

GERMANY – A LUDORADO.

AN INTRODUCTION TO THE GERMAN BOARD GAME MARKET AND THE POSSIBILITIES IT OFFERS

In America board games are called “German games” – and with good reason. Classic games enjoy great popularity, not only among players who rejoice in a wide choice and great variety, but Germany also offers (potential) game authors many possibilities to present and promote their ideas: fairs, conventions and a huge number of editing houses. Though only very few game authors can make a living of it, the percentage of people dedicating their spare time to the development of games is higher in Germany than anywhere else.

The annual output of the many large and small game editing houses in Germany tops that of any other country and over the last few decades has led to a rich and qualitatively well developed game scene. Furthermore, the popularity of German games is not limited to the German speaking countries. “The Settlers of Catan” e.g. has been translated to a number of languages and can be found nearly everywhere, and as far away as New Zealand, the game shelves of toy- or bookstores are filled to a large degree with games invented in Germany.

Here a short explanation shall be given as to why the German game culture developed the way it has, and the most important possibilities Germany offers for game research, game design and, of course, playing, will be introduced.

Board and table games have a long tradition in Germany, which probably has to do with their social function. If one looks back to the 19th century, one discovers that the board game has basically been a medium for the bourgeoisie middle class who had not only the financial means, but also the leisure to indulge for hours in activities which had no productive purpose. It was during the Biedermeier period when people drew back into the safe and quiet of their homes, that board games reached a first peak. They brought entertainment and united generations at one

table. Even more than the also common reading aloud of a book to the whole family, games offered the possibility of joint activity and communication.

These qualities still characterize the board game today and might be one explanation as to why the classic form of play is still attractive to millions even though technology has opened a whole new game market since the late 1970s/early 1980s. The same period, though, marks a new peak in the history of the board game. Today, about 300 to 400 new games reach the market every year, and the annual turnover for board and card games lies around 450 million Euro. Though the figures are no longer, they are not sinking either but have stagnated on a high level.

The being independent of electricity, the authentic experience with real people, the communicative factor, and also the – though by now to a minor degree – social effect of bringing the generations together around one table are merits of the classical game which still ensure its lasting attraction.

That alone, though, does not explain why Germany's board game scene has developed to such an extent during the last three to four decades. Since the late 1970s, some occurrences have given a new impetus to the development of the German game scene. The first of them surely was the introduction of the "Game of the Year" award in 1979, which has found great acceptance among the public. The winning of the award leads to sometimes a tenfold increase of turnover, to which also the editing houses have reacted by investing more into the quality of their games. The "Jury – Game of the Year" has become an institution in Germany which not only sorts through, selects and recommends the best games of the latest production year, but also furthers the career start of new game authors and supports scientific research in the field of classic games.

Another important step was the founding of the game fair in Essen in 1983 which has grown to become the world's most important game event. The "International Games Event SPIEL" lasts four days and attracts roughly 150.000 visitors every year. In the wake of Essen, other such fairs have developed, and in addition, a great amount of smaller events, conventions and countless game clubs have come into being.

Also in 1983, the Game Designer Conference in Göttingen took place for the first time, at which game authors have the possibility to present their prototypes to a wider public, colleagues, representatives of editing houses and also members of the "Jury – Game of the Year", who there award a prize to young aspiring game authors who have not published any game as yet.

A second such conference was established close to Munich, in Haar, in 1997 which wants to offer a meeting place for authors who mainly come from Southern Germany, Austria and Switzerland.

In connection with the Game Designer Conference in Göttingen, the foundation of the "Spieleautorenzunft" (SAZ), the Game Designer Association, in 1991 has to be mentioned. Its aim is, in their own words, "to promote games as

a cultural value, to promote the communication among game designers and within the games industry, and to represent the interests of game designers”¹. The latest undertaking of the SAZ has been to set up an annual specialist conference for professional game authors, at which practical and theoretical aspects of game designing are discussed.

A short overview over the game trends since the early 1980s

The production of games has increased enormously over the last few decades which, in consequence, has led to a much reduced shelf life of most games. This becomes very obvious when one sees “old” games from the 1980s and 1990s like e.g. “Scotland Yard” or “Cluedo” (polished up with new graphics) still on sale while games which had been published at the beginning of the millennium have already vanished again after only a few years.

Classics like “Monopoly” or “Scrabble” obviously never lose their attraction, but apart from this there are some clear trends which characterize the game development of the last three decades.

The boom that had begun in the late 70s lasted roughly till the middle of the 90s, after which the annual turnover of the editing houses stopped rising, for which one can suspect a number of reasons: Apart from the growing competition from the constant development of electronic games as well as other spare time activities, the growing unemployment and rising prices in some areas of everyday life are likely to have led to changes in consumer habits. Still, as was said before, there is no reason to fear that classic games will have to face a decline in Germany any time soon.

After the onset of the boom, the highly popular family board games dominated the market, followed towards the end of the 1980s by a vogue of quiz games which was triggered by the success of “Trivial Pursuit”. This game in all its versions became one of the long-time sellers while most of the other quiz games disappeared relatively quickly again, though at the beginning of the new millennium the show “Who wants to be a Millionaire?” led to a new popularity of the genre.

During the 1990s, card games came into fashion and were produced by nearly every editing house, but with the rising amount of card games on the market, the turnover for each one of them sank quickly, so that the trend cooled down towards the end of the decade. Around the turn of the century it was rather the trading cards that enjoyed a huge success, especially with the younger generation.

Also in the 1990s, the editing house KOSMOS took into account that often players would not meet in bigger groups, so that in 1997, it started the series “Games for Two” which proved to be quite successful, so that now there is a great number of such games on offer.

¹ <<http://www.spieleautorenzunft.de/englisch/verein/index.html>>, retrieved on 3 August 2008.

A current trend is to produce follow-ups to popular games: A game that has proved to be successful, appears in different versions, or new features are added to the original game which have to be bought separately. Games which received an award (particularly the “Game of the Year” award) are especially likely to produce a lot of spin-offs – like e.g. “Carcassonne” or “The Settlers of Catan” have done to an extreme extent.

While “family games” dominated the 1980s, which were marked with age limits like “8 – 88”, one now finds mostly games that are labelled “10 and up” which goes to show that the trend of producing more complex games for an adult target group has taken over. This started in the middle of the 1990s when the “Settlers of Catan” by Klaus Teuber was published, and contrary to expectations, enjoyed a great success. Before that date, games which seemed too intellectually-demanding were considered not to be marketable. But as it became obvious that there was an audience for those high-quality games, more of them began to enter the market. Apart from a slump in 2002/03, their number has been growing steadily.

The boom naturally had an effect on the publishers as well. Traditional editing houses like, e.g. Ravensburger, the history of which goes back to 1883, have existed in Germany for many decades. New ones began to appear mainly during the second half of the 20th century. While the big ones like Ravensburger or KOSMOS offer a broad spectrum ranging from games, via puzzles or experimental kits to books, electronic games and sometimes toys, the medium-sized and smaller editing houses concentrate solely on parlour games. There also exists a large number of tiny publishing houses which sell sometimes only one game. Usually these are founded by game authors who have not been able to pass their idea to one of the big editors and so publish at their own expenses. While most of them remain platforms for their owner’s inventions, some of them manage to grow and also publish other authors’ ideas. That there are many people who try their luck at game designing is probably well illustrated by the fact that Ravensburger decided in 2004 to outsource prototype analysis. Authors who want to place their product with Ravensburger now have to pay an agency which decides whether an idea is at all suitable for the editing house.

A list of German (and also foreign) publishers can be found on the internet e.g. on the *Spielbox* site which is the online version of a very popular game magazine in Germany and offers a lot of information on anything that has to do with games².

An outline of the most important game events and institutions

In the second part of this article, the most important fairs, conventions and

² See www.spielbox.de – under the heading “Verlagsadresse” one finds a list of addresses and links to editing houses worldwide – among them more than 200 which are based in Germany.

awards, as well as the Game Designer Association and the two game archives, shall be introduced with a few words of explanation.

The Fairs

The most important fair, the “International Games Event SPIEL”, which takes place in Essen every year in October has already been mentioned. It is the biggest consumer fair for gaming in the world and has been based on the idea of “inviting the consumer and gamer to play new games and toys and make up his own mind about the quality of the individual game”³. It attracts roughly 150.000 visitors and over 700 exhibitors from up to 30 nations every time, and therefore has become a fixed date for everybody in the game industry. Here is the possibility for publishers and game authors to get an initial feedback from the public, and for journalists and reviewers as well as players to inform themselves about and also test the new products. The range is enormous and offers everything from the classical family, adult, children and parlour games to modern electronic games, as well as fantasy, adventure or science fiction games. Also, books dealing with games are on offer. The fair has recently widened its range to comic books and also toys which, however, might be considered as watering down the original concept. Still, to quote the Chairman of the German Games Producers Association, Ernst Pohle: “The International Essen Games Event is something the whole world envies us”⁴.

Another important event for game publishers is the Toy Fair Nuremberg where games constitute one important aspect, though the general orientation of the Toy Fair is much broader than in Essen. In contrast to Essen, Nuremberg is a producer fair to which the general public has no access. For game authors though who are members of the Game Designer Association, taking part in the fair is one of the membership privileges.

The Game Designer Association and the game author conventions

As has been said, the Game Designer Association (SAZ) has been in existence since 1991. The Association, on the one hand, works on building networks among the authors, and on the other hand also tries to be an equal partner of editors and journalists. It concentrates and presents the common interests of the game authors, organizes conferences with the aim of promoting game designing as a professional job and bringing game authors together to exchange ideas and solve difficulties.

³<<http://www.merz-verlag.com/spiel/e022.php4>>, retrieved on 3 August 2008.

⁴ Ibidem.

Though the administrative offices of the Association are in Stuttgart, the annual meeting of its members takes place on the eve of the Game Designer Conference in Göttingen. Besides, the SAZ is present at many game fairs and conventions all over Germany as well as abroad, and the “SAZ-News” is published four times a year.

The most important possibilities for game authors to meet have also already been mentioned – apart from the Game Designer Conference in Göttingen which takes place annually at the beginning of June, the most important conventions for game authors are the International Southern German Meeting of Game Inventors in Haar at the beginning of November and since 2005 the specialist conference in Weilburg which has been established by the Game Designer Association. All these events offer workshops and possibilities for discussion among the game authors. While they remain rather among themselves in Weilburg, representatives of editing houses and the press are part of the scene in Göttingen and Haar.

In Göttingen, the meeting lasts for two days. While the first day is reserved for authors and agents of the editing houses exclusively, the general public is welcome on the second day which gives the aspiring game designers the opportunity to test their prototypes with “normal” players. On the same day, the “Jury – Game of the Year” presents the award winner of the competition for prospective new game authors. The prize consists of four internships at a large and a small editing house, the German Game Archive in Marburg and in a game shop. A sum of 2500 Euro is awarded to the winner to pay for the arising expenses.

The Game Awards

It has already been hinted at that, by the very fact of introducing game awards, the game scene has drawn a wider public attention to itself. In the wake of the success of the “Game of the Year” award, a number of other competitions have been set up like e.g. the “German Game Award” which is connected to the Game Fair in Essen or the “German Edugame Award”, the winner of which is presented at the Southern German Game Fair in Stuttgart at the end of October.

The “Game of the Year” award is a reviewer award, and the jury consists of a federation of specialist journalists from the German speaking countries who must not have any financial interest in the games they are choosing and therefore are independent of the game producing and marketing industry. Up to five games of the current and the previous year’s publications are nominated every year, on one of which the title will be bestowed. The criteria which lead to the final decision are explained by the jury as being: “game concept (originality, playability, game value), rule structure (composition, clearness, comprehensibility), layout (box, board, rules), and design (functionality, workmanship)”⁵. The award is not connected to

⁵ < http://www.spiel-des-jahres.com/cms/front_content.php?idcat=33>, retrieved on 3 August 2008.

any prize money; actually the winner even has to pay a licence fee for the award emblem, but the fact that a game has been chosen as game of the year is the best advertisement it can get, and the “Jury – Game of the Year” remains independent, because it is financed to a great degree through this license fee. Apart from the award, the Jury compiles a recommendation list every year, also chooses a “Childrens’ Game of the Year”, and may even bestow special prizes for an outstanding performance in one area like e.g. the “Literature in Games” award which was won by Dr. Reiner Knizia’s board game version of “Lord of the Rings” in 2001.

Apart from the association’s aim to “promote the cultural asset games, to stimulate the idea of playing games with family and friends and to give orientation within the large choice of games available”⁶, the Jury also supports young game authors by giving grants as has been mentioned above, and last but not least it is interested in scientific research on games which it supports financially.

In contrast to the Jury’s naming a winner for the “Game of the Year”, the “German Game Award” includes the public in the process of choosing. Players, readers of the magazine “Fairplay”, journalists, game club members in Germany, Austria and Switzerland, and game stores elect their favourite games (which since 2001 is also possible via the internet), and an independent institute counts and evaluates the votes. The result is a list of the ten best games of the current year with the award winner at the top. Here, too, a prize for the best childrens’ game is bestowed. The “German Game Award” is linked to the fair in Essen where the prize is handed over to the winner. An extra award, the “Essener Feder” (the Essen quill) goes to the exemplary written rule.

The “German Edugame Award” is again chosen by a jury of the “Studienkreis Nachhilfe” (Study Circle Tutelage) and the magazine “Spielen und Lernen” (Playing and Learning) who ask game authors and editing houses, but also pedagogues and students, to send in games or prototypes of games. Awards will be bestowed on the best published as well as the best as yet unpublished game. The main criteria here is that the games must have an educational effect, and it must be a traditional form of game – that is no electronic games, books or teaching materials. The winner will receive 500 Euro and an official presentation at the Southern German Game Fair in Stuttgart.

The Game Archives

With all the new games appearing on the market each year, one also has to ask the question how to keep track of titles, trends and technology. For these purposes the two game archives in Germany are of great help.

The Bawarian Game Archive which is housed in the townhall of Haar was founded in 1996 and is collecting and documenting parlour games and game

⁶ Ibidem.

literature with the aim of promoting the game in family and society. The collection comprises about 10.000 games and 1.000 books. As a special offer to game authors, the archive also helps to secure game rights: Descriptions of prototypes can be sent to Haar in sealed envelopes which will be kept there to be opened only in case of disputes about copy-rights. In contrast to books, there is no legal copy-right on game ideas. The method the game archive offers is one of the few ways to prove the time of invention of a certain idea or concept.

The biggest game archive though is the German Game Archive which is part of the Philipps University Marburg. It contains about 30.000 games and is especially useful for researchers as it also has a number of databases at its disposal. Apart from the games database, a literature database and address files are available to researchers, game authors, editors, journalists and teachers. Next to this electronic approach, the archive also offers card indexes with material from journals and newspapers about different game matters, game reviews, articles about the editing and production history of games as well as biographical publications about various game authors and material concerning game fairs and other game events.

The archive also houses an extensive stock of literature and magazines, catalogues and brochures and, of course, the games themselves. As the priorities are set on board and table games, one can find a great number of board and card games in the archive, but there are also electronic games, puzzles, and game materials like dice, play money etc. stored there.

The German Game Archive in Marburg has been founded with the purpose of becoming a center for scientific documentation and research, with the main focus on board and table games. Its aims are to archive everything that has happened in the games sector since 1945, to support the media in their reporting, and, like the archive in Haar, to promote games in family and society, and last but not least to support scientific research not only by opening the archive's doors to scientists of all disciplines, but also by giving lectures, contributing to discussions and developing classifications for different types of games.

Conclusion

It seems to be obvious that German people are fond of game-playing and have a long tradition in this field. The market for board games is immense in the German speaking countries, because consumers show a lot of interest, and there is a great demand for new (forms of) games. The current generation, which grew up with the intellectually-demanding board games, is selective and willing to deal with more sophisticated games. This opens a wide area of possibilities for the editing houses, of which Germany possesses an extremely large number – as a whole they produce not only many new games every year, but also cover a wide range of interests.

The great popularity of games expresses itself not just in market terms, though, but also by the fact that Germany has a lively game author scene. Not only are many people interested in designing games, but amateur prizes for young aspiring game authors further spark the motivation to come up with new ideas. The competition continues, of course, with the growing number of game awards which have established or are in the process of establishing themselves as seals of quality.

The question whether Germany can be considered an *El Dorado* for gamers has to be answered with “yes”, on the one hand because the term implies material wealth, which the German game market offers – otherwise the number of editing houses would be considerably smaller than it currently is. And on the other hand, there is the immaterial side of games as a cultural asset. Lately, especially, educational games have become very popular – it seems to have come back to mind that playing is a very natural way of learning and that games are a perfect medium to convey content, be it rather simple math or language games, more demanding subjects like e.g. literature, or just in general aspects of a certain culture. In this sense, the very size of the German game market alone witnesses to the fact that games are an important part of Germany’s culture, and thus raises interest also in a scientific context.

Therefore, the German board game scene as a whole (as shown in this introduction) offers a huge sphere of activity not only for passionate players, but also for game designers and researchers.