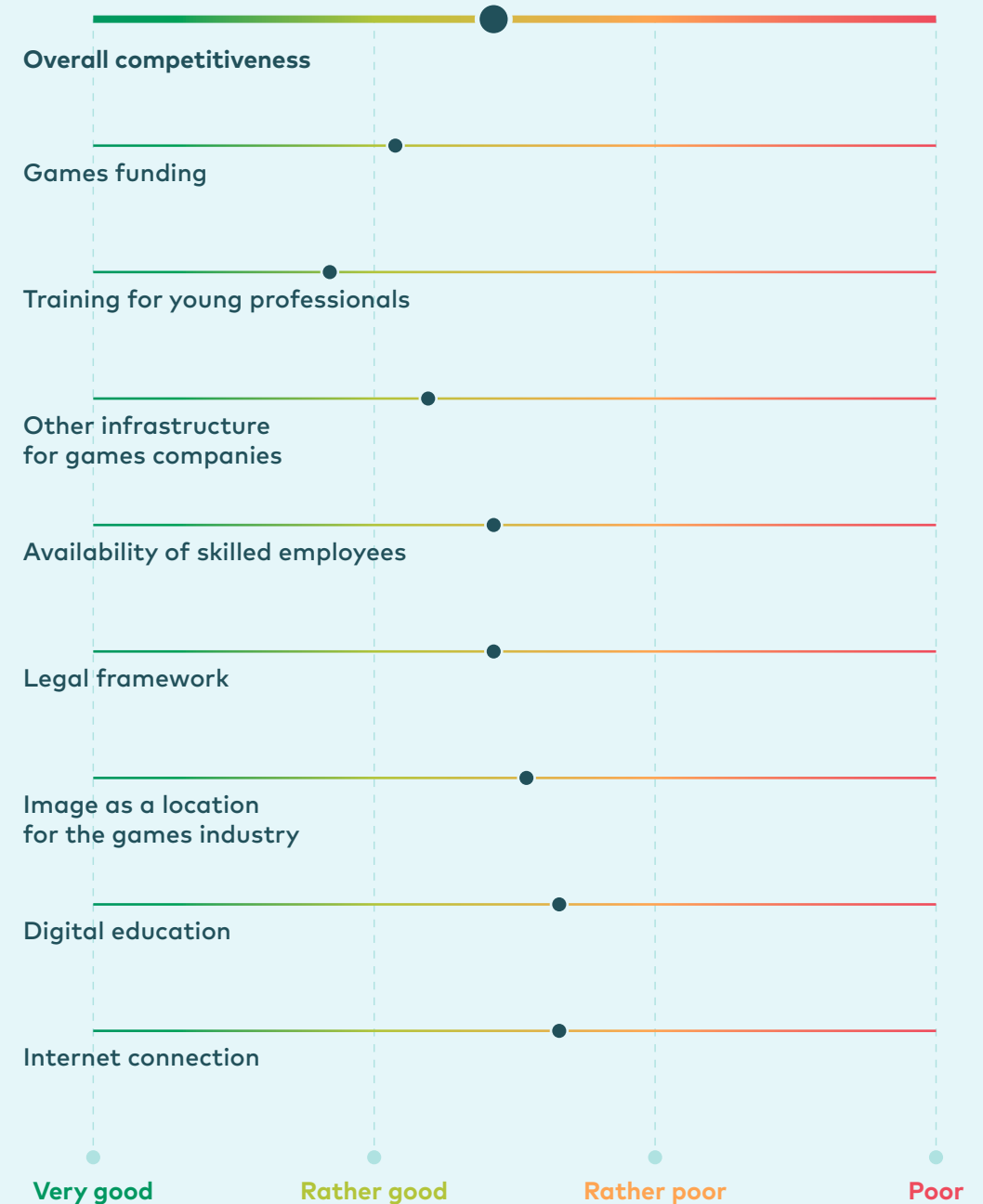
these companies (392, down by 3 per cent) are active in both development and publishing. 358 games studios focus solely on the development of games for PCs, video game consoles and mobile devices. The number of these companies increased significantly, rising by 14 per cent compared to the previous year. The number of companies active solely as publishers is significantly lower, with just 36 such companies in Germany (up by 13 per cent).

The positive trend in the number of employees has also continued, as the previous year's 8 per cent growth has been followed up by approximately 3 per cent growth in the core market. This brings the total number of people employed in the development and marketing of games in Germany to 11,242. Differences in the growth rates underscore the degree to which the establishment of numerous

smaller companies is driving the current growth trend in the German games industry: the number of employees has increased by about 12 per cent over the past two years, whilst the number of games companies grew by 26 per cent during this same time span. Following a decline in the previous year, the games industry's extended labour market also recovered somewhat: the estimated number of people employed here increased by nearly 6 per cent to 17,048. This extended labour market includes people employed by service providers, retailers, educational establishments, the media and the public sector in connection with the games industry. In total, the German games industry currently secures more than 28,000 jobs.

However, a look at current employment figures also indicates how much potential for growth Germany still offers. Canada, for instance, has only half the population of Germany and has been providing significant funding to its domestic games industry for several years – the Canadian games industry employs about 32,300 people, or nearly three times as many as the sector in Germany. If these numbers are extrapolated to apply to Germany,

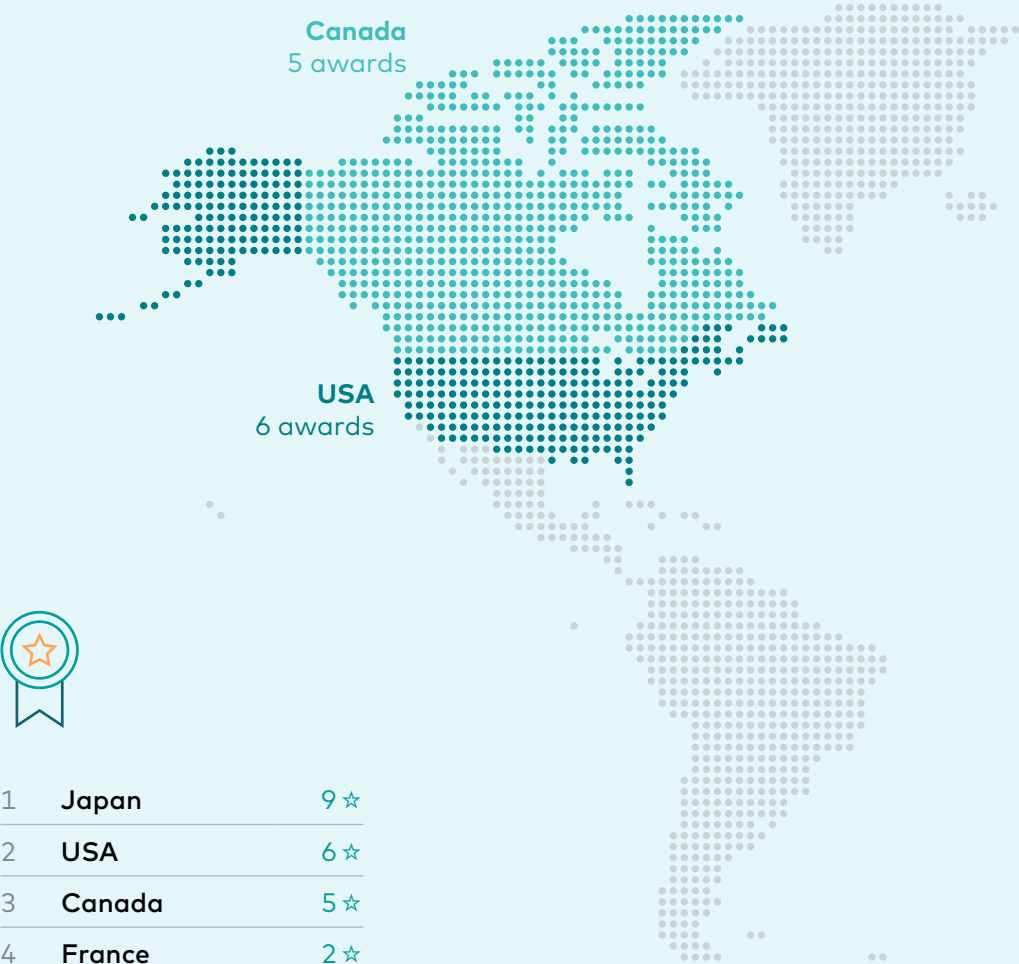
## How games companies assess Germany's international competitiveness



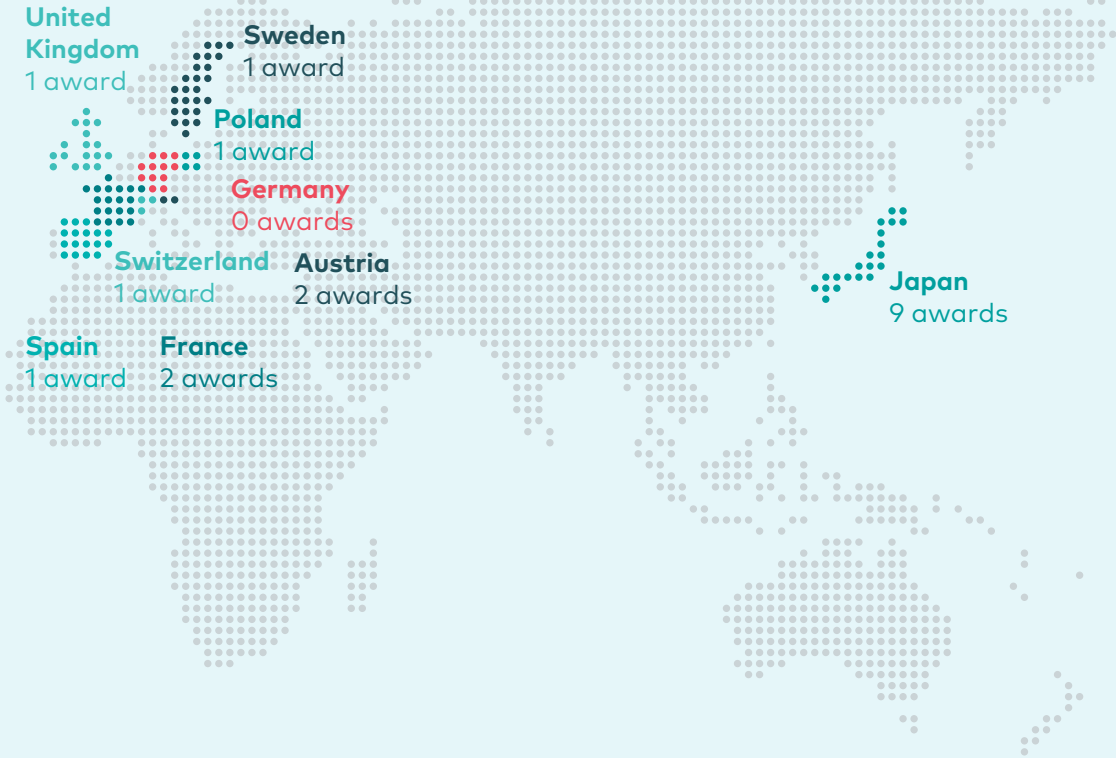
Source: game member survey (5/2021). © game 2022

# Development locations of the most successful computer and video games of 2021

Where were the winning titles of the game Sales Awards 2021 developed?



|   |                |     |
|---|----------------|-----|
| 1 | Japan          | 9 ☆ |
| 2 | USA            | 6 ☆ |
| 3 | Canada         | 5 ☆ |
| 4 | France         | 2 ☆ |
|   | Austria        | 2 ☆ |
| 5 | United Kingdom | 1 ☆ |
|   | Poland         | 1 ☆ |
|   | Switzerland    | 1 ☆ |
|   | Sweden         | 1 ☆ |
|   | Spain          | 1 ☆ |



Source: Berechnungen auf Grundlage der game Sales Awards. © game 2022

they indicate up to 60,000 potential jobs in the core labour market of the German games industry. Likewise, the United Kingdom, which has approximately 15 million fewer residents than Germany, has nearly twice as many people (about 20,870) working in computer and video game development and distribution.

Despite these positive developments in the number of games companies and employees in the industry in Germany, the country remains less competitive as a location for the games industry in relative terms. On the whole, the German games industry lags behind in international competitiveness; games companies rate it as rather poor. 56 per cent of companies say that Germany's global competitiveness is *rather poor*, and 14 per cent even rate it as *poor*. 31 per cent considered it *rather good*. None of the companies surveyed for game's industry barometer 2021 rated the German games industry's competitiveness as *very good*.

The most positively rated aspect of the current situation was games funding. Here, it can be seen that the current federal government's efforts are beginning to pay off now that the Germany-wide funding scheme providing more than 50 million euros per year has launched. Training for young professionals was also rated as rather good overall. A contributing factor here is that the number of study programmes in the field of games has increased at both public and private universities in recent years. The games industry in Germany sees digital education and internet infrastructure as the areas where the country needs to improve most.



**The conditions for the games industry in Germany have improved significantly, and many games companies are taking the opportunity to develop new projects.**

### 03.2 Games funding

Games funding at the federal level has been in place in Germany since 2019, when the pilot phase of the scheme began. Despite the limited funding amounts, which were capped at 200,000 euros per company, interest in the scheme was enormous, with 380 funding applications submitted. The major funding scheme ratified by the EU Commission that offers funding amounts over 200,000 euros subsequently launched in late 2020. The conditions for the games industry in Germany have improved significantly, and many games companies are taking the opportunity to

develop new projects. However, as the development of such projects generally takes several years, Germany still has a long way to go before it becomes a top international location for game development. Growing numbers of companies and employees in the German games industry are an early indicator that the games industry funding scheme is having an impact, but the gap between Germany and top global games industry locations such as Canada, France and the United Kingdom is still large. The reason is that

many countries introduced targeted funding schemes for their domestic games industries years ago. The resulting advantages in those locations led to numerous companies opening branches there, creating extremely vibrant games ecosystems. At the same time, the cost of producing games in Germany was up to 30 per cent higher. Politicians finally took notice of these disadvantages, which had arisen over the course of years, and they introduced the games funding scheme as a result.

Other improvements for the games industry have been implemented in addition to the funding scheme. For example, in early 2021, the federal government began working on its first games strategy. It coordinated closely with the games industry as well – the publication of a position paper as a basis for discussion was followed by a workshop. The end result of the process was the first German federal games strategy – a brilliant premiere! The strategy includes many further steps that will be required to make Germany into a globally competitive location for the games industry. The subjects covered range from establishing a structured approach to marketing Germany as a games location, updating the German Computer Games Awards and training industry employees in game development to making better use of serious games and supporting esports. As 2021 went on, it became clear who would handle the implementation of the strategy: a specially convened games department in the Federal Ministry of Transport and Digital Infrastructure. This was the first time that clear responsibility for games had been assigned to a government body at the federal level. With the games funding scheme, games strategy and games department, there are now three central components intended to strengthen Germany's position as a location for the games industry.

The German parliamentary elections in September 2021 not only resulted in the formation of the first federal governing coalition between the political parties SPD, Bündnis 90/Die Grünen and FDP with Olaf Scholz as the new German chancellor; they also resulted in the responsibility for games being reassigned within the new government. Instead of the Federal Ministry of Transport and Digital Infrastructure, the Federal Ministry for Economic Affairs and Climate Action took on responsibility for games in late 2021. Consequently, the games department is now under the auspices of Vice Chancellor and Federal Minister for Economic Affairs Robert Habeck. In their coalition agreement, the three governing parties stated their aim to further bolster Germany as a location for the games industry. This also includes a continuation of games funding anchored in the agreement. The government agenda additionally provides official recognition of the non-profit status of esports associations. In that sense, from a games industry perspective the coalition agreement



**From a games industry perspective the coalition agreement lays a strong foundation for successful games policies going forward.**

lays a strong foundation for successful games policies going forward. Assigning responsibility for games to another ministry was also a positive step from an industry perspective. Robert Habeck's decision to take charge of games was welcomed as a vote of confidence, and the industry was pleased that the Minister for Economic Affairs shares its ambition to continue strengthening Germany as a games location.

But the new federal policies regarding games were not the only good news in 2021 – the positive developments of recent years continued at the state level as well. Growing numbers of German states began providing support for their local games companies, for example through funding schemes, helping them build networks and other support measures. Hamburg relaunched its funding scheme back in 2020; this scheme also covers the development of prototypes. The northern German city-state makes 520,000 euros available for this purpose annually. Federal states such as Berlin and Brandenburg, Baden-Württemberg, Lower Saxony and Saarland also increased their funding in 2020. Rhineland-

Palatinate launched its first regional media and games funding scheme in October 2021, providing project funding and a scholarship programme totalling 250,000 euros annually. Late 2021 also brought good news for local games companies in northern Germany. The new state government of Mecklenburg-Vorpommern – a coalition of the political parties SPD and Die Linke – took games into account in its coalition agreement for the first time ever. Additionally, the new governing coalition in Schleswig-Holstein laid the groundwork for launching its own regional games funding scheme.

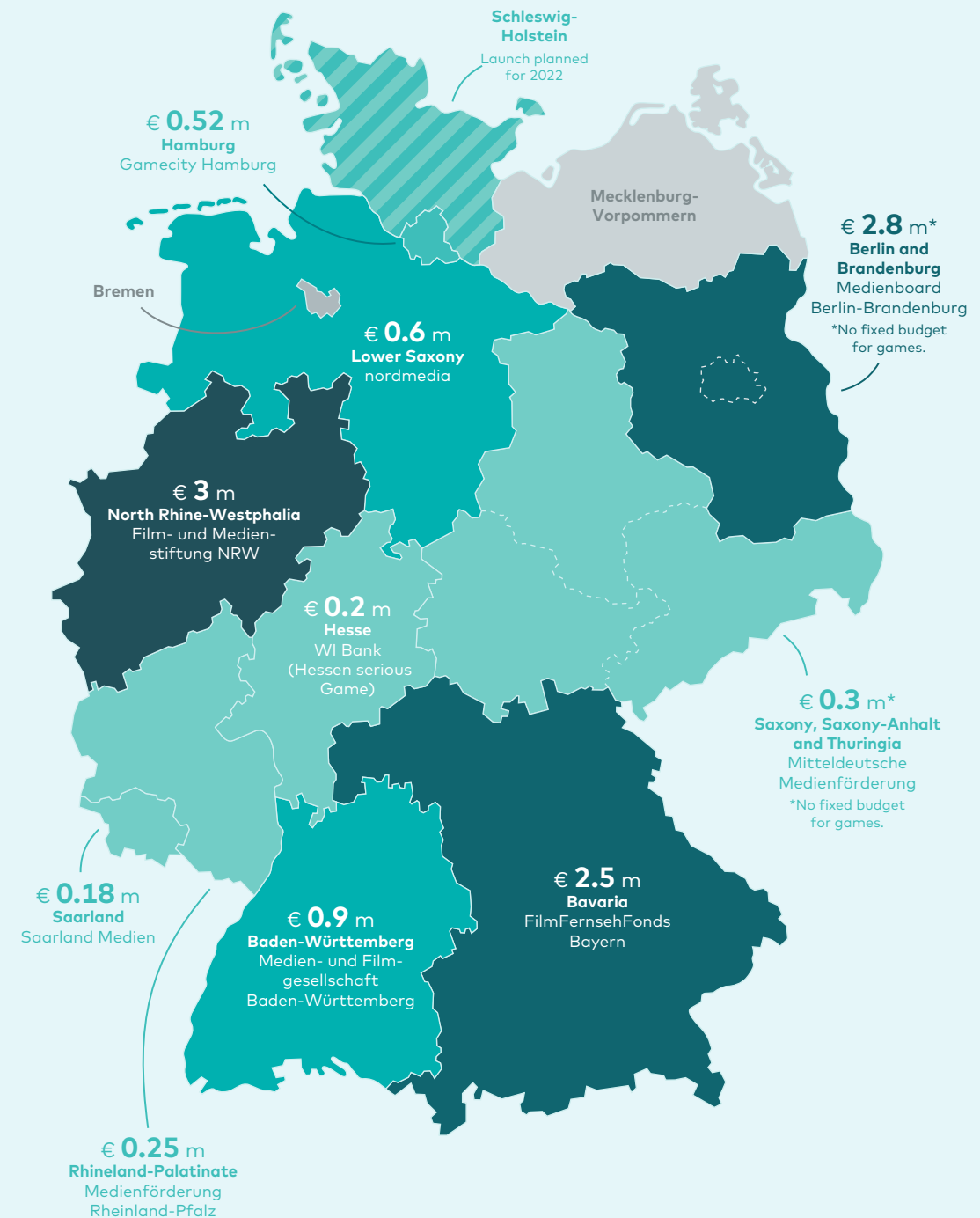
The funding programme *Kreativ-Transfer* (Creative transfer), which helps German games studios with international networking and improved visibility, was continued throughout the second year of the Covid-19 pandemic. A total of 24 games studio projects were considered during the current funding period (since June 2021). As many of the games industry's most important events were still either cancelled or took place entirely online due to the pandemic, companies were also granted support – in addition to the funding originally intended to cover travel expenses – to help them optimise their online presence, purchase streaming equipment and participate in fee-based online events, among other things.



## Regional offices of the games industry

The games industry is very active in the German federal states through its dedicated regional offices, which are supported by game. The objective is to advocate better framework conditions in the regions by taking clear positions and offering dedicated points of contact. The regional offices include game Schleswig-Holstein, game Norddeutschland, game Hamburg, game Berlin-Brandenburg, game Rheinland-Pfalz, game Baden-Württemberg and game Saarland. In Saxony, Saxony-Anhalt and Thuringia (Games & XR Mitteldeutschland) as well as in North Rhine-Westphalia (games.nrw), Hesse (gamearea-HESSSEN) and Bavaria (Games Bavaria Munich), game works closely with existing regional offices connected to the games industry.

## Regional games funding in Germany



**Note:** There is no regional funding for computer and video games in the federal states of Mecklenburg-Vorpommern or Bremen. Last updated: July 2022. © game 2022

## 03.3 The ten demands of the games industry

game – the German Games Industry Association is lobbying for a comprehensive improvement of the environment within which the German games industry operates. At the core of its political work are the following ten demands:

### 1 Promoting and strengthening Germany as a games location for the long term

For Germany as a games location to be able to compete on the international stage, the German government must promote the games industry in an unbureaucratic, predictable and transparent manner with a long-term focus. Germany as a location for developers, as well as games that are *Made in Germany*, need to be visible, with networking required both within Germany and internationally. The games strategy of the federal government is a key foundation for the ongoing development of the location.

### 2 Games to enhance learning, in school and throughout life

Our education system must take advantage of the opportunities offered by computer and video games for digital education in schools, vocational schools, universities and continuing education, and for lifelong learning. The development of games for use in educational instruction 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.

### 3 Greater commitment to games specialists

The German games industry is lacking in highly specialised, experienced professionals. Given this scarcity in Germany, the training situation must be improved and it must be made easier for these professionals to move here from abroad.

### 4 Digital infrastructure for all

As a games 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 ensure that future-proof digital infrastructure is accessible to all.

### 5 Youth protection legislation: modern, convergent and internationally compatible

The responsibilities of the German federal and state governments need to be put to the acid test to enable a modern German system for the protection of young people. 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. A host of contemporary protection systems and technical features from the games sector may serve as models here.

### 6 Infrastructures for games development

Games hubs with incubator and accelerator programmes are an important corporate home for start-ups and provide opportunities for regional economic locations. They promote communication between games companies and cooperation with other sectors that wish to benefit from the potential of games development. These economic and innovation-linked effects demand high levels of commitment and the support of the federal states and local authorities.

### 7 Providing investment certainty, creating value

As the games sector, we have developed innovative business models that are based first and foremost on the needs of the users, that are focused on feasibility and that treat users' trust in our products as vital to our success. New digital business models need scope to grow and operate, so a fair balance of interests must be found between consumers' rights and corporate freedom in the digital world, like elsewhere. Strengthening the empowered and confident users must take precedence over new regulation.

### 8 No space for haters, trolls and pirates: also bringing security authorities up to speed digitally

As the games sector, we advocate diversity and tolerance each and every day. All actors in the sector must come together to robustly confront hate speech as well as immoral and sometimes illegal behaviour in our digital society. The digital competences of the authorities must be expanded to create flexible and targeted solutions.

### 9 Making Germany the best location for esports

We want to make Germany the best location for esports. Given the major societal, cultural and economic significance of esports, the best possible conditions need to be created. In particular, the valuable work of the organisations that offer esports should be promoted rather than further disadvantaged. These organisations consequently need to be granted non-profit status in tax legislation. Whether or not esports is an actual sport is not a decisive factor here.

### 10 Gamification – helping through play

Computer and video games are more than entertainment. They can support people in nearly all spheres, open up new worlds of experience and serve to enhance performance in many areas. They are easily accessible and can often be utilised to save costs. The use of computer and video games should therefore be promoted in all areas of life.



# 04

## Esports



**As the home and venue of a number of internationally renowned competitions, Germany can play a leading role in esports**

Everyone is talking about esports. More than two thirds of German citizens are familiar with these competitions, which take place in computer and video games. In fact, approximately 12 million Germans have already watched esports broadcasts themselves. This makes it clear that esports have already achieved a high level of relevance in German society. They also offer a great deal of potential in the economic sphere.

According to surveys conducted by the market research company Newzoo, the global esports market is set to reach approximately 1.6 billion euros by 2024. In addition, the number of people viewing esports tournaments worldwide is expected to grow to more than 640 million people by 2025. This presents Germany with an opportunity to position itself as a pillar of the European and international esports scene: as the home and venue of a number of internationally renowned competitions, including the Intel Extreme Masters Cologne tournament, the League of Legends Championship Series and the Valorant Champions 2021 tournament in Berlin, Germany can play a leading role in esports.

Yet in spite of all the positive developments and forecasts, esports in Germany still lack some key elements of the policy framework necessary to continue growing stronger. For example, the official acknowledgement of esports clubs' non-profit status – something that was agreed upon in the German government's coalition agreement back in 2018 – has still not been delivered. This is needed first and foremost by associations whose non-profit esports programmes are aimed at amateur or semi-professional players. Like all other associations, these clubs take responsibility for each other and for society at large. Yet unlike other associations, to date esports associations have not been able to enjoy the benefits of tax exemption, reduced bureaucracy or the opportunity to apply for EU and German federal government funding for projects.

Furthermore, municipalities continue to do far too little to attract international esports tournaments, in spite of the positive impact hosting these events has on host cities, including for their hotels, restaurants and bars, and the benefits these tournaments hold for raising a city's international profile. Katowice offers an excellent example of what a close and successful partnership can look like. The Electronic Sports League, or ESL for short, has been holding the Intel Extreme Masters event in this Polish city since 2014, and during this time the tournament has become the world's largest esports event, drawing more than 170,000 visitors. Over the course of five years, the city of Katowice provided 12.5 million zloty (approximately 3.38 million US dollars) for the two-week event, working closely with the event's organisers to create the best possible conditions for spectators. At the same time, esports fans poured money in the city in the form of hotel bookings, money spent in restaurants and bars, and other such expenditures. The economic leverage effects demonstrate just how worthwhile greater involvement from municipalities and states can be in this area.

In addition, support for esports talents in Germany remains underdeveloped. Support for initiatives like the esports player foundation can help combat this by supplying young esports talents with wide-ranging assistance as they strive to reach the top of their field. Greater openness to some of the most successful esports titles like *League of Legends* and *Counter-Strike* would also represent a positive development.

In August 2018, the German Federal Foreign Office made a welcome move by simplifying entry requirements for esports players from non-EU countries, making it easier for professional players from these areas to come to Germany. It has also been good to see how the state of Schleswig-Holstein is supporting the establishment of community esports facilities and has set up a state centre for esports. In addition, since 2022 the Esports Association of Schleswig-Holstein has been holding the first (and to date only) state championships in German esports. Schleswig-Holstein has also formed its own esports team comprising ten top talents – the aim is to lend them the support necessary to foster their careers in esports. The state of Saxony-Anhalt also offers funding for esports clubs, and the state of North Rhine-Westphalia is a co-initiator and supporter of the esports player foundation. Germany has the potential to become one of the world's most renowned esports locations, but it will have to improve conditions for esports if it wants to tap this potential.



**The missing acknowledgement of esports clubs' non-profit status is a serious challenge for the clubs.**

# 05

## esports player foundation

Esports have long since established themselves in Germany. A field that began with private LAN parties and events back in the 1990s has grown to become a mass movement. The number of people who play esports as a hobby has been rising in Germany for many years now; today there are esports clubs, departments, university groups and organisations throughout Germany where esports enthusiasts can enjoy their pastime. Germany's cohort of professional esports players is also growing. These are the players for whom esports are a profession and who compete at the highest level.



**Esports: growing from private LAN parties in the 1990s to a mass movement.**

In order to ensure that these persons and other up-and-coming esports professionals enjoy the best possible support in future, in January 2020 the world's first initiative devoted to supporting esports players was founded in Cologne: the esports player foundation (epf). The association focuses on providing a comprehensive support programme to current and future top players like those offered in conventional sports – something that has never before existed in the field of esports.

The esports player foundation aims to close this gap, because in order to be successful in the digital arena, competitors need years of balanced professional training. This means not only helping esports players – from young up-and-comers to semi-professional and professional players – to hone their game-playing skills, but also taking responsibility for the time after their careers, or in the event that they are unable to make it as professional players. That is why ensuring a healthy balance between their esports careers and school, training, professional development and work is top priority.

The esports player foundation is already assuming a leading role globally in many areas. Extensive sports psychology support, nutrition consultation and sports medicine check-ups as well as tax and financial coaching, help with contractual matters and targeted support for career issues are all part of the programme. And in each case, the services on offer are tailored to the individual player's situation and provided by a non-profit organisation – a programme for esports players that has yet to be matched anywhere in the world. In addition, the values of good sportsmanship are taught, and players are empowered to serve as positive role models for millions of other ambitious players.

Support is funded by partners from the business world that include Deutsche Telekom, CosmosDirekt, Deutsche Kreditbank (DKB), AnyDesk, Garmin, Techniker Krankenkasse, PricewaterhouseCoopers and Logitech G. Other supporters help the programme by providing their products and services, such as Nvidia and Taylor Wessing. Together, the efforts of these prominent companies do more than simply strengthen Germany's position as an esports location and supply young talents with partners offering support – they also help to foster the continued growth of the esports ecosystem.

The esports player foundation is currently supporting 90 players of the *Counter-Strike: Global Offensive*, *League of Legends*, *Brawl Stars* and FIFA games. In future, the foundation hopes to be able to deliver comprehensive support to every talented player in Germany for every relevant esports game. The aim: to significantly increase Germany's share of the world's elite esports players. In order to get started in achieving this, the epf collaborated with DKB to establish *DKB Diamonds*, a *League of Legends* free agent team with which they can offer talented young players the chance to gather game experience and attract attention in the Prime League (similar to the German Bundesliga). It is hoped that the DKB Diamonds can help players make the leap to teams in higher leagues.

In addition to games promotion, the epf is also involved in other esports fields: in 2021, the epf joined with Deutsche Telekom and SK Gaming to launch the *Equal Esports* initiative, which promotes greater diversity and equality of opportunity in esports. The foundation is also working to combat toxicity and hate speech in esports with its *SpeakUpEsports* campaign.



**The esports player foundation is the first of its kind in the world to support aspiring esports professionals.**



Further information is available on [www.esportsplayerfoundation.org/en](http://www.esportsplayerfoundation.org/en)



# 06

## gamescom and devcom

As in 2020, gamescom took place entirely digitally again in 2021 due to the Covid-19 pandemic. Numerous facets of the digital concept were optimised based on experience with the 2020 event, resulting in hundreds of satisfied gamescom partners and millions of satisfied gaming fans around the world, as well as a great deal of media attention.



**The live broadcast of the grand opening show *gamescom: Opening Night Live* reached around 5.8 million live viewers.**

Be it the strong community involvement with formats like *gamescom EPIX* and the *Indie Arena Booth Online*, the entirely revamped *gamescom now* content hub or the *gamescom: Opening Night Live* show, players from more than 180 countries took advantage of gamescom's shows, formats and special events millions of times. The live broadcast of the grand opening show *gamescom: Opening Night Live* hosted by Geoff Keighley reached around 5.8 million live viewers, roughly 30 per cent more than the 2020 event, with some 2 million people once again watching the broadcast simultaneously. *gamescom: Awesome Indies*, a show format launched in 2020, was able to more than double its range, reaching a live viewership of over 500,000 people.

A wealth of major German and international developers and publishers presented their latest products and announcements virtually at gamescom and on the gamescom now content hub. In addition, 255 indie developers participated in the Indie Arena Booth Online format, where they presented more than 120 games. Numerous possibilities were provided for interaction in order to transfer gamescom's incomparable atmosphere into the digital sphere: with the gamescom EPIX format, for example, players had the chance to take part in a total of 30 quests where they

## gamescom 2021 in numbers

# 2.000.000+

people again watched  
*gamescom: Opening Night Live* at the same time

# 63 Mio.+

viewers from over  
180 countries

# 13 Mio.

people watched the  
gamescom shows live

# 109 Mio.

video views

# 2.000+

companies participated in the matchmaking  
of the devcom digital conference 2021

could earn rewards. An interactive multiplayer game was on offer at the Indie Arena Booth Online that was taken advantage of by approximately 15,000 players. A great many players also seized the opportunity to donate to gamescom forest, a sustainability initiative to promote the growth of the eponymous forest. Players were able to watch exciting game debuts, Let's Plays and interviews throughout the multi-day event and immerse themselves in the international world of gaming.



**Players were able to watch exciting game debuts, Let's Plays and interviews throughout the multi-day event and immerse themselves in the international world of gaming.**

The devcom Developer Conference was once again a digital event for developers and trade visitors. Trade professionals joining in from 87 countries and over 2,000 participants combined to make devcom a success yet again. The trade visitors were treated to a varied programme and took part in countless panel talks, workshops, matchmaking sessions and other events. The presentations, fireside chats and panel discussions featured more than 250 speakers and produced twice as much content as in the previous year. In fact, over 55 hours of content was streamed live on the Twitch platform, reaching around 200,000 viewers.

There were more than 35 items on the agenda at the gamescom congress, where 56 experts discussed the potential that games offer for business and society. Both days of the congress were greeted with huge interest yet again, reaching approximately 118,000 viewers. One of the focal points was the topic of digital learning, while the impact of computer and video game innovation in industry and the healthcare sector were also a topic of discussion.

gamescom 2021 was clearly focused on its central theme *Games: The New Normal*. The gamescom congress and various political events offered opportunities for guests, including Andreas Scheuer, the Federal Minister of Transport and Digital Infrastructure, and Dorothee Bär, the Minister of State for Digitalisation, to highlight the tremendous social and economic potential of games. Whether it was at the political opening of gamescom or the Debatt(l)e Royale panel talk, in the run-up to the 2021 German parliamentary elections, policymakers once again made it clear that digital and games policy would be a high priority for the upcoming legislative period. Further improvements in the conditions for Germany as a games location were promised, including the simplification of support systems for the games industry, the deployment of serious games, and efforts to attract specialist personnel. gamescom once again demonstrated its position as one of the most important events bringing policymakers and the gaming industry together.



Further information is available on [www.gamescom.global/en](http://www.gamescom.global/en)



**gamescom once again proved to be one of the most important events bringing together politics and the gaming industry.**

# 07

## German Computer Games Awards

The German Computer Games Awards, which were established in 2009, are the most important awards for the German games industry.

They are presented to 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 Games Awards are supported by the Foundation for Digital Games Culture (Stiftung Digitale Spielekultur).

The organisers continuously work to develop these awards further. Their goal is to shine a spotlight on the creators of these games and on the outstanding work they have been doing in a way that earns them the publicity they deserve.

The German Computer Games Awards are presented in a total of 16 categories, including two international categories, a Public Choice Award and a Special Jury Award. The winners are selected by the main jury and specialist juries made up of respected games experts and policymakers, media figures, and people from the realms of academia and culture. They evaluate the submitted games on the basis of aspects like quality, degree of innovation, enjoyment of the game, and cultural and educational value. The current chairwoman of the main jury is Odile Limpach, Professor for Economics and Entrepreneurship at the Cologne Game Lab, TH Köln – University of Applied Sciences.

Together, the winners of the German Computer Games Awards 2022 were presented with prize money totalling 800,000 euros. That is the most money that has been paid out in the history of these awards.

Following two digital awards ceremonies necessitated by the Covid-19 pandemic, the German Computer Games Awards 2022 were finally able to take place in front of a live audience again. Nominees and presenters were invited to attend this year's ceremony at Munich's Tonhalle in person. The host, Uke Bosse, and the presenters honoured the winners of the German Computer Games Awards 2022 at this gala event. More than half a million people watched the live stream to see how the nominees fared. Streamer Ollimeee even hosted a Community

Bar, supplying gripping live commentary that gave gaming fans the chance to be a part of the show. *Chorus* from Deep Silver Fishlabs was selected as the Best German Game 2022.



Further information is available on [www.deutscher-computerspielpreis.de](http://www.deutscher-computerspielpreis.de)

## All the winners of the German Computer Games Awards 2022

NEW TALENT AWARD –  
BEST DEBUT

**White  
Shadows**

Monokol / Headup Games

PLAYER OF THE YEAR

**Maximilian  
Knabe**

(aka HandOfBlood)

BEST FAMILY GAME

**OMNO**

Studio Inkyfox

BEST EXPERT GAME

**Imagine Earth**

Serious Brothers

BEST SERIOUS GAME

**EZRA**

Landesverband Kinder- und  
Jugendfilm Berlin e.V.

BEST LIVE GAME

**Hunt:  
Showdown**

Crytek / Koch Media

BEST MOBILE GAME

**Albion Online**

Sandbox Interactive

BEST GERMAN GAME

**Chorus**

Deep Silver Fishlabs /  
Koch Media

BEST INTERNATIONAL  
MULTIPLAYER GAME

**It Takes Two**

Hazelight Studios /  
Electronic Arts

BEST GAME WORLD  
AND AESTHETICS

**A Juggler's  
Tale**

kaleidoscube / Mixtvision  
Mediengesellschaft

BEST INTERNATIONAL  
GAME

**Elden Ring**

From Software / Bandai  
Namco Entertainment  
Germany

STUDIO OF THE YEAR

**CipSoft**

Regensburg

BEST GAME DESIGN

**Kraken  
Academy!!**

Happy Broccoli Games /  
Fellow Traveller

NEW TALENT AWARD –  
BEST PROTOTYPE

**Wiblu**

Peter Bartonik, Christian  
Walter, Ramona Raabe

BEST INNOVATION  
AND TECHNOLOGY

**Warpdrive**

Holocafé

SPECIAL JURY AWARD

**Games Jobs  
Germany**

# Entertainment Software Self-Regulation Body (USK)

Games are a source of fascination for adults, adolescents and children alike. For 28 years now, the Entertainment Software Self-Regulation Body (USK) has been working in the field of youth protection to ensure that young people can enjoy a good gaming experience without being subjected to inappropriate content.



**Since 1994, the USK has conducted over 51,000 evaluations of digital games in Germany.**

As the games industry's organisation for voluntary self-monitoring, the USK is the responsible authority for the assessment of computer and video games in Germany. The non-profit organisation's sole stakeholder is game – the German Games Industry Association. The familiar USK age ratings (0, 6, 12, 16 or 18 and up) found on games make it possible to recognise at a glance the age from which a game is appropriate from a youth protection standpoint.

Since it was first established in 1994, the USK has conducted over 51,000 evaluations of digital games in Germany. In 2021 alone, 1,744 games were assessed. The USK also awards age ratings in the framework of the International Age Rating Coalition (IARC) for apps and games that can be obtained online. USK age ratings serve as an important point of reference for children and adolescents, as well as for parents and educators.

As part of efforts to continue improving the system's quality assurance process, the IARC test process has been utilising ATLAS (Artificial Intelligence Testing, Learning And Scraping), an AI tool developed by USK. ATLAS is based on a machine learning system that analyses online games and apps according to a specific set of criteria and is able to predict the probability that an app will be incorrectly classified.



Further information is available on [www.usk.de/en](http://www.usk.de/en)

Nearly 50 companies have already become members of USK.online. As an officially recognised self-regulation body under the German Interstate Treaty on the Protection of Minors (JMStV), USK.online gives its member companies practical support in implementing and complying with statutory provisions related to their online offers. USK.online also conducts approval processes regarding technical measures for the protection of minors in the media environment. In 2021, the organisation welcomed another leading international company in Microsoft, which joined USK.online in order to be able to work together to promote high standards of youth protection in the company's games division.

Germany's new youth protection legislation came into force in May 2021, bringing with it significant changes for digital games. Since the legislation was passed, the USK has been working closely with the responsible Supreme Youth Protection Authorities of the state of North Rhine-Westphalia, game and the Permanent Representatives of the Supreme Youth Protection Authorities at the USK to develop proposals for putting the new provisions into actual practice. It is expected that the provisions of this new legislation will have been implemented by the end of 2022.

As the official partner for youth protection, the USK advised gamescom on the age-appropriate implementation of the event. The USK also organised a digital open day as part of gamescom 2021, which once again had to take place digitally on account of the Covid-19 pandemic. This day offered people a look behind the scenes of the USK.

The USK also puts its comprehensive knowledge in the field of games to work on projects to promote media expertise, and it collaborates on efforts to educate the public on the principles of digital games safety. An excellent example is provided by the *ESportZ* initiative, which is sponsored by *ZEIT für die Schule* and ESL. As part of this project, educational materials were developed for the topics of youth protection, gaming and esports that could be used by teachers. The USK team also lent its support to the Institut für Film und Bild in Wissenschaft und Unterricht (FWU) in its efforts to create teaching materials on the topic of gaming for third- and fourth-year primary school pupils. Issues covered include *Diversity of games*, *Protection and monitoring*, *Frustration and flow*, *Cost traps* and *Serious games*.

## Proportion of USK age ratings 2021



Source: USK 2022



# Foundation for Digital Games Culture (Stiftung Digitale Spielekultur)

The Foundation for Digital Games Culture (Stiftung Digitale Spielekultur) develops and initiates projects and measures that make games accessible as a cultural asset, educational medium, and driver of research and innovation.

It was jointly initiated by the German Bundestag and the German games industry in 2012. The foundation's efforts are supported by a high-calibre advisory council whose 14 members come from areas including German Federal Ministries, the Supreme Youth Protection Authorities of the German federal states, colleges and universities, and the games industry. In keeping with its focus on research,

education and culture, the foundation implements numerous research and pilot projects. The following offers a few selected insights into the work done by the foundation in 2021.

In the field of research, in summer 2021 the foundation organised *Erinnern mit Games (Remembering with games)*, a digital conference held in collaboration with the German Cultural Council and supported by the Foundation Remembrance, Responsibility and Future (EVZ Foundation). The conference sought to answer a question: what might games be able to contribute to education in the field of history and politics in terms of cultural themes of remembrance? Following the event, the foundation published the *Games und Erinnerungskultur (Games and remembrance culture)* online database, a digital reference work presenting selected

games that deal with key events of German and European history in various ways. Additional entries were made to this database thanks to support from the Federal Government Commissioner for Jewish Life in Germany and the Fight against Antisemitism. In November 2021, the foundation also worked with Charité Berlin to organise the Healthcare Game Jam, an event format that helped foster the development of seven game prototypes designed to motivate young people to pursue a career in medicine and raise awareness of the important contribution that specialists make to the field of healthcare.

As part of its efforts in the field of education and research, in 2021 the foundation launched the *Games machen Schule (Games at school)* initiative. As part of this initiative, in autumn 2021 a model project supported by the Berlin Senate Department for Education, Youth and Family set out to determine whether – and how – digital games could be employed in scholastic instruction. In addition, in spring 2022 a thematically related six-month feasibility study was started in North Rhine-Westphalia with the support of the North Rhine-Westphalia Ministry of Schools and Education.

As part of its efforts in the field of education, the foundation has also enabled more than 3,500 children and adolescents to participate in cultural education through its *Stärker mit Games (Stronger with games)* initiative. The programme is supported by the Federal Ministry of Education and Research. Furthermore, the foundation collaborated with Bildung & Begabung to once again hold the academy for the GamesTalente youth support programme entirely digitally. As part of *Projektstage Games – Berlin/Brandenburg (Games project days – Berlin/Brandenburg)*, an event sponsored by Medienboard Berlin-Brandenburg, the foundation also afforded over 500 pupils valuable insights into careers in the games industry.

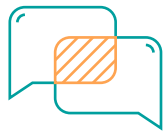
In the field of culture, in spring 2021 the foundation worked with the Goethe-Institut to hold *Game 'n' Train Mixer Online: India*, a new digital version of the cultural exchange programme for German and international game developers. In addition, August saw the finals of the second season of the *Quartet of Game Culture*, an event series supported by the Federal Government Commissioner for Culture and the Media. As the awards office for the German Computer Games Awards and the gamescom award, the foundation has also been responsible for the submissions process and jury deliberations for two key games awards in Germany for many years now.



**Stärker mit Games  
(Stronger with games)  
focuses on cultural  
education.**



Further information is available on  
[www.stiftung-digitale-spielekultur.de/en](http://www.stiftung-digitale-spielekultur.de/en)



**Erinnern mit Games  
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# 10

## game – the German Games Industry Association

game is the association of the German games industry. Our approximately 370 members include developers, publishers and many other games industry actors such as esports event organisers, educational establishments and service providers.

As a joint organiser of gamescom, game is responsible for the world's biggest event for computer and video games, which takes place every year in Cologne in late August. 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 the sole stakeholder in the USK (Entertainment Software Self-Regulation Body), the Foundation for Digital Games Culture (Stiftung Digitale Spielkultur) and the esports player foundation, as well as a sponsor of the German Computer Games Awards. devcom is a subsidiary of game, and among other things, it organises the gamescom developer conference of the same name. As an expert partner for media and for political and social institutions, game answers all questions on topics such as market development, games culture and media literacy. The members of game participate in various working groups, where they work on the association's positions on numerous issues, such as market research, law, funding, serious games and conditions for indie developers. Additionally, the game esports association includes members who actively work with esports. They include a wide range of stakeholders in the esports ecosystem, such as game developers, publishers, event organisers and agencies.

Lars Janssen, VP, Worldwide Studios & Talent of Koch Media, has been Chairman of the game Executive Board since 2022, after being confirmed as a board member by the general meeting in May of this year. His deputy is Julia Pfiffer, Co-Managing Director of astragon Entertainment. The members also elected the following individuals to the Executive Board: Johanna Janiszewski (Founder and CEO of Tiny Crocodile Studios), Christian Kluckner (Co-Founder and Managing Director of Chimera Entertainment), and Ralf Wirsing (Managing Director Europe of Ubisoft). As the strong, unified voice of the entire German games industry, game has additionally helped to support the founding of many regional offices throughout Germany since the merger.



Further information is available on [www.game.de/en](http://www.game.de/en)

## game in figures

# 2.6 Mio.

social media impressions on Twitter, LinkedIn, Instagram and Facebook in 2021

# 24

points of contact at the regional offices

# ~370

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

# 440.000

viewers of all live streams on Twitch in 2021

# 5

members of the Executive Board

# 17

employees at the branch in Germany's capital, Berlin

# Hier spielt Vielfalt

## Diversity initiative



The games industry is justifiably proud of how incredibly diverse its games and its communities are. More than 2.9 billion people around the world play computer and video games – regardless of age, gender, nationality, religion or sexual orientation. And the thousands of game developers around the world are just as diverse as the players.

This is why the German games industry launched the initiative *Hier spielt Vielfalt* (*Diversity plays here*) in December 2019, with the goal of further bolstering its commitment to an open, diverse games culture. The joint declaration on the subject has thus far been signed by more than 1,500 individuals and institutions.

game also published a Diversity Guide to help raise awareness of the issue even further. It provides readers with specific tips and advice on building diverse teams and games communities, and it is expanded on a regular basis. The guide is available free of charge in German and English. Due to the strong interest in games industry issues and diversity, game has not only participated in numerous discussions and talks on the subject in recent years; it has also put forward many speakers for such events.



Further information is available on  
[www.hier-spielt-vielfalt.de/en](http://www.hier-spielt-vielfalt.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 do not act quickly to stop the crisis from intensifying further.

The games industry takes its social responsibility in this area very seriously. In Germany alone, 80 per cent of games companies say that environmental and climate protection is important to them. 76 per cent of games companies are already committed to operating more sustainably, such as by implementing measures to save energy and heat, using green electricity, separating waste and the like. And around the world, growing numbers of games companies have committed to far-reaching environmental strategies.

game is also doing its part to protect the environment. For example, the association and its subsidiaries USK (Entertainment Software Self-Regulation Body), the Foundation for Digital Games Culture (Stiftung Digitale Spielekultur), the esports player foundation and devcom are all completely climate neutral. Since mid-June 2021, game has also been an associate member of the Playing for the Planet Alliance, an environmental partnership between the UN and the games industry. As part of its membership, game has committed to measuring its environmental impact annually, implementing measures to achieve complete climate neutrality – which game has already accomplished – and to inform its members and 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. Additionally, gamescom has launched a sustainability project called *gamescom forest*, the goal of which is to reforest a climate-stable mixed woodland near Bayreuth, partly financed by donations from the community. In early 2022, game joined forces with co-organiser Koelnmesse as part of gamescom 2022 to launch the *gamescom goes green* sustainability initiative. The new sustainability concept makes gamescom the first climate-friendly games event. Building on previous initiatives, all emissions from the core event will now be 100 per cent offset in cooperation with the climate experts at ClimatePartner.

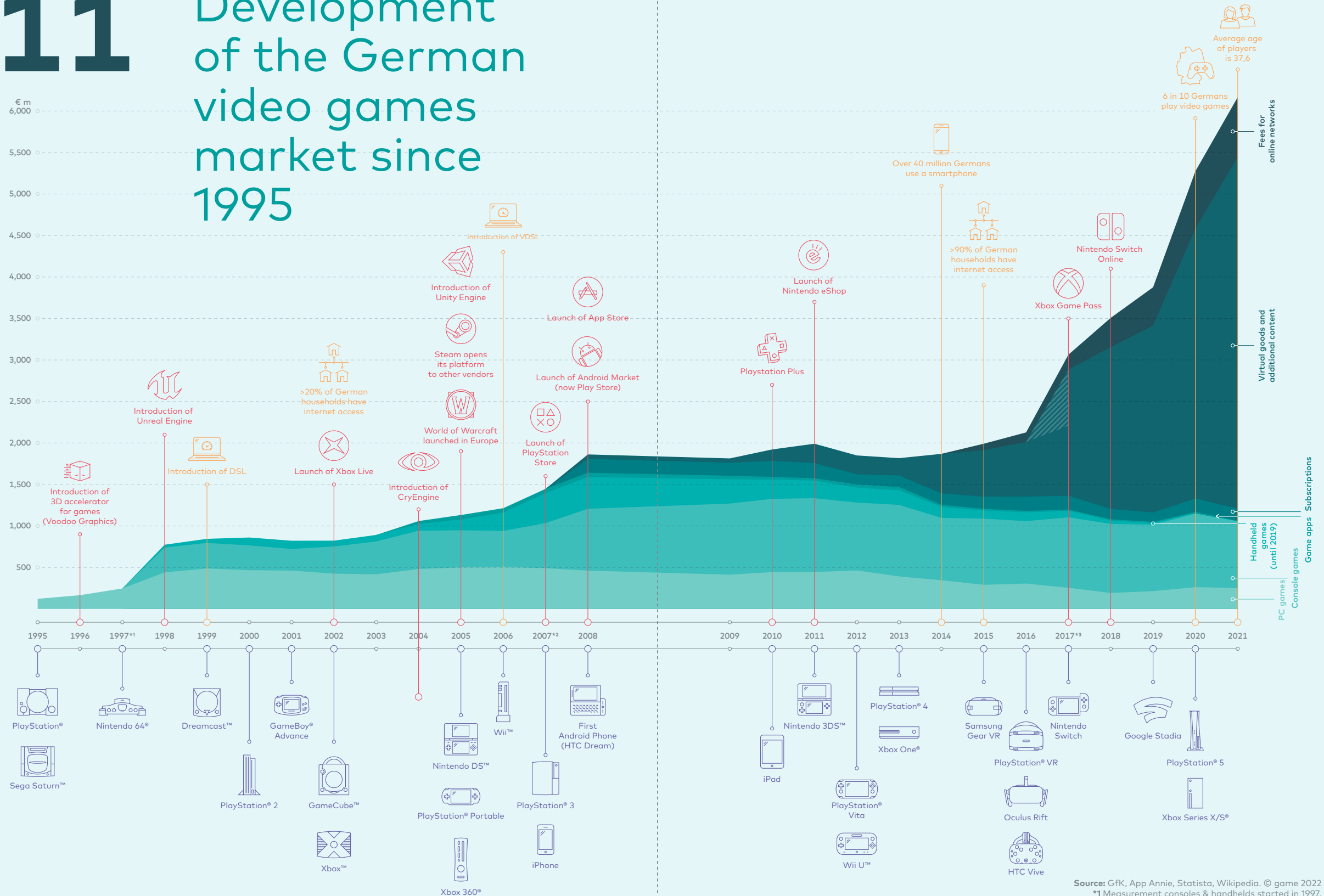


Further information is available on  
[www.game.de/en/guides/  
game-environmental-guide](http://www.game.de/en/guides/game-environmental-guide)



# 11

## Development of the German video games market since 1995



Source: GfK, App Annie, Statista, Wikipedia. © game 2022

\*1 Measurement consoles & handhelds started in 1997.

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


\*3 Measurement converted for mobile games in 2017.

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