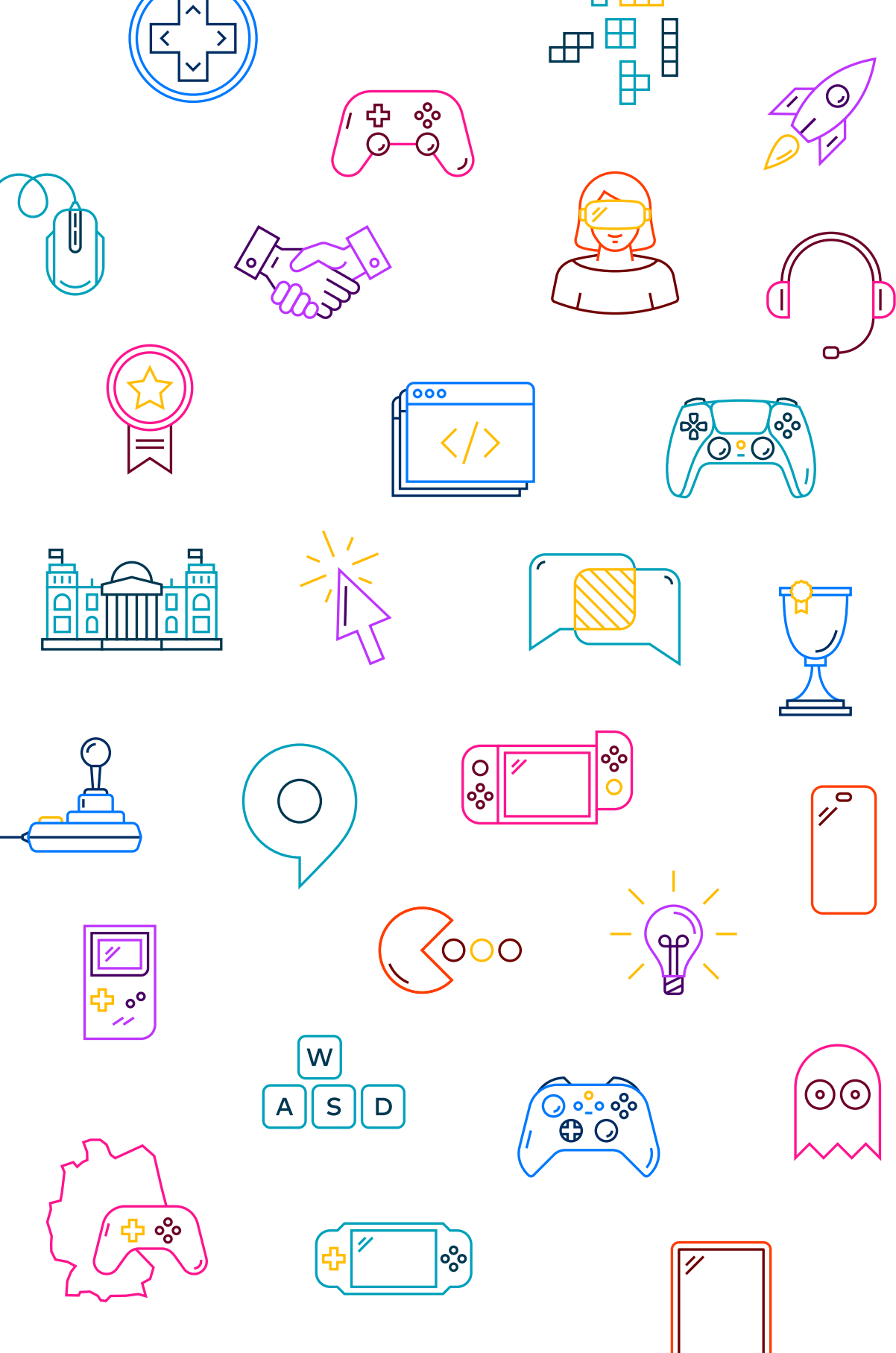


Annual Report of the German Games Industry 2025





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Dear readers,

From the perspective of the German games industry, 2024 can certainly be described as bumpy. Although the wave of consolidation in the international games sector slowed last year, projects continued to be cancelled, employees laid off and studios closed worldwide. These developments pose a challenge for the German games industry in particular, which is dominated by small and medium-sized studios that rely to a large extent on international publishers and partners to realise their projects. This is especially true when, as in 2024, an absence of reliable long-term games funding in Germany brings cost disadvantages of 30 per cent compared to relevant international locations.

However, particularly in the second half of the year, there was also good news. On the occasion of gamescom, the new funding guidelines of the then responsible Ministry for Economic Affairs and Climate Action were announced. While these guidelines in part worsened the situation for many companies, they also clarified the conditions that are to apply when the government resumes acceptance of funding applications. And the 33 million euros made available by the German

Bundestag to the Minister of State for Culture and the Media one year earlier for the promotion of game development were implemented in exciting form: the Press Start: Games Founding Grant, the first programme to provide targeted support to game developers over a period of a year and a half for realisation of their projects. The overwhelming demand demonstrates that there continues to be a huge desire to develop games and take the leap into entrepreneurship in Germany.

In the midst of this back and forth on games funding, Germany's governing coalition of the SPD, Bündnis 90/Die Grünen and FDP also collapsed. The budget for 2025 had not been resolved up to that point. This in particular brought added challenges for games companies. As became apparent shortly before the end of 2024, when funding applications could once again be submitted, this uncertainty gave rise to tight restrictions that the practical reality of game development makes virtually impossible for applicants to comply with. As a result, despite the resumption of the funding application process at the end of 2024, many games companies lack the necessary internationally competitive framework conditions. Our game industry barometer showed at the start of 2025 just how negatively companies assess Germany's international competitiveness.

The development in the number of employees and companies in the sector clearly shows the impact of the difficult conditions on Germany as a game production location: after years of strong growth in some areas, both figures are now declining. The launch of the Federal funding for video games in 2020 was largely responsible for the subsequent boom in start-ups, which in turn led to a significant increase in the number of employees in the industry. Meanwhile, the challenging conditions internationally and the unreliable and unpredictable funding situation in Germany have put an end to this development for the time being.

Against this backdrop, the coalition agreement between the CDU, CSU and SPD following the federal election at beginning of 2025 gives cause for hope. The new governing coalition of Christian Democrats and Social Democrats not only recognises the huge cultural, economic and technological potential of the games industry and its role as a pacesetter driver of innovation, but has also announced the introduction of additional tax breaks for game development in Germany. And less than 50 days after taking office, the new federal government, most notably the federal minister responsible for research and games, Dorothee Bär, followed up on the coalition's pledge to increase support for the industry by designating 88 million euros for games funding in the budget proposal for 2025 and 125 million euros from 2026 onwards. This gives companies significantly greater planning security as well as the breathing space they need until the additional tax breaks announced in the coalition agreement are implemented.

The importance of this not only for German games companies, but also for Germany as a business location and even for federal revenue as a whole, is demonstrated by a study, conducted by Goldmedia on our behalf, on the leverage effects of tax breaks for games. The results are striking: every euro in funding generates an additional 3.40 euros in tax revenues and social security contributions, 4.80 euros in additional investment and 8.70 euros in additional gross value added. In other words, every euro that goes into games funding multiplies, generating new revenue for Germany.

Developments in the German games market were mixed in 2024. After attaining completely new heights in recent years, revenue from games, games hardware and online gaming services dropped by 6 per cent, its first decline in a long time. Among the reasons for this are that there were fewer major game releases last year and that demand for game consoles returned to normal. The greatest

growth could be seen in online gaming services like cloud gaming – which underscores the perpetual dynamics and innovative strength of the games industry. In combination with new game consoles and blockbuster titles that have already been announced, this promises renewed growth in the near future.

Further cause for this positive outlook is delivered by gamescom. The world's largest games event broke multiple records in 2024, including in the number of exhibitors, the internationality and, above all, international reach. As the annual highlight of the global games industry, gamescom once again took a huge leap forward, underscoring the positive future outlook for games and the global games market.

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



The number of players over the age of 60 grew from 6.4 million to 7.7 million in 2024.

Computer and video games are more prevalent in Germany than ever before, with 6 out of 10 Germans aged 6 to 69 now reaching for controller, mouse or smartphone to play.

Across all age groups, around 37.5 million Germans play games, and this diverse community continues to grow. The number of video game players has increased by 9 per cent since 2020. Games are a popular pastime for young and old alike. The development among players over 60 is especially dynamic, with this group having grown from 6.4 to 7.7 million in 2024. On the one hand, this is because many people remain loyal video game players over

several decades. On the other, ever more older people are newly discovering the joy of video games. Thus the trend of recent years continues, with the average age of German players now surpassing 39 for the first time – rising from 38.2 in 2023 to 39.5 in 2024. In total, 8 in 10 players in Germany are over 18 years old. With regard to gender, the distribution of players is balanced, at around 48 per cent women and 52 per cent men.

The diversity of video game players is also reflected in the use of various gaming platforms. The most popular device for playing computer and video games in Germany is the smartphone. With around 22.9 million players in 2024, its year-long success as a gaming platform remains unbroken. Game consoles are also charting a successful course and are closing in on the top spot among the most widely used platforms: some 20.5 million Germans played on consoles in 2024, more than ever before, and up from 18.7 million in 2023. In recent years, the console has

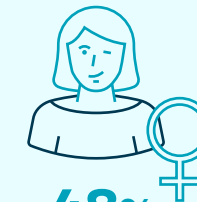
A huge and diverse community: Video game players in Germany



37.5 m
Germans play
video games



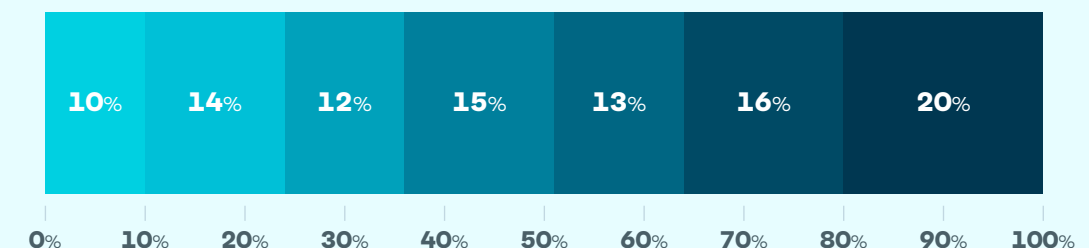
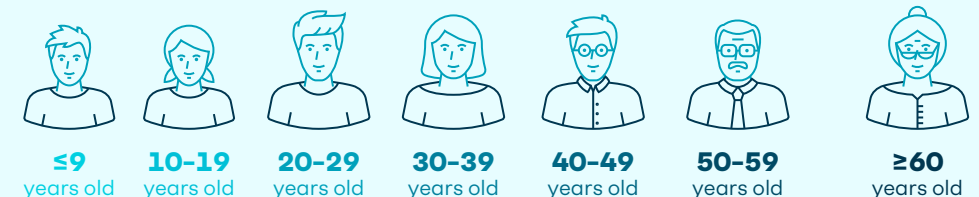
39.5
is the **average**
age of video game
players



48%
of video game
players are
women

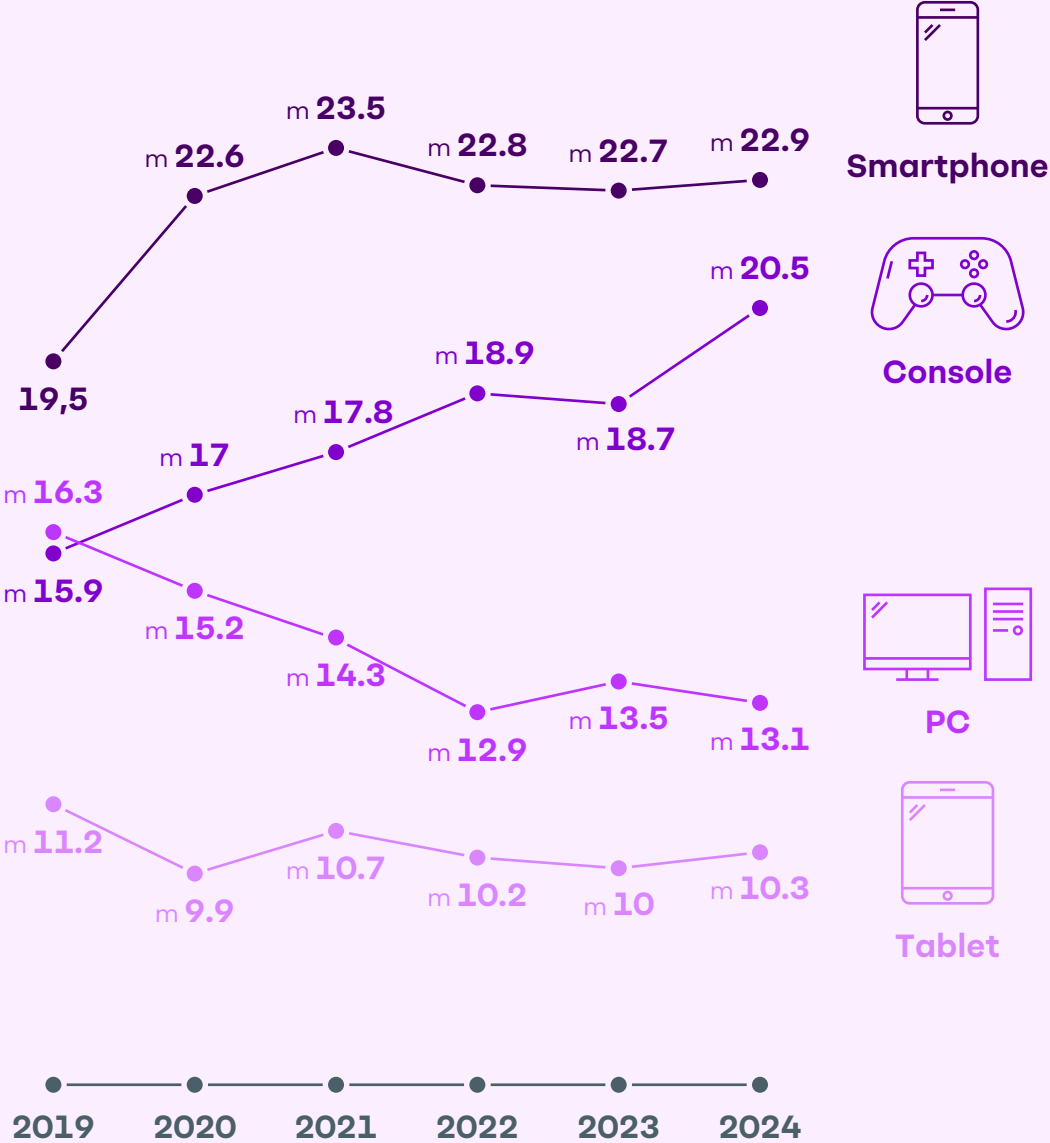


79%
of video game
players are
at least
18 years old



Source: Calculations based on data provided by YouGov Shopper (2025; n = 25.000 Germans). © game 2025

The most popular gaming platforms in Germany: console and smartphone attract ever more video game players



Source: Calculations based on YouGov Shopper (2024/2025, n=25.000). All figures refer to the number of video game players in Germany. © game 2025

shown strong overall development, with the number of console players in Germany having risen by 29 per cent since 2019. This can be traced in significant part to the great popularity of the current console generation including Nintendo Switch, PlayStation and Xbox, whose makers have all come out with new, technically optimised versions or matching accessories in the last few years. In 2024, the PC saw a drop in users in Germany, to 13.1 million people, 400,000 fewer than in 2023. It thus continued its downward trend of recent years, registering a decline of 20 per cent compared to 2019, when there were 16.3 million PC game players. On the other hand, more people are playing on tablet computers again. Their numbers have risen by 300,000, to a total of 10.3 million. However, many Germans don't limit their play to just one device: about 19 million use two or more platforms.

The top 20 bestselling new games of 2024 in the official game charts show which games and genres are particularly popular among Germans. EA SPORTS FC 25 from Electronic Arts took first place on PCs and consoles. The popular football simulation has consistently held its spot at the top of the German monthly charts since its release in late September 2024. Second place in 2024 went to the action-packed first-person shooter Call of Duty: Black Ops 6 (Activision Blizzard) after a huge sales success. The cooperative third-person shooter Helldivers 2 (Sony Interactive Entertainment) came in third place among the year's most successful games. Fourth place in the annual charts went to the new Farming Simulator 25 (GIANTS Software), in which players can try their hand at idyllic yet challenging agricultural work. The party game Super Mario Party Jamboree (Nintendo) rounded off the top five most popular new game titles. From thrilling football tournaments and action-packed team adventures to relaxed farm work or colourful party games for the whole family, 2024 offered outstanding highlights for all video game players in Germany.



Around 19 million Germans play on two or more platforms.

The top 20 newly released PC and console games in Germany in 2024

1	EA SPORTS FC 25	Electronic Arts
2	Call of Duty: Black Ops 6	Activision Blizzard
3	Helldivers 2	Sony Interactive Entertainment
4	Landwirtschafts-Simulator 25	GIANTS Software
5	Super Mario Party Jamboree	Nintendo
6	Dragon Ball: Sparking! Zero	Bandai Namco Entertainment
7	The Last of Us Part II Remastered	Sony Interactive Entertainment
8	Dragon's Dogma II	Capcom
9	EA SPORTS F1 24	Electronic Arts
10	Star Wars Outlaws	Ubisoft
11	Warhammer 40,000: Space Marine II	Focus Entertainment
12	Final Fantasy VII Rebirth	Square Enix
13	Dragon Age: The Veilguard	Electronic Arts
14	The Legend of Zelda: Echoes of Wisdom	Nintendo
15	Astro Bot	Sony Interactive Entertainment
16	NBA 2K25	2K
17	WWE 2K24	2K
18	Tekken 8	Bandai Namco Entertainment
19	Prince of Persia: The Lost Crown	Ubisoft
20	Skull and Bones	Ubisoft

Source: Games Sales Data (GSD) and game - The German German Games Industry Association. The most frequently sold new games in Germany in 2024 across all platforms, both physically and digitally for PC and games consoles, are shown. Digital sales of Nintendo titles from the Nintendo eShop are not included. As the publisher does not participate at GSD, the game Black Myth: Wukong is not included. © game 2025

The top 20 most downloaded mobile games in Germany in 2024

1	Block Blast Adventure Master	Hungry Studio
2	Brawl Stars	Tencent
3	ROBLOX	Roblox
4	Royal Match	Dream Games
5	Offline Games - No Wifi Games	JindoBlu
6	Last War:Survival Game	Onefun
7	Pokémon TCG Pocket	Pokemon
8	Subway Surfers	Tencent
9	Pizza Ready	Supercient
10	Whiteout Survival	Zhejiang Century Huatong Group
11	Zenless Zone Zero	miHoYo
12	MONOPOLY GO!	Scopely
13	My Perfect Hotel	SayGames
14	Township	Playrix
15	Solo Leveling:ARISE	Netmarble
16	One Punch Man: World	Sony
17	Legend of Mushroom	Joy Net Games
18	PUBG MOBILE	Tencent
19	Charade explain, guess and win	Michael Rothkegel
20	Travel Town	Moon Active

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

02

German video games market



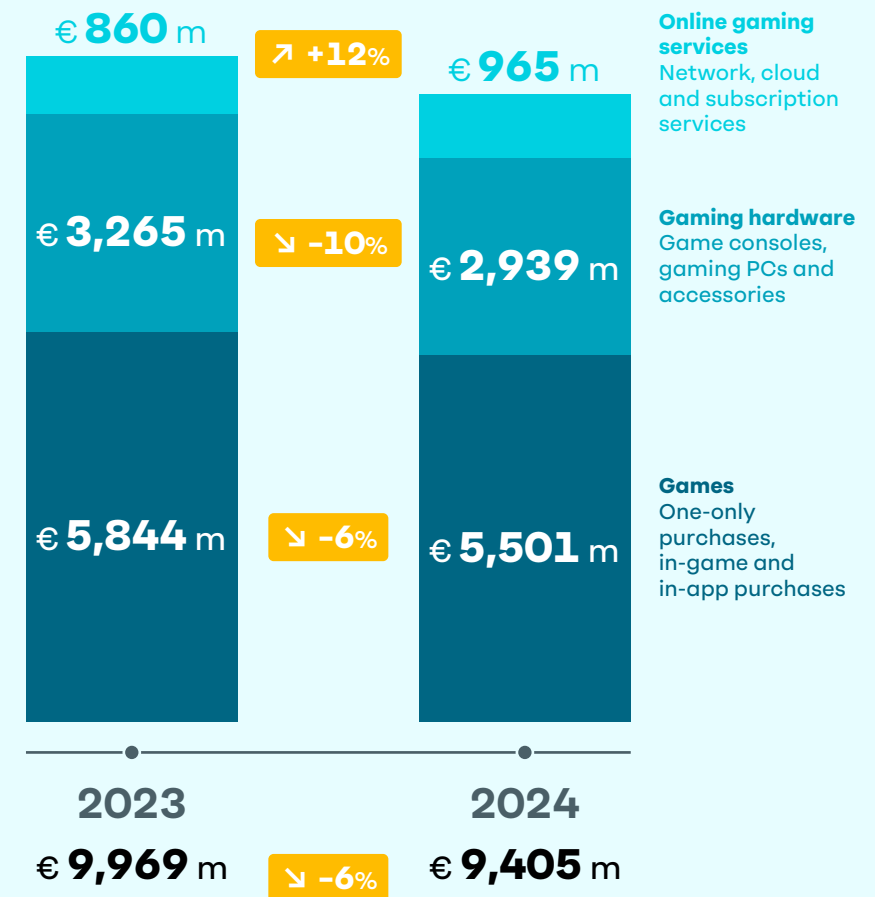
The German games market remains the largest in Europe and ranks fifth worldwide.

Around 9.4 billion euros were spent on games, games hardware and online gaming services in the German video games market in 2024. This represents a decline of 6 per cent compared to the previous year. The market thus experienced a pause in growth. The slowdown in growth in 2024 followed a period of strong overall development: in total, revenue in the German games market has increased by over 50 per cent since 2019. This means

that the German games market has reached a new level, with Germany remaining the largest market in Europe and the fifth largest worldwide.

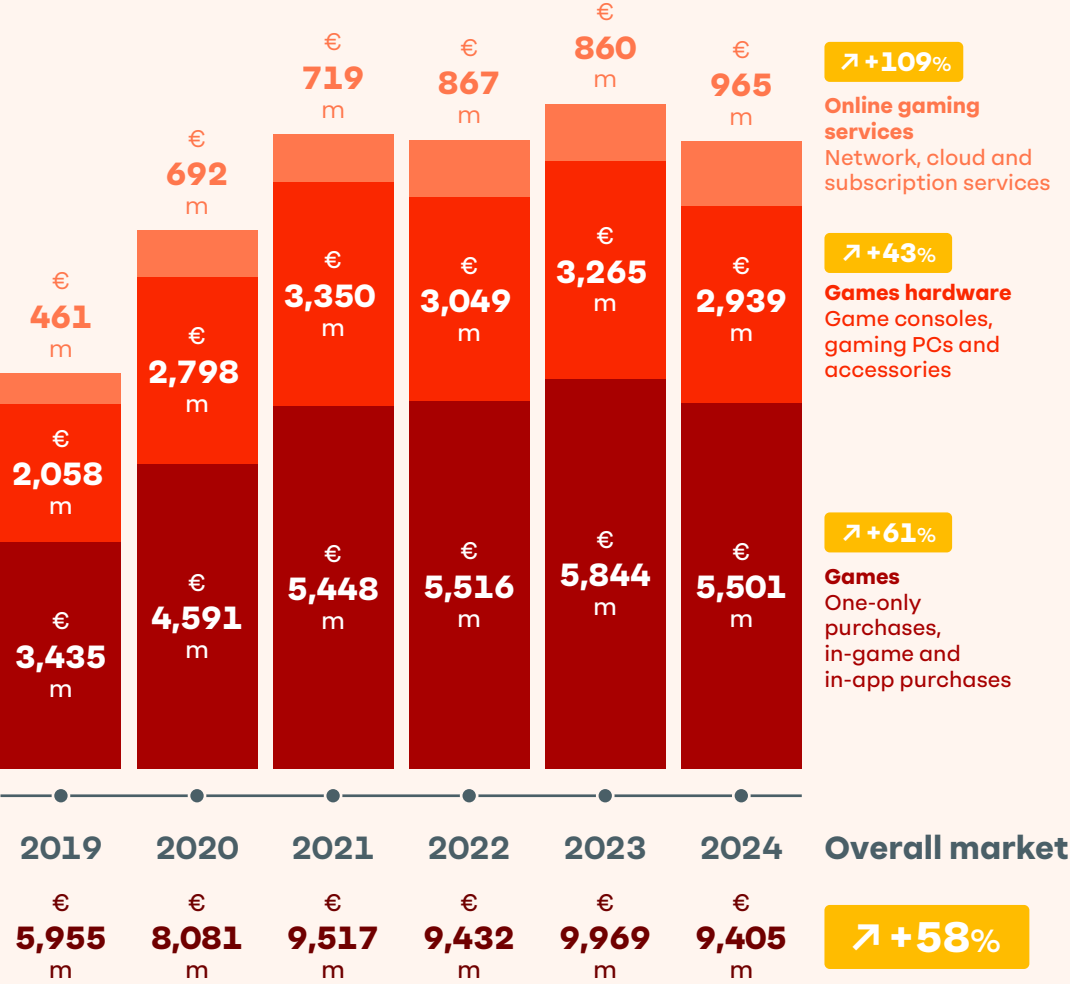
Games for PCs, consoles and mobile devices generated sales revenue of 5.5 billion euros in 2024. This is 6 per cent less than in the previous year. The decline was especially steep in game purchases, which saw a 17 per cent drop in revenue, to 921 million euros. One reason for this was that, compared to 2023, a year of

German games market 2024: decline of 6 per cent



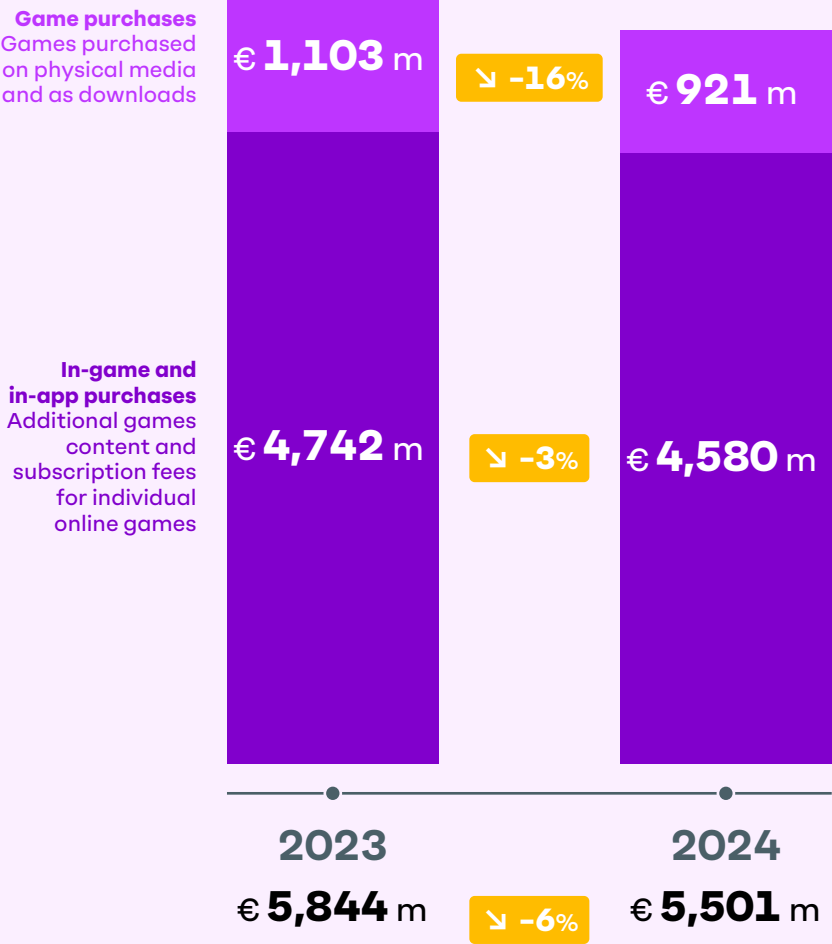
Source: Calculations based on data provided by YouGov Shopper (2025; n=25,000), Data.ai (a Sensor Tower Company) and Nielsen IQ. © game 2025

German games market up around 50 percent since 2019



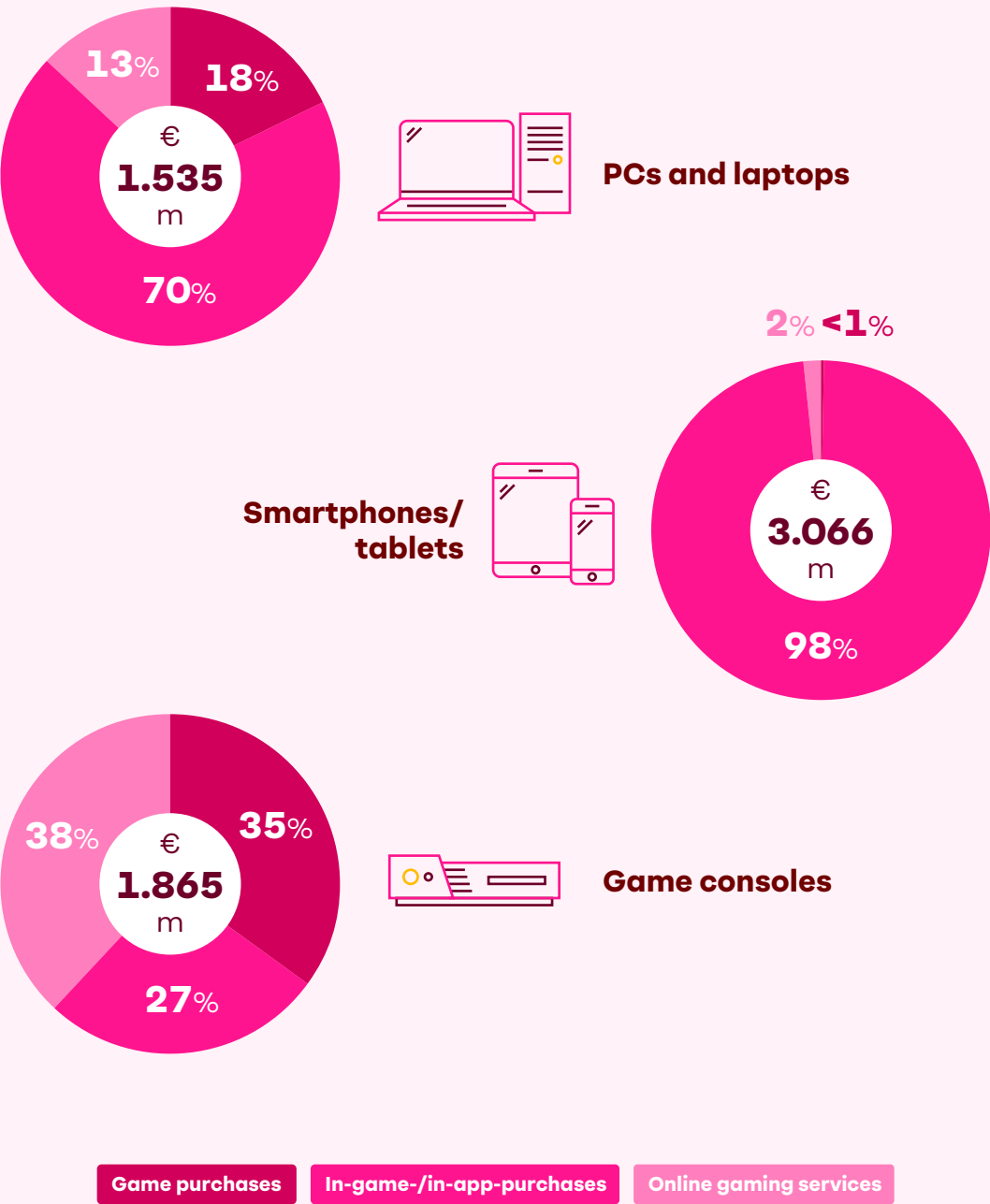
Source: Calculations based on data provided by YouGov Shopper (2025; n=25,000), Data.ai (a Sensor Tower Company) and Nielsen IQ. © game 2025

6 per cent less revenue from video games



Source: Calculations based on data provided by YouGov Shopper (2025; n=25,000), Data.ai (a Sensor Tower Company) and Nielsen IQ. © game 2025

Consumer behavior varies greatly between gaming platforms



Source: Calculations for 2024 based on data provided by YouGov Shopper (2025; n=25,000), Data.ai (a Sensor Tower Company) and Nielsen IQ. © game 2025

numerous blockbuster releases, fewer major titles were released in 2024. The submarket of in-game and in-app purchases generated around 4.6 billion euros in revenue in Germany in 2024, a decline of just 3 per cent after strong overall growth in the preceding years. Whether as free-to-play or full-price games, ever more titles are offering additional content. This takes wide-ranging forms – from ‘skins’, which can change the appearance of a game character, to season passes providing unlimited access to content over a period of weeks, to full expansions with new campaigns or missions. In-game purchases allow video game players to individualise or augment their game experience. Additionally, this business model is an important source of revenue for games companies, not least as it enables them to reduce the economic risk brought on by the sharp rise in development costs in recent years, and to develop further projects.

A large proportion of sales revenue from games in Germany in 2024 can be attributed to mobile games for smartphones and tablets. Last year, revenue from these apps in Germany rose to 3 billion euros for the first time. Gaming on smartphones and tablets has thus reached a new high as it continues its successful course of recent years. Since 2019, the market for mobile games in Germany has grown by 63 per cent. In particular, the high accessibility and variety of games have led to a sharp rise in sales. Almost all mobile games are based on the free-to-play principle, a model which makes mobile games available to anyone at no charge. Players may then opt to pay for additional content, such as levels or cosmetic features, in the form of in-app purchases. The mobile games market also offers a wide selection of games for casual and experienced players alike – from complex and technically demanding games to esports titles.



A large proportion of games revenue in Germany in 2024 was generated by mobile games for smartphones and tablets.

Games for consoles generated around 1.9 billion euros in 2024, making this the second largest category. At around 1.5 billion euros, PC games form the third largest source of revenue. With regard to the various business models, spending behaviour differs across game platforms. For example, 98 per cent of revenue from games for smartphones and tablets comes from in-app purchases. By contrast, the largest share of console revenue, at 38 per cent, is generated by online gaming services, which can now be subscribed to on every console. Over one third of console revenue comes from the purchase of individual games. Around 70 percent of PC game revenue is generated through in-game purchases and slightly less than one fifth from the purchase of games themselves.



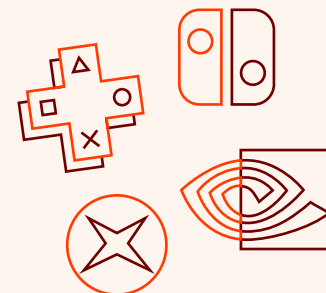
Since 2019, revenue from online gaming services has more than doubled.

The submarket for online gaming services grew to 965 million euros in 2024 – an increase of 12 per cent over the previous year. This segment includes categories such as paid subscription services for PCs, game consoles and mobile devices – services that provide access to a broad selection of games, or enable cloud gaming or functions like online multiplayer gameplay and the saving of game progress in the cloud. The growth in sales over the past five years shows the huge interest in these online services: revenue here has more than doubled from the 2019 level of 461 million euros. Around one quarter of video game players in Germany aged 16 and over already use one or more subscription services in parallel. For the majority, the reasons include the opportunity to easily try new games. About 8 in 10 players who use subscriptions say that they try out games more often as a result. For around 79 per cent, subscription services have also led to the discovery of games that they would not have come across otherwise, and some three quarters of subscription users have purchased games that they previously discovered through their subscriptions.

Sales revenue from games hardware decreased by 10 per cent overall, to about 2.9 billion euros. The largest decline was in game consoles. Here, sales amounted to €807 million, 26 percent less than the year before. One reason for this is that many models of the current console generation which had not been consistently commercially available for several years became available on an ongoing basis again for the first time in 2023. Players therefore snapped them up, leading to a catch-up effect before demand normalised in 2024. In a further demonstration of this effect, sales revenue from accessories for game consoles rose by 6 per cent, to 391 million euros. The market for gaming PCs and laptops was stable, with revenue of 540 million euros, or just 1 per cent less than in 2023. Accessories for gaming PCs – including special input devices like gaming keyboards or mice, graphic cards, etc. – didn't fare quite so well, with revenue falling by 4 per cent, to just under 1.2 billion euros.

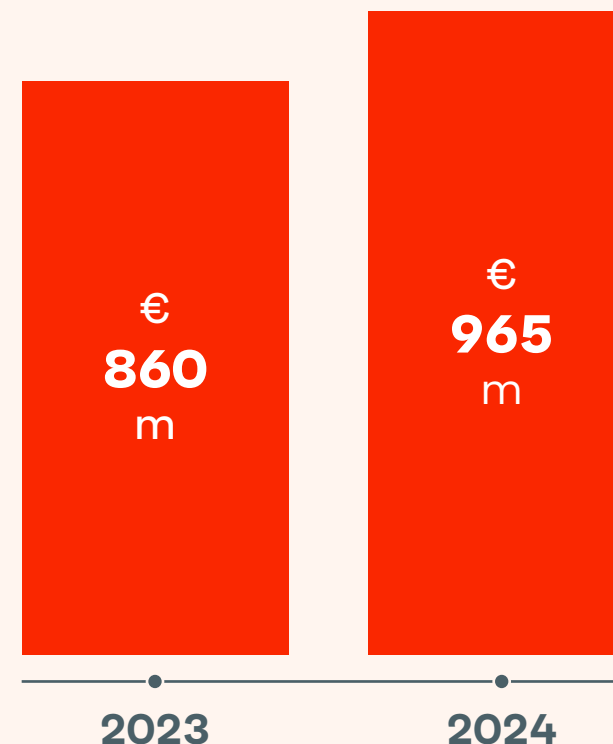
Downloads account for 7 of 10 PC and console games purchased in Germany. In 2024, the share of downloads jumped by 8 percentage points, from 60 to 68 per cent, a new record. Just under one third of games in Germany are purchased on physical media. Among PC players, especially, downloads have become the preferred means of buying games: nearly all games for PCs, around 99 per cent, were acquired digitally in 2024. Most console games, on the other hand, were purchased on physical media. While the share of download purchases rose in this category as well, from 40 per cent in 2023 to 44 per cent last year, physical media still accounted for over half of purchases of console games (56 per cent). The strong growth in the share of downloads can be attributed in part to the 'digital only' development of the last several years. Ever more blockbuster titles are being released

Revenue from online gaming services grows by 12 percent



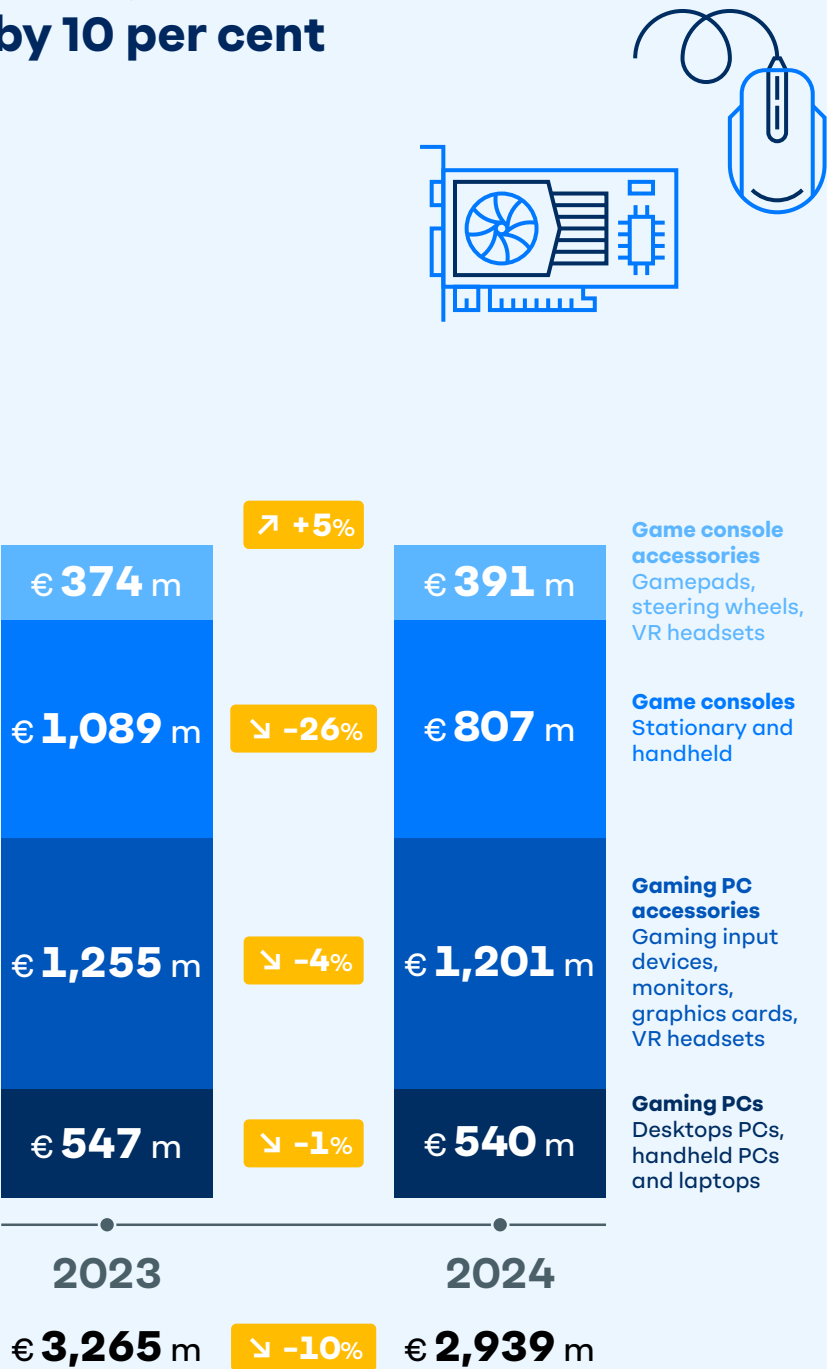
Online gaming services
e. g. Nintendo Switch Online,
Nvidia GeForce NOW,
PlayStation Plus,
Xbox Game Pass

↑ +12%



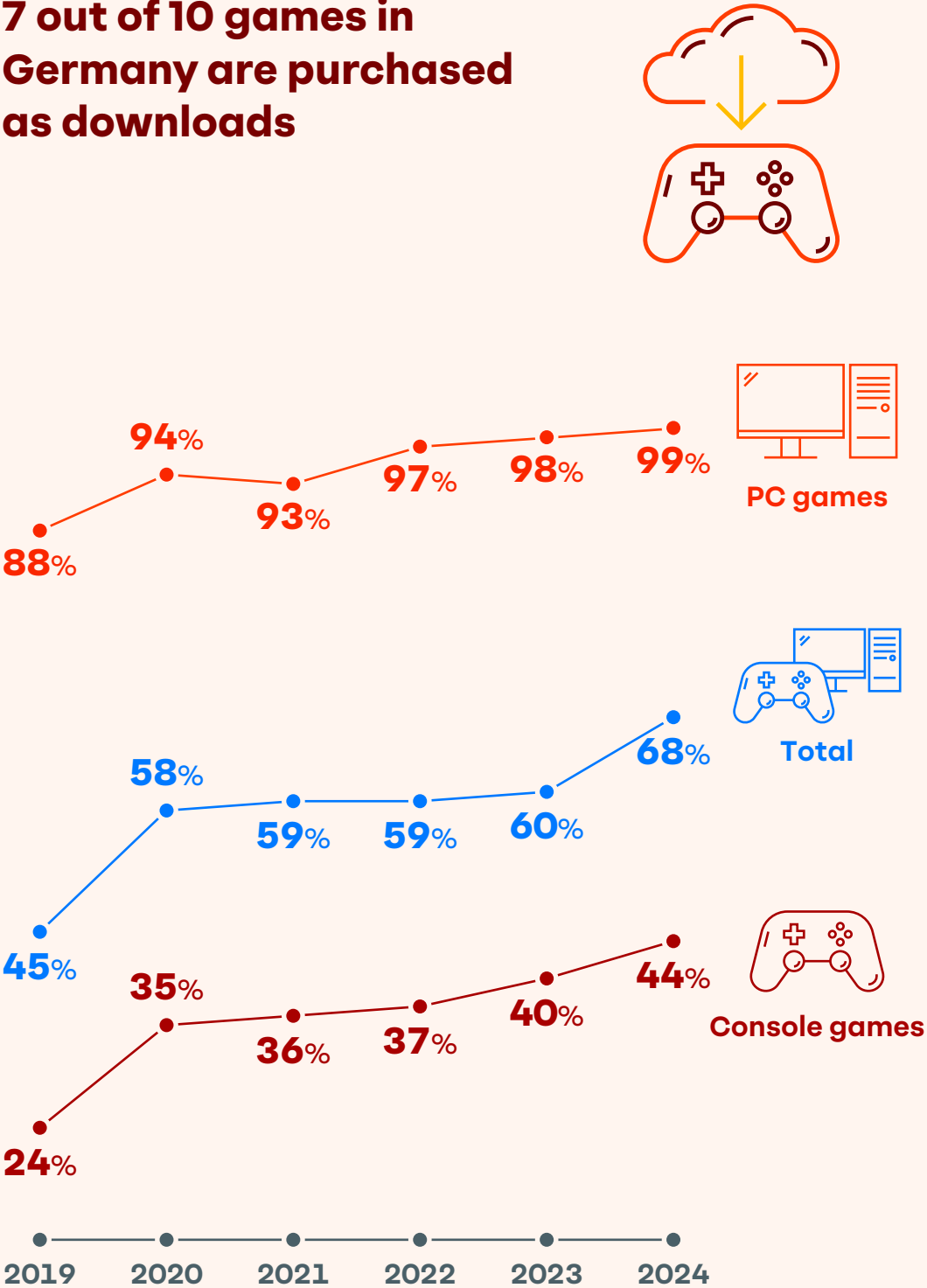
Source: Calculations based on data provided by YouGov Shopper (2025; n=25,000). © game 2025

Revenue from games hardware declined by 10 per cent



Source: Calculations based on data provided by YouGov Shopper (2025; n=25,000) and Nielsen IQ. © game 2025

7 out of 10 games in Germany are purchased as downloads



Source: Calculations based on YouGov Shopper (2024/2025; n=25.000). The data refers to sales in Germany. © game 2025

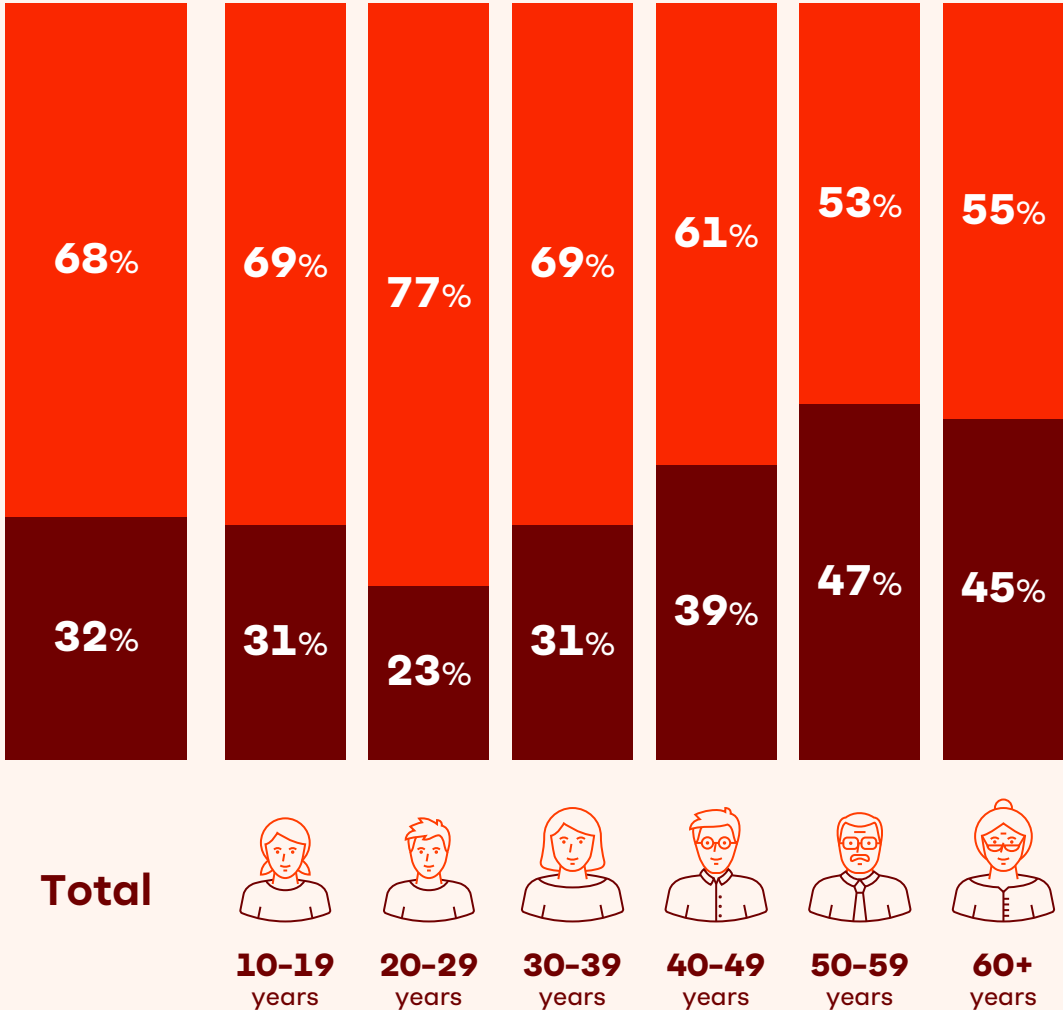
Download purchases of games are particularly popular among 20- to 29-year-olds



Downloads
Share of download purchases of games



Physical media
Share of games purchases



Source: Calculations based on YouGov Shopper (2024/2025; n=25.000). The data refers to sales in Germany. © game 2025

initially or exclusively in digital-only versions, and indie and early-access games are often distributed almost exclusively digitally.

Players' choice of game acquisition via physical media or download isn't just a question of the gaming platform they use, but also of their age. In Germany, download purchases are particularly widespread among the 20- to 29-year age group, who buy more than three quarters of their games for PCs or consoles digitally. Physical media, in contrast, are popular for game purchases above all among older players. In 2024, players aged 50 to 59 bought nearly half of their PC and console games on physical media.

After years of strong growth, the German games market took a breather in 2024. Individual market segments such as online gaming services continue to develop very dynamically. This, together with further impetus in the form of new game consoles and blockbuster games announced for the near future, indicates that the decline in sales revenue seen in 2024 is likely to be short-lived.



Whether games are purchased on physical media or as downloads is not only a question of the gaming platform, but also of the age of the players.

03

The games industry in Germany



Only 17 percent of games companies in Germany expect positive economic development for the entire industry in 2025.

Last year was a challenging one for the German games industry. The back and forth around games funding and, as a result, Germany's compromised international competitiveness collided with the weakened yet ongoing consolidation wave that has swept the global games sector.

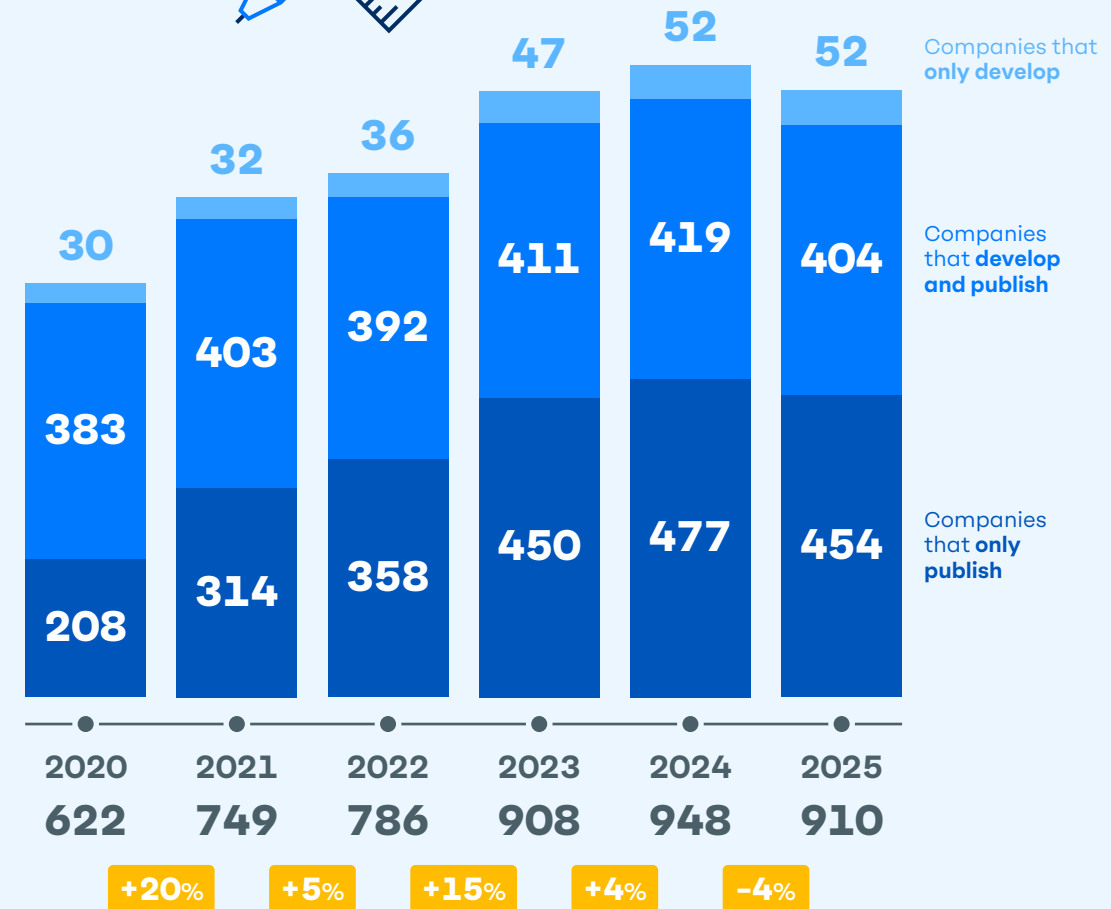
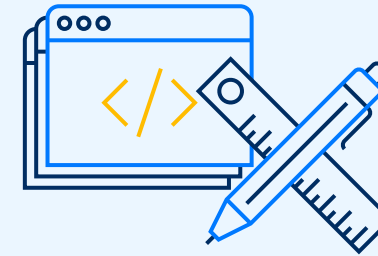
Accordingly, German games companies were cautious heading into 2025: only 17 per cent of them anticipated positive economic development for the industry as a whole this year. While this figure was slightly more positive than that recorded for 2024 (12 per cent), it remains far below the 48 per cent registered two years ago. When asked to assess their own business prospects for 2025, however, companies were markedly more optimistic. More than half, 52 per cent, expected a positive or even strongly positive development in their

business operations this year – two percentage points higher than one year ago. Only 15 per cent anticipated a negative development, as compared to 19 per cent in 2024.

Despite the generally cautious outlook on the development of the industry, a clearly positive tendency can be seen in companies' expectations for their own business development. This is supported by sales trends worldwide. Market researchers at Newzoo, for example, anticipate approximately 3.4 per cent growth in the global games market in 2025, to around 189 billion US dollars¹.

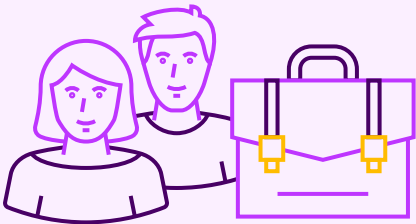
¹ Global games market report & forecast Q2 2025 update (<https://newzoo.com/resources/blog/global-games-market-update-q2-2025>).

Number of games companies in Germany declined for the first time in years

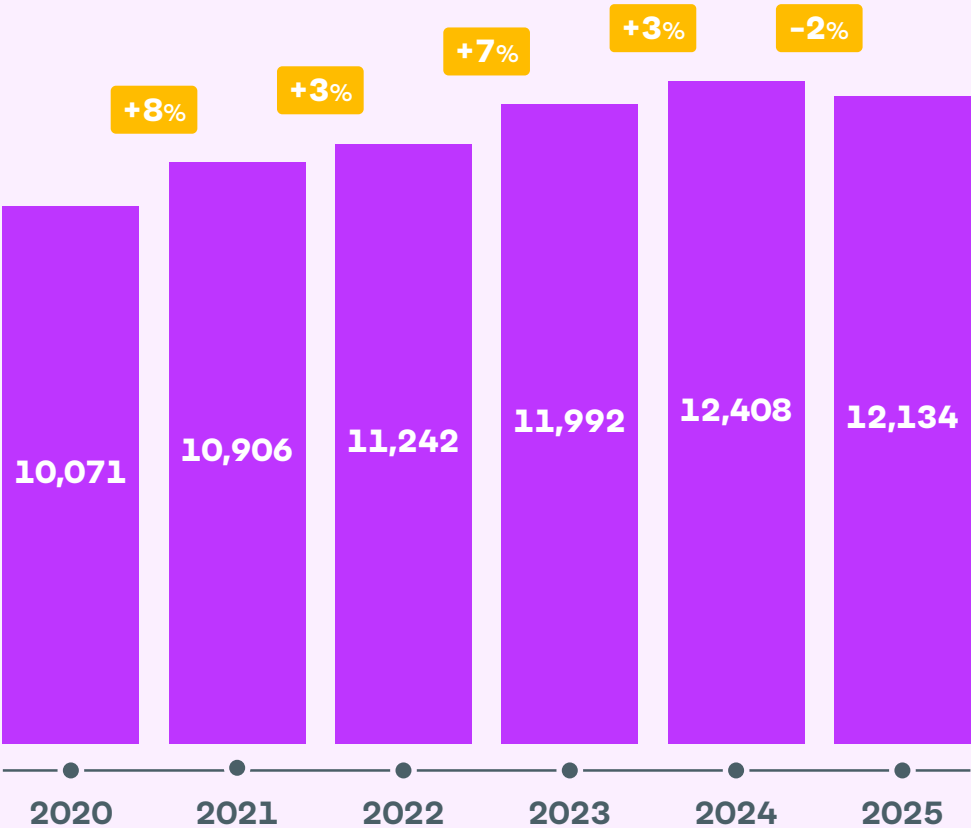


Source: Calculations based on gamesmap.de data from May 2025. © game 2025

German games industry employs fewer people than last year



Employees at game developers and publishers



Source: Calculations based on gamesmap.de data from May 2025. © game 2025

03.1 Companies and employment figures

The figures for the number of companies and employees in the German games industry also show how challenging the environment has been for games companies recently. After years of growth, there has now been a decline for the first time. According to the data, the number of companies in Germany that develop and/or publish games has dropped by 4 per cent since last year, to 910. The boom in start-ups in the games sector that was set in motion by the introduction of the federal funding for games in 2020 has now completely subsided. Last year's figures already indicated a clear slowdown. The decline can be attributed in particular to the consolidation of the global games market as well as the unreliable availability of federal funding. Three times since 2020, there have been months-long suspensions placed on funding applications. Despite the newly registered drop, the number of companies has risen by 46 per cent overall since the initial start of the games funding programme in 2020. Of the 910 present companies, 454 work exclusively in game development and 52 exclusively as publishers. The remaining 404 companies are active in both the development and publishing of games.



The boom in start-ups in the German games industry triggered by the introduction of the federal funding for games in 2020 has now completely subsided.

The number of employees at games companies in Germany has also declined over the past year. Whereas game developers and publishers employed 12,408 workers in 2024, the figure for 2025 stands at just 12,134 – a drop of 2 per cent. As with the number of companies, the employee numbers had previously shown strong growth since the introduction of the games funding programme at the federal level: a rise of 23 per cent from 2020 to 2024. The recent decline indicates that the conditions, which afford little plannability, in combination with the repeated funding application stops are impacting the job market. A year ago, there were still more companies with ongoing projects that were internationally competitive thanks to federal funding. Despite the international consolidation wave and the uncertainty around funding for the industry here, this had stabilised Germany's games sector. The games industry secures a total of over 30,000 jobs in Germany. In addition to jobs in development and publishing, these include, for example, skilled professionals in educational institutions, the media and the public and commercial sectors.

03.2 Games funding

The unreliability of games funding at the federal level has unfortunately continued in recent years. The freeze on funding applications that was put in place in May 2023 extended into 2024. In July 2024, more bad news followed from the Federal Ministry for Economic Affairs and Climate Action: the previously independent department responsible for digital games was merged with the department for cultural and creative industries. Although existing projects such as the Federal German Games Funding Programme and the German Computer Game Awards were continued, this new lack of independence significantly reduced the visibility of this area and its capacity to act. Seeking to promote the games industry's profile and scope of action, the German Bundestag had allocated funds in the 2021 federal budget for the establishment of a games department in the then Federal Ministry of Transport and Digital Infrastructure. This allowed for the ongoing, centralised handling of all games-related policy issues. It also placed games on an equal footing with other sectors with dedicated independent departments in the federal government, such as music, literature, film, visual arts, theatre, microelectronics, bioeconomics, AI and many more.

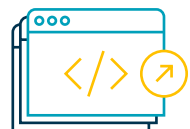
On the other hand, the Initiative for *Growth – new economic dynamism* for Germany launched by the previous governing coalition brought hope for significant improvement in the competitive conditions for games companies in Germany. As stated in the initiative, the objective of strengthening the country as a location for game production shows the high relevance the former government – consisting of the SPD, Bündnis 90/Die Grünen and FDP – attributed to the games industry for Germany's future viability in economic and technological terms. Never before had all three coalition partners spoken out so clearly in favour of the speedy introduction of tax breaks for the development of games.

However, the key points of the new funding guidelines presented by Germany's then Vice Chancellor and Economic Minister Robert Habeck at the political opening of gamescom 2024 gave rise to considerable controversy. From the perspective of games companies, they worsened the situation with respect to certain important criteria. Specific funding amounts remained unclear and therefore unreliable. At the same time, only prototypes and projects with a significantly increased minimum volume of 300,000 euros are to be eligible for future funding. Given that the German games industry is comprised largely of start-ups, this will exclude numerous companies from federal games funding. In addition, combining federal and state funding, an important option for small and medium-sized games companies and standard practice in, for example, the area of film industry financing, will no longer be permitted. And the fact that applications can no longer be submitted on an ongoing basis, but only in response to a maximum of two calls from the ministry per year, will also make planning more difficult.

The largest games companies in Germany

			Number of employees in Germany
1	Nintendo of Europe	Hesse	935
2	Ubisoft	Berlin, NRW, Rhineland-Palatinate	660
3	InnoGames	Hamburg	350
4	Crytek	Hesse	340
5	wooga	Berlin	325
6	GAMEFORGE 4D	Baden-Württemberg	300
7	gamigo	Hamburg	253
8	Stillfront Germany	Hamburg	185
9	PLAION	Bavaria	152
10	Kalypso Media Group	Rhineland-Palatinate	150
	Electronic Arts	North Rhine-Westphalia	
12	GameDuell	Berlin	130
13	Kolibri Games	Berlin	115
14	Bigpoint	Hamburg	110
	KING Art	Bremen	
16	Travian Games	Bavaria	107
	upjers	Bavaria	
18	astragon Entertainment	North Rhine-Westphalia	104
	weltenbauer. Software Entwicklung	Hesse	
20	YAGER Development	Berlin	100
	CipSoft	Bavaria	
	Klang Games	Berlin	
	Sandbox Interactive	Berlin	

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



72 percent of new games in Germany would not have been developed without the federal funding for games.

The degradation of the funding guidelines was poorly received in the games industry also because the evaluation of the previous guidelines by the auditing firm PwC on behalf of the Federal Ministry for Economic Affairs and Climate Action in late 2023 had highlighted many strongly positive effects of the games funding programme. 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. Because funds had been insufficient up to that point – resulting in two application freezes since the start of the funding programme in 2020 – a significant increase in funding was recommended. The evaluation by the Federal Economic Ministry had revealed that, on a per capita basis, Germany provides only one quarter of the budget that other game production locations do.

At the end of 2024, the 18-month freeze on funding applications was finally lifted. This was good news for games companies in Germany and, given the collapse of the governing coalition shortly before that, in November, it also marked a small success. It didn't give rise to any real spirit of optimism, however, as the stricter conditions imposed by the new guidelines excluded many game development studios, in particular smaller ones, from federal funding. In addition, the failed coalition hadn't yet passed a budget for 2025, which resulted in significant additional restrictions on the funding programme. For example, after the call for funding, funds were initially available to multi-year game development projects only if their total budget didn't exceed 900,000 euros. Funding for larger projects and prototypes could initially only be approved if these were to be completed by the end of 2025 – a serious hurdle given that it usually takes several years to develop a game. In addition, the call for funding reduced the maximum project funding amount to 2 million euros. With these heavy restrictions, games funding only truly helped a few companies in practice.

The continuing uncertainty surrounding games funding may also have contributed to the comparatively poor results of game's industry barometer. There are areas in which German games companies view the country as an advantageous location, such as in the training of young talent and the social climate with regard to games. However, a large majority of companies evaluate Germany's international competitiveness as a game development location as rather poor or very poor. This total negative rating of 87 per cent comprises 72 per cent, or almost three quarters, that say Germany's international competitiveness is rather poor, plus 15 per cent that assess it as very poor. Just 13 per cent rate the framework conditions for the games industry in Germany as rather good, and not a single company assesses these as very good.

The commitment of the German political sphere to the games industry received only slightly better marks, with 7 out of 10 games companies (71 per cent) rating government support for the domestic conditions as rather poor or very poor. A strong majority of companies rated government funding of games as poor: about two thirds, or 65 per cent, with respect to big-budget AAA games and 62 per cent in the case of indie games. By contrast, when it comes to the training of young professionals, companies are significantly more positive. Just under two thirds, or 63 per cent, view Germany as a rather good or even a very good location. The social climate towards games is perceived similarly, with a total positive rating of 66 per cent. The further infrastructure for games companies, such as hubs and networks, is seen the most favourably, with 78 per cent of companies rating it as rather good or very good.















Despite these challenging conditions, the desire to develop games in Germany remains strong. This is demonstrated by the Press Start: Games Founding Grant, a funding programme launched in mid-October 2024 by then Federal Government Commissioner for Culture and the Media Claudia Roth to support the establishment of new game development studios in Germany. Over a period of 18 months, company founders receive a grant of 2,750 euros per month to help them focus their efforts during the start-up phase and further the development of their own games. Grant recipients also benefit from a comprehensive education and networking programme along with accompanying coaching, to provide them with optimal support for their start in the games industry. The promotional programme met with overwhelming interest. The 24-member expert jury worked through over 1,000 applications, ultimately selecting 132 grant recipients.


















The expert jury at Press Start had to work through a total of over 1,000 submissions.

Further positive news came after the federal elections and the subsequent coalition negotiations between the CDU, CSU and SPD in early 2025. The coalition agreement takes up central demands of the games industry that are intended to make Germany a strong and internationally competitive game development location in the coming years. The governing coalition of Christian Democrats and Social Democrats acknowledges the great cultural, economic and technological potential of the games industry and its leading role as a pacesetter and innovation driver. A key step forward is the planned introduction of new tax breaks for games in Germany, which are designed to reliably offset the country's current 30 per cent cost disadvantage compared to other game locations worldwide. The coalition agreement additionally accords esports clubs non-profit status. While this was also part of previous coalition agreements, it had yet to be implemented. For the first

International comparison of games funding models

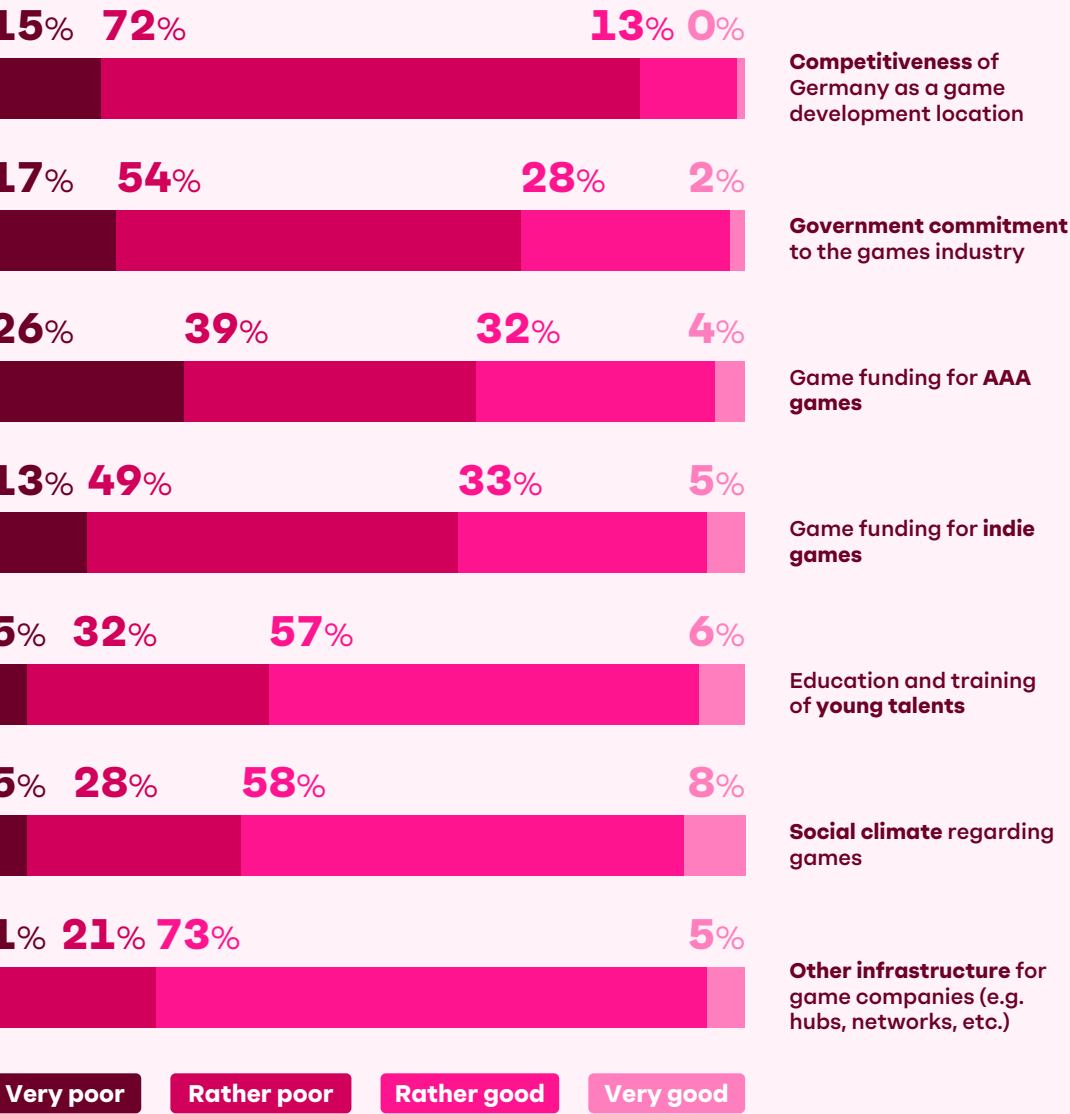
			
	Germany 2024	Canada 2024	Ireland 2021/22
		 Quebec	  British Columbia Ontario
Game Companies	948	821	-
Employees	12,400	34,010	2,000
Funding measures	Direct funding	Tax credit	Tax credit
Tax credits/ Funding rate	 N/A	 27.5%  25%  35%	 32%
Guaranteed funding (if eligible for funding)			
Cap on annual funding	 € 50 m ¹	 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.

			
United Kingdom 2024	Australia 2024	France 2021/22	USA 2024
			 Texas
2,150	137	1,200	2,756
24,420	2,470	32,000	75,353
Tax credit	Tax credit	Tax credit	Tax credit
 34%	 30%	 30%	 7.5-22.5%
			
 unlimited	 unlimited	 unlimited	 unlimited

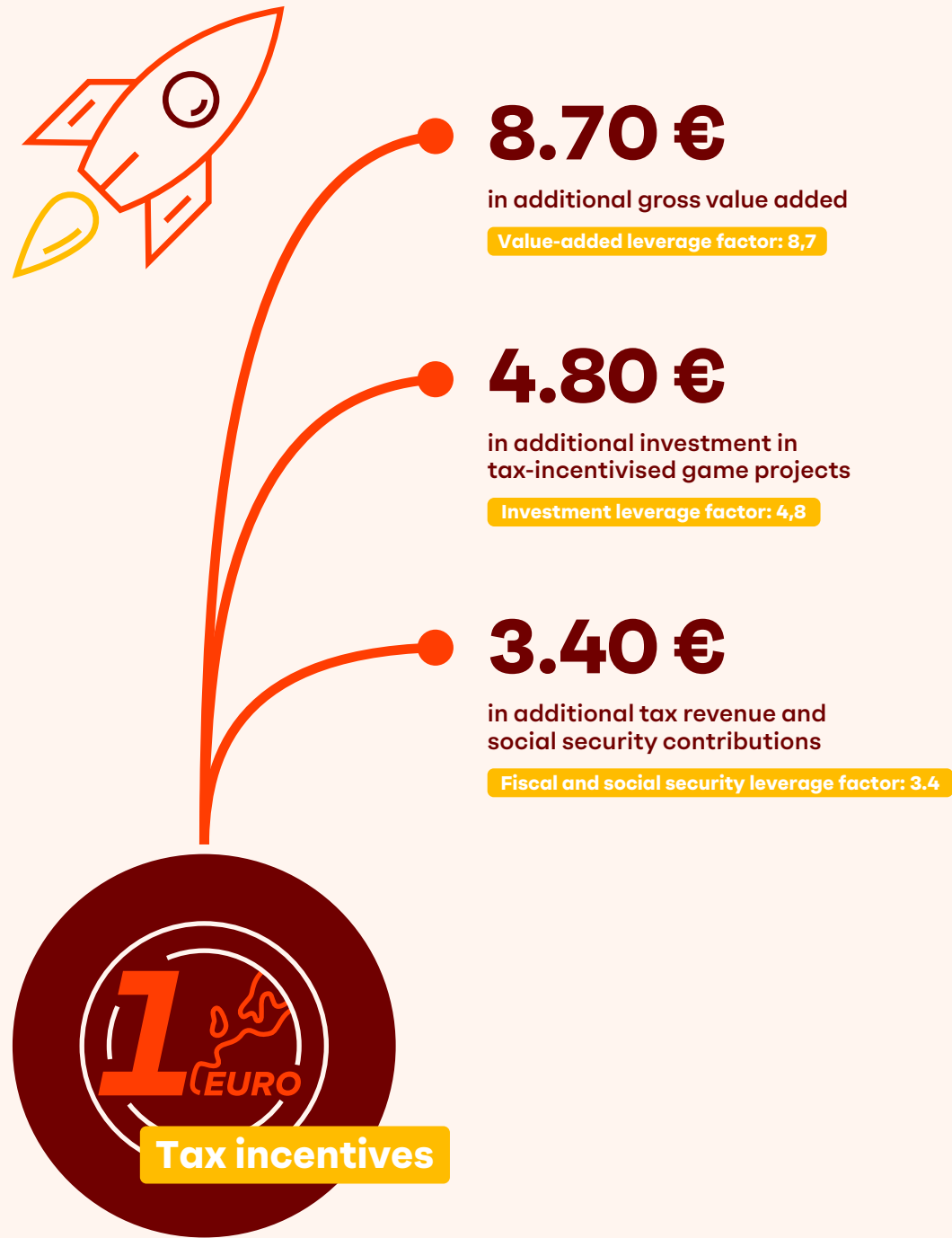
Source: Nordicity in cooperation with Goldmedia on behalf of game – The German Games Industry Association. © game 2025

9 out of 10 gaming companies see an urgent need for action to improve Germany's international competitiveness



Source: Online survey conducted by game – The German Games Industry Association – between November 6 and November 18, 2024, in which 187 member companies of game participated, including developers and publishers in particular. © game 2025

Leverage from tax breaks for games in Germany



Source: Calculations by Goldmedia on behalf of game (2025). © game 2025



time, the new federal government has assigned games to the Federal Ministry of Research, Technology and Space. This puts them under the responsibility of Dorothee Bär, who has a track record of commitment to the medium and the games industry. During her first appearance as the new 'games minister' at the German Computer Game Awards 2025, she announced the establishment of an independent games department within her ministry.

The German government's draft budget includes an increase in funding for games to a total of 88 million euros in 2025 and 125 million euros annually from 2026 onwards.

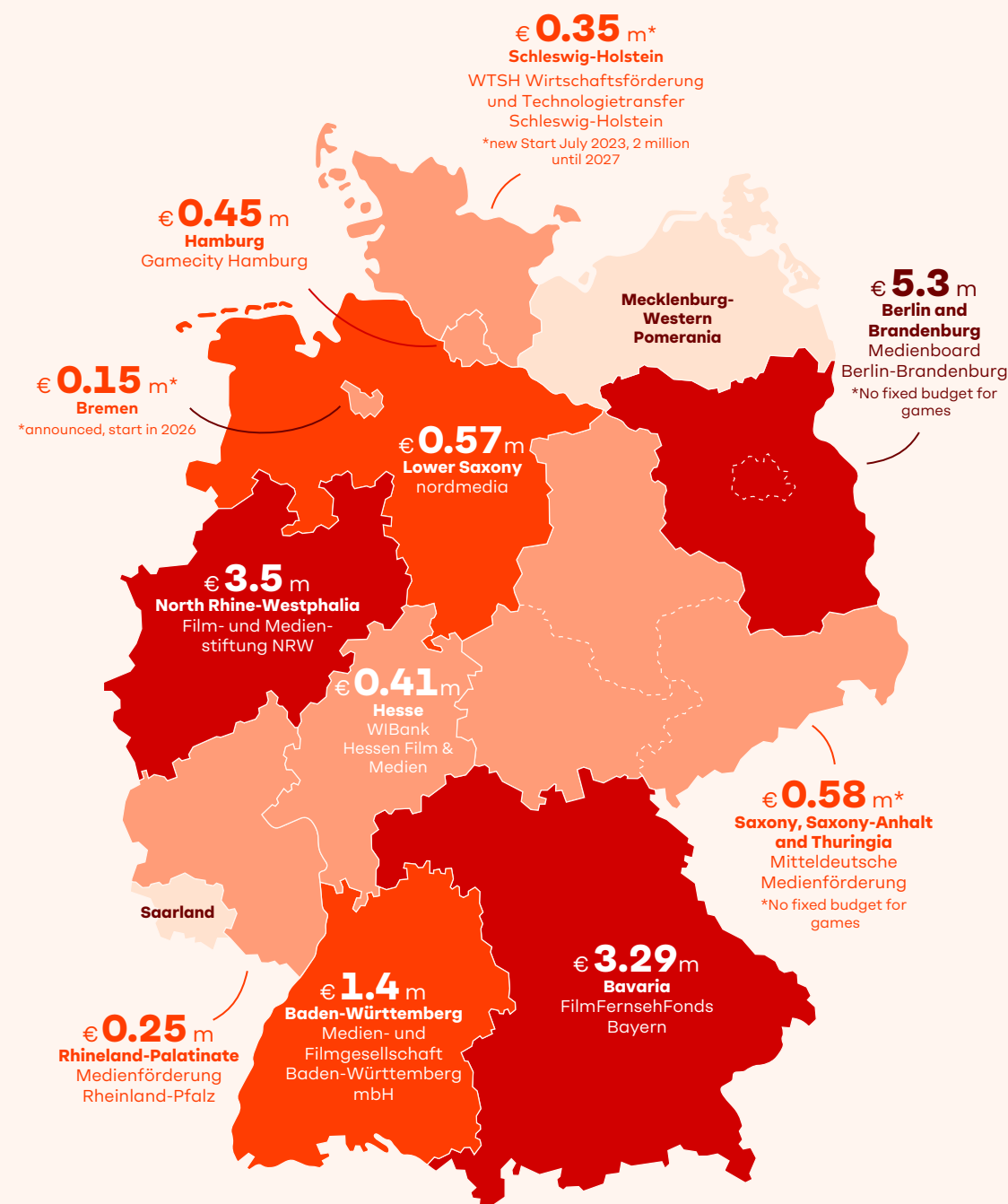
At the beginning of 2025, game presented its proposal for the additional tax-based funding of games development, as included in the government coalition agreement, to enable Germany to catch up with the world's top game development locations. It called for the introduction of tax credits of 30 or 35 per cent for small and medium-sized companies. This would jump-start investment and sharply boost tax revenues and value creation, as underscored by findings of the research and consulting firm Goldmedia on behalf of game. The analysis shows that every euro in tax credits for games in Germany would trigger 4.80 euros in additional investment, yield 3.40 euros in new tax revenue and social security contributions and generate

8.70 euros in gross value added. Long-term implementation of such tax breaks would result in even greater benefits, according to the experts, as it would spur German enterprises to expand production capacity, encourage foreign companies to establish locations in Germany and incentivise the domestic development of major games for the global market. Combining internationally competitive tax breaks with funding aimed especially at young companies helps games companies of all sizes and has proven a successful model in the top international game development locations worldwide.

The budget plans announced by the federal government in late June 2025 bolstered German games companies' confidence with regard to the near future. They provide for the long-sought increase in the budget for games funding. The draft budget specifies a total of 88 million euros for 2025 and sets an annual funding level of 125 million euros from 2026 onwards. This is in line with game's calculations of the financing that is required until the implementation of additional tax breaks in line with global standards, as called for in the coalition agreement.

Which federal states are pursuing good game development policy from the perspective of German companies can be seen in the results of game's industry barometer. They show Bavaria to be the best location for game production in Germany. The battle for first place nonetheless remains a head-to-head race. North Rhine-Westphalia, which finished first in the previous rankings in 2023, holds second place in the current rankings. Berlin takes

Regional games funding programs in Germany

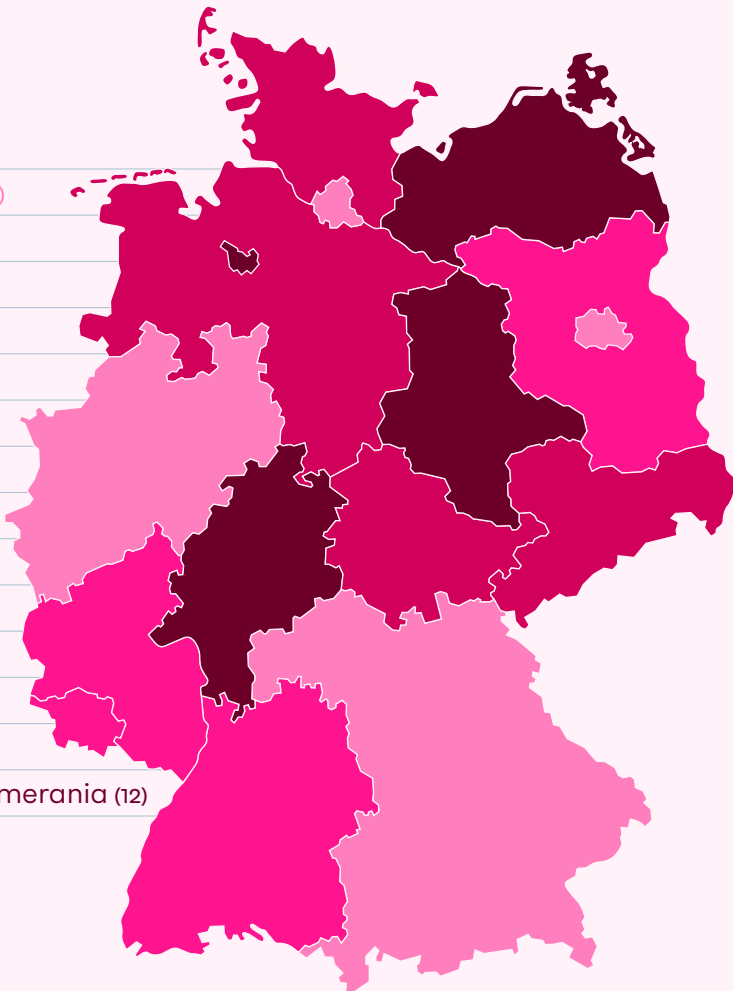


The best games industry locations in Germany

Rated by companies in the games industry



- 1. Bavaria (3)
- 2. North Rhine-Westphalia (1)
- 3. Berlin (2)
- 4. Hamburg (2)
- 5. Baden-Württemberg (4)
- 6. Brandenburg (5)
- 7. Rhineland-Palatinate (7)
- 8. Saarland (8)
- 9. Lower Saxony (6)
- 10. Saxony (12)
- 11. Schleswig-Holstein (8)
- 12. Thuringia (12)
- 13. Bremen (9)
- 14. Saxony-Anhalt (11)
- 15. Mecklenburg-Western Pomerania (12)
- 16. Hesse (10)



Note: Previous ranking in brackets.
Source: member survey (12/2024). © game 2025

third place, just ahead of Hamburg, after the two shared the second-place spot two years ago. Movement was also seen at the bottom of the rankings. Hesse, which ranked tenth out of twelve in 2023, brings up the rear this time, behind Saxony-Anhalt in 14th and Mecklenburg-Western Pomerania in 15th place.

There has been positive news recently from several federal states. Baden-Württemberg, Bavaria, Hamburg and Hesse have all slightly increased their budgets for games funding. Bavaria, Berlin together with Brandenburg, and North Rhine-Westphalia continue to be the federal states with the most extensive programs to support game development. Although Berlin and Brandenburg are now below the record funding amount of 2023 at 3.6 million euros, the Berlin Senate is supporting the establishment of the House of Games Berlin with 4.6 million euros. And North Rhine-Westphalia has announced an additional 500,000 euros in funds to fund games that specifically counter disinformation and radicalisation. In the first round of this funding, 277,000 euros were distributed in July 2025.

The Mitteldeutsche Medienförderung (MDM), which is responsible for Saxony, Saxony-Anhalt and Thuringia, saw a slight decline in funding commitments in 2024. At the same time, however, a flagship project was launched in Leipzig: the R42 accelerator programme, which receives 900,000 euros in assistance from the state of Saxony. From 2025, this will enable additional start-up funding of 30,000 euros to be awarded to the 12 studios receiving support.

In 2024, Schleswig-Holstein awarded around 630,000 euros to game projects for the first time. These resources, from the European Regional Development Fund (ERDF), were announced in 2023 but delayed until 2024. Hesse, which placed last in game's industry barometer, is also making progress in its support of the games industry. There, both WIBank and Hessen Film & Medien increased their funding for games in 2024, paying out a total of 410,000 euros.

Despite positive political signals and a planned budget of 300,000 euros, no games funding was distributed in Saarland. Saarland's Ministry for Economic Affairs, which has only recently become responsible for this policy area, is working with the industry in the state to finalise the new funding guidelines. There is good news from Bremen, however, where games funding is being introduced from 2025. The initial budget of 150,000 euros will be allocated through the regional funding program institution nordmedia.

03.3 The 10 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

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 order to be able to compete internationally with the necessary ambition and to enable significantly more innovation, growth, and creative games made in Germany, strong and targeted efforts are needed to improve the country's conditions as a game development location.

Competitiveness in games 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 program 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. The new federal government's plan to increase funding to 125 million euros per year from 2026 onwards is an important step in this further development. This means that games funding will be more closely aligned with the actual needs of the games industry in Germany than before and will gain the necessary time to implement the additional tax-based funding for games planned in the coalition agreement. The goal must be a hybrid system combining the existing games fund system with additional tax breaks for games, as has been common practice in the world's leading locations for many years. Such a funding system would give a significant boost to investment, tax revenue, and value creation. The Analysis of leverage effects¹ shows that every euro in tax credits for games in Germany would trigger 4.80 euros in

¹ Source: Economic significance of the games industry in Germany and leverage effects of tax-based games funding, <https://www.game.de/publikationen/volkswirtschaftliche-bedeutung-der-games-branche-in-deutschland-und-hebeleffekte-einer-steuerlichen-games-foerderung/>

additional investment, yield 3.40 euros in new tax revenue and social security contributions and generate 8.70 euros in gross value added.

It is crucial that all measures are implemented in an unbureaucratic, predictable, and transparent manner and are designed to be long-term and in line with demand. This also applies to funding provided by the federal states, which play an important role in strengthening regional structures. Specific funding and support for start-up teams complements the promotion of game development. An evaluated continuation of the *Press Start* program for founders therefore appears to be a logical step. The decisive factor is the responsible investment of public funds. It is therefore important to regularly evaluate the effects, developments, and positive leverage for the economy that stem from a strong games industry through market studies.

Campaign for Germany as a game location

Germany as a production location and games made in Germany need good visibility and networking both domestically and internationally. 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 games 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, such as that provided for the House of Games Berlin.

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

Games-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. We support the establishment of a professional association for game studies and strive for close cooperation.

4.

Education needs video games – from school up until old age

Video games are perfect entertainment, but they can also be so much more in almost all areas of life. They open up new ways of acquiring knowledge, promote social interaction, motivate, and are easy to use. Our education system must take advantage of the opportunities games offer for education in schools, vocational schools and universities, for continuing education and for lifelong learning. The use of video games in learning contexts needs targeted support, as does the development of didactically sound educational games. Media literacy and basic digital skills – including programming skills – are key skills for the future and must be integrated into teaching in a mandatory manner.

5.

Youth protection legislation: modern, convergent and internationally compatible

Germany's modern, internationally leading youth protection system enables people of all generations to safely play video games. Uniform, modern, and convergent youth protection laws must reflect the media realities of children and adolescents, enable their rights to participation, and ensure the system's 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 develop innovative business models for refinancing investments, such as in-game purchases, which have become firmly established among video game players and are geared toward digital practicality. Across all business models in the games industry, maintaining the trust of players has the highest priority and is a decisive factor for success. Many other industries are taking inspiration from these innovations and adapting them. However, new digital business models need ample latitude to develop, 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 – right here in Germany. 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. The International Computer Game Collection could also play a leading

global role in addressing the unique challenge of preserving video games as a dynamic cultural asset. 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

To enable successful game development, internationally compatible cloud gaming, and lag-free gaming experience for millions of players, Germany as a games location must have nationwide gigabit connectivity. 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 make a sustainable digital infrastructure accessible to all while maintaining net neutrality. It is only then that games can truly demonstrate their exceptional capacity for innovation in Germany.

9.

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

We in the games industry are committed to promoting diversity and tolerance on a daily basis. All industry stakeholders 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 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. This is more true than ever in light of the Olympic Esports Games.

04

gamescom and devcom

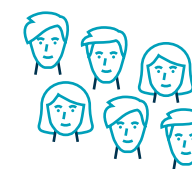
gamescom 2024 was a huge success, with more exhibitors than ever before and record-breaking levels of reach and international engagement. Millions of people celebrated their passion for video games at the world's largest games event, both in person in Cologne and online from around the world. With unparalleled numbers of exhibitors, trade visitors, political guests and online visitors as well as record levels of international participation, gamescom underscored

its importance as the heart of the games world and one of the best-known global event brands.

Held at the Koelnmesse exhibition centre in Cologne, gamescom offered a unique festival experience to approximately 335,000 visitors from 122 countries; the event featured the full spectrum of games culture. More than 1,460

exhibitors, 70 percent of whom were international, showcased the entire spectrum of the gaming world – from the latest AAA blockbusters to indie insider tips – as well as the most exciting gaming technologies and innovations. Community meetups with nationally and internationally renowned creators from the games industry, esports tournaments and the gamescom city festival in central Cologne also gave visitors the opportunity to dive into the unique atmosphere at gamescom. Millions of games fans from all over the world were also able to take part in gamescom digitally, thanks to the extensive range of online formats: from exhibitors' live streams and the talks and shows in the gamescom studio to the interactive online adventure gamescom epix – which, for the first time, also offered unique digital trading cards as rewards for completing quests. The event's grand kick-off,

gamescom Opening Night Live, welcomed an audience of thousands of in-person visitors and featured numerous world premieres and announcements; it racked up around 44 million online views. In addition, live stage events gave world-famous personalities like film director Tim Miller and game developer Peter Molyneux a chance to present their latest games-related projects. gamescom's online formats also set a new record: with more than 547 million hits, the event achieved a new high in terms of international reach. The central theme of gamescom 2024 – The biggest community in the world – underscored the enormous appeal of games. And nowhere is the unparalleled creativity, passion and openness of the immense global games community more evident than at gamescom. From esports tournaments in the event arena and costume contests at the cosplay village to old-school games in the retro area and new highlights such as the cards & boards area and the artist area – every inch of space at gamescom was dedicated to people from all over the world celebrating games culture together. Additionally, over 32,000 trade visitors – more than ever before – convened in the business area to discuss the latest developments and projects in the games industry. The percentage of trade visitors from the USA and Japan increased particularly strongly in 2024.



The proportion of trade visitors from the USA and Japan grew particularly strongly.

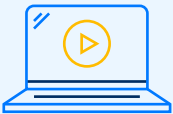
gamescom also achieved a number of important milestones in terms of social responsibility. As part of the sustainability initiative gamescom goes green, the event expanded the range of green and recyclable materials it offered to exhibitors. And the gamescom cares platform underscored exhibitors' commitment to areas such as diversity, education and environmental protection. This gave greater visibility to projects such as the volunteer career initiative Amir Satvat's Games Community, the women's and children's aid organization Kids of Ukraine, and the devcom Scholarship Program, which was launched for the first time in 2024 and which devcom and gamescom are using to enable game developers from underrepresented groups to participate in the events. gamescom also took an important step towards improving accessibility and making the event more comfortable and enjoyable for wheelchair users and people with limited mobility. Starting in 2024, gamescom requested that exhibitors sign a voluntary agreement to provide wheelchair-friendly access to their gamescom booths.

gamescom was an annual highlight for many politicians from all over Germany and Europe, as well. More than 500 guests from the political sphere – around twice as many as in 2023 – came to Cologne in 2024 to enter into a dialogue with the games industry. They offered strong words of support on particularly



gamescom 2024 broke records in terms of the number of exhibitors, internationality, and global reach.

gamescom 2024 in numbers



547 m+

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



335,000

Visitors from 122 countries



2.7 m

Page views on gamescom epix

Source: www.gamescom.global



5,000+

trade visitors from 83 countries at the devcom developer conference 2024



32,000

trade visitors to the gamescom business area, half of whom came from abroad



1,460+

exhibitors from 64 countries on approximately 230,000 square meters of exhibition space



11,000

livestreams on over 5,000 different channels



Further information is available on
www.gamescom.global

important issues, such as funding and further development of the games industry in Germany. At the political opening of gamescom, Robert Habeck, then Federal Minister for Economic Affairs and Climate Action, and Hendrik Wüst, Minister President of North Rhine-Westphalia, emphasized the high economic, technological, and cultural significance of games and the need to create internationally competitive conditions for the German games industry. By serving as a platform for direct conversations with state, federal and EU politicians as well as hosting guided tours of the event for politicians, gamescom also provided the opportunity for discussions on a wide range of other topics. In addition to the potential of games for business, culture, and digital innovation, other topics included future-proof youth protection, accessibility in games, and the preservation of games as cultural assets, for example through the International Computer Games Collection (ICS).

gamescom congress

The 2024 gamescom congress was larger, more international and more diverse than ever before. The record-breaking attendance – over 900 visitors – at this leading congress on the potential of computer and video games underscored the event's importance within the industry. On eight stages in the new Confex conference centre, more than 150 experts from business, culture, education, politics, science, media and games explored the contribution games make to social progress. The talks and panels focused on the topics Games and Artificial Intelligence and Games and Democracy – once again proving that the gamescom congress is on the cutting edge of societal debate and demonstrating the powerful impact games have on all areas of life. A high-calibre political panel discussion featuring former Parliamentary State Secretary Michael Kellner, Media Minister of North Rhine-Westphalia Nathanael Liminski, Berlin's Senator for Economic Affairs Franziska Giffey and Bavaria's State Minister for Digital Affairs Dr Fabian Mehring focused on how the enormous potential of games can be put to even better use in Germany.



Further information is available on
congress.gamescom.global/en

devcom developer conference

The 2024 devcom developer conference was a resounding success: gamescom's official event for developers achieved a new record, with more than 5,000 registered participants from 83 countries. This was an increase of 45 per cent compared to the previous year, cementing devcom's status as the largest industry conference for game developers in Europe and the second-largest in the world. The

expanded programme, including the Indie Expo, retro area and exclusive networking, partner and evening events, complemented the regular schedule of the three-day conference. In over 210 sessions on 17 stages, more than 350 speakers presented talks on the latest issues in game development and the games industry – the event was hosted in the new Confex conference centre for the first time. A whole host of renowned industry experts delivered impressive keynotes and presentations, including game author and narrative designer Kelsey Beachum, Cinematic Director of Larian Studios Jason Latino and game designer and VP Global Creative at Ubisoft Fawzi Mesmar. One highlight of the 2024 event was the newly established Scholarship Program, which devcom is offering in collaboration with gamescom and more than 20 international partners: over 200 game developers from underrepresented communities were granted access to the events free of charge.



Further information is available on
www.devcom.global

gamescom latam and gamescom asia

gamescom latam, Latin America's biggest event for the games community and games industry trade visitors, celebrated the success of its first edition in late June 2024. At this new gamescom satellite format in São Paulo, Brazil, more than 100,000 visitors from 70 countries came together to experience the latest game releases, colourful cosplay and esports tournaments. From Bandai Namco and Epic Games to Nintendo, Square Enix, Ubisoft and Warner Bros, a huge number of international games companies participated in the event as partners. gamescom latam featured a business area for industry professionals, as well as an additional platform for independent game developers based in Latin America – the gamescom latam BIG Festival.



The first edition of gamescom latam welcomed over 100,000 visitors.

The fourth gamescom asia, which was held in Singapore in late October, also boasted record visitor numbers: this games event for the entire Southeast Asian region takes place under the gamescom brand, and it attracted approximately 40,000 visitors in 2024 – 20 per cent more than the previous year. Trade visitors and members of the general public from a total of 78 countries participated in gamescom asia, celebrating the diversity of games culture together at the event's business area, entertainment area and industry conference.

05

German Computer Game Awards

The best game titles produced in Germany – and the teams behind them – were honoured at the 2025 German Computer Game Awards.

The ceremony featured all the exceptional games from Germany alongside an incredible show boasting quite a few famous names. A multitude of guests from the spheres of culture, media, politics, society and games attended the awards ceremony in Berlin, which was hosted by presenter Katrin Bauerfeind and entertainer Uke Bosse. Frankfurt-based studio Keen Games took home the award for Best German Game 2025 for its title Enshrouded. The main award was presented by Federal Minister for Research, Technology and Space Dorothee Bär; just a few days before the award ceremony, it was announced that she would be responsible for video games in the new German federal government. Enshrouded also won in the category Best Innovation and Technology. Megagon Industries from Berlin won Studio of the Year and accepted the award from Governing Mayor of Berlin Kai Wegner. A total of 800,000 euros' worth of cash prizes were awarded during the ceremony.

The German Computer Game Awards, established in 2009, are the most important awards in the German games industry. They are presented to the makers of Germany's best computer and video games by the German federal government 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 highlight their outstanding achievements so that they receive the publicity they deserve.

The German Computer Game Awards are presented in a total of 15 categories. The winners are selected by a main jury and specialist juries made up of diverse groups of games industry experts as well as experts from the political, media, academic and cultural spheres whose work has a connection to computer and video games. They evaluate the submitted games based on aspects such as

quality, degree of innovation, playing enjoyment, and cultural and educational value. The chair of the jury is Dr Sabiha Ghellal, Professor of Experience and Game Design at Hochschule der Medien (HdM) in Stuttgart.



Further information is available on www.deutscher-computerspielpreis.de

All the winners of the 2025 German Computer Game Awards

NEWCOMER AWARD -
BEST DEBUT

Nordhold

Stunforge / Stunforge &
HypeTrain Digital

PLAYER OF THE YEAR

Steinwallen

BEST FAMILY GAME

PRIM

Common Colors /
Application Systems
Heidelberg

BEST GERMAN GAME

Enshrouded

Keen Games

STUDIO OF THE YEAR

Megagon Industries

Berlin

BEST STORY

**Vampire
Therapist**

Little Bat Games

BEST INNOVATION
AND TECHNOLOGY

Enshrouded

Keen Games

BEST GRAPHIC DESIGN

**Harold
Halibut**

Slow Bros.

BEST MOBILE GAME

**Duck
Detective: The
Secret Salami**

Happy Broccoli Games

BEST INTERNATIONAL GAME

Split Fiction

Hazelight Studios /
Electronic Arts

BEST SERIOUS GAME

Deine Stimme

Sebastian Grünwald &
Reality Twist / Bayerische
Landeszentrale für politische
Bildungsarbeit

NEWCOMER AWARD -
BEST PROTOTYPE

Blob the Klex

Melena Dressel, Alejandro
Rebollo, Laura Octavianus
/ Hochschule Darmstadt

SPECIAL JURY AWARD

**Flipper und
Arcade
Museum
Seligenstadt**

GAME:IN

BEST AUDIO DESIGN

ODDADA

Sven Ahlgrimm,
Mathilde Hoffmann,
Bastian Clausdorff /
Sven Ahlgrimm

BEST GAME DESIGN

Thronefall

Grizzly Games

06

Entertainment Software Self-Regulation Body

The Entertainment Software Self-Regulation Body (USK) has been committed to the protection of minors in the games sector for over 30 years. The wide range of computer and video games available on the market can pose a number of challenges for parents and educators: which games are suitable for children and young people? Which content is age-appropriate? As the games industry's organisation for voluntary self-monitoring, the USK evaluates games in Germany and assigns age ratings.



The USK age rating provides important guidance: 93 per cent of parents are familiar with the USK age rating, and 9 out of 10 parents believe that protecting minors is important when it comes to choosing games. 86 per cent also find the additional information on content and usage provided by the USK helpful.

Around 18 million age labels now also provide guidance online.

Since 1994, the USK has conducted over 55,000 age rating reviews. Today, more than 18 million age ratings are available to provide guidance on games, both online and offline. The primary reasons for an assigned age rating can be found directly on the back of a game's packaging or on online platforms. These reasons may include depictions of violence, strong pressure to act or increased incentives to make purchases.

Other potential risks to users – such as chats, in-game purchases or gambling-style elements like loot boxes – are also listed. In 2024, just under 30 per cent of the digital games evaluated by the USK posed these sorts of potential risks to users. As a result, approximately one third of those games received a higher age rating. The remaining games already included sufficient parental control systems. When assigning age ratings, the USK

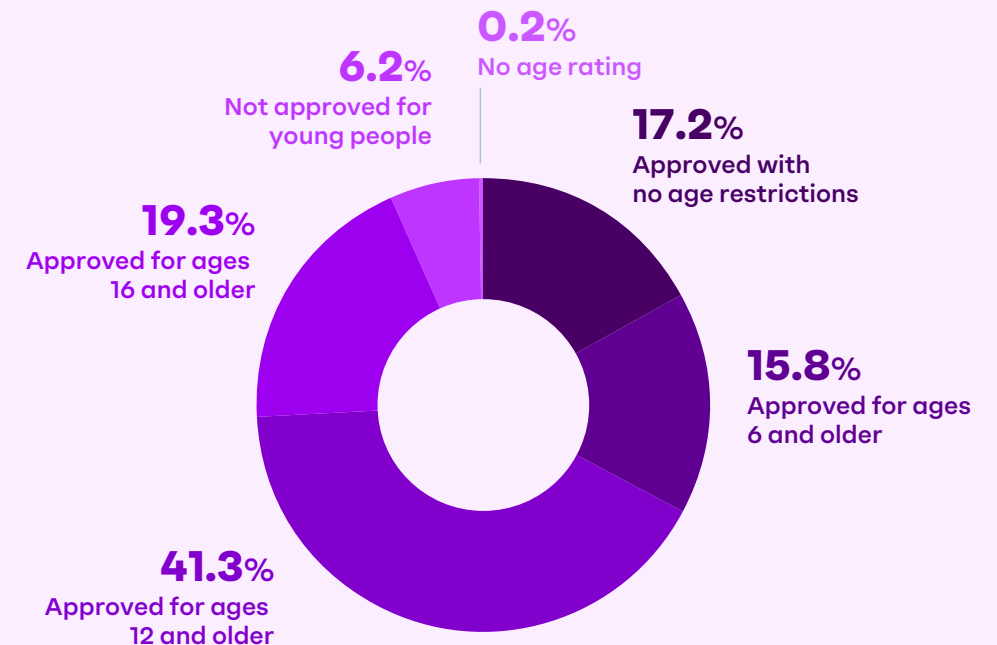
draws on the expertise of around 50 independent youth protection experts from the fields of media education and child and youth services. The USK also receives advice from a council comprising representatives of the ministries for youth of the German federal states, the German Federal Ministry for Youth, media education, churches and religious communities, the German Federal Agency for Child and Youth Protection in the Media, youth organisations and the games industry. The council defines the USK's principles and the assessment criteria for the age-rating process. Additionally, the USK demonstrates its commitment to media education by hosting digital parents' evenings and publishing guides for parents.

Another milestone for the USK: since 2013, it has been automatically assigning age ratings for apps and games on online gaming platforms via the global system of the International Age Rating Coalition (IARC). In early 2025, the youth protection authorities of the German federal states evaluated this system and granted it official recognition – a clear sign that USK age ratings provide effective protection of minors in the media environment.



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

Proportions of USK age ratings in 2024



Source: USK 2024

INTERVIEW

Sandra Winterberg on the International Video Game Collection

Since early 2025, Sandra Winterberg has been the new Managing Director of the International Computer Game Collection (ICS). In this interview, she explains what makes the ICS unique and which milestones the organisation is hoping to achieve next.

What makes this collection so unique? And what is special about the ICS?

The International Computer Game Collection is the only one of its kind in the world, primarily due to its scope, its academic independence and its technology. It already includes well over 40,000 PC, console and handheld games – a collection of cultural treasures of unparalleled magnitude. Game titles are archived in a structured meta-database according to international standards, allowing for in-depth research. The five shareholders – the Computer Games Museum, the Förderverein für Jugend und Sozialarbeit (Association to promote youth and social work), game – The German Games Industry Association, the Foundation for Digital Games Culture and the USK – founded the ICS as an independent, non-profit organisation. It is fully committed to science, research and education. The faceted search function in our metadata infrastructure makes us a reference model for open research data. Consequently, the ICS offers the world's most comprehensive and methodologically advanced research infrastructure for digital games culture. I am convinced that our collection, which we expect to grow to over 60,000 titles, will set new global standards for the archiving of games.

What is the current status of the International Computer Game Collection? What are you working on at the moment?

Right now, we are in the middle of an extremely exciting development phase at ICS. We are currently aligning the physical collection supplied by our shareholders with the corresponding metadata in order to ensure that our data is scientifically valid. Additionally, we are developing an image recognition system that will not only create digital twins of game packaging; it will also



Sandra Winterberg

Managing Director of
International Video Game
Collection

Photograph: Franziska Krug

enrich the datasets with specific information on the unique items in the collection. The most exciting project is our AI prototype, however: this 'AI agent' adheres to rigorous academic standards as it searches publicly accessible sources of information from around the world. The data it finds undergoes a quality assurance process before enriching our data pool; this enrichment process will continue on an ongoing basis. In future, the AI agent will use natural language processing to serve as an intelligent partner to users of our collection, supporting them in their research and answering questions.

What are the next steps for ICS, and what kind of support does the organisation still need?

The next step, which will be very challenging, is to select a physical location for the ICS. We want to bring all the items in the collection together in a single location, where we can use cutting-edge technology to make the entire history of games tangible. We use systematic emulation processes to make unplayable games playable again – even if the hardware or operating systems have long since disappeared. The ICS will make it possible to do all of this for research purposes while still respecting all copyrights and intellectual property rights. With its unique collection and cutting-edge, hands-on venue, the ICS will be an international flagship for the games industry here in Germany. And it's about more than just researching computer and video games as a cultural asset, with all their historical, artistic and academic relevance; we also want to make the innovative energy of the games community accessible to all areas of society. A source of knowledge as valuable as the ICS needs reliable, long-term public funding. Games are a cultural asset, an important medium and a reflection of their time, and as such, they must be preserved as a source of inspiration for the future.

Why should we invest in establishing an ICS in Germany?

I am of the opinion that Germany can't afford not to invest in establishing an International Computer Game Collection. Games have been a cultural reality for billions of people around the world for many years, and they deserve to be part of the public consciousness. With the ICS, we have the chance to play a leading global role and to set new international standards. I also believe the ICS will be a catalyst for innovation: the archiving and enabling technologies we've developed here have set benchmarks, and they can be applied to other digital cultural assets. In that sense, Germany will set the pace for the future of digital cultural heritage.



With more than 40,000 games, ICS already preserves a cultural treasure of unprecedented magnitude.



Further information is available on
www.games-archive.org/en

07

Foundation for Digital Games Culture

Games connect people, expand our horizons and create spaces for us to meet, learn and express ourselves. The Foundation for Digital Games Culture invites stakeholders from the political and academic spheres and from civil society to take advantage of the opportunities games offer as a medium and to apply them in the areas where society needs them most. With its pilot projects and platforms for dialogue, the foundation demonstrates how digital games can

provide inspiration for education, remembrance, democracy and cultural development. Its goal is to make the societal impact of games visible and tangible – with projects that demonstrate conviction and spark change.

Founded in 2012 on the initiative of the German Bundestag and the German games industry, the foundation operates at the intersection of games and society, serving as a driving force and an intermediary. game – The German Games Industry Association is a shareholder in the foundation, and the foundation's work is supported by an interdisciplinary advisory board with 14 members who belong to bodies such as federal government ministries, youth protection organisations, and cultural and university institutions.

The foundation's educational projects create new channels that make learning and teaching accessible. The courses and workshops offered as part of the *Stärker mit Games 2 (Stronger with games 2)* initiative used video games to provide cultural education to more than 2,100 children and young people in 2024.



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

The initiative is funded by the Federal Ministry of Education and Research and forms alliances with non-profit organisations throughout Germany to support children from disadvantaged socio-economic backgrounds. *Projekttag Games (Games project days)*, an initiative sponsored by Medienboard Berlin-Brandenburg, helps bolster the digital and media literacy of more than 780 pupils at 20 schools in Berlin and Brandenburg. Another project funded by Medienboard Berlin-Brandenburg is the third round of the *Start-Up: Games Entrepreneurs* workshop programme, which supports 16 company founders from Berlin and Brandenburg as they take their first steps in the game industry. The *GamesTalente (Games talents)* programme, a Germany-wide initiative in partnership with *Bildung & Begabung*, launched its talent competition in early 2025 via a new gamified online portal. Its objective is to use game development to help young people develop skills that they will need for their future careers.

Democracy and social cohesion are another focus of the foundation's work. The pilot project *Games und Wertebildung (Games and values education)* celebrated its high point in summer 2024 with its symposium *Werte ins Spiel bringen (Bringing values into play)*. Sponsored by the Federal Office for Migration and Refugees, the project focuses on the question of how digital games can support inclusive values education. The two-year project *Let's Remember! Erinnerungskultur mit Games vor Ort (Cultivating commemoration with games on-site)* marked its conclusion with a tour and a conference panel at gamescom. In partnership with the Deutscher Kulturrat, the project proved that games in museums and memorial sites make a valuable contribution to remembrance of the injustices of the Nazi era. The project was funded by the Foundation Remembrance, Responsibility and Future (EVZ Foundation) and the Federal Ministry of Finance.

The Foundation for Digital Games Culture also explores and promotes cultural awareness of games in society. The foundation's award office oversees the jury process for the German Computer Game Award, organized by the German federal government and game – The German Games Industry Association, as well as for the gamescom award, the official award of the world's largest gaming event. Since autumn 2024, the foundation has also been responsible for the education and networking programme *Press Start: Games Founding Grant*, which is funded by the Federal Government Commissioner for Culture and the Media. For the symposium *AI Utopia and Dystopia: How Artificial Intelligence and Games Are Shaping Futures*, which took place in late 2024 and was funded by Medienboard Berlin-Brandenburg, the foundation additionally invited experts to engage in a dialogue about the role of AI in game development and the picture of AI that games paint with the stories they tell.



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

INTERVIEW

Nandita Wegehaupt on the games founding grant

In October 2024, game – The German Games Industry Association and the Foundation for Digital Games Culture launched the Press Start: Games Founding Grant, which is funded by the Federal Government Commissioner for Culture and the Media. Nandita Wegehaupt, Managing Director of the Foundation for Digital

Games Culture, explains the programme's objectives and how it has been received.



Nandita Wegehaupt

Managing Director of the
Foundation for
Digital Games Culture

What is the objective of the Press Start: Games Founding Grant?

The founding grant supports creative minds from the games industry as they establish their own game development studios; the aim is to bolster the diversity of the games landscape in Germany. Over a period of 18 months, 132 start-up founders receive a stipend that helps them focus on the start-up phase of their company and devote themselves to the development of their own games. At the Foundation for Digital Games Culture, we also provide support for the stipend recipients via our education and networking programme, and the individual coaching we offer is designed to help the start-up founders realise their vision in a lasting way.

How has the response to the founding grant been?

The response has been incredible; it has exceeded our expectations. Well over 1,000 people applied in total, either individually or in teams of up to three. Our 24-person jury chaired by Linda Kruse (founder of the games studio "the Good Evil") certainly had its work cut out for it! But despite all the hard work, everyone involved was so impressed with the creativity that drives these game developers. We've also received a lot of positive feedback from people outside of the project – from

within the games industry, from colleges and universities, and from politicians and the funding sector. The establishment of a national launch pad for fresh new game concepts in Germany has proven to be a very popular idea.

How have the regular workshops and coaching sessions been received?

The participants are very aware of the fact that Press Start is a fantastic opportunity for them, so in nearly all the workshops, they are extremely motivated – even when the workshops focus on subjects like legal issues. The goal of our programme is to prepare the participants for all the important aspects of founding a company in the games industry, from financing and project management to business management, marketing and community management. In addition to the workshops, the one-to-one consulting sessions with our coaches are in high demand. Participants have told us that being able to talk to their coaches about what it's like to found their own companies – and having the coaches understand those experiences first-hand – has been very rewarding for all of them. And the coaches find their mentees to be highly motivated and capable. On top of that, the stipend recipients also support each other and share best practices.



What does the future hold for the programme?

The stipend recipients will receive support until the end of the 18-month programme. There will be a big half-time event at gamescom in Cologne in August 2025. We plan to celebrate the official conclusion of the programme with all the participants in Berlin in 2026. In the meantime, we regularly offer stipend recipients the opportunity to participate in other local events – by providing discounts, for instance – such as GG Bavaria in Munich or A MAZE. in Berlin, because for the future, we want to create as tightly knit a network as possible within the games industry.

What has been your personal highlight from the programme thus far?

I'm most excited about the fact that with Press Start, we are able to support so many promising people from such different backgrounds. I'm really looking forward to seeing how the creative ideas that grow out of this programme will influence the games landscape in Germany.



Further information is available on
www.games-stipendium.de/en

Esports has become a cultural phenomenon around the world, and Germany is no exception. The number of people who play esports as a hobby has been rising in Germany for many years; today, there are esports clubs and university groups throughout the country. Additionally, the ranks of professional esports players are swelling – these players play games competitively, full-time, at the highest levels.



The esports player foundation supports ambitious esports players on their way to the top.

What does it take to shape a raw talent into the type of strong character that can succeed at the top of the game? Esports requires quick reflexes, strategic thinking and precision, but other issues can also play an important role in players' development, such as values education, structure and career prospects. Consequently, players require targeted support in order to develop true excellence that goes beyond the pure skill of playing video games. And that's exactly where the esports player foundation (epf) comes in.

Since 2020, the epf has been the world's first talent promotion agency of its kind to support ambitious esports players on their path to the top. The epf provides a solid foundation for players within the dynamic esports environment. It also serves as a partner to players, assisting them with their performance, education, mental resilience, and career prospects. The epf's comprehensive talent promotion programme includes in-game coaching as well as sports psychology, exercise and nutrition counselling, hardware support and careers advice. The organisation works one-to-one with more than 150 talented esports players in League of Legends, Valorant, Counter-Strike 2, EA FC and Brawl Stars.

The epf's work focuses on fostering talent with an eye to the long term. To that end, the organisation maintains strong cooperative ties with partners in the games industry and other sectors. epf's partnership with XPERION, Germany's largest gaming location, has been in place since 2023 – as part of this partnership, epf is able to provide young talents with their first practical experience

playing in a team. The NXT teams that came together as a result at XPERION are now a permanent fixture of the epf's support structure – such as the DKB XPERION NXT League of Legends team, which formed in 2024 and competes in the 2nd division of the Techniker Prime League. This team is living proof that the epf's young talents can keep pace with established esports players. Programmes like these create structured paths to the top of the sport.

Additionally, in partnership with Deutsche Kreditbank (DKB), the epf presented its first Young Player Award in 2024 – it went to 13-year-old EA FC talent Robert Brysik. The objective of the award is to motivate talented young players to believe in themselves and to be passionate in their pursuit of a career in esports.

The epf also makes an important contribution to diversity in esports and the entire games community. For example, the *Equal Esports* initiative, which the epf established in 2021 in cooperation with Deutsche Telekom and SK Gaming, continued to grow in 2024: with new talent, new mentors, the Equal Esports Cup – a League of Legends tournament for women and non-binary people – and a thrilling finale at gamescom, which was the highlight of the programme. The goal is to foster diversity in the games community and work towards a more inclusive culture in esports.

Mental health is another focus. In close cooperation with Techniker Krankenkasse (TK), the epf provides players with counselling sessions with sports psychologists; these sessions are an integral aspect of the support players receive. The epf's outreach work and awareness campaigns in cooperation with TK and other partners such as Deutsche Telekom underscore the importance of resilience, prevention and a mindful approach to mental-health challenges – to ensure that players have a healthy career in esports and beyond.

Additionally, long-term career prospects are a vital aspect of the programme. In collaboration with Deutsche Bahn, the epf developed a dual-career model for esports in 2024. Young players can complete a traineeship or an integrated vocational programme while pursuing an esports career at the same time. As part of this model, they also receive targeted coaching, attend boot camps and have the chance to achieve their full potential – in their careers and in the games they play.

The epf is supported by strong partners, including Deutsche Telekom, Techniker Krankenkasse, DKB and Deutsche Bahn, as well as the state governments of North Rhine-Westphalia and Berlin. They all share the same vision: making Germany a professional, responsible and sustainable location for esports. Together, they are providing talented young people with a platform and a solid stepping stone into a bright future.



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

Julius Althoff on the Esports Team Berlin and Olympic Esports Games



Julius Althoff

Managing Director of
esports player foundation

In esports, there have been two announcements in recent months that have caught people's attention: the state of Berlin will be fielding its own esports team, and Saudi Arabia will be hosting the first Olympic Esports Games in 2027. Julius Althoff, Managing Director of the esports player foundation explains what these announcements mean and how the esports world is responding to them.

Why did you team up with the state of Berlin to form the Esports Team Berlin?

If someone demonstrates talent in a conventional sport at a young age, there are professional support structures in place to help them advance. These support structures do more than just help young people improve at their sport; they also provide educational and social assistance. These sorts of structures are still lacking in esports, but the Esports Team Berlin is a first step towards closing this gap. We are creating a structured, values-oriented development programme at the state level that offers personal and professional support for talented young players. The programme is specifically targeted at very young players; it provides them with access to a support environment that is the only one of its kind in the world. It includes world-class coaches, sports psychologists, nutritionists and mentors. The goal is to help children and young people from Berlin grow into international esports stars – role models who can represent Berlin's values and diversity on the global stage. Berlin is setting an important example with this project – not only does the state respect young people's enthusiasm for esports; it will also work hand-in-hand with them to shape their futures. Where other states are still hesitating, Berlin is stepping up and taking responsibility.

Photograph: Jörg Heupe

How was the announcement of the first Olympic Esports Games received by the esports community in Germany?

The esports community in Germany is divided about the announcement of the Olympic Esports Games. But regardless of the valid criticism, I primarily see this event as an enormous opportunity for esports. For the first time, esports is being given a platform as part of the Olympic movement – there's huge potential in that. One particularly exciting aspect is the role the national teams will play. They haven't been particularly relevant in esports up to this point, but now, they could become a real rallying point; people can identify with them. Of course, there is valid criticism that needs to be taken seriously – that holds true for the event's selection of games as well as for the decision to hold the event in Saudi Arabia. The latter, in particular, is going to require clear, critical discourse – but also the willingness to play an active role in shaping that discourse.

What can people expect from this tournament? Will it be as important to esports as the Olympic Games are to conventional sports?

The Olympic Games are the biggest sporting event in the world, and the Olympic Esports Games have the potential to be similarly important: the event will be a global celebration of esports that connects players from around the world and provides them with the platform and the recognition they deserve. And esports demands high performance, with the same standards of discipline, precision, mental resilience, physical fitness, good nutrition and recovery time as conventional sports. I hope that, over the long term, the Olympic Esports Games will come to have the same reach and relevance as the Olympic Games have in traditional sports. But there's still a long way to go before that point – and a lot will depend on whether the International Olympic Committee (IOC) is open to the interests and culture of esports and the games industry.

What role does diversity and inclusion play in the Olympic Esports Games?

The Olympic Charter mandates gender equality – complete gender parity was achieved for the first time at the 2024 Summer Olympic Games. This goal should also apply to the Olympic Esports Games. And in esports, in particular, there is enormous potential for gender equality: physical requirements are hardly a factor. Currently, there are still differences in performance at the top, although most of these are the result of structural issues. We are working on breaking down these barriers with programmes such as our Equal Esports initiative. Also, many people in the esports community identify as gender non-binary. In order to be fully inclusive, the Olympic Esports Games will need to recognise this diversity, raise its visibility and actively foster it.

About game – The German Games Industry Association

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.



**With games, we enrich
the lives of all people.**

As a joint organiser of gamescom, game is responsible for the world's largest event for computer and video games, 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 shareholder 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 a co-host of the German Computer Game Awards. In addition, game events GmbH, 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, games culture and media literacy.



**Together we are making
Germany the heart of
gaming worldwide.**

The members of game participate in various working groups that formulate the association's positions on topics such as funding, market research, law, skilled labour and professional training, and communication. 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 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 Deck13 Interactive, has been Chairman of the Executive Board at game since 2022; he was re-elected to the position at the general meeting of game in June 2024. His deputy is Julia Pfiffer, Co-Managing Director of astragon Entertainment. Other members of the Executive Board are Johanna Janiszewski, founder and CEO of Tiny Crocodile Studios; Clemens Mayer-Wegelin, European General Counsel and Senior Director of Nintendo of Europe; and Ralf Wirsing, Managing Director of Ubisoft Europe. 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.



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

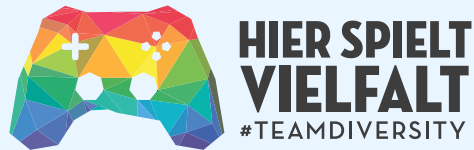


Shareholder of the USK, the Foundation
for Digital Games Culture, the esports
player foundation, game events and the
collecting society VHG

22

employees at the central office
in the political heart of Berlin

Diversity and „Hier spielt Vielfalt“



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 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.

In 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.

Alongside this initiative, game published the Best Practice Guide Diversity in an effort to raise further awareness of diversity issues. It provides readers with specific tips, best-practice examples and advice on building diverse teams and gaming communities, and it is being expanded on an ongoing basis. For instance, the 2024 Guide includes an additional best-practice example on fostering the talent of female creators in the games industry. Readers will also find free templates for a code of conduct and a safer space policy to use in their own companies, a guideline for respectful interaction with one another and 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. game also hosts a number of programmes and formats where its members can discuss issues of diversity and exchange ideas on the topic. In 2024, for example, game teamed up with the Geena Davis Institute on Gender in Media to host a joint webinar on representation in games.



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

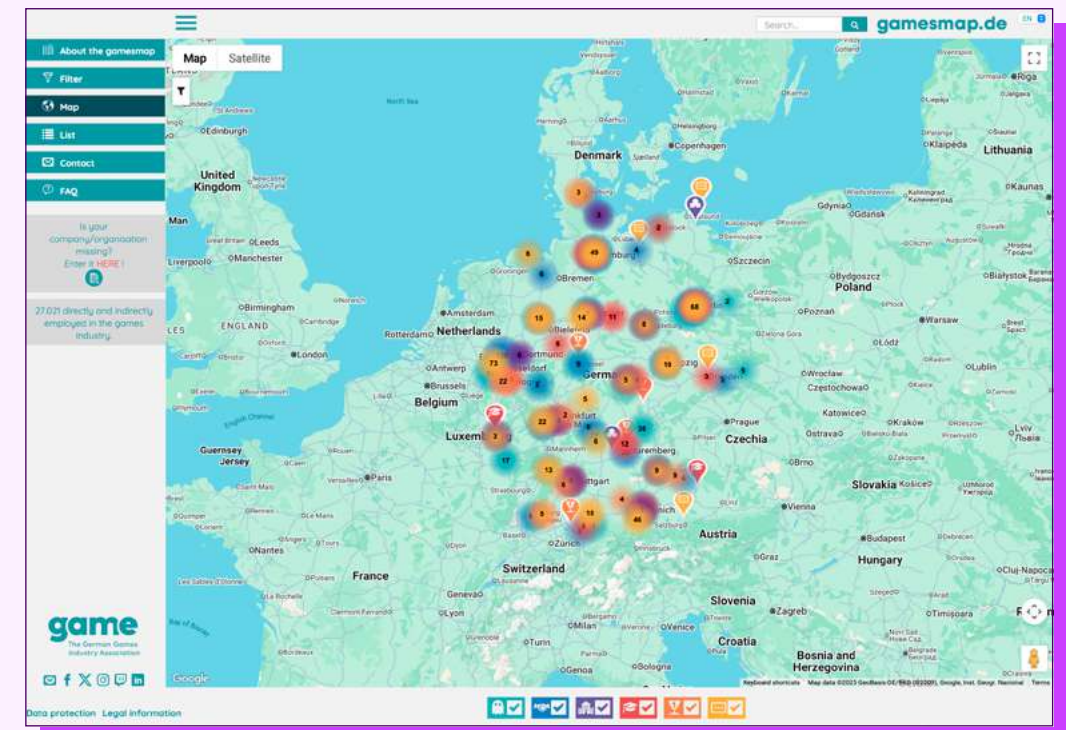
gamesmap.de

game – The German Games Industry Association operates gamesmap.de, its online directory of the games industry.

gamesmap.de uses an interactive map to visualise over 1,800 entries, including approximately 950 game developers and publishers; about 700 companies from sectors such as media or technical and financial services; 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. Business, politics and society need to act now to address the effects of the worsening crisis.

The games industry takes its social responsibility in this area very seriously. In Germany alone, the majority of games companies are already taking action to operate even more sustainably, such as by implementing climate and environmental protection schemes, putting measures in place to save energy and reduce heating usage, opting to use green energy, and more. 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 reducing carbon emissions or eliminating them entirely wherever possible. Their corporate carbon footprint (CCF) is also calculated by an external partner, and any emissions that cannot (yet) be prevented are fully offset by various climate protection projects. In addition, since June 2021, game has been a member of the Playing for the Planet Alliance, an environmental partnership between the UN and the games industry, and provides active support for the project. game also supplies games companies with information on how they can reduce their impact on the climate; for instance, game publishes a free guide on environmental and climate protection. In early 2022, game

joined forces with Koelnmesse to launch the gamescom goes green sustainability initiative. This new sustainability concept made gamescom the first climate-friendly games event of its size, and numerous initiatives, programmes and partnerships have arisen as a result. One of them is 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 and from exhibiting companies at gamescom. Every year, further steps are taken to avoid and reduce carbon emissions, and all remaining emissions from the principal event are fully offset in cooperation with the climate experts at ClimatePartner.



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

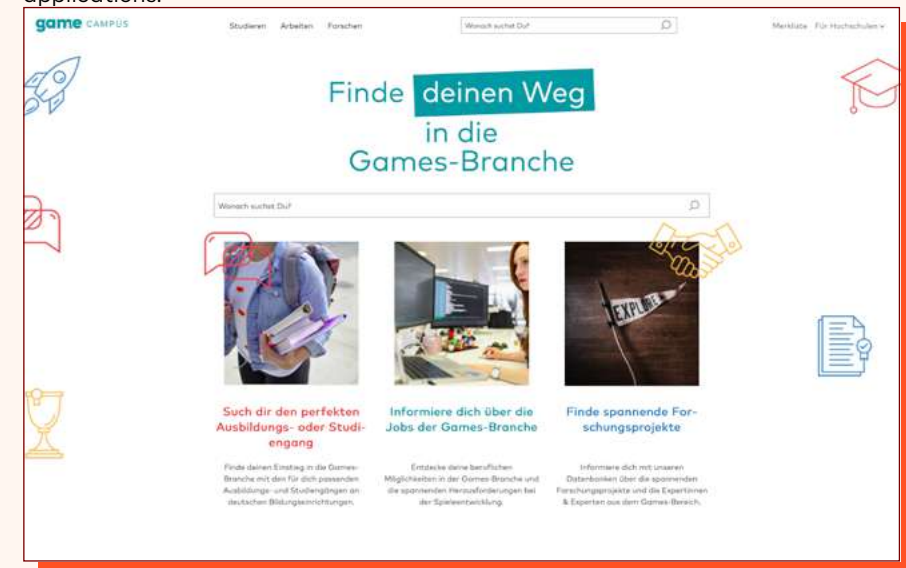
gamecampus.de

With gamecampus, game offers a comprehensive view of the working world of game development and lays out potential pathways to a career in the games industry.

The Studieren (Studies) section provides an overview of educational opportunities in Germany related to games. The overview also includes a map showing the locations that offer degree programmes and traineeships, as well as which subject areas the educational institutions specialise in. Under Arbeiten (Work), you will find profiles of jobs in the games industry, facts and figures about the games market, the comprehensive StartUP! Guide with valuable tips on founding a studio, information on the diversity initiative Hier spielt Vielfalt and gamesmap, the interactive map of all companies and institutions in the German games industry. The Forschen (Research) section highlights the potential of games beyond their entertainment value, outlines the exciting research projects currently being carried out in this field and introduces the experts who work on tapping the potential of computer and video games for future applications.



Further information is available on www.gamecampus.de (German only)



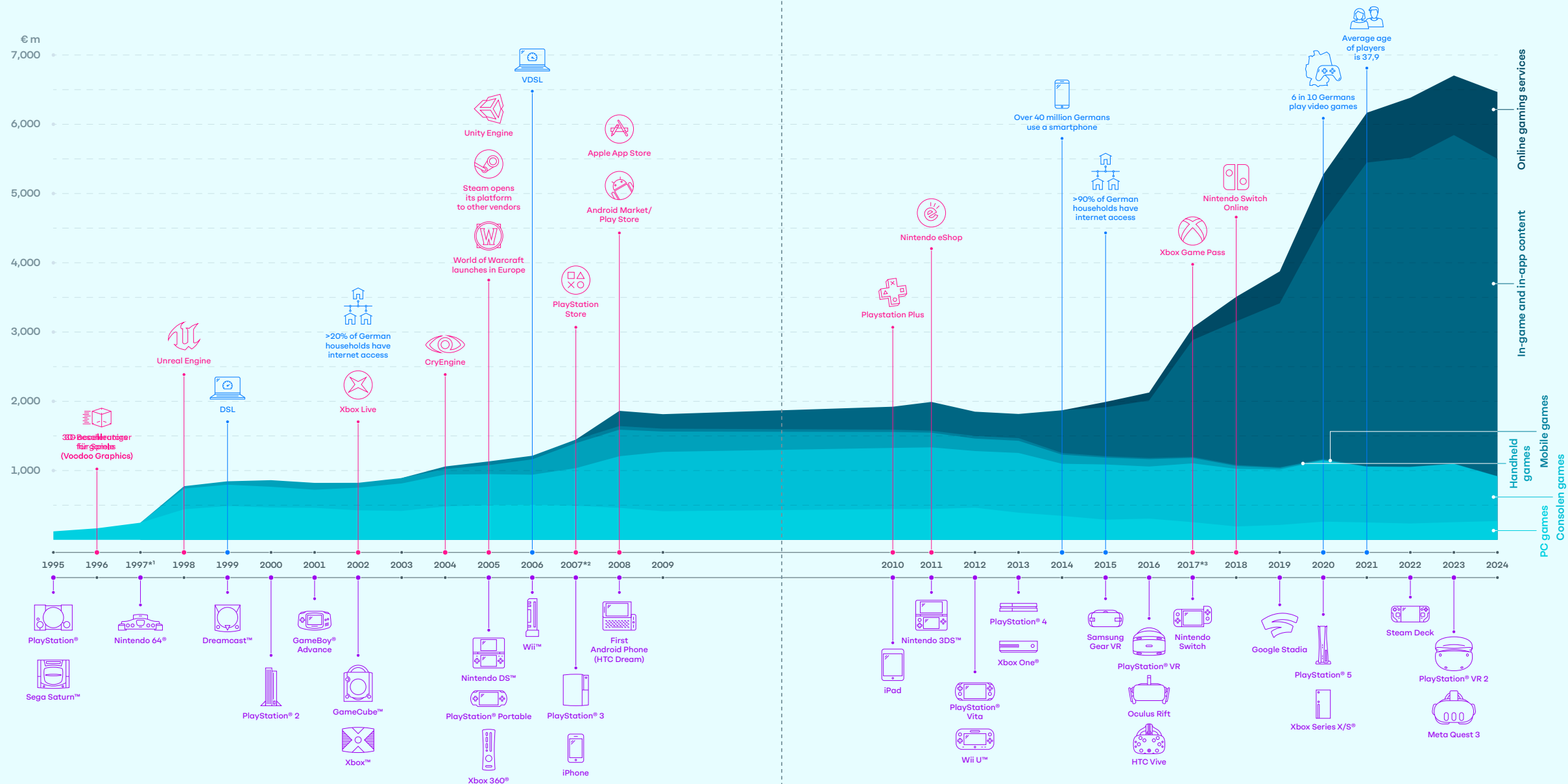
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10 Development of the German games market since 1995



Source: YouGov Shopper, data.ai, Statista, Wikipedia. © game 2024

*1 Measurement game consoles and handhelds started in 1997

*2 Measurement in-game- und in-app-content started in 2007

*3 Measurement converted for mobile games in 2017



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