



BEYOND THE BOX

A Comprehensive Market Research
of The Board Game Industry

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Abstract

The board game industry is witnessing an unprecedented era of growth, projected to double from \$13.06 billion in 2023 to \$26.04 billion by 2030. In other words, we are in a golden age of board games. Amidst this expansion, our research provides an extensive overview and critical examination of the industry's progression and potential, emphasizing the need for sustainable and inclusive practices to navigate future growth.

This comprehensive study provides a detailed overview of the historical progression and current dynamics of the board game industry. We explore the industry's evolution from ancient games to today's diverse market, highlighting significant developments such as the rise of mass-market games in 1935, the birth of role-playing games in 1974, and the digital transformation of board gaming. Utilizing a meticulous research design that includes diverse data collection methods and rigorous analysis, this paper examines market trends, value, revenue, and segmentation by game type, region, sales channel, and user demographics.

The study presents a thorough market overview, revealing the industry's competitive landscape and identifying leading companies like Hasbro, Asmodee, and others. Market dynamics are dissected to unearth driving factors such as the expansion of e-commerce, the upsurge in leisure time, and innovations in game design. Trends like the rise in adult gaming, influence of social media, and the emergence of hybrid gaming models reflect the industry's adaptability.

Additionally, we address the restraints challenging the industry, including competition from digital gaming, marketing hurdles, and economic barriers. The research delves into the value chain of board games, from idea development and playtesting to marketing and promotion, providing key insights into each stage. Consumer insights are gathered to understand leisure preferences, engagement opportunities, and spending patterns, with a focus on physical versus digital gaming inclinations.

Overall, the research encapsulates the multifaceted nature of the board game industry, offering a valuable resource for stakeholders to navigate its complexities and leverage growth opportunities in an ever-evolving landscape.

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History and Evolution of The Board Game Industry

world of board games, often seen as quaint historical artifacts, mirrors the evolving social values and mores, reflecting how cultural shifts influence leisure activities (Brown, 2004). The categorization of board games has traditionally focused on game mechanics or goals. This method was sufficient for classical games like Chess or Mancala but became inadequate as modern board games, which often combine multiple mechanics, grew in popularity (Murray, 1952; Bell, 1979; Parlett, 1999). The contemporary board game market can be segmented into traditional games, mass-market games, and hobby games, with hobby games further divided into wargames, role-playing games, collectible card games, and eurogames. This classification reflects the games' varying complexity, themes, and target audiences, following the same path as the board game has evolved through history.

Ancient Beginnings and Classical Games

Chess, Go, and Mancala not only served as pastimes but also played crucial roles in demonstrating strategic prowess and intellectual depth across various cultures. Chess, believed to have originated in 6th-century India, was a metaphor for war and strategy, teaching kings and nobles the art of warfare planning. Similarly, Go, with its roots in ancient China, symbolized the balance of power and was used as a tool for teaching strategy and foresight, reflecting the philosophical depth and competitive spirit of Chinese culture. Mancala, spread throughout Africa and Asia, was more than a game; it was a way of social interaction, teaching arithmetic and critical thinking skills. These games are testaments to the rich, intertwined history of civilization and strategic gaming (Murray, 1952).

The Rise of Mass-Market Games - 1935

The 20th century marked a significant metamorphosis in the board game domain, heralding the rise of mass-market games that resonated deeply with family dynamics and entertainment. Iconic titles such as Monopoly and Scrabble burgeoned beyond mere pastimes to cultural icons, encapsulating and influencing the economic and social zeitgeist of their times. Monopoly, launched amid the throes of the Great Depression in 1935, offered players an escapist journey into wealth creation, while Scrabble, arriving in the wake of World War II in 1948, tapped into the public's desire for intellectual advancement and mastery of language. The enduring success of

these games illuminated the viability of board games as enduring commercial entities, leading to an expansion of mass-market offerings and cementing their status within the fabric of global family entertainment (Parlett, 1999).

Mass-market games, notably those classics persisting on toy store shelves, became synonymous with board gaming in the public consciousness. Titles like Scrabble, Monopoly, The Game of Life, Clue, and Candyland not only maintained their commercial allure years beyond their conception but also ingrained themselves into the Western cultural lexicon, passed down through generations and buoyed by a blend of nostalgia and strategic promotion. The advent of Trivial Pursuit in the early '80s sparked an explosion in the popularity of party games—games emphasizing group interaction and performance, akin to parlor games of the Victorian era, with straightforward rules catering to large groups. This category blossomed with hits like Pictionary, Outburst!, Cranium, and Taboo, further diversifying the mass-market genre (Woods, 2012).

The emergence of television in the 1950s spurred the final archetype of mass-market games: the licensed game. As television reshaped leisure in the household, game manufacturers rapidly capitalized on this medium, transforming popular shows into a plethora of board game experiences. This era saw a shift in the industry's strategy, with a greater emphasis on licensing and marketing over long-term game development, leading to a market saturated with games tied to the ephemerality of television programming and the allure of associated characters and themes (Parlett, 1999).

During the 50s, many game companies ... began to acquire more and more licenses to television shows. Businesses that once hoped to sell a game that would be a staple in the line for decades were now making products that would be obsolete as soon as the program on which they were based was no longer on the air. More attention was given to the name and character on the box than to the product inside [Whitehill, 1997].

Together, these trends—classic family games, party games, and licensed television tie-ins—outlined the evolving narrative of board games throughout the 20th century, from cherished household activities to significant commercial commodities and touchstones of cultural heritage (Woods, 2012).

The Emergence of Hobby Gaming Culture

In the 1950s, larger companies seemed to settle on the notion that the variety of games available was ample to eternally satisfy the average consumer, a complacency that coincided with television's ascent posing challenges for major toy manufacturers and leading to a plateau in the innovation of game concepts. Yet, in the face of these challenges, the hobby gaming industry

entered a renaissance in the latter half of the 20th century. Contrary to the static selection on the shelves of mainstream retailers, game design has seen a remarkable resurgence. Innovations flourished, and entirely new genres of games have emerged and evolved well beyond the confines of the mass-market, reshaping the landscape of contemporary board and table games and offering experiences vastly different from those available in the previous era (Woods, 2012).

In the closing segment of "The Oxford History of Board Games," David Parlett touches on the contemporary landscape of board games, delineating a category known as "specialist games." These games distinguish themselves by appealing to a demographic typically characterized by maturity and a pursuit for serious, intellectually stimulating gameplay. While they share many traits with classic games, such as depth of skill and strategic complexity, specialist games are set apart by their targeted appeal to a distinct niche of the gaming market, a dedicated cohort that emerged prominently in the latter part of the 20th century. This group's preferences veer away from both the time-honored abstract games and the ubiquitous offerings of the mass market, leaning instead towards what are generally known as hobby games—an area where enthusiasts find richer, more sophisticated gaming experiences (Parlett, 1999).

Wargaming Evolution: From Tactical Simulations to Monster Game Phenomena - 1954

Wargaming, a genre that significantly shaped the hobby gaming world, can trace its origins to military simulation exercises used for strategic planning. The modern incarnation of wargaming crystallized in the 1950s with Charles S. Roberts's 'Tactics' (1954), the first board wargame to modernize the concept. Its success prompted Roberts to establish Avalon Hill in 1958, a company that became seminal in defining the pre-electronic wargaming genre through a series of games that meticulously simulated historical conflicts. This was not just a commercial triumph but also a nod to a growing interest in conflict simulations, which led to a surge of wargaming enthusiasts and other companies like Simulation Publications Incorporated (SPI) and Game Designer's Workshop (GDW), heralding the 'golden age of wargaming' in the 1970s (Dunnigan, 2000; Woods, 2012).

A typical board wargame of this time was characterized by its hexagonal grid system, terrain features, units depicted by cardboard tokens, and the use of probability-based tables to determine combat outcomes. This meticulous attention to detail was indicative of a shift from mass-market appeal to a focus on enthusiast-driven design, where the designer's name began to feature prominently on game boxes, a practice popularized by Redmond Simonsen at SPI. The magazine 'Strategy & Tactics' became a benchmark for community involvement and feedback, further cementing SPI's influence in the hobby (Costikyan, 2006).

The emergence of Avalon Hill's 'PanzerBlitz' (Dunnigan, 1970) and the subsequent 'Squad Leader' series (Hill, 1977) introduced innovations such as geomorphic maps and configurable scenarios that significantly advanced tactical-level wargaming. These games, particularly 'Squad Leader,' achieved a cult-like status and fostered a subculture of wargaming enthusiasts. The same period also saw the birth of 'monster games,' massive endeavors like GDW's 'Drang Nach Osten' and SPI's 'War in Europe,' which required dozens of hours for campaign completion and were emblematic of the dedication of wargaming aficionados (Palmer, 1980).

However, the landscape began to shift in the 1980s as role-playing games and personal computers offered new forms of entertainment. The intricate manual bookkeeping and complex mechanics of traditional wargames faced competition from the digital realm, where issues of platform compatibility and processing power were gradually being overcome. Companies that had made their name in wargaming either diversified their offerings or succumbed to the rising tide of digital gaming. Despite these changes, wargaming maintains a dedicated following today, though it has never reclaimed the widespread popularity of its golden age, settling into a niche for those who appreciate its blend of historical simulation and strategic depth (Dunnigan, 1997; Owen, 1990).

The Birth of Role-Playing Games (RPGs) - 1974

In the realm of gaming, the 1970s marked an innovative leap with the birth of role-playing games (RPGs), sparked by Gary Gygax and Jeff Perren's 'Chainmail,' a medieval miniatures game that introduced fantasy elements like magic and dragons. Dave Arneson, an avid player of Gygax's system, took these ideas further, developing a game that allowed each participant to embody a singular adventurer, setting the stage for what would become the first fantasy RPG. The collaboration between Gygax and Arneson eventually led to the creation of 'Dungeons and Dragons' (D&D) in 1974, the first commercial RPG. D&D's unprecedented growth forged a path for the RPG industry, creating a new cultural phenomenon where players engage in intricate narratives through characters they develop over time, guided by a game master's storytelling.

As RPGs matured, they embraced long-term storytelling and character progression, often in a series of sessions known as a campaign. The late 1970s and 1980s saw RPGs expanding into various themes, shifting from combat-heavy sessions to those driven by narrative and character interaction. Steve Jackson's introduction of the 'Generic Universal Role Playing System' (GURPS) streamlined the gaming process, offering a flexible framework that could adapt to any imaginative setting.

Meanwhile, the rise of computer-based RPGs in the 1990s began to influence tabletop role-playing, though the digital medium initially lacked the social dynamics central to the traditional RPG experience. This shift led to an increasing focus on storytelling and character development

in tabletop RPGs, with the 'storyteller system' from White Wolf Inc. pushing the genre towards immersive narrative experiences, exemplified by 'Vampire: The Masquerade.

Collectible Card Games: Revolutionizing the Gaming Landscape - 1993

In 1993, a significant pivot occurred in the gaming world with Richard Garfield presenting a game concept to Peter Adkison of Wizards of the Coast, which would later become Magic: The Gathering. Initially brought in for a board game titled Roborally, Garfield's Mana Clash, blending elements of card trading with gameplay, evolved into a two-player card game with the potential for endless expansion. Magic's release not only revolutionized hobby gaming but also birthed the genre of collectible card games (CCGs), creating a frenzy with gamers and establishing a new tradition of store release days swamped by eager buyers (Woods, 2012).

There is no way to overstate how much CCGs changed the RPG industry back in 1993 and 1994. Gamers were lining up at stores on release day, purchasing the new sets by the \$100 case. There was so much money in the fad that new game stores popped up just to get in on the booming industry. Print runs kept increasing, but pre-orders were locked in months ahead of each release, and Wizards couldn't afford to print much above them, so retailers and distributors were constantly limited in their purchases, as their desires typically had grown by release date [Appelcline, 2006b].

Magic's immediate success catalyzed a flourishing culture of strategic deck-building as players delved into creating effective card combinations for gameplay, enhancing the depth of the gaming experience. Wizards of the Coast, recognizing the potential of this growing community, supported it by hosting tournaments and introducing 'The Duellist' magazine, fostering a robust gaming community. The enthusiasm around this new genre of gaming was further cemented by the introduction of a professional competitive tour offering substantial prizes, which further validated the game's widespread appeal (Woods, 2012).

The success of Magic: The Gathering prompted other publishers to produce their own CCGs, leading to a market flush with variety—from Decipher's Star Trek: The Next Generation CCG to TSR's Spellfire, and other notable titles like Shadowfist and Legend of the Five Rings. However, it was the late 1990s emergence of Pokémon that presented a serious rival to Magic, tapping into a younger demographic and paralleled later by Yu-Gi-Oh! These titles underscored the genre's versatility and broad appeal, with collectible card games transitioning from niche to mainstream, capturing the imagination of players across generations (Woods, 2012).

The transition of CCGs into the digital age marked a new era, beginning with the release of Chron X in 1997, the first online collectible card game. This innovation paved the way for a blend of digital interaction and collectible gameplay, expanding the CCG concept into virtual realms. The introduction of collectible miniatures merged CCG dynamics with miniature wargaming,

attracting a new audience and enriching the hobby gaming market. Titles like Mage Knight, launched in 2000, and HeroClix brought a new dimension to the collectible model, enhancing the tactile experience of gameplay. The sustained influence of CCGs has continued to shape the structure of contemporary gaming and enrich the diversity of the hobby gaming culture, maintaining its significance and appeal in the gaming community (Woods, 2012).

Eurogames: Strategizing the Global Board Game Revolution - 1995

As the 20th century neared its close, a new breed of board games known as eurogames began to carve out a significant niche in the gaming world. Originating in Europe, particularly Germany, these games eschewed the high chance factor of traditional American board games in favor of strategy and player decision-making. Games like 'Settlers of Catan' (1995) became quintessential examples of the genre, captivating players with mechanics that focused on resource management, strategic planning, and social interaction, rather than on luck or direct conflict (Woods, 2012).

Eurogames distinguish themselves through gameplay that encourages thoughtful choices, rewards planning, and minimizes the randomness often found in dice rolls or card draws. This emphasis on skill over luck, coupled with themes that are historically and culturally engaging, has resonated with a global audience (Tinsman, 2008). Such games foster communal play and intellectual stimulation, becoming a staple in gatherings that celebrate the social and cerebral elements of gaming (Elias, Garfield, & Gutschera, 2012).

Throughout the 1990s and into the new millennium, eurogames continued to influence the broader board game market, with their principles becoming hallmarks of quality game design. They offered a counterpoint to the American style of board games, leading to a broader diversification within the industry and a renaissance in board game innovation. Players around the world embraced eurogames for their depth and replayability, qualities that contributed to the formation of dedicated gaming communities (Costikyan & Davidson, 2011).

Today, the influence of eurogames is seen in many facets of modern board gaming, with their design philosophy heavily impacting how new games are developed. They have enriched the landscape of gaming possibilities, allowing players to engage in more strategic and less luck-dependent games. Eurogames have elevated the medium, making board gaming a more thoughtful and engaging pastime that continues to draw in new enthusiasts.

Methodology

Research Design

Type of Research: This study employed a mixed-methods approach, integrating both qualitative and quantitative data to explore the board game industry comprehensively.

Study Scope: The research focused on the Canadian market, specifically targeting Toronto, but also included global perspectives through secondary research to understand broader market dynamics. The study examined various types of board games (Strategy, RPGs, Family, Party, Wargames) and themes, assessing customer purchasing behaviors, preferences, and contexts of gameplay.

- **Out-of-Scope:** The study did not cover playing cards, including poker cards, bridge cards, or tarot cards, nor did it encompass puzzles such as jigsaw puzzles, crossword puzzles, or Sudoku puzzles. These categories were considered outside the purview of the research which was specifically focused on board games.

Data Collection Methods

Primary Data:

- **Interviews:** Conducted in-depth interviews with a diverse range of stakeholders including users, crowdfunding backers, board game designers, self-publishers, experts (authors, course instructors), content creators, game-testers, retail store managers, and marketing professionals specializing in crowdfunding campaigns. Interviews were primarily recruited in-person from board game public venues like cafes and specialty stores.
- **Surveys:** Conducted surveys with 65 participants, all over the age of 18, recruited from OCAD University, University of Toronto, Snakes and Lattes branches, and online through LinkedIn. The survey extensively covered various aspects including leisure activities related to board games, preferences and purchasing behavior, the

context in which board games are played, and all types of board games (Strategy, RPGs, Family, Party, Wargames, etc.). It also explored demographic variations, examining distinctive behaviors among various genders and age groups to glean insights into consumer trends and preferences in the board game market.

Secondary Data:

- Utilized a range of sources including published books, industry reports, previous research studies, market growth statistics, board game community websites, and game publishers' websites. This comprehensive approach to gathering secondary data was designed to complement the primary research findings and extend the geographical scope of the study beyond Canada, offering a broader understanding of global market dynamics and trends.

Data Analysis

Qualitative Analysis: Employed thematic analysis on the interview data to identify themes related to motivations, pains, gains, and market dynamics throughout the value chain.

Quantitative Analysis: Used Microsoft Excel for data analysis, focusing on comparing demographic data to identify patterns and insights. The analysis technique can be described as exploratory data analysis, aimed at identifying patterns and relationships within the data.

Ethical Considerations

Consent and Privacy: Ensured that all participants provided informed consent, with privacy and anonymity strictly maintained throughout the study.

Bias and Limitations: The study acknowledges potential biases due to the regional focus on Toronto and limitations in data scope, which were partially mitigated through secondary research. The representativeness of the survey sample and the recruitment approach may also influence the findings.

Challenges Encountered

Stakeholder Recruitment: Encountered difficulties in timely recruitment of diverse stakeholders for interviews, addressed by targeting board game venues.

Survey Participation: Achieving a balanced survey participant group within a short timeframe presented challenges, addressed through strategic recruitment and incentives.

Data Consistency in Secondary Research: Faced challenges in synthesizing market growth statistics from various sources, requiring careful selection and verification of data to ensure consistency and relevance.

Scope for Improvement

Geographical Expansion: Future research could expand geographically to include more diverse markets such as the US and UK to explore regional differences in market dynamics and consumer behavior.

Methodological Enhancements: Further research could refine data collection and analysis methods, possibly incorporating more advanced statistical techniques or expanding qualitative insights with additional stakeholder interviews.

Market Overview

Market Value

The board game industry has shown remarkable growth, with the market valued at \$11.88 billion in 2022. It's on an upward trajectory, estimated to expand from \$13.06 billion in 2023 to \$26.04 billion by 2030, achieving a CAGR of 10.36% (Talbot, 2024). This momentum is expected to continue, with projections indicating growth to USD 32.00 billion by 2032, at a slightly higher CAGR of 10.52% during this forecast period (Board Games Market Size, Share & Trends Analysis [2032], 2024). This growth reflects a sustained interest in board games and indicates a thriving market for the foreseeable future.

Market Revenue

In 2022, the global board games market achieved a significant milestone with total revenues hitting the \$8 billion mark. Looking forward, the industry is poised for continued growth, with forecasts predicting an expansion to \$10 billion by 2028, reflecting a robust 25% increase within this timeframe (Talbot, 2024). The year 2024 alone is anticipated to generate a remarkable \$9 billion in revenue, with a per capita contribution amounting to US\$1.11, underscoring the vibrant and escalating demand for board games (Statista, n.d.). This upward trend highlights the enduring popularity and consumer engagement with board games, showcasing a dynamic and flourishing market.

Market Segmentations

By Game Type: Physical vs. Digital Board Games.

Within the board game industry, the advancement towards digital offerings is significantly altering its landscape. Even as physical tabletop games held a commanding 67% market share in 2020 (13 Board Game Statistics - All You Need to Know in 2024, 2024), the dramatic increase in digital board game apps usage, exemplified by a 300% rise in 'Tabletop Simulator' users on Steam, signaled a critical shift (Must-Know Board Game Industry Statistics [Current Data] • GitNux, 2023). This movement represents not just a change in consumer preferences but also highlights the growing importance of digital platforms in the board gaming experience.

To adapt to the digital era's demands, board game publishers have innovated to enhance revenue streams by transitioning classic tabletop games into digital formats available via applications. This strategic shift enables monetization through various channels, including initial app downloads, in-app purchases, and advertising revenue.

As of 2022, the global landscape of board game apps has witnessed remarkable engagement, with downloads reaching 4.85 billion worldwide, generating revenues of \$2.12 billion. This revenue was composed of \$1.09 billion from advertising (51.42%), \$0.98 billion from in-app purchases (46.23%), and \$0.05 billion from one-time purchases (2.36%), showcasing a diverse income stream within the digital board game market (Talbot, 2024; Elad, 2023).

In 2022, the United States led the way in board game app revenue with \$1.15 billion, accounting for 54.25% of the global total, making it the top country in this market. China followed as the second-largest market with \$0.52 billion in revenue, and the UK ranked third, generating \$0.08 billion from board game apps (Talbot, 2024).

Anticipated growth in the Digital Board Games Industry suggests it will achieve a revenue milestone of \$4.84 billion by 2027. North America is projected to emerge as the most rapidly expanding market in this sector between 2023 and 2030. Specifically, the United States has shown significant traction, with over 321 million board game app downloads in 2022 and advertising revenues alone reaching \$708 million, underscoring the robust momentum of digital board gaming in the region (Elad, 2023).

Highlighting this trend, Monopoly Go, developed by Hasbro, shattered records by generating over \$1 billion in seven months since its April 2023 launch, marking it as the year's most successful

mobile game. By November 2023, it had surpassed 100 million downloads and initiated over 150 million game invitations, showcasing its massive appeal and social engagement among users (Monopoly GO Revenue and Usage Statistics (2024) - Business of Apps, 2024; Talbot, 2024c).

In 2024, the revenue generated per board game app download is projected at \$0.43, with an anticipated increase to \$0.47 by 2027. This growth represents an overall increase of 6.82%, reflecting positive trends in the digital board game market's revenue generation capabilities per download (Talbot, 2024).

As the digital aspect of board gaming accelerates, Eden Bradley, a board game expert at Toronto's Snakes and Lattes, reinforces the enduring appeal of the physical board game experience. He elaborates on the unique charm that physical games retain: *"The charm is undeniable... The charm of like being in a room with your buddies laughing, having drinks, whatever food, all that stuff is part of the experience."* Eden explains. He draws an analogy with the digital transformation of magazines, where the format adapted but the essence of reading remained. However, board games are different. *"The format is seeing your friends; that is an integral part of it. And so that's why, yeah, you're not going to see that go away,"* Eden asserts (E. Bradley, personal communication, April 3, 2024).

By Region

North America

North America significantly influences the global board games market, bolstered by major companies like Hasbro Inc. and Mattel Inc. Furthermore, the increasing number of board game conventions in the U.S. and Canada will favor the regional market expansion. At a macro level, the rising trend of social tabletop games, most notably among adults, will also increase the product sales across the North American markets. For instance, in April 2022, Asmodee, a French publisher of card & board games, launched Drinkopoly, its new board game intended for adults, in the U.S. This region's strong market presence is expected to continue leading globally (Board Games Market Size, Share & Trends Analysis [2032], 2024). With a total market value of \$11.88 billion in 2022, North America's contribution was \$4.85 billion, representing 40.82%. The US, in particular, stands out within North America, generating \$2.48 billion or 31.00% of the worldwide revenue (Talbot, 2024), largely due to the effectiveness of television and online media platforms in promoting board games (Board Games Market Size, Share & Growth Analysis by 2030, 2024).

Canadian board game designer and author Joe Slack provided further insights into the crowdfunding aspect of the market. According to Joe, *"In the crowdfunding platforms for board games, the U.S. typically represents about 50 to 60% of backers. Europe and the UK together contribute about 30%, with Canada accounting for roughly 10%. Australia and New Zealand make up about five percent, with the remaining few percent coming from the rest of the world."* (J. Slack, personal communication, April 10, 2024)

Europe

Europe, with Germany, France, and the UK at the forefront (Talbot, 2024), is poised for significant growth in the board game sector. This upswing is attributed to increased disposable income and a rising interest in educational and strategy-focused games, particularly in Germany and the U.K. To maintain a competitive edge, European market players are diversifying their offerings, forging partnerships, and pursuing collaborations to extend their reach geographically. For instance, in March 2023, Blueprint Gaming Ltd., a U.K.-based game studio, announced a licensing agreement with Galaxy Gaming, a U.S.-based tabletop games company, to launch a range of tabletop games. This partnership will likely expand growth opportunities for Blueprint Gaming Ltd. to adopt new game variants and increase its presence in unpenetrated geographical territories. (Board Games Market Size, Share & Trends Analysis [2032], 2024). Projected to achieve a CAGR of 6% by the end of the forecast period in 2028 (Board Games Market Size, Share & Growth Analysis by 2030,

2024), Europe is anticipated to command the largest market share, holding approximately 43% by 2026 (*Must-Know Board Game Industry Statistics [Current Data]* • *GitNux*, 2023b). This surge is supported by the unique appeal of Euro-style board games, which emphasize strategy and skill over luck, distinguishing them from their North American counterparts. Esteemed European publishers have leveraged this appeal to produce award-winning games like *Settlers of Catan* and *Pandemic*, achieving acclaim not only within Europe but also making significant inroads into the U.S. market (Intelligence, 2023).

Asia Pacific

The Asia Pacific region's board game market is poised for significant growth, expected to exceed \$4 billion by 2025 (*Must-Know Board Game Statistics [Recent Analysis]* • *GitNux*, 2023), with China and Japan leading the charge. China, with a 2022 revenue of \$1.10 billion, claims 14% of the global market, positioning it as the second-largest market worldwide. Japan follows closely, securing the third spot globally with a revenue of \$0.46 billion, or 5% of global revenue (Talbot, 2024). This financial prowess underscores the region's substantial impact on the global board game market.

The rich tradition of board gaming in countries like Japan and South Korea is set to propel the market forward. Meanwhile, burgeoning markets such as India and China are ripe for development, offering vast opportunities despite higher market entry costs. APAC's consumer base exhibits high price sensitivity, often opting for more affordable local brands over premium-priced games, which keeps the penetration of expensive board games relatively low. Nevertheless, with APAC's higher annual saving rates compared to the West—50% in China and over 30% in India and South Korea—the region presents a significant growth potential for board games (Intelligence, 2023).

The expanding middle-class demographic is a crucial driver of market growth within APAC, making it a key consumer market for goods, including board games. The powerhouse economies of China and India are especially important for fueling the tabletop games market's expansion, poised to cater to new demand throughout the forecast period (Intelligence, 2023).

A growing trend towards using tabletop games as a means of family bonding during the holiday season is set to boost demand across APAC. The rise of board game cafes and bars, alongside a growing preference for board games among millennials and Gen Z, is influencing market trends. In response, companies are broadening their distribution networks to capitalize on the increasing adoption in India and China. A notable example of market adaptation is the December 2021 partnership between Publisher Services Inc., a U.S.-based board games company, and CMON, a

Singapore-based developer, aiming to enhance board game distribution across Asia Pacific and the Middle East (*Board Games Market Size, Share & Trends Analysis [2032]*, 2024).

Latin America, Middle East, and Africa

North America, APAC, and Europe are currently the principal markets for board game vendors, but significant growth is anticipated in Latin America and the Middle East & Africa (MEA) due to rising disposable incomes and increasing recognition of board games' value. Brazil stands out for its robust demand in Latin America, which is predicted to experience the highest growth rate at a CAGR of 14.20% by 2028(Intelligence, 2023). Meanwhile, the UAE and Saudi Arabia's investments in their entertainment sectors are set to boost the board game market, with Dubai and the UAE seeing a surge in new board game cafes (*Board Games Market Size, Share & Trends Analysis [2032]*, 2024).

By Sales Channel

The board games market segments into online and offline stores, including hypermarkets, supermarkets, and convenience stores, for physical games (*Board Games Market Size, Share & Growth Analysis by 2030*, 2024). For digital board game apps, the primary sales channels are the Apple Store and Google Play Store. In 2022, the Apple Store led with \$1.18 billion in revenue from board game apps, while the Google Play Store followed with \$0.94 billion. However, from 2022 to 2027, Apple's revenue share is expected to decrease from 55.60% to 52.40% (Talbot, 2024).

Offline Stores

In 2022, the offline sales channel led the global board games market, claiming over 54% of the industry share, emphasizing the significant role of physical retail spaces in the sector (Intelligence, 2023). With an estimated 50 million square feet of retail space dedicated to board games worldwide (*Must-Know Board Game Industry Statistics [Current Data]* • *GitNux*, 2023c), retailers serve as crucial intermediaries between companies and consumers. Given their direct engagement with end-users, maintaining robust relationships with retailers is vital for vendors to outperform competitors, especially in key emerging markets that favor retail distribution (Intelligence, 2023).

Online Stores

The online segment of the board games market, benefiting from rising internet penetration, is set to increasingly challenge offline sales into 2028. Tabletop games are increasingly available online through e-commerce platforms and retailers like Amazon and eBay, accounting for over 45% of market distribution. The sector sees growth driven by the convenience of comparing prices and a wide selection, notably in the US, Germany, and the UK, projecting over a 13% CAGR into the forecast period (Intelligence, 2023). Crowdfunding platforms like Kickstarter and Gamefound.com have also emerged as significant channels, further expanding online access to board games (Elad, 2023).

By Users

The board game market segments into three primary user groups: kids and families, teens, and adults. Each group interacts with board games differently, influenced partly by digitalization's impact on gaming habits.

Kids and Families

This segment holds the second largest market share, about 33%. There's a growing trend of using tabletop games as educational tools for children, leading to the highest CAGR in this segment. Games for preschoolers often focus on chance, while older kids are drawn to strategy-based games, aiding in cognitive development (Intelligence, 2023).

Teens

Digitalization has significantly altered the gaming habits of teenagers. Previously, the transition from board games to digital platforms typically occurred around age 12. However, now it's more common for children to start engaging with digital games by age 8. Despite this early shift, many find their way back to board games by the age of 15, drawn by the unique social and strategic elements these games offer, deeming them "sexy and cool," a viewpoint shared by adults as well. Hermann Hutter, the president of the German game publishers association Spielevetlag, remarked on this trend, emphasizing the renewed interest in board games among teenagers as both cool and appealing (Matalucci, 2021).

Adults

Dominating the user groups, adults prefer games that are strategic and tactical, such as murder mysteries and adventure games. A survey of 1,158 US adults highlighted that 50.60% of US adults value board games for their socializing opportunities. Adults' preference for board games underscores their role in strengthening social bonds and offering intellectual challenges (Talbot, 2024).

Competitive Landscape

The board game industry boasts a vast and vibrant landscape with over 20,000 publishers worldwide as of 2020 (Talbot, 2024), releasing more than 5,000 new games annually in 2019 and 2020 (Desiata, 2024). The BoardGameGeek database further highlights this diversity, listing over 150,000 titles by 2024 (*Must-Know Board Game Industry Statistics [Current Data]* • GitNux, 2023).

The competitive landscape of the board game industry is marked by a dynamic mix of established giants and innovative newcomers, each striving to capture the imaginations of diverse player demographics. Major companies leverage their extensive distribution networks and brand recognition, often expanding their portfolios through acquisitions and partnerships. In contrast, independent developers focus on niche markets, utilizing crowdfunding platforms to bring creative and unique game concepts to life (Intelligence, 2023).

Marissa Elizabeth, Canadian board game editor views the divide as a marker of success rather than a quality gauge, suggesting that a game's journey into the mass market doesn't inherently elevate its gameplay excellence—it's a testament to its reach and popularity. Mass-market games often excel in simplicity and broad appeal, securing their spot on shelves beyond specialized board game stores (M. Elizabeth, personal communication, April 5, 2024).

Spencer Moore, Canadian board game designer, points to the retail environment as a litmus test for distinguishing between the two, with mass-market games populating the shelves of general bookstores and non-gaming centric hobby stores—another threshold of their widespread success (S. Moore, personal communication, April 5, 2024).

Adam Singer, Canadian board game content creator on YouTube, offers a perspective akin to indie music, where luck and recognition can be as pivotal as quality. Some games, much like underground musical talents, may not garner the spotlight despite their merit, overshadowed by more prominent names. This, according to Adam, is part of a complex mix that includes marketing, artwork, and personal tastes, all of which can sway public opinion on what constitutes a 'good' game. It's a subjective arena, where even highly ranked games on renowned databases may not resonate with everyone. Furthermore, Singer notes the big companies' tendency to minimize risks, sticking to the tried and true, in stark contrast to indie developers who often innovate out of necessity and passion (A. Singer, personal communication, April 10, 2024).

Competitors

Hasbro

Hasbro, Inc., originally known as Hasbro Industries (Hasbro Bradley) until their name change in 1985, has a storied history that includes the first use of the Hasbro brand in March 1959, though it's unclear if this was for games or toys (*BoardGameGeek*, n.d.). As an American multinational toy and board game company, it's become one of the largest toy makers globally, headquartered in Pawtucket, Rhode Island, now holding a significant 20% share of the global market as reported in the *Global Board Game Market 2023-2027*. Known for outsourcing its manufacturing primarily to East Asia, primarily outsourcing production to third-party companies, mainly in China. Hasbro's strategic moves and partnerships, particularly in North America, Europe, and the Asia-Pacific region, have been crucial to its expansive reach and robust revenue streams (*Reportlinker.com*, 2023).

The company's portfolio is a testament to its industry leadership, featuring beloved classics such as Monopoly, Scrabble, Risk, and Clue. In terms of modern board games, Monopoly and Scrabble are thought to be the most popular. Monopoly, with its rich history of 275 million copies sold by 2015 and an expansive range of over 2,000 editions, dominates with a 31.88% share of the global board games market and an even more impressive 42.54% in the U.S. market as of 2022. Scrabble, not far behind, boasts sales of more than 150 million copies and is supported by a vibrant community of approximately 4,000 clubs globally (Talbot, 2024).

This diverse range, from strategy to educational and family-friendly games, showcases Hasbro's adaptability and its commitment to innovation. Strategic acquisitions, including the significant purchase of Entertainment One in 2019, have further bolstered its offerings, particularly in the family and children's segments (*Reportlinker.com*, 2023; *BoardGameGeek*, n.d.).

Hasbro's dedication to development and collaboration, highlighted by alliances with blockbuster franchises like Star Wars and Marvel, underscores its dynamic approach to growth and market presence. Through these initiatives, alongside a strong focus on digital adaptations and educational titles, Hasbro continues to solidify its status as a vanguard in the board game industry, leveraging its historical legacy and forward-thinking strategies to maintain competitive advantage and market leadership (*Reportlinker.com*, 2023).

Asmodee

Asmodee Holding has made a significant impact on the global board game market since its establishment in 1995, capturing an 18% market share by 2020 (Talbot, 2024). Headquartered in France, Asmodee has become a powerhouse through a mix of innovation, strategic acquisitions, and a broad product portfolio that appeals to diverse consumer tastes across strategy, family, and party games. Its popular titles include "Ticket to Ride," "Catan," and "Pandemic."

Asmodee's growth strategy has been marked by its acquisition of companies like Fantasy Flight Games and Days of Wonder, enhancing its game offerings and leveraging new intellectual properties and distribution networks. This approach has not only solidified its market presence but also allowed Asmodee to explore and enter new market segments effectively (Reportlinker.com, 2023; *BoardGameGeek*, n.d.).

Furthermore, Asmodee has embraced digital transformation by adapting its board games for online play, thus reaching a wider, tech-savvy audience through its digital arm, Asmodee Digital. This move towards digital platforms reflects the company's adaptability and its aim to cater to the evolving preferences of gamers worldwide (Reportlinker.com, 2023).

Collaborations with renowned game designers and the development of award-winning titles underscore Asmodee's commitment to quality and innovation. By continuously expanding its portfolio and strengthening its global distribution network, Asmodee is well-positioned to maintain its status as a leading entity in the competitive board game industry, reflecting its strategic foresight and adaptability in meeting consumer demands.

Ravensburger AG

Ravensburger AG, with origins dating back to the Otto Maier Verlag in Ravensburg founded in 1884, is a cornerstone in the global board game market, boasting a 4% market share (Talbot, 2024). The company's legacy began with "Journey Around the World," a game inspired by Jules Verne's novel, "Around the world in 80 days", marking its longstanding tradition of creating engaging and educational board games. Since its rebranding to RAVENSBURGER SPIELE-VERLAG GMBH in 1992, The company is celebrated for its diverse array of board games, puzzles, and toys, each embodying innovation and quality (*BoardGameGeek*, n.d.). Notably, Ravensburger AG has adeptly navigated the shift towards digital, broadening its offerings to include digital gaming applications alongside traditional board games. Renowned titles like "Labyrinth," "Scotland Yard," and "Puerto Rico," along with their acclaimed puzzles, have cemented Ravensburger AG's reputation in the industry (Reportlinker.com, 2023).

Ravensburger AG's global operations extend across North America, Europe, and Asia, with a notable commitment to sustainability in its production processes. The company's dedication to minimizing environmental impact, coupled with its vigorous pursuit of product excellence through research and development, underscores its industry stature (Reportlinker.com, 2023).

The company's product and service portfolio are impressively broad, spanning from strategy and war games to family-friendly and educational games. This range not only caters to a spectrum of consumer preferences but also positions Ravensburger AG favorably within the competitive dynamics of the board game market. Their strategy games invite players into worlds of complex decision-making and resource management, while their family games are crafted to enrich social interactions among players of all ages. Furthermore, Ravensburger AG's educational games are designed to stimulate learning and cognitive development, making learning enjoyable (Reportlinker.com, 2023).

Ravensburger AG's blend of traditional and digital gaming, coupled with its global reach and robust R&D investments, positions it uniquely in the industry. Its extensive experience, commitment to quality and sustainability, and broad product offerings ensure Ravensburger's continued influence and success in the competitive board game market.

Kosmos

Kosmos, with its origins as a storied German publishing house dating back to 1822, has made a significant mark on the board game industry, particularly after the advent of "The Settlers of Catan" in 1995. Created by Klaus Teuber and initially published by Franckh-Kosmos Verlag (Kosmos), this game not only reinforced the company's commitment to high-quality design and manufacturing standards but also showcased their ability to offer innovative and captivating games. Kosmos's remarkable roster of over 700 authors and a strong base of approximately 20,000 trade customers signify its expansive global reach (kosmos, n.d.). This is further evidenced by the establishment of Thames & Kosmos in North America in 2001 and its expansion into the UK in 2015, amplifying the distribution of Kosmos's distinctive game genres (*BoardGameGeek*, n.d.). Kosmos has firmly positioned itself in the global board game industry, with a 2% market share as of 2020 (Talbot, 2024). The company's catalog includes award-winning titles such as "The Crew" (2019) and "Cascadia" (2021), alongside the escape-room-inspired "Exit" series. These games, recognized for their educational value merged with entertainment, have become staples in the world of gaming.

Mattel

Mattel, Inc., with a storied history dating back to 1945, is a prominent force in the global board game market. As the world's second-largest toy maker, only surpassed by The Lego Group. The company's influence spans across the globe, with a presence in 35 countries and a product reach of over 150, from its headquarters in El Segundo, California. The company's strength lies in its impressive portfolio that surpasses 220 brands, including timeless names like Barbie, Hot Wheels, Fisher-Price, UNO, and Scrabble, as well as a history of embracing digital gaming through early ventures in video game systems (*BoardGameGeek*, n.d.; *Mattel, Inc.*, n.d.).

The board game segment of Mattel's vast empire stands out for its classic and enduring titles such as UNO, Scrabble, Pictionary, and Apples to Apples. These games are renowned for bringing people together, sparking joy and competition across generations. Mattel's agility in the market is evident in its recent pushes toward innovation, developing fresh game concepts while bolstering its digital footprint to captivate a wider, more tech-forward audience (Reportlinker.com, 2023).

With a deep-seated commitment to quality and satisfaction, Mattel has consistently refined its lineup through persistent research and development. The company's endeavors in the educational and strategic game categories exhibit a sharp understanding of the growing appetite for games that challenge the mind and enhance learning (Reportlinker.com, 2023).

Strategic partnerships have been a crucial aspect of Mattel's expansive strategy, showcasing its adeptness in collaboration, whether it's tapping into the allure of movie franchises or creating unique gaming experiences with other industry entities. Such alliances have enabled Mattel to widen its reach, drawing in diverse segments of consumers to maintain a robust standing in the global market.

Overall, Mattel's expansive product and service offerings—ranging from its flagship board games to digitally integrated versions—reflect a company deeply in tune with its consumer base, ready to adapt and innovate in the dynamic playground of the global board game market. This innovative spirit dates back to the early 1980s when Mattel ventured into producing video game systems, branding its own products as well as securing licenses from Nintendo (*BoardGameGeek*, n.d.). This early foray into digital gaming underscores Mattel's long-standing commitment to evolving alongside technological advancements and consumer trends, ensuring it remains at the forefront of the entertainment and gaming industry.

CMON Limited

CMON Limited, established in 2001, transitioned from a community website into a formidable board game publisher, renowned for its innovative and immersive miniature games. The company broadened its publishing spectrum significantly by 2015, branching out into various types of board games and forming partnerships with publishers in Europe and Australia to distribute games in North America and beyond. This strategic diversification and global outreach have been pivotal in

CMON's growth, allowing it to capture a substantial market share and develop a loyal global fanbase.

The company's expertise in miniature games, exemplified by titles like *Arcadia Quest*, *Blood Rage*, and the widely celebrated *Zombicide* series, showcases CMON's dedication to quality and creativity. These games, featuring detailed miniatures and rich thematic elements, have not only elevated the company's stature within the board game community but also underscored its ability to lead and innovate in the miniature gaming sector. CMON's commitment to excellence and its strategic expansion efforts have solidified its position as a key player in the dynamic global board game market (*BoardGameGeek*, n.d.; *Reportlinker.com*, 2023).

Other Competitors

The global board game industry is further enriched by a constellation of other distinguished competitors, each contributing their unique flavors to the diverse world of tabletop gaming. Czech Games Edition, known for its strategy-heavy titles, brings intellectual rigor to the table with games like *Codenames* and *Through the Ages*. Goliath B.V. offers family-friendly experiences that engage players of all ages, emphasizing fun and accessibility. Repos Production enhances the landscape with hits like *7 Wonders* and *Concept*, focusing on innovation and player interaction.

Games Workshop and Wizards of the Coast stand as titans within the niche of fantasy and strategy, the former with its *Warhammer* series and the latter with the ever-popular *Magic: The Gathering* and *Dungeons & Dragons*, captivating audiences with rich lore and intricate gameplay. Cartamundi shines with its expertise in card game manufacturing, offering unparalleled quality and design. Meanwhile, Rio Grande Games, with classics like *Dominion* and *Puerto Rico*, continues to shape the strategy game genre, ensuring depth and replayability. Each of these companies, with their distinct approaches and dedicated fan bases, plays a vital role in the ever-evolving tapestry of board gaming, offering a myriad of experiences that cater to every type of gamer.

Market Dynamics

Drivers

E-commerce Expansion - "Digital Marketplace Growth"

E-commerce expansion is a significant driver for the board game industry. The rise of online shopping platforms and marketplaces has made it easier for consumers worldwide to discover and purchase board games. This accessibility has broadened the customer base, allowing for niche and mainstream board games to reach a more diverse audience. The convenience of online shopping, coupled with a wider selection of games and competitive pricing, has stimulated consumer interest and demand. The expected growth of e-commerce at a Compound Annual Growth Rate (CAGR) of 9% during the forecast period (2022-2030) underpins the vital role e-commerce plays in driving the industry forward (*Board Games Market Size, Share & Growth Analysis by 2030, 2024*).

Industry Advocacy and Support Networks - "Collective Momentum Builder"

The formation and growing support of industry associations for board game publishers and designers serve as a crucial driver, aptly named "Collective Momentum Builder," for the board game industry. These associations play a pivotal role in advocating for the interests of their members, including critical areas like intellectual property protection and the establishment of industry standards. By facilitating collaboration and networking, these organizations help to foster innovation, share knowledge, and address common challenges facing the industry. The launch of new associations, such as The Tabletop Game Designers Association (TTGDA) in November 2023 by prominent game designers Sen Foong-Lim, Elizabeth Hargrave, and Geoff Engelstein, underscores the industry's commitment to supporting the creative and business needs of tabletop game designers (*Board Games Market Size, Share & Trends Analysis [2032], 2024*). These efforts are instrumental in propelling market growth by creating a more cohesive, supportive environment that encourages the development of new games, the protection of creative works, and the maintenance of high-quality standards across the industry. The collective action facilitated by these associations not only strengthens the industry's infrastructure but also amplifies its capacity for sustainable growth and innovation.

Increased Leisure Time Adoption - "Homebound Leisure Surge"

The global shutdown of workplaces has unexpectedly driven the board game industry by significantly increasing total leisure time for residential users (*Board Games Market Size, Share & Growth Analysis by 2030, 2024*), a dynamic known as the "Homebound Leisure Surge." As people find themselves spending more time at home, there has been a marked uptick in the adoption of board games among residential users. This increased availability of leisure time provides an opportunity for families and housemates to engage in more in-person, interactive entertainment options like board games, which not only serve as a form of entertainment but also to strengthen bonds and alleviate the monotony of extended home stays. The trend of increased leisure time contributing to board game popularity underscores the industry's resilience and adaptability, turning the challenge of global workplace shutdowns into a driver for growth by catering to the shifted lifestyle needs of consumers.

Digital Detox Demand - "Analog Connection Revival"

The growing desire among consumers to take breaks from digital devices and screen-based entertainment has emerged as a significant driver and opportunity in the board game industry, termed "Analog Connection Revival." As digital fatigue sets in from the increased prevalence of screens in everyday life, board games have become a popular alternative for fostering social interaction and bonding among family and friends. This shift towards digital detoxing encourages people to engage in more face-to-face communication and shared activities, making board games an attractive option (Reportlinker.com, 2023). Furthermore, the specific appeal to millennials, who are increasingly seeking recreational activities to counteract their high screen time, is driving demand for venues like tabletop game cafes (Intelligence, 2023). These cafes not only provide a space to enjoy board games but also serve as social hubs where individuals can connect in a meaningful way, thus tapping into the broader trend of pursuing more tangible, personal interactions in leisure activities. This driver reflects a deeper societal shift towards valuing personal interaction and community building in leisure choices, presenting continuous growth opportunities for the board game market.

Game Design Innovation - "Creative Gameplay Evolution"

The board game industry is experiencing a significant driver and opportunity known as "Creative Gameplay Evolution," characterized by a renaissance in game design and mechanics. This surge

in creativity has seen designers pushing the boundaries of traditional gameplay to introduce unique concepts that cater to a wide array of tastes and preferences. Such innovations are not only enriching the gaming experience but are also essential in attracting a broader consumer base (Reportlinker.com, 2023). As new mechanics and themes are explored, the variety of games available expands, making the hobby accessible and appealing to more people. This driver of continual innovation is crucial for the sustained growth of the industry, as it keeps the market dynamic and responsive to evolving consumer demands. Moreover, this drive for innovation opens up numerous opportunities for game designers and companies to differentiate their products in a competitive market, potentially leading to higher sales and a stronger presence in the global gaming community.

In the current wave of "Creative Gameplay Evolution," the board game industry is being propelled by discerning consumer expectations and the drive for refinement in game design. This trend is not just a result of designers' creativity, but also a response to the evolving demands of the gaming community. Adam Singer articulates this progression, highlighting the increasing standards: *"I'm also really impressed with it. I think there's more pressure on developers to streamline their games, and people have higher expectations for board games today."* He further elaborates, offering a personal reflection to underscore how far the industry has come: *"So I think it's constantly getting better and better, and things are getting less fiddly, and games are making more sense."* Adam provides a stark contrast with a look back at a classic, *"When I grew up, I thought Monopoly was amazing. And now if I play Monopoly, I'm like, wow, I don't hardly make a single decision and there's some just rolling dice and then buying whatever I land on and then randomly grabbing his chance card. It's like there's not really a lot of that game. So, it's come from quite far."* His insights speak to the industry's shift towards more engaging and decision-driven gameplay, marking a significant departure from the more luck-based classics (A. Singer, personal communication, April 10, 2024).

Trends

Pandemic-Driven Sales Surge - "Quarantine Boost Effect"

The dramatic increase in board game sales during the COVID-19 pandemic, including a 240% surge in the UK (*Must-Know Board Game Industry Statistics [Current Data]* • GitNux, 2023e) and a 20% growth in the global market in 2020 (Matalucci, 2021b), exemplifies a significant trend known as the "Quarantine Boost Effect." This trend was largely due to the lockdown measures and the resultant shift in consumer behavior towards indoor entertainment options. With people spending more time at home, board games emerged as a preferred choice for leisure, leading to a notable spike in sales. The pandemic-induced demand reflects a broader trend of seeking tangible, engaging activities that can be enjoyed without leaving the safety of one's home, rekindling interest in traditional tabletop games like Ludo and chess.

Amplifying the "Quarantine Boost Effect," insights from industry insiders reveal a deeper look into consumer engagement during the pandemic. Craig Sakula, Manager of Bergo Design, reflects on this unprecedented demand: *"People really wanted something to fill their spare time, and we sold thousands and thousands of puzzles for three years... that period was our peak, I would say, in that category... It's changed a little bit. I feel like people have gone back to the regular way of life. Still, our sales have remained high in that category since the pandemic."* (C. Sakula, personal communication, March 21, 2024)

Echoing this, Casto Chan, General Manager of Snakes and Lattes, notes a shift in gaming complexity post-lockdown: *"...after the pandemic or even during, because people were stuck at home, they're looking for things to do. So, people started playing more and more board games."* He highlights an intriguing trend, *"Before we would get like maybe once a month, we were playing Dominion at most. Now, it's like once in a couple of days, I'll see someone playing it, which is fantastic. Like people are moving away from simple traditional games into like more actual complex games."* (C. Chan, personal communication, April 5, 2024)

Adult Gamer Growth - "Mature Play Renaissance"

The expanding interest among adult consumers in board games marks a significant trend and opportunity, referred to as the "Mature Play Renaissance." Adults are increasingly drawn to board games not just for entertainment but also for the cognitive benefits they offer, such as enhanced memory, problem-solving skills, and strategic thinking. Additionally, board games provide a platform for social interaction, which is particularly appealing in an age where digital communication often predominates. The nostalgic element of board games also plays a crucial

role, as many adults seek experiences that remind them of simpler times or offer a respite from the pressures of adult life (Reportlinker.com, 2023). This surge in interest from the adult demographic is broadening the market, encouraging the development, and marketing of games that cater specifically to adult tastes and preferences. This trend represents a substantial opportunity for the industry to innovate with more complex game mechanics, themes that resonate with mature audiences, and promotional strategies that target adult consumers directly.

Further fueling the "Mature Play Renaissance," a sense of nostalgia acts as a catalyst for adults reconnecting with board games. Craig Sakula, store manager of Bergo Designs in Toronto's Distillery District, observes, *"There's kind of that nostalgia to those sorts of things, I guess... people are interested in them because they remember them when they were kids."* (C. Sakula, personal communication, March 21, 2024)

Media-Influenced Board Game Popularity - "Pop Culture Catalyst"

Adapting tabletop games from well-loved series, movies, comics, and video games is a pronounced trend known as the "Pop Culture Catalyst" within the board game industry. This approach leverages the vast audiences of these media forms, drawing in fans with themed board games that feature familiar narratives and characters. The effectiveness of this strategy is vividly illustrated by the significant increase in sales following the release of popular media titles. For instance, in November 2020, coinciding with the popularity of "The Queen's Gambit," a Netflix series, Goliath Games, a games and toys company based in Hattem, Netherlands, reported a staggering 1,000% increase in chess set sales (*Board Games Market Size, Share & Trends Analysis [2032]*, 2024). Similarly, the release of this miniseries led to a 215% rise in chess board sales on eBay in November 2020, compared to sales in November 2019 (Talbot, 2024c). These figures underscore the substantial impact that popular culture can have on the demand for board games, showcasing how thematic integration from beloved media properties can attract new audiences and significantly boost product sales worldwide. This trend not only underscores the synergy between entertainment media and board game engagement but also highlights the broadening scope of board game appeal across diverse consumer segments.

The "Pop Culture Catalyst" phenomenon in the board game industry continues to gain momentum with contributions from various entertainment sectors. Casto Chan, from Snakes and Lattes, observes how certain shows like "Stranger Things" have shone a spotlight on classic hobbies such as Dungeons & Dragons, bringing them into mainstream conversation and reigniting interest in the hobby (C. Chan, personal communication, April 5, 2024). Additionally, Adam Singer, a Canadian content creator on YouTube, notes a surge in intellectual property (IP) integrations: *"definitely seen a lot more IP lately a lot of Marvel a lot of video games turning into board games."* Adam praises the quality of these adaptations: *"They've been taking all these video game IPs and*

TV shows and movies and stuff and making games with it... but they've been doing a good job of it."

Adam goes on to discuss the care taken in these adaptations to stay true to their sources: *"So it's more than just putting the name on it. They're actually taking ideas from the game and then applying that."* He cites the board game version of the video game "Dying Light" as an exemplary case, where *"you have cards, and you can use them either in the day or you could save them and use them at night, and they have different effects depending if it's day or night... They really took that concept and made it into a fun game."* (A. Singer, personal communication, April 10, 2024).

Educational Game Dominance - "Learning Through Play"

The significant market share of educational games, occupying 41.25% of the global tabletop market in 2022 (Intelligence, 2023), underscores a combined trend and opportunity called "Learning Through Play and Edu-gaming Evolution." This movement is powered by the high demand for educational games that fuse fun with learning, enhancing critical thinking and subject comprehension in young players. Recognized by parents and educators as vital learning tools, these games have sparked innovative developments, such as Bambini Africa Edutainment Limited's new game line and University Games' recent acquisition, suggesting a burgeoning market for educational content in gaming (*Board Games Market Size, Share & Growth Analysis by 2030*, 2024). These trends present opportunities for further expansion and collaboration with educational institutions, leveraging games to enrich educational experiences both in and out of classrooms.

Adding to the "Learning Through Play and Edu-gaming Evolution," Eden Bradley's experience at Snakes and Lattes in Toronto provides a compelling anecdote. He recounts an instance that encapsulates the potential educational reach of modern board games: *"There was a kid... He may be seven. And his dad was like, this kid has been talking to me about some game... And he says to me, there's a game where you work together as a scientist, and you're trying to fight a disease."* Eden reveals his astonishment, *"Is this kid playing Pandemic at his daycare? And the answer was yes."*

Eden goes on to describe the scenario in more detail: *"Him and his little buddies at daycare had a daycare like teacher person, something getting these kids to play hardcore board games over long periods of time and when they would go home, they would put it on pause and they continue it the next day."* This illustrates the game's ability to engage young minds in complex problem-solving and cooperative strategies, a testament to the power of educational games. Eden adds, *"A game like that has such a broad audience potential because kids tend to want to play games that are challenging for their, like comprehensive skills. And Pandemic was a hilarious example of that. I couldn't believe it and he understood the game fully. He practically taught me the rules on the*

spot, or he was capable of doing so; it was bizarre, and it was so funny." This real-world example further solidifies the significant role educational games are playing in developing critical thinking and teamwork in young learners, extending the gaming experience far beyond mere entertainment (E. Bradley, personal communication, April 3, 2024).

Rise of Social Gaming Venues - "Board Game Cafe Boom"

The global board games cafe market, valued at \$1.27 billion in 2022 with an estimated growth to \$2.50 billion by 2027 (Talbot, 2024h), showcases both a trend—"Board Game Cafe Boom"—and an opportunity within the board game industry. This trend reflects a significant shift towards social gaming venues as central hubs for community engagement and entertainment. With a notable Compound Annual Growth Rate (CAGR) of 8.83% (Talbot, 2024h), board game cafes and bars are not just burgeoning as popular leisure destinations but also as vital platforms for introducing a broader audience to the world of tabletop gaming. The United States alone boasted around 800 board game cafes in 2018, a number that has likely grown, highlighting the increasing popularity of these establishments (*Must-Know Board Game Industry Statistics [Current Data]* • GitNux, 2023)s. Notable venues in New York such as Fat Cat, The Uncommons, and E's Bar exemplify the diverse appeal of these spaces, offering everything from casual gaming to more focused strategy sessions (Intelligence, 2023). This rise presents an opportunity for game publishers and cafe owners alike to collaborate on events, exclusive launches, and promotional activities, further driving the growth of the board game market and fostering a vibrant gaming culture.

The "Board Game Cafe Boom" extends beyond mere market growth, as insights from industry professionals reveal the reasons behind the trend and the demographics it attracts. Eden Bradley from Snakes and Lattes captures the essence of the board game cafe's appeal: *"people are here to have fun... They are here to have a nice time and they're more than happy to share it."* He emphasizes the inclusive nature of these spaces: *"It's the community; people talk to each other... They are more than happy to have somebody walk through the door and be their best friend that second."* (E. Bradley, personal communication, April 3, 2024)

The social dynamics within board game cafes like Snakes and Lattes cater to various consumer preferences and needs, as outlined by insights from Casto Chan. He provides reassurance for those who may feel self-conscious about indulging in their hobby in public spaces: *"I see people coming in here playing DMG, but I've never seen people doing that at a Starbucks or something. So that kind of help alleviate the concerns about a little bit anxiousness a little bit for, I guess."*

Adding to this, Casto touches on the convenience factor that board game cafes offer: *"Some people don't enjoy hosting, and we, we take care of it for you, right? We have a space for you. We have to give you food and drinks; you don't have to, like, clean up your house to come here."* This insight

highlights the role of these venues in providing a hassle-free gaming experience, where the focus is on enjoyment without the responsibilities that come with hosting at home.

As for who is frequenting these venues, Casto delineates: *"Mostly it is entry party players and then like beginner and intermediate strategy players, anything heavier than that tends to be uh much fewer players, we are a destination for parties... we also have fantastic first date slot."* He also notes a shift towards balance in the gaming community: *"The gap between male and female players is getting smaller and smaller as it's becoming more of a mainstream hobby"* (C. Chan, personal communication, April 5, 2024).

Eden further describes the varied clientele: *"demographics are all over the place... If there is a person that exists, somebody like them has probably come here."* This broad demographic reach, from young enthusiasts to older generations seeking both nostalgia and new experiences—*"I had an old couple, 70 years old, they'll play all sorts of stuff, whether it's new or old, whatever"*—underscores the universal appeal of board games and the role cafes play in making gaming accessible to alle (E. Bradley, personal communication, April 3, 2024).

Crowdfunding Creativity Surge - "Kickstarter Game Revolution"

The board game industry's engagement with crowdfunding platforms, notably Kickstarter, has catalyzed a significant trend and opportunity—dubbed the "Kickstarter Game Revolution." This evolution has not only democratized game development, allowing for an influx of inventive designs and niche genres, but has also broadened the market's appeal by drawing in diverse player demographics. Crowdfunding's impact is underscored by compelling statistics: 45.50% of Kickstarter's successful campaigns involve tabletop gaming (*Must-Know Board Game Industry Statistics [Current Data]* • GitNux, 2023); in 2017, 76% of board game projects on Kickstarter reached their funding objectives (*Must-Know Board Game Statistics [Recent Analysis]* • GitNux, 2023); and in 2019, the tabletop games sector amassed USD 6.15 million in funding on Kickstarter alone (*Must-Know Board Game Industry Statistics [Current Data]* • GitNux, 2023), illustrating crowdfunding's vital role in fostering industry growth, innovation, and direct creator-audience engagement. This shift has not only facilitated the launch of myriad game projects but has also significantly contributed to the expansion and dynamic of the global board game market.

The "Kickstarter Game Revolution" has been a game-changer for both indie developers and established companies. Adam Singer, a Canadian board game content creator, sheds light on why even the big players are increasingly tapping into crowdfunding platforms. One key reason, he points out, is financial strategy: *"Money now is better than money later."* explaining the immediate financial benefit over traditional investment and return models. *"They're getting all that money*

upfront... You don't have to pay interest, and you could even invest that money to get interest if you're really good with your money."

Furthermore, Adam highlights the advantages of market research: *"It also allows them to kind of understand the market in real-time... They just save themselves a whole ton of hassle from manufacturing a game that would never sell."* He also mentions the allure of exclusivity: *"The Kickstarter version will usually have things in it that don't make sense for them to mass produce."*

He elaborates on the economic implications of these campaigns for publishers: *"It allows them to charge more and produce more of the ideas they have."* Beyond the financials, Adam acknowledges the significant marketing benefits: *"Plus, they get a lot of free marketing with it because Kickstarter is gonna advertise for them... It gets people talking about it."* He adds from his perspective, *"It gets YouTubers like me doing coverage for free. I just do whatever my audience wants to hear about."* (A. Singer, personal communication, April 10, 2024)

Adam Singer's insights reveal how crowdfunding platforms have become integral to the board game industry's growth, offering a multifaceted suite of benefits that extend well beyond the initial fundraising.

Miniature Gaming Renaissance - "Minis, Detail in Small Scale"

The growing enthusiasm for miniature-based games represents a notable trend known as the "Miniature Gaming Renaissance," highlighting an increased interest in games that feature detailed miniatures as a core element. This enthusiasm not only speaks to the hobbyists who appreciate the artistry and craft involved in painting and customizing miniatures but also attracts a broader audience fascinated by the tactile and visual appeal of these components. Miniatures add a unique, immersive dimension to gameplay, enhancing storytelling and strategic depth. This trend offers significant opportunities for game designers and manufacturers to innovate and expand their offerings in this niche yet growing segment. It also opens avenues for retailers and online platforms to cater to this specialized market with dedicated spaces for miniature games, painting workshops, and community events. The miniature enthusiasts' community is often highly engaged, contributing to the hobby's growth through social media, forums, and participation in gaming conventions, thus fostering a vibrant culture around miniature gaming (Adam, 2017).

While the "Miniature Gaming Renaissance" has brought new depth to the gaming world, it is not without its criticisms, particularly regarding accessibility and gameplay integrity. Casto Chan of Snakes and Lattes points out an economic concern: *"I appreciate the physicality of it. I think it's detrimental to a hobby, and it creates a barrier of entry in the form of costs."* He emphasizes that many games are *"entirely playable without the added cost of miniatures."* He suggests that the

aesthetic enhancement can present *"a false kind of barrier to guests who might be interested in trying something new."* (C. Chan, personal communication, April 5, 2024)

Adam Singer raises another issue—the impact on gameplay. He uses Robinson Crusoe as an example: *"A lot of times publishers will force those [miniatures] into the game when it actually makes the game worse... they turned all of those in miniatures."* He elaborates on the practical problems this creates: *"A core mechanism of the game [Castle of Burgundy] wasn't possible to do anymore with the miniatures... It just made it more clunky, and it was so simple before... now I have to do all this fumbling around and fiddliness."*

Adam also points out environmental concerns with overproduction of miniatures: *"It's like putting more plastic and... for no reason and more garbage that will eventually make into the landfill."* He's critical of this trend when it does not serve the game itself: *"The red flag for me is like when they force stuff in because they know what's gonna increase their sales but at the cost of the game."* (A. Singer, personal communication, April 10, 2024)

These insights highlight that while miniatures can enhance the visual and tactile aspects of board gaming, there is a balance to be struck to avoid unnecessary costs, complexity, and environmental impact. It's a cautionary reminder that the push for more elaborate components should not overshadow the fundamental aspects of gameplay or inclusivity within the hobby.

Hybrid Game Innovation - "Digital-Physical Fusion"

The emergence of hybrid board games, which combine traditional gameplay with digital enhancements like mobile apps and augmented reality, marks a significant trend and opportunity, aptly termed "Digital-Physical Fusion." This innovative approach enriches the gaming experience by increasing interactivity and immersion, effectively bridging the gap between traditional and digital gaming landscapes. By integrating digital elements, these hybrid games cater to the tech-savvy generation while still appealing to traditionalists who appreciate the tactile nature of board games. This fusion not only broadens the appeal of board games to a more diverse consumer base but also revitalizes the market by introducing a new dimension of play (Reportlinker.com, 2023). Such developments are expected to drive market growth as they attract consumers looking for enhanced gameplay experiences that combine the best aspects of both digital and physical gaming worlds. This trend offers significant opportunities for game developers and publishers to innovate and capture new segments within the evolving gaming market.

In the vanguard of gaming innovation, "Digital-Physical Fusion" is opening doors to new gaming experiences, a sentiment echoed by experts in the field. Eden Bradley highlights the user-friendly aspect of digital integration in games: *"It's called Eternal... because it's electronic, you don't have*

to learn the rules. The game just tells you what's legal and what's not right away." He adds, "There's no learning. You just go, 'I play this part, it says I can,' and uh, over time, in two games, you have it down pat because the game kind of does it for you." This seamless introduction to complex games showcases the potential for digital aids to enhance the learning curve and accessibility of modern board games (E. Bradley, personal communication, April 3, 2024).

Adam Singer, from a design perspective, stresses the importance of balance: *"People really like to just disconnect when they play a board game. They don't really want to be pulling out their phone and things like that."* However, he acknowledges the benefits of digital resources: *"Having tutorials and having videos and having your rule book online is really helpful... being able to pull it up on your phone's really nice."* Furthermore, Adam points out the advantages for game development: *"having that... simulator Tabletopia is really awesome for play testing, you can just play with anyone over the Internet... really awesome for getting people to play your game before they buy it."* These insights from Eden and Adam underline the multifaceted benefits of hybrid gaming—simplifying gameplay while offering new forms of engagement and development tools, thus fueling the evolution of the board game industry (A. Singer, personal communication, April 10, 2024).

Digital Community Engagement - "Social Media Synergy"

The expansion of online communities and social media platforms represents a key trend—"Social Media Synergy"—and an opportunity within the board game industry. This trend highlights how digital spaces have become crucial for connecting board game enthusiasts worldwide, facilitating the sharing of experiences, strategies, and insights about different games (Reportlinker.com, 2023). The ease of access to these communities not only nurtures a global network of gamers but also provides manufacturers, designers, and retailers with direct channels to engage with their audience, gather feedback, and promote new releases. This digital convergence fosters a more inclusive and accessible gaming culture, allowing for the rapid dissemination of board game trends, crowdfunding campaigns, and event announcements. As a result, the industry has the opportunity to leverage these platforms for marketing purposes, community building, and customer support, enhancing the overall visibility and appeal of board games in a digitally connected world.

Incorporating Eden Bradley's insights, the "Social Media Synergy" trend reveals the potent influence of online trends on the popularity of board games. Eden notes the creative use of social media to reimagine classic games: *"There was an Instagram trend that came around where people are saying, oh, you can't use descriptor words. You have to use like vague statements kind of like 'does the person look like they would own a boat?'"* This innovative play on "Guess Who?"

showcases how a simple game can be revitalized through social media engagement, leading to a significant spike in interest and sales.

Eden further observes the impact of social media influencers on consumer behavior: *"It'll just be some Instagrammer or something like that. Will be like, 'Oh, look at this game, that's it.' And then that game will fly off our shelves for a couple of weeks."* He points out that *"It's usually something superbly simple. It's always the classics or something as simple as the classics."* This reflection highlights the fact that while newer, complex games have their place, there's a notable trend where the simplest of games gain sudden popularity, attributing to the power of social media's reach and its ability to rapidly shift consumer trends (E. Bradley, personal communication, April 3, 2024).

Visual Dominance in Board Gaming - "The Power of Aesthetics"

In the board game industry, the trend of visual dominance highlights a significant shift in consumer behavior, emphasizing the importance of aesthetic appeal in game selection. Craig Sakula, General Manager of Sales Operations & Logistics at Bergo Design, notes the contemporary visual focus of consumers: *"People nowadays are so visual and spend so little time looking at the contents of the box that they will just pass it by so that it's unsalable."* (C. Sakula, personal communication, March 21, 2024)

Echoing this sentiment, Brayden Popke, Retail Store Manager at Bergo Design, observes, *"I think a lot of consumers will look at things from a visual standpoint rather than what's inside it."* This perspective suggests that the initial visual impression can significantly influence purchasing decisions (B. Popke, personal communication, March 21, 2024).

Adam Singer, further illustrates the impact of visuals in the context of crowdfunding: *"In Kickstarter, people are very influenced by the way things look and the way they're marketed, so a lot of times I'll look at a game and be like that design's terrible. It's terrible from a design perspective. I would not buy that game, but it looks nice, and then they just kill it and they get millions of dollars."* He adds, *"It's like, all right, okay I can't argue with results, I guess."* (A. Singer, personal communication, April 10, 2024)

These insights collectively underscore the increasing importance of visual elements in board games. As aesthetics continue to drive consumer interest and sales, designers and publishers are challenged to balance compelling visuals with substantive gameplay to satisfy both initial appeal and lasting engagement.

Print and Play Accessibility - "The Democratization of Board Gaming"

The trend of Print and Play (PnP) and Roll and Write games is burgeoning in the board game industry, offering inclusive and economical access to gaming worldwide. Canadian board game designer and author Joe Slack explains the significance, particularly for regions where shipping costs or delivery challenges are prohibitive: *"There are some people in different regions of the world that the shipping would be prohibitively expensive... or maybe war-torn countries and that kind of thing, but if they want to still have the game, they have the option."*

He highlights the affordability and immediacy as key strengths: *"For backers [buyers] who... don't want to spend fifty, sixty, a hundred dollars on the game... it just gives a good option for people who may not have the resources."* (J. Slack, personal communication, April 10, 2024)

The PnP and Roll and Write phenomena are not just about overcoming logistic hurdles; they represent a shift towards more agile and player-centered game distribution, providing immediate and flexible play experiences and creating new opportunities for designers and players alike to engage with the board gaming hobby.

Compact Gaming Wave - "The Shift to Smaller Box Games"

The board game industry is increasingly embracing a trend towards smaller, more streamlined games. This movement towards compactness is driven by the desire for cost-effective production and distribution, as well as a consumer preference for games that are easy to store and carry. Exploring the evolving landscape of board game packaging and production, Joe Slack identifies a shift toward more compact offerings: *"I think there may be more and more trends towards smaller box games. Less expensive, cheaper to ship, easier to produce that kind of thing."* He notes the mutual benefits for publishers and players, such as shelf space efficiency and ease of transport, without compromising the gaming experience. For publishers, the advantages are clear: *"cheaper to produce... they might be able to airship it to people as opposed to sea shipping, which can save some money."* Joe references a practical application of this trend, *"like Gabe Barrett from Board Game Design Lab... He's doing solo game of the month... all in the same size box... much easier and cheaper to produce."* This trend encapsulates a strategic approach to game design and distribution that accommodates both production limitations and consumer preferences (J. Slack, personal communication, April 10, 2024).

Solo and Duo Play Dynamics - "The Rising Demand for Solo and Two-Player Games"

In the board game industry, there has been a noticeable shift towards accommodating solo and two-player modes, driven by evolving player preferences and lifestyle changes. Joe Slack notes the growing popularity of solo play: *"About years ago, solo modes were just starting to take off... So, including a solo mode in your game, if it's possible and it makes sense, is something that you want to consider."* (J. Slack, personal communication, April 10, 2024)

Concurrently, the demand for genuine two-player experiences has also increased, as expressed by Marissa Elizabeth, a Canadian board game editor: *"Games are supposed to be social things. It makes sense that you get together in a group and three and four, but so many games say yeah, they play from two to four players. If you try it at two players, the way that they've changed the mechanics to make it work does not work. It's a serious downgrade and the game does not truly play with two players."* She underscores a common frustration: *"It's very often false advertising and that is so frustrating because there are very few games out there that play well for two players."* (M. Elizabeth, personal communication, April 5, 2024)

This trend highlights the market's response to a niche yet significant segment of gamers seeking quality gaming experiences tailored to smaller settings, whether solo or with another player. It reflects a broader pattern of diversification within the game design industry, aiming to meet the varied needs of today's gaming community.

AI Integration in Board Games - "Ethical Dilemmas and Artistic Authenticity"

The integration of AI in board game design, particularly in the creation of visual art, is a growing trend that has sparked significant ethical debates within the gaming community. Adam Singer acknowledges the mixed feelings about AI art: *"I think more recently, people seem to be very concerned with AI and AI art... It's nice that they're investing in these communities like you're paying a person to use their skill, and that's a really nice thing."* He critiques the impersonal nature of AI art, noting, *"Using it can sometimes be a little bit of a shortcut and rather than going through the effort of let's find the artist that will present the game we want instead, it's just get whatever this machine spits out and use that."* (A. Singer, personal communication, April 10, 2024)

Spencer Moore, a Canadian board game designer, emphasizes the broader implications for creators: *"Most RPG designers are themselves effectively starving artists... They are some of the least likely people to be okay with commercial use of AI art."* He highlights the lack of attribution

and ethical concerns: *"The fact that AI is still scraping the entirety of the internet not crediting authors, that's the issue."* (S. Moore, personal communication, April 5, 2024)

Casto Cahn, General Manager at Toronto's Snakes and Lattes, points to a possible middle ground: *"AI is such a contentious topic... there has been movements where AI is pulling from specific artists that have consented to having their art used, right? So that is a much more amicable kind of solution."* He adds the necessity of a human touch, *"You can have AI art, but there's no problem as long as there's consent from the artist and as long as there have been human eyes on it to kind of touch up things that might need finishing."* (C. Chan, personal communication, April 5, 2024)

These perspectives collectively underscore a critical aspect of AI integration in board games—balancing technological innovation with respect for artistic integrity and ethical standards. The discussion reflects a community deeply invested in maintaining the authenticity and human connection that board games traditionally offer, while navigating the new possibilities AI brings to the table.

Competitive Gaming Engagement - "Millennial & Gen-Z Tournament Wave"

The increasing organization of national and international board game competitions and exhibitions constitutes a significant trend, aptly named the "Millennial & Gen-Z Tournament Wave." This trend illustrates how competitive events in board gaming, such as those hosted by the Nigeria Scrabble Federation and the National School Scrabble Championship by Mattel and the Scrabble Association of India, not only promote the games themselves but also actively engage younger demographics (*Board Games Market Size, Share & Trends Analysis [2032]*, 2024). By creating platforms for competitive play, these events help to elevate the profile of board games, making them more appealing to millennials and Gen-Z participants. Such competitions foster a community around board games, encourage strategic thinking and learning, and provide entertainment, thereby enhancing the popularity of these games among a demographic known for its keen interest in interactive and social activities.

Customization Drive - "Personalized Gaming Experience"

The trend of personalization in board games is becoming a prominent trend and opportunity, termed "Personalized Gaming Experience." This movement towards customizable board games, where game elements can be tailored to the preferences of individual players or groups, is rapidly gaining popularity (Reportlinker.com, 2023). As consumers increasingly seek unique and

personalized experiences, the demand for bespoke board games is expected to rise. This trend caters directly to the modern consumer's desire for products that reflect their individual tastes and enhance their engagement with the game. Looking forward, the ability to offer customizable options in board games will not only increase consumer satisfaction but also provide manufacturers with a significant competitive edge in the market. By focusing on customization, game developers can differentiate their offerings, potentially leading to greater market share and fostering deeper connections with their audience. This trend signifies a shift in market dynamics where personalization and consumer-centric approaches become key drivers of growth and innovation in the board game industry.

Restraints

Digital Gaming Competition - "Tech-Led Entertainment Shift"

The board game industry is encountering a significant restraint known as "Tech-Led Entertainment Shift," driven by the burgeoning popularity of online multiplayer and virtual games. This trend presents strong competition, particularly as urban consumers, who are increasingly gravitating towards digital gaming options, engage with board games less frequently (*Board Games Market Size, Share & Growth Analysis by 2030*, 2024). The rapid growth of digital gaming platforms, characterized by advanced video games with high-quality graphics and immersive experiences, is reshaping consumer preferences globally (*Board Games Market Size, Share & Trends Analysis [2032]*, 2024). This shift towards digital entertainment is not only diversifying how people spend their leisure time but also potentially limiting the adoption of traditional board games, especially in urban areas where technology penetration is high. Additionally, the widespread availability of smartphone games further exacerbates this challenge, as they offer a convenient and accessible alternative, thereby impacting the demand for physical board games across various markets. This competition from digital platforms could significantly hamper the growth of the board game market unless countered by innovative strategies that enhance the appeal and engagement of traditional gaming experiences (*Board Games Market Size, Share & Growth Analysis by 2030*, 2024).

Marketing Challenges - "Visibility and Awareness Gap"

A significant restraint impacting the board game industry is the "Visibility and Awareness Gap," particularly affecting niche and specialty tabletop games. Lack of product awareness can critically limit consumer interest and purchasing decisions, as potential buyers may not even be aware of the variety of games available, especially those outside mainstream popularity (Intelligence, 2023). This challenge is exacerbated for new entrants who struggle to gain visibility in a market saturated with entertainment options. Without effective marketing and promotional strategies, these games often fail to reach their intended audience, hindering market traction and sales potential. Established companies with a strong market presence and brand reputation face fewer hurdles in making consumers aware of their products. However, for smaller or newer companies, the lack of visibility remains a substantial barrier, necessitating innovative marketing approaches to differentiate their offerings and capture consumer attention in a competitive landscape.

Cost-Driven Market Limitations - "Economic Accessibility Barrier"

High production costs represent a notable **restraint** in the board game industry, known as the "Economic Accessibility Barrier." The creation of high-quality board games, especially those with intricate components and detailed designs, involves significant manufacturing expenses. As the cost of raw materials, labor, and transportation rises, these increased production costs are often passed on to consumers in the form of higher retail prices. This pricing strategy can restrict market growth by limiting the accessibility of these games to a broader audience, particularly affecting price-sensitive consumers. In segments like tabletop and strategy games, where complexity and quality often result in higher costs, the potential for widespread adoption may be curtailed. Budget-conscious consumers might be deterred from purchasing these higher-priced games despite their unique entertainment value, thus limiting the overall market expansion and accessibility of these premium products (Reportlinker.com, 2023).

Complexity and Time Investment - "Gamer Fatigue Risk"

A significant restraint impacting the board game industry is what could be termed "Gamer Fatigue Risk." The intricate nature of some board games, characterized by complex rules and long playtimes, poses a challenge in attracting and retaining casual gamers. This restraint is particularly prevalent in strategy games, which demand a considerable time investment and cognitive effort to enjoy fully. While these characteristics are appealing to a niche audience of dedicated gamers who appreciate deep, immersive experiences, they can act as barriers to mass market adoption (Reportlinker.com, 2023). The complexity and lengthy commitment required can deter those looking for a more casual, accessible gaming experience. Consequently, while such games enrich the diversity of offerings within the industry, their specialized appeal may slow overall market growth by limiting broader consumer engagement and market penetration.

Counterfeit Product Impact - "Brand Integrity Erosion"

The prevalence of counterfeit board games poses a significant restraint known as "Brand Integrity Erosion" within the board game industry. Counterfeit products not only damage the reputation of established brands but also impede overall market growth (Reportlinker.com, 2023). These unauthorized reproductions often fail to meet the quality and safety standards that genuine products uphold, resulting in consumer dissatisfaction and potential safety hazards. This can lead to reduced demand for authentic products as consumer trust erodes, and the perceived value of purchasing an original, often more expensive, product diminishes. Furthermore, the presence of knock-offs in the market undermines the financial viability of legitimate game manufacturers and designers, who

invest considerable resources in developing unique, engaging, and safe games. This issue necessitates stringent actions from industry stakeholders to protect intellectual property, ensure compliance with safety standards, and maintain consumer trust in the quality of their products.

Storage and Distribution Challenges - "Retail Space Constraints"

The limited availability of storage space in retail stores represents a notable restraint for the board game industry, termed "Retail Space Constraints." As physical retail spaces face limitations in terms of shelving and storage, board game manufacturers may find it challenging to secure adequate visibility and accessibility for their products. This issue is compounded by the increasing popularity of e-commerce platforms, which, while offering an alternative route to market, also require adaptation in terms of logistics and marketing strategies (Reportlinker.com, 2023). For some board game manufacturers, especially smaller or newer ones, the competition for retail shelf space with more established brands can hinder their ability to reach their target audience effectively. To navigate these challenges and remain competitive, manufacturers may need to explore and invest in new marketing strategies and distribution channels, such as direct online sales, partnerships with non-traditional retail outlets, or enhanced digital marketing campaigns that drive both online and in-store demand.

Market Value Chain

1. Idea and Concept Development

The idea and concept development phase is crucial in the board game industry, setting the foundation for the game's design, mechanics, and thematic elements. While mainstream game design often begins with identifying market needs and trends through extensive research, independent indie game designers frequently take a different approach.

For many indie designers, game ideas stem from personal inspiration or interests, not necessarily from a calculated response to market demands. As a result, the development of these game concepts can span years, evolving slowly as the idea continues to inspire and prove viable.

For indie designers like Spencer Moore from Toronto, game ideas can remain relevant and exciting over many years. Spencer has been working on his game, "Breadwinner," a concept he conceived 7-8 years ago. He explains that an important part of his design process is the longevity and resilience of an idea: *"If it lives in my head for months or years, it's worth designing and making a real product."* The concept for "Breadwinner," a competitive sandwich building card game, has already resonated with many, eliciting laughter and interest simply from its description, which confirms its potential in Spencer's eyes.

Another project of his, "Apocalyptica," has been in development for almost a decade. This game is more complex and demonstrates the patience required in the indie game development process, where the evolution of a concept isn't rushed but allowed to mature and refine over time (S. Moore, personal communication, April 5, 2024).

Similarly, Marissa Elizabeth, who works as both a designer and editor for "Breadwinner," describes her approach to game design as driven by a desire to improve on existing games. She often starts with a game that she enjoys but finds fundamentally flawed in some way: *"For my own way as a designer, I tend to just get started with a game where I have played a game and there was something I really liked the game in some way, but it was also intrinsically flawed for me. And that flaw bothers me. I want to do that game, but do it better."* This approach highlights a common motivation among game designers—both amateur and professional—to refine and reimagine games based on personal experiences and frustrations (M. Elizabeth, personal communication, April 5, 2024).

During the concept development phase, the game's core mechanics—how players interact with the game and each other—are defined. Designers decide whether the game will be cooperative, competitive, or solo; the basic rules; how the game progresses; and how a game ends. Theme is another critical aspect developed at this stage; it involves deciding the narrative or setting of the game, like space exploration, medieval adventure, or modern-day trading.

After the initial ideas are formulated, they are shaped into a more coherent structure. This includes drafting preliminary rules and game flow, deciding on the number of players, game duration, and what physical components the game will need, such as cards, dice, boards, and tokens. This phase often ends with the creation of a basic prototype, which is a rudimentary version of the game made from simple materials. This prototype is essential for moving into the next stage of the process, which involves testing and refining the game based on feedback.

This phase of development in the indie sector underscores a highly personalized and passionate approach to game design. Unlike commercially driven projects, these games evolve organically, often enriched by the time they take to develop and the personal connection the designer maintains with the concept. For indie designers, the game's journey from concept to completion is not just about filling a market gap but about bringing a deeply cherished idea to life, making this phase not only about creation but also about connection and personal expression.

2. Playtesting and Refinement

Playtesting is a critical phase in the development of a board game, serving as a bridge between the game's design and its market readiness. This stage involves rigorous testing of the game with real players to evaluate its mechanics, balance, fun factor, and overall coherence. The primary goal of playtesting is to gather actionable feedback to refine and improve the game. This involves identifying any issues with game rules, mechanics, pacing, and player engagement. Playtesting helps ensure that the game is not only enjoyable and challenging but also fair and accessible to its intended audience.

Setting Up Playtesting

- **Selection of Players:** Playtesters are typically selected to represent a cross-section of the target audience. This can include gamers who are casual enthusiasts, seasoned strategists, or complete beginners, depending on the game's complexity and market.
- **Environment:** Tests can be conducted in various settings, such as at the designer's home, in gaming cafes, at conventions, or through organized playtesting events. The setting might influence the feedback, with more formal environments potentially leading to more focused and detailed critiques.

Types of Playtesting

- **Internal Playtesting:** Initially, playtesting is often conducted internally within the development team or with friends and family. This is a preliminary round to catch the most apparent flaws and issues before broader external testing.
- **Blind Playtesting:** In this phase, the game is given to new groups of players without any guidance from the designers. This tests the clarity and comprehensibility of the written rules and the game's ability to stand on its own.
- **Focused Group Testing:** Targeted testing sessions may be conducted with specific objectives, such as testing game balance across various player counts or the effectiveness of game components and materials.

Conducting Playtesting

- **Observation:** Designers observe games without intervening, noting any confusion or disputes about the rules, player engagement, and the overall game flow.
- **Feedback Collection:** Feedback is typically collected through questionnaires, structured interviews, or open discussions post-gameplay. Questions might focus on the fun factor, rules clarity, length of play, and replayability.
- **Iteration:** Based on the feedback, the game may undergo several iterations. Rules might be rewritten, mechanics adjusted, and components redesigned. This iterative process is essential for refining the game into a polished product.

Joe Slack, a board game designer, publisher, course instructor, and author, emphasizes that there is no "magic number" of playtests. The adequacy of playtesting depends on the game and how it evolves:

- **Feedback Evolution:** Joe points out that early feedback often highlights fundamental issues, while later stages of feedback might suggest changes that don't necessarily improve the game but could make it different. When feedback shifts from critical issues to suggestions that might alter the game's nature without clear benefits, it's a sign that the game is nearing completion.
- **Consistent Positive Feedback:** A crucial indicator that a game is well-tested and ready is consistent positive feedback across multiple sessions, with players showing genuine interest or a desire to play again (J. Slack, personal communication, April 10, 2024).

Playtesting is not just about identifying what's wrong with a game; it's also about discovering what players love, what excites them, and what keeps them coming back. It's a crucial developmental tool that directly influences the game's final quality and success. Effective playtesting can transform a good game into a great one, ensuring it meets the designer's vision and the players' expectations.

Adam Singer, a board game content creator, stresses the importance of being open to feedback. Designers can become very attached to their games, making it difficult to accept criticism. However, listening to feedback is vital for creating a game that will appeal to others, not just the designer. Concerns such as production costs also need consideration; excessive costs can make the final product unaffordable for the target audience (A. Singer, personal communication, April 10, 2024).

By rigorously testing the game and refining it based on diverse player feedback, designers can significantly enhance the game's appeal and usability, paving the way for a successful launch in the competitive board game market.

3. Rulebook Editing

Once a board game has passed through rigorous playtesting and the game mechanics are solidified, the next critical step is rulebook editing. The rulebook is not just a set of instructions but the gateway through which players understand and enjoy the game. This phase focuses on creating a clear, comprehensive, and engaging rulebook that effectively communicates how to play the game.

The primary objective of rulebook editing is to ensure that all players, regardless of their previous gaming experience, can easily understand how to set up, play, and win the game without confusion. A well-edited rulebook can significantly enhance the player's experience and satisfaction, reducing the learning curve and potential frustration.

The rulebook is often the first point of contact between the game and its players, and as such, it plays a crucial role in the game's success. An unclear rulebook can lead to misunderstandings and diminished enjoyment, impacting the game's reception and sales. Conversely, a clear and engaging rulebook can significantly enhance the gaming experience. Spencer Moore, a board game designer, underscores this point: *"I think that some of the best well-known games are that way because of how good their instructions are. A lot of the less well-known games, I found we often encounter issues with the instructions specifically. That word like 'How does this rule actually work?' It's not properly explained or it's not clear or just some things are either frustrating in terms of their layout and appearance and sometimes frustrating in terms of the actual text that's there."* (S. Moore, personal communication, April 5, 2024).

Key Steps in Rulebook Editing

1. **Drafting the Initial Rulebook:** This step involves translating the game mechanics and designer's intent into a structured document. It includes sections on setup, gameplay, turn structure, scoring, and any special rules.
2. **Clarity and Comprehensibility:** The language used must be clear, concise, and unambiguous. It's crucial to define game-specific terms and ensure that the rules are logically organized. Flowcharts or diagrams can be very helpful in visualizing complex interactions or sequences within the game.
3. **Inclusivity in Language:** Using inclusive language ensures that all potential players feel welcomed. This involves avoiding jargon that might be unfamiliar to new players and ensuring that examples and pronouns within the rulebook do not alienate any group. Eden

Bradley, a board game expert at Toronto's Snakes and Lattes, emphasizes the confusion that can arise from technical jargon:

"There are so many games that have rule books that are basically like nonsensical, they're so complicated. They use weird terminology, and it's almost written in another language to some of these people who are coming to board games for the first time... When I talk to some people that don't come from a board game background... I'll say something to me that seems simple. I'll go, 'Hey, can you fan out your hand?' Which if you've never played a card game before, they just look at me and I go, 'Oh, sorry. Right. You just spread the cards out in your hands so that it looks like you're fanning yourself and that we can select a random card,' like that kind of stuff. And so rule books often don't get that point of realization." (E. Bradley, personal communication, April 3, 2024)

4. **Iterative Feedback and Revisions:** Like game development, editing the rulebook is an iterative process. The draft rulebook should be tested with different groups to ensure that players can understand and apply the rules without external help. Feedback from these sessions is crucial in identifying areas that need more clarity or simplification.
5. **Layout and Design:** The visual aspect of the rulebook is also significant. Proper layout, readable fonts, and the strategic use of icons and color can make the rules easier to follow and more appealing. Including illustrations or examples of gameplay can also aid understanding.
6. **Consistency and Accuracy:** Ensuring that the rules are consistent with the game's final version is critical. All terms, components, and mechanisms described in the rulebook must match what's in the box. This also includes checking that all scenarios described in the rulebook are possible and accurate according to the game's design.
7. **Legal and Safety Information:** Depending on the market, there may be legal or safety information that needs to be included in the rulebook. This can include copyright information, age ratings, and safety warnings about game components.

Once the rulebook is drafted and internally reviewed, it's often beneficial to have a professional editor or proof-reader go through the text. They can catch common errors, suggest improvements for clarity and flow, and ensure that the rulebook meets professional standards.

4. Visual Art Design

Visual art design is a critical phase in board game development that encompasses the creation of all visual elements, including the game board, cards, tokens, packaging, and any promotional materials. Unlike what might be commonly assumed, visual art design often progresses simultaneously with other development phases, such as playtesting, rather than starting only after playtesting is complete. This integrated approach allows designers to continuously refine visual elements based on real-time feedback and gameplay dynamics.

The main goal of visual art design is to make every visual component engaging and functional, enhancing the game's aesthetic appeal and gameplay clarity. Effective design communicates the game's theme and mechanics intuitively, enriching player immersion and accessibility. Eden Bradley from Snakes and Lattes emphasizes the importance of targeting visual design to the audience: *"There's a target audience for sure. Like if it's a kid, I look for something cute and fun looking. If it's like people that are more competitive, I might find something that looks more like antique and like, you know, fancier."* (E. Bradley, personal communication, April 3, 2024)

Key Steps in Visual Art Design

1. **Thematic Integration:** From the outset, designers focus on aligning visual elements with the game's theme, choosing appropriate colors, typography, and artistic styles that resonate throughout the gameplay experience.
2. **Component Design**

The design of game components is crucial, as these are the physical elements players interact with. This includes game boards, cards, and tokens, each requiring clarity and thematic consistency.

 - **Game Board:** Must be functional yet visually appealing, facilitating gameplay through clear zones and paths.
 - **Cards:** Should be easy to read and handle, with well-organized information.
 - **Tokens and Pieces:** Need to be distinct and easy to differentiate at a glance, enhancing gameplay through intuitive design.

Casto Chan, General Manager at Snakes and Lattes, values the tactile aspect of board games, stating, *"I'm also a big believer of components because like compared to video games, a board game is a physical object. It's something that you have in front of you to*

interact with, right? So, uh well produced group of components are also like a part of what I gravitate towards as well. Uh Not necessarily like miniatures and stuff like that, just like something that is aesthetically pleasing." (C. Chan, personal communication, April 5, 2024)

3. **Illustration:** Creating compelling illustrations that help narrate the game's story and enhance player immersion. These illustrations are often developed in parallel with game mechanics to ensure they accurately represent the evolving gameplay elements.
4. **Typography and Readability:** Selecting fonts and layouts that enhance readability and player understanding, crucial for games with extensive textual information.
5. **Packaging Design:** The design of the packaging is the first impression a game makes on potential buyers and can decisively influence purchasing decisions. Packaging must be visually striking and clearly convey what the game is about, its player count, age recommendations, and playtime.

Craig Sakula of Bergo Design highlights the critical role of packaging: *"Packaging is enormous for us. It has to look good on a shelf. Packaging sells product from my experience 100% of the time... I think this is why packaging nowadays really needs to be well designed. It has to sell the product, it has to be informative, it has to attract somebody to pick it up and turn it over and see it's such a self-help world... Like everyone wants to have the ability to look at information themselves." (C. Sakula, personal communication, March 21, 2024)*

6. **User Experience and Accessibility:** Ensuring that the game is accessible to a diverse range of players, including those with disabilities, is a critical aspect of visual design. Design choices should accommodate players with visual impairments, such as color blindness, by using high-contrast colors and inclusive symbols.

Casto Chan also emphasizes the importance of designing for accessibility: *"It would be helpful to have a bigger trend of uh accessible games and that like games that are designed with like um to be accessible to diverse racial people where, like, where they are like nearly diverse or like uh visually impaired um like, even color blindness is a huge thing. That's why like, more games need to take those things into consideration in the design." (C. Chan, personal communication, April 5, 2024)*

7. **Iterative Design and A/B Testing:** Visual design components are not only developed in parallel with other phases but are also subjected to A/B testing during playtesting. This approach allows designers to compare different visual strategies and directly gauge how variations in design impact player understanding and engagement. Feedback from these tests is crucial for refining the visuals to better support the gameplay and enhance the overall player experience.

After iterative testing and feedback incorporation, final adjustments are made to the visual designs. The completed art files are then handed off to the production team for manufacturing, ensuring that the visuals are optimized for both appeal and gameplay function.

5. Funding

The funding phase is a pivotal stage in transitioning a board game from concept to production. Game developers must choose between pitching to publishers or raising funds through crowdfunding platforms. Each option presents distinct advantages and challenges and requires careful consideration based on the game's specific needs and the developer's capacity.

Pitching to Game Publishers:

Advantages:

1. **Access to Established Resources:** Developers benefit from the publisher's established distribution channels, marketing resources, and production capabilities. They have better access to their audience. Joe Slack notes, *"So if I'm making a game and it fits with the kind of puzzly, creative games we do, that's a contender for a campaign we might run... But if it's a different type of game, it's better suited to another publisher who has the right audience."* (J. Slack, personal communication, April 10, 2024)
2. **Market Knowledge:** Publishers have comprehensive knowledge of the market, gaps, and needs. Marissa Elizabeth emphasizes, *"The most important thing to me is that they're established, that they actually have the industry knowledge that I don't have."* (M. Elizabeth, personal communication, April 5, 2024)
3. **Broader Reach and Sales Potential:** Publishers often have a broader reach and can propel a game to a wider audience, potentially leading to greater exposure and sales.
4. **Financial Benefits:** Game designers can focus on their passion, designing games, instead of manufacturing, marketing, and distribution. Financially, a board game author typically receives between 5% and 12% of the net sales price when rights are passed over to a publisher. Some publishers may offer staggered fees depending on the level of sales achieved (Talbot, 2024).

Challenges:

1. **Finding the Right Fit:** It can be challenging to find a publisher whose portfolio aligns with your game's theme and style. Joe Slack adds, *"One of the biggest challenges is finding the*

right publisher... making sure they're reputable, and you have agreement on what's in the contract." (J. Slack, personal communication, April 10, 2024)

2. **Project Follow-through:** There's a risk of the game not being published even after being signed. Joe Slack explains, *"There have been some occasions where games got signed, but then they never actually came out... due to changes in the market, changing the publisher, maybe the publisher went under."* (J. Slack, personal communication, April 10, 2024)
3. **Communication Issues:** Publishers may not always provide timely updates or feedback. Joe Slack elaborates, *"Publishers are not necessarily the best or fastest communicators... You'll pitch a game, you might get ghosted, and they're sitting with your prototype, and you never hear back."* Marissa Elizabeth also notes, *"A huge red flag with a publisher is lack of communication."* (M. Elizabeth, personal communication, April 5, 2024)
4. **Financial Consistency:** Inconsistencies in royalty payments can be an issue with smaller publishers. Joe Slack mentions, *"Some publishers are very good about making sure that they keep with their schedule for sending royalty payments, and then I've heard a lot of other designers say they've had to reach out and follow up almost nag publishers about it."* (J. Slack, personal communication, April 10, 2024)
5. **Short-Lived Projects:** Joe Slack discusses the variability in publisher effort: *"And then even when you do get it signed and get it published, the degree to which that publisher makes an effort to sell your game to market your game. I've had some experiences where they've done a great job and sold more copies; others that don't spend as much time or energy in the marketing or move on to the next game too quickly, and then it gets kind of forgotten. So, the sales don't necessarily continue."* (J. Slack, personal communication, April 10, 2024)

Crowdfunding Platforms:

Crowdfunding platforms are not only avenues for indie designers to launch their games but are also utilized by large-scale publishers. These platforms offer several strategic advantages: immediate access to funds, as Adam Singer says, *"Money now is better than money later,"* a direct way to gauge market interest, an opportunity to engage with early bird gamers who influence others to buy, and the benefit of free marketing that platforms like Kickstarter provide (A. Singer, personal communication, April 10, 2024).

There are various crowdfunding platforms available, each catering to different types of games and audiences. Some platforms specialize in niche markets, such as war games or historical games.

Adam Singer mentions, *"There are a couple of websites that do a crowdfunding sort of, but it's a little bit different. They'll post a game up, and it'll just stay there for kind of forever until people upvote it enough, and then they manufacture it."* Another significant platform is The Game Crafter, which simplifies the process for creators by providing simple components to assemble a game, which can then be sold directly on the platform (A. Singer, personal communication, April 10, 2024).

Among these, Kickstarter is often preferred for its large user base and established presence in the gaming community, but other platforms like Indiegogo and Gamefound offer unique features that may be better suited for specific projects. Joe Slack discusses his decision-making process:

"[KickStarter,] That's where the biggest audiences. That's where we're gonna find most people interested in games and crowdfunding in general. I ultimately decided to continue with Kickstarter because Gamefound didn't have quite the size of the audience, and I was worried about that. I had also seen one or two campaigns from smaller creators launch and not been successful; in one case, they went and moved over to Kickstarter, relaunched within a few weeks or a month, and hit their funding goal very quickly." (J. Slack, personal communication, April 10, 2024)

Advantages:

1. **Higher Profit Potential:** Board game designers can keep more money for themselves rather than going with publishers, who take a significant share.
2. **Creative Control:** Developers maintain greater control over their product and can build a community around the game.
3. **Direct Engagement:** Developers directly engage with their audience, providing upfront validation of the market demand without the full financial risk. Adam Singer highlights, *"Kickstarter reaches the true gamers... They're willing to pay the extra price for a game that's too expensive to put out to retail."* (A. Singer, personal communication, April 10, 2024)

Challenges:

1. **Risk of Not Meeting Funding Goals:** There's also the risk of not meeting funding goals, which can halt the project.
2. **Extensive Effort Required:** Running a successful crowdfunding campaign requires significant effort in marketing and community management. Joe Slack shares, *"If you're*

self-publishing, there's a lot more challenges because there's a lot more involved... The biggest challenge, probably number one, is building an audience... And then after you actually get funded, if you do actually make the game, then the big challenges of getting a manufacturer, getting your files to the printer, getting everything out, getting it shipped, and avoiding pitfalls like costs that you didn't foresee your game being more expensive to produce or expensive to ship than you expected." (J. Slack, personal communication, April 10, 2024)

Securing funding is crucial for ensuring that a board game can be successfully produced and brought to market. This phase tests the market's reception of the game and influences its development, marketing strategy, and overall success trajectory. The chosen funding route profoundly impacts how the game is developed, marketed, and distributed.

Considerations for Board Game Designers Using Crowdfunding Platforms

When launching a board game through crowdfunding platforms, designers face unique challenges and opportunities. To maximize the potential for success, it is crucial to consider both what to avoid and what to incorporate into your campaign. Here are key considerations based on insights from industry experts.

Things to Avoid in Crowdfunding Campaigns:

1. **Overly Complex or Luxurious Offers:** Avoid complicated multi-tier offers and overpromising on deliverables that may not be feasible.
2. **Lack of Clear Rulebook:** As Joe Slack emphasizes, *"If they can't provide a rule book, for example, then I don't know exactly how it plays. So, has it been well-tested? Are the rules complete?"* (J. Slack, personal communication, April 10, 2024)
3. **Absence of Social Proof:** Lack of reviews or feedback from credible sources may indicate potential concerns. Joe Slack states, *"If they don't have any social proof like any reviewers, any comments, any reviews at all, then who's played this game? Is it any good?"* (J. Slack, personal communication, April 10, 2024)
4. **Excessive Cost:** Setting a price too high can deter potential backers, especially if the cost is not justified by the components or gameplay experience.

5. **Unfinished Game Design:** Over-promising on logistical capabilities, especially when the game design isn't finalized, is risky. Spencer Moore notes, *"For me, a big part of it is overpromising... trying to say we can get this game to you in six months, even though we are manufacturing it across on the other side of the world and aren't done designing it yet."* (S. Moore, personal communication, April 5, 2024)
6. **Infeasible Funding Goals:** Joe Slack advises caution with the campaign's funding target: *"If it looks like they haven't taken a lot of things into consideration if the costs look way out of whack... there's no way you're gonna get this made."* (J. Slack, personal communication, April 10, 2024)
7. **Lack of Creator Credibility:** Check the campaign creator's background. Joe Slack suggests, *"If they have created other games before but they haven't delivered, that's a huge red flag."* (J. Slack, personal communication, April 10, 2024)
8. **Poor Visual and Content Presentation:** The campaign should have compelling visuals and well-organized content. Joe Slack remarks, *"If there's something like the art doesn't catch my eye or the theme doesn't catch my eye... or if their campaign is just walls of text or it's very sparse."* (J. Slack, personal communication, April 10, 2024)
9. **Exploitative Practices:** Beware of tactics that exploit backers, such as artificially limited pledges. Adam Singer explains, *"Once you start feeling like the publishers are exploiting you... They just kind of do it; they say we only have a hundred, and then once they get to 98, they put another hundred."* (A. Singer, personal communication, April 10, 2024)
10. **Jeopardizing Campaign Integrity:** Avoid adding features that have not been thoroughly tested or priced, which could jeopardize the entire project. Joe Slack shares his caution about stretch goals: *"When I'm looking at stretch goals or things I want to add on, I want to have things that I already know work, that I've already priced out, that are already developed, that that's not going to add additional development time costs throwing anything into jeopardy. So, I would want to avoid things where somebody wants to add a solo mode to a game that doesn't exist. They want to add a five and six-player mode to a game that doesn't already exist. If they want to add a cooperative version of the game. If they want to change the components to something completely different, They would need to be tested, which may weigh more like changing to metal coins... It would have put their game into the next tier for shipping, and it might have sunk their company before they even got to a second game."* (J. Slack, personal communication, April 10, 2024)

Positive Indicators in Crowdfunding Campaigns:

1. **Detailed Videos and Demos:** Provide comprehensive visual and playable content to give backers a clear idea of what to expect.
2. **Successful Previous Projects:** Having a track record of successfully delivered projects boosts credibility.
3. **Early Funding Success:** Projects that achieve their funding goals quickly often generate more interest and confidence among potential backers. However, as Casto Chan points out, *"Hype and marketing play significant roles, influencing backers' perceptions of a project's desirability and success potential.... one trick that I've heard people doing is lower their funding goal so that they can say, oh, we got funded in a short time in like two hours or something."* (C. Chan, personal communication, April 5, 2024)
4. **Free Previews:** Offering a way for backers to try the game before they pledge with tabletop simulators or online versions can significantly increase interest and trust.
5. **Exclusive Benefits for Backers:** Adam Singer suggests, *"One thing especially with Kickstarter and Gamefound is what extra are you getting from buying it there opposed to if you wait till retail... A lot of Kickstarter games, you can't get them ever again."* (A. Singer, personal communication, April 10, 2024)
6. **Deluxe and Exclusive Versions:** Offering a deluxe version of the game or expansions at a reasonable extra cost can significantly boost backer interest and funding levels. Joe Slack shares his experience: *"One of the things that I found was anyone that offered a deluxeified version or an expansion or something extra, especially when it was only a little bit more like, extra five dollars ten dollars, \$20 depending on what the base price was. In a lot of cases, 80-90 percent of backers who went for the physical version went for the deluxe version. So what I saw was that if there's a good perception of value, people wouldn't mind paying a little bit more. They feel it's gonna enhance their gaming experience."* (J. Slack, personal communication, April 10, 2024)

By carefully planning and managing these aspects, board game designers can significantly improve their chances of a successful crowdfunding campaign, while avoiding common pitfalls that could undermine their efforts and alienate potential backers.

6. Manufacturing

The manufacturing phase is a crucial step in bringing a board game from concept to the market, involving multiple detailed processes to ensure the final product meets quality standards and is delivered on time.

1. Choosing a Manufacturer

Selecting the right manufacturer is pivotal to the success of a board game. Key factors to consider include:

- **Experience with Board Games:** It's essential to choose a manufacturer that understands the specific needs of board games.
- **Minimum Order Quantity:** This is particularly important for indie designers. Marissa Elizabeth highlights, *"The minimum number of copies when I talk to my book publishers, yeah, a hundred two hundred fifty copies is reasonable; when I'm looking at my board game publishers, they're not talking to you for less than a thousand five hundred. Yes. So, the manufacturing costs are going to be a lot higher."* (M. Elizabeth, personal communication, April 5, 2024)
- **Quality of Work and Reliability:** The manufacturer must consistently produce high-quality components and adhere to timelines.
- **Cost:** Competitive pricing is crucial without compromising the quality.
- **Communication:** Working with manufacturers, especially overseas, can present challenges. Adam Singer notes the benefits of manufacturers like Panda Game Manufacturing: *"The thing that's great about them is they still manufacture in China like most of them, but they have an office here in Vancouver... So, it's really easy to communicate with them because they have a presence here. It's very difficult when you're not only a different language and a different culture, but you're on the opposite side of the world in different time zones. It can be quite difficult to coordinate manufacturing and do the quality control."* (A. Singer, personal communication, April 10, 2024)

2. Finalizing and Approving Design

Before production begins, all game designs must be finalized and approved. This includes a digital proofing stage where designers review how the cards, board, and other components look on a screen. Joe Slack describes this process: *"I didn't realize how long it was going to go back and forth with my manufacturer on finalizing the files. I thought it*

was just gonna be like, submit it. And they'll get it... I thought it was gonna be a couple of weeks, and it took a couple of months." (J. Slack, personal communication, April 10, 2024)

3. Creating Prototypes

Before full-scale production begins, a final prototype is created. This prototype should mirror the final product and allows designers to check for any potential issues with the design or quality of components, making necessary adjustments before mass production starts. This step is crucial for ensuring that the product meets all specifications and quality expectations.

Adam Singer underscores the importance of this stage: *"You must see a sample to make sure everything's going well because if you get to the end of your manufacturing and then you find out there's a problem, companies go under because of that. A lot of board games have a very small margin to begin with, so if there's any big failure, it can be quite costly. Mythic Games recently, they're a pretty big publisher, and they weren't able to deliver on a bunch of their Kickstarters, and they ended up going out of business, and that unfortunately happens a lot."* (A. Singer, personal communication, April 10, 2024)

4. Production Run

Once the prototype is approved, the manufacturer begins the production run. This process includes printing, cutting, assembling, and packaging the various components of the game. Ensuring quality control throughout this phase is essential to maintain the integrity of the final product.

5. Logistics and Shipping

After production, the games need to be shipped to the designer or directly to distributors and backers if crowdfunded. Effective logistics management is critical, as shipping costs can vary significantly and impact the overall budget. Designers must decide whether to ship by sea, air, or a combination of both, depending on urgency and budget.

Joe Slack elaborates on the complexities and uncertainties of shipping: *"In terms of things that take a lot of time between finishing your campaign and getting it delivered, shipping is a huge part of that because you're going to have to get your game onto a freight ship, which is gonna take a month or two. Then it's gonna get to the port, and then it's gonna have to get trucked somewhere, and then it's going to be in line behind other projects, and then it's going to get shipped out. You're going to have to do that in multiple regions, or have one region do it and then you're gonna have some backers getting it a lot later because*

they are in different parts of the world. Shipping can be a big thing." (J. Slack, personal communication, April 10, 2024)

Role of Raw Material Suppliers

Raw material suppliers are integral to the board game industry's value chain. They provide essential materials such as cardboard, paper, plastic, wood, and metal, which are fundamental for creating game boards, cards, tokens, dice, and other game components. The choice of these materials significantly affects the quality, durability, and aesthetic appeal of the final products.

The board game industry, with its reliance on substantial physical components and elaborate packaging, faces growing scrutiny due to global awareness of environmental issues. As industries worldwide are pressed to reduce their ecological footprints, the board game sector must also adapt to more sustainable practices.

In 2019, plastic components alone accounted for 30 percent of the materials used in board game production cycles (*Must-Know Board Game Statistics [Recent Analysis]* • GitNux, 2023). The industry's traditional approach often emphasizes large, eye-catching boxes and detailed plastic miniatures to attract customers. Adam Singer points out a significant perception issue within the community regarding material choices: *"The community values plastic components. They see them as premium. Where really the wooden ones are more costly and difficult to manufacture and are a more costly material. So, a lot of these manufacturers have replaced their wooden components with plastic ones, and from a consumer standpoint, they're like, 'premium plastic components'"* (A. Singer, personal communication, April 10, 2024). While effective for marketing, this strategy contributes significantly to environmental concerns, particularly in terms of waste and the use of non-renewable resources.

A significant portion of board game manufacturing is concentrated in China, with more than 50% of Hasbro's manufacturing units located there (Intelligence, 2023), and up to 80% of toys globally being produced in the country (Matalucci, 2021c), where the concentration of production facilities can lead to questionable sourcing of materials and less stringent environmental regulations. This centralization presents challenges in terms of shipping distances and the carbon footprint associated with transporting products to global markets (Plunkett, 2023).

There are several strategies that the industry could adopt to improve sustainability:

- **Reducing Plastic Use:** Companies like Ravensburger have made strides by eliminating shrink wrap, achieving an 89% reduction in plastic waste and saving over 36 tons of plastic based on 2022 adult puzzle sales volumes (Ravensburger, n.d.-b).

- **Minimizing Game Box Sizes:** Reducing the size of game boxes and avoiding excessive packing materials can significantly cut down on waste.
- **Eco-friendly Material Sourcing:** Ensuring that wooden and cardboard components are sourced responsibly is crucial. Using materials certified by forest stewardship councils can help ensure sustainability.
- **Renewable Energy:** Incorporating renewable energy in the manufacturing process wherever possible can reduce the carbon footprint of production facilities.
- **Recycling and Reusability:** Developing components that can be easily recycled or repurposed at the end of their lifecycle can help reduce waste.

7. Distribution and Sales

Distributors and retailers play a pivotal role in the board game market value chain, bridging the gap between manufacturers and consumers. As the market grows, the distribution and retail landscape is diversifying, combining both physical and online channels to cater to a wide range of consumer preferences.

Physical Retail

Physical retail remains a crucial distribution channel for board games. Specialist game stores and hobby shops provide a curated selection of games, offering expert advice and personalized recommendations that appeal to both enthusiasts and casual gamers. These stores are vital for creating a community and fostering direct customer interactions, which can be important for the promotion and sustained interest in board games.

Mass-market retailers such as supermarkets and department stores are also significant players in the board game distribution network. They have started to capitalize on the growing popularity of board games, expanding their selections to attract a broader audience and meet the increasing demand from mainstream consumers.

Online Retail

Online retail is an equally significant channel within the board game market. It offers consumers the convenience of browsing a vast selection of games from the comfort of their homes. Online marketplaces like Amazon, along with specialist game retailers, have solidified their presence in the market. They compete by offering competitive prices, wide selections, and efficient delivery options, making it easier for consumers to access their favorite games.

Direct Sales

In addition to traditional retail, many game publishers and creators sell directly to consumers via online platforms, their own websites, or at conventions and other events. This direct sales approach allows for higher profit margins and direct customer engagement but requires effective e-

commerce strategies and logistics. Joe Slack shares his experience with direct sales: *"I do make my games available directly through my website, but unfortunately, it's harder to get direct sales through your website unless you're doing a lot of advertising directly to it because there's so many small independent creators out there just not going to be seen that easily."* (J. Slack, personal communication, April 10, 2024)

Role of Sales Representatives and Trade Shows

Sales representatives and trade shows play a crucial role in introducing new games to retailers. Craig Sakula, General Manager of Bergo Design, describes the process: *"Larger suppliers of games and puzzles often come and introduce themselves to us. Sale Reps, they're kind of like our eyes and ears before the retail face... The sales reps go out to the businesses, and they introduce the products to us."* (C. Sakula, personal communication, March 21, 2024)

Trade shows are pivotal events where distributors of games showcase their line sheets and offerings. These events provide a platform for game publishers to reach new and existing retailers, negotiate deals, and display their latest products. Additionally, local independent game developers have the opportunity to directly pitch their games to retailers.

Craig Sakula further explains the importance of understanding the product's market performance: *"We wanna know like the features and benefits of every product, we wanna know its track record, and where else it's been sold because we want to be competitive."* (C. Sakula, personal communication, March 21, 2024)

8. Marketing and Promotion

After the game has been manufactured and distribution channels have been established, the next crucial step in the board game market value chain is marketing and promotion. This stage is vital for creating awareness, generating interest, and driving sales of the game.

Key Strategies for Marketing and Promotion

1. Social Media Marketing

- **Platforms:** Utilizing platforms like Facebook, Instagram, Twitter, and TikTok can help reach a broad audience. These platforms allow for targeted advertising, community building, and direct interaction with potential customers.
- **Content:** Sharing engaging content such as game tutorials, behind-the-scenes development blogs, player testimonials, and live play sessions can help attract and retain interest.

2. Email Marketing

- **Newsletters:** Regular newsletters can keep the community informed about game updates, upcoming releases, and special promotions.
- **Subscriber Engagement:** Exclusive offers for subscribers can encourage more sign-ups and foster a loyal customer base.

3. Influencer Partnerships

- **Board Game Reviewers and Bloggers:** Collaborating with influencers who specialize in board games can provide credibility and reach within the enthusiast community. Joe Slack advises, *"It's better to find those who match with your type of game... So, it's better to get somebody who really loves that style of game who's going to love it and maybe is a little lesser known than somebody who's not gonna like your style of the game and is just gonna give it a bad review or be like I didn't really like it."* (J. Slack, personal communication, April 10, 2024)
- **Paid vs. Non-Paid Content Creators:** Joe Slack notes, *"I found that the paid creators were generally more focused and structured; you know exactly what you're*

getting with that whereas with other people, it's more like, 'I'll play your game and I'll do a video on it and talk about what I liked and what people should look for in that type of thing'" (J. Slack, personal communication, April 10, 2024). Adam Singer adds, "I think the main value I bring to the viewers is I help them make more informed decisions... to the publishers, though, I'm providing free advertising, and that's especially helpful for the smaller guys that can't afford it." (A. Singer, personal communication, April 10, 2024)

4. Advertising

- **Online Advertising:** Pay-per-click (PPC) campaigns, display ads, and video ads on platforms such as Google and YouTube can drive significant traffic and conversions.
- **Print and Broadcast:** Depending on the target market, traditional advertising mediums like magazines, radio, or TV might be effective.

5. Public Relations and Media Outreach

- **Press Releases:** Announcing product launches, major updates, or events through press releases can help generate media coverage.
- **Media Kits:** Providing media kits to journalists and bloggers can facilitate the writing of articles or reviews about the game.

6. Trade Shows and Conventions

- **Exhibitions:** Attending board game conventions and trade shows can help in networking with distributors, retailers, and directly with consumers.
- **Demos and Tournaments:** Organizing game demos and tournaments at these events can directly engage potential customers and create buzz around the game.

7. Community Building and Engagement

- **Online Forums and Groups:** Participating in and fostering discussions on platforms like Reddit, BoardGameGeek, or dedicated Facebook groups can help maintain interest and gather feedback from the community.

- **Events and Meetups:** Hosting or sponsoring board game nights and meetups can build a local community of gamers and advocates.

8. Retail Engagement and Point-of-Sale Strategies

- **Providing Samples and Signages:** Ensuring that products are well displayed and accessible in retail environments is essential. Providing samples for demonstration and effective signage can help attract attention and encourage sales. Craig Sakula emphasizes the importance of presentation: *"So, there's an investment for them in partnering with the store to make sure it's displayed properly... I think it's a huge benefit for our product's saleability to have those resources first. What is it, make it simple, captivating, let people see it and touch it. That all helps sell products, in my opinion."* (C. Sakula, personal communication, March 21, 2024)

Effective marketing and promotion are crucial for the success of a board game. By employing a mix of digital and traditional marketing strategies and actively engaging with the community, publishers can increase the visibility of their games and drive sales. Building a strong brand presence and maintaining ongoing engagement with gamers are essential components of a successful marketing strategy in the highly competitive board game industry.

Consumer Insights

In this section of the research, a survey was conducted to understand consumer preferences within the board game industry, specifically focusing on various social leisure activities. All participants are residents of Canada and over 18 years of age. The demographic composition of the survey participants reveals a significant concentration in the 25-34 and 35-44 age ranges. The gender distribution is quite balanced between male and female participants, with minimal representation from non-binary genders.

Age Distribution

- **18-24 years old:** 10 respondents
- **25-34 years old:** 32 respondents
- **35-44 years old:** 18 respondents
- **45-54 years old:** 3 respondents
- **55 or older:** 2 respondents

Gender Distribution

- **Female:** 34 respondents
- **Male:** 30 respondents
- **Non-binary/Third gender:** 1 respondent

Leisure Activity Preferences

The survey included a wide range of leisure activities to ascertain their popularity among board game enthusiasts and those less inclined towards board games. Respondents rated their likelihood of participating in each activity using a scale where "Most Likely" is valued at 4, "Quite Likely" at 3, "Slightly Likely" at 2, and "Least Likely" at 1. This numerical scale facilitates a clear quantitative comparison across activities. Here, we analyze the mean scores for both groups—those who are enthusiasts of board games (rating them as "Most Likely" or "Quite Likely") and those who are not (rating them as "Slightly Likely" or "Least Likely").

The following table summarizes the mean scores for all 15 surveyed leisure activities, comparing the preferences of board game enthusiasts and non-enthusiasts:

| # | Activity | Overall Mean Score | Mean Score (Enthusiasts) | Mean Score (Non-enthusiasts) | Difference in Means |
|----|--|--------------------|--------------------------|------------------------------|---------------------|
| 1 | Bars/ Restaurants | 2.98 | 3.03 | 2.93 | +0.10 |
| 2 | Parties/ Gatherings | 2.82 | 3.00 | 2.57 | +0.43 |
| 3 | Movies | 2.71 | 2.65 | 2.79 | -0.14 |
| 4 | Attending Live Performances | 2.69 | 2.65 | 2.75 | -0.10 |
| 5 | Board/Card Games | 2.69 | 3.49 | 1.64 | +1.84 |
| 6 | Group Hiking or Walking | 2.37 | 2.41 | 2.32 | +0.08 |
| 7 | Interactive Adventure Experiences | 2.34 | 2.81 | 1.71 | +1.10 |
| 8 | Multiplayer Video Games | 2.17 | 2.51 | 1.71 | +0.80 |
| 9 | Arcade Gaming | 2.17 | 2.43 | 1.82 | +0.61 |
| 10 | Bowling | 2.06 | 2.24 | 1.82 | +0.42 |
| 11 | Team Sports (e.g., basketball, soccer) | 2.03 | 2.24 | 1.75 | +0.49 |
| 12 | Karaoke | 1.97 | 2.11 | 1.79 | +0.32 |
| 13 | Tabletop Games (e.g., air hockey) | 1.97 | 2.22 | 1.64 | +0.57 |
| 14 | Social Clubs (e.g., Book Clubs) | 1.92 | 2.00 | 1.82 | +0.18 |
| 15 | Billiards/Pool | 1.74 | 1.81 | 1.64 | +0.17 |

Table 1: Leisure Activity Preferences

Top Rated Activities: Bars/restaurants and parties/gatherings are the highest-rated leisure activities among all participants, indicating a widespread preference for social engagement activities.

Board Game Enthusiasm: There is a significant difference in the mean scores for board/card games between enthusiasts (3.49) and non-enthusiasts (1.64), reflecting a strong division in leisure preferences related to board games. This suggests that board game interest may correlate with a distinct set of social and recreational activities.

Interactive and Strategic Preferences: Activities such as interactive adventure experiences, multiplayer video games, and arcade gaming are more favored by board game

enthusiasts. These activities, which involve interactive engagement and strategic thinking, resonate more with those who are also interested in board games.

Social and Physical Activities: While enthusiasts show a preference for strategic and interactive leisure activities, they also rate physical and social activities like team sports and group hiking or walking relatively high. This points to the multifaceted nature of their leisure interests.

Passive Entertainment: More passive forms of entertainment, such as attending live performances and watching movies, have a slightly lower overall mean score among enthusiasts compared to non-enthusiasts, suggesting that enthusiasts might prefer more active participation in their entertainment choices.

Engagement Opportunities Across Board Game Player Segments

Among board game enthusiasts, a significant 81.9% engage in playing board games monthly or more frequently, indicating a highly active segment deeply integrated into the gaming hobby. Conversely, within the non-enthusiast group, despite a substantial drop in frequency, 32.14% still play board games monthly or more. This demonstrates that there remains a considerable opportunity to further engage non-enthusiasts. By creating more accessible and inclusive games, which can cater to diverse interests and schedules, the board game industry can potentially increase the engagement levels of this less active but sizable segment.

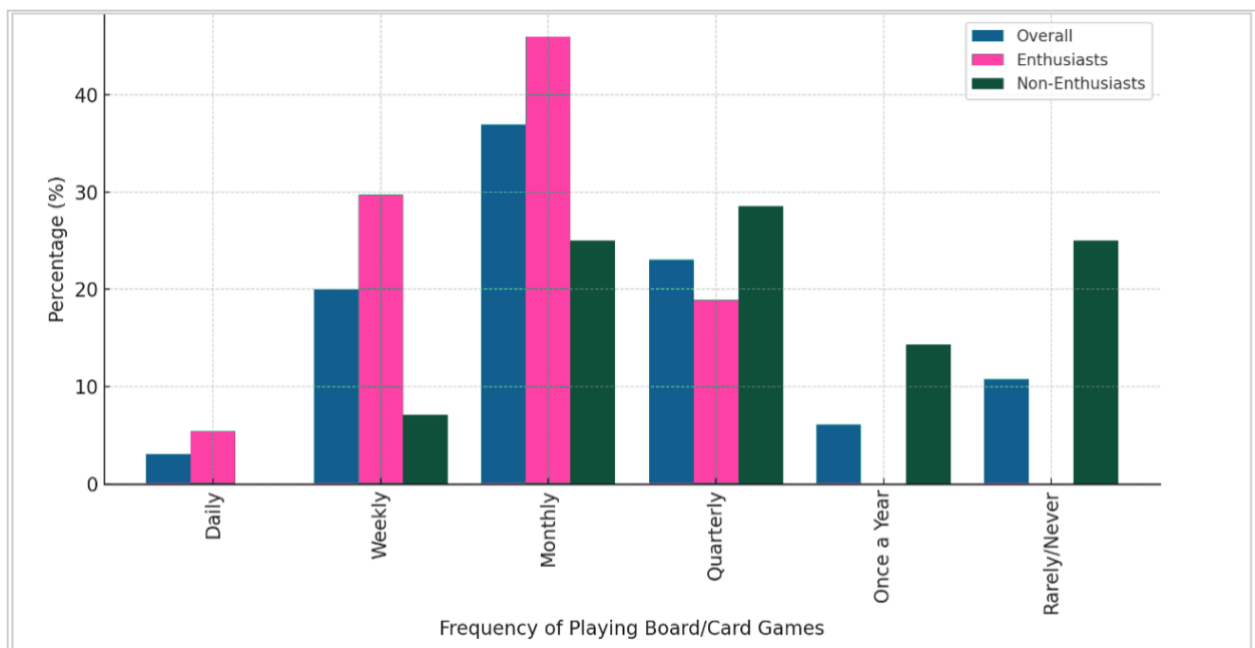


Figure 1: Board/Card Games Play Frequency

Leisure Activity Engagement by Age Range

The data visualized in "Figure 2: Leisure Activity Engagement by Age Range (Hours per Week)" and "Figure 3: Monthly Spending on Leisure Activities by Age Range" provide a comprehensive view of how different age groups allocate time and financial resources to leisure activities.

Most Common Hours Per Week: Among all age groups, up to 10 hours per week is the most common duration dedicated to leisure activities, as evidenced across multiple age ranges in Figure 2.

Most Common Monthly Budget on Leisure Activities: The spending category of "over \$200" per month emerges as a frequent expenditure across several age groups, particularly noted in Figure 3.

Youth Engagement (18-24 Age Group): Younger individuals tend to spend fewer hours (most commonly up to 5 hours) and less money (up to \$100 most commonly) on leisure activities compared to other age groups. This suggests a more conservative approach to leisure expenditure and time allocation within this demographic.

Mid-Age Financial Commitment (25-44 Age Groups): Those in the 25-44 age bracket appear to allocate more significant financial resources to leisure activities, frequently spending over \$200 a month. This indicates a higher financial investment in leisure, potentially reflecting greater disposable income or prioritization of leisure spending within this cohort.

Variation with Increasing Age: As age increases, the hours dedicated to leisure activities slightly increase but with varying spending habits. While the 45-54 age group shows a propensity to spend up to \$200, the 55 or older group displays a mix between spending up to \$100 and \$200.

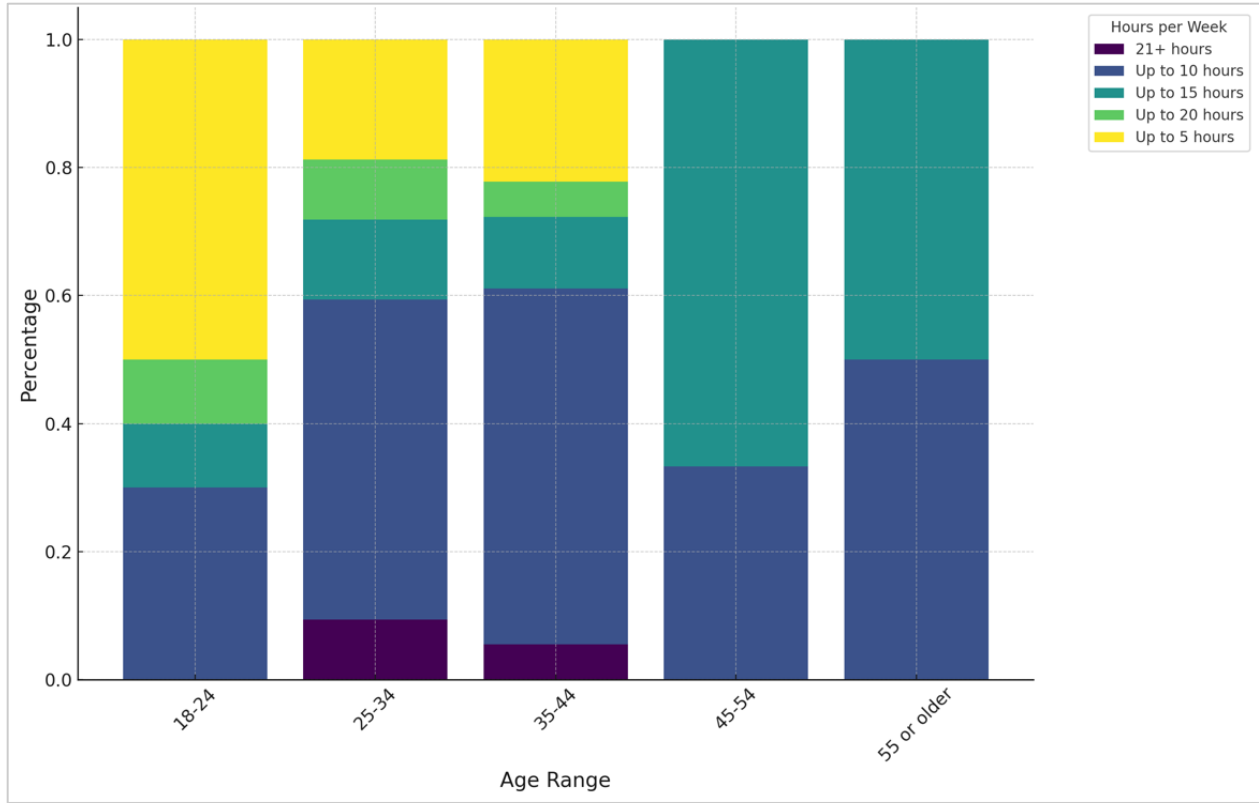


Figure 2: Leisure Activity Engagement by Age Range (Hours per Week)

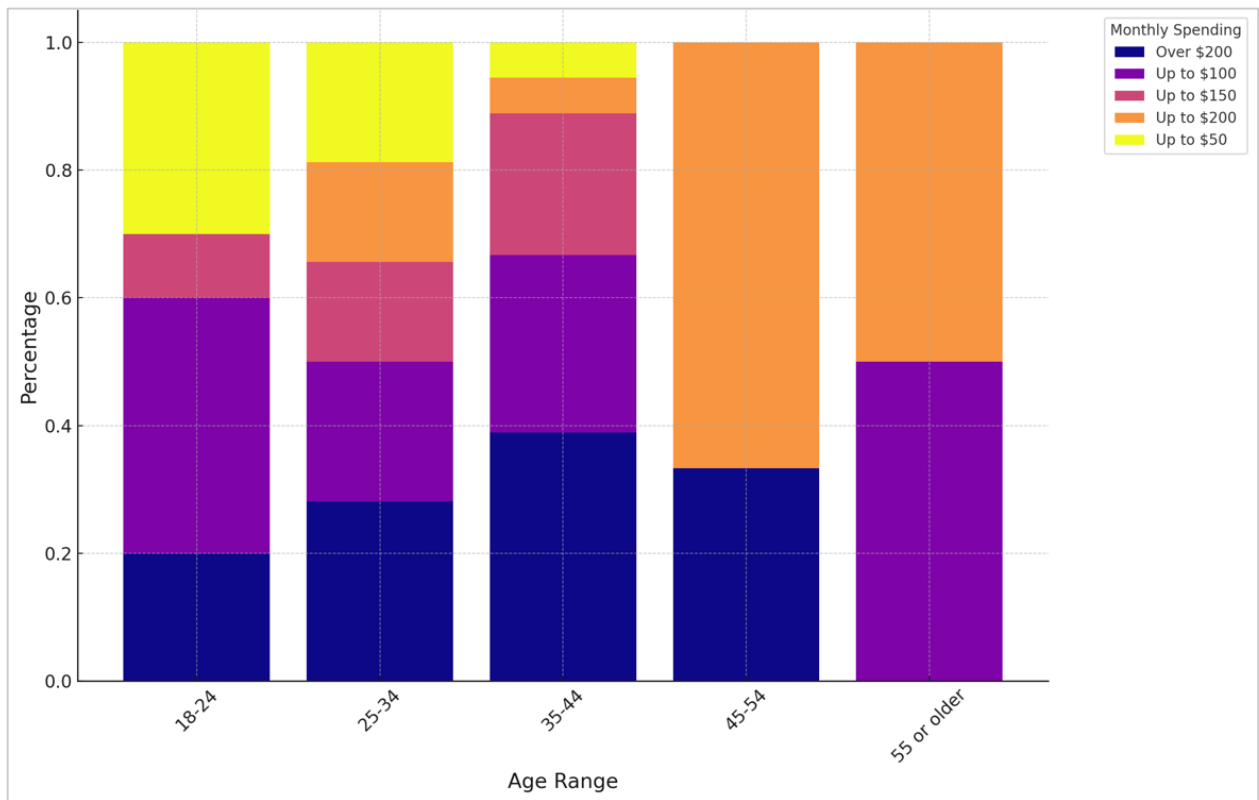


Figure 3: Monthly Spending on Leisure Activities by Age Range

Solo and 2-Player Board Games

Here are the average scores for group sizes in general leisure activities and for playing board games, based on the numerical conversion of the response preferences:

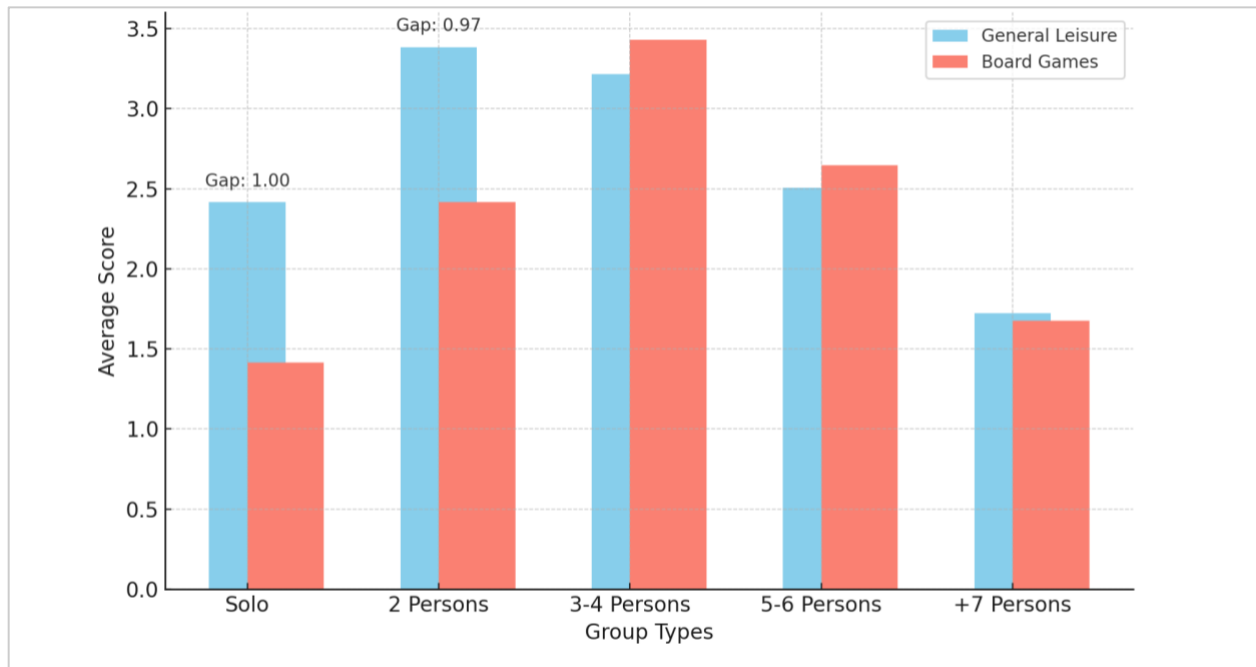


Figure 4: Comparison of Group Size Preferences

The noticeable gaps in preferences for solo and 2-player games between general leisure activities and board games highlight significant market opportunities:

Solo Games: The substantial preference for solo activities in general leisure, compared to board games, suggests an under-served market segment. This gap reveals a potential for developing engaging and innovative solo board games that offer immersive gameplay experiences, which can cater to those seeking quality entertainment when alone. Integrating compelling narratives, strategic challenges, or interactive elements could make solo board games more appealing.

2-Player Games: Similarly, while 2-player board games are somewhat popular, the preference for 2-person activities in general leisure indicates that there is still room for growth and innovation in this segment. Board games designed for two players can be optimized for quick setup and engaging play, possibly incorporating cooperative or competitive dynamics that mirror the interaction found in other 2-person activities.

These insights align with the observations made by industry figures Joe Slack and Marissa Elizabeth, further substantiating the identified trend towards accommodating solo and duo players

within the board game market. Slack notes the rising trend of solo modes in games, while Elizabeth points out the shortcomings in the current 2-player game offerings, both of which corroborate the identified market opportunities for solo and 2-player board games.

Preferences in Board Game Environments

The chart illustrates the board game playing preferences across different age groups for various locations. Here are some insights from this data:

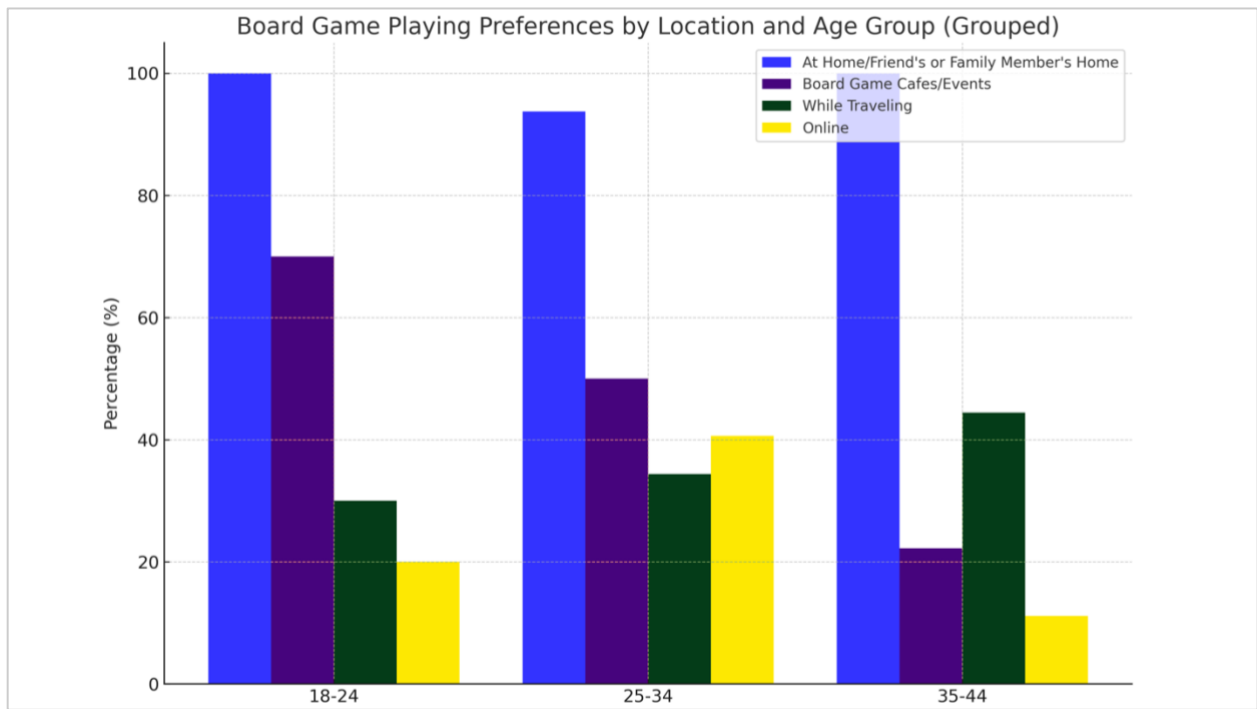


Figure 5: Board Game Playing Preferences by Location and Age Group

At Home or Friend's/Family Member's Home: This location remains the most popular across all age groups analyzed (18-44 years), with each group showing a very high participation rate (100% for 18-24 and 35-44, and 93.75% for 25-34).

Board Game Cafes/Events: There's a notable decline in the preference for playing at board game cafes as age increases. The youngest age group (18-24) has the highest participation at 70%, which significantly drops to 50% in the 25-34 group, and further to 22.22% in the 35-44 group. This trend suggests a decreasing interest in public gaming spaces with age.

While Traveling: Contrary to the cafes/events trend, the preference for playing board games while traveling increases with age. The 18-24 group shows the least interest (30%), which increases in the 25-34 group (34.38%), and peaks in the 35-44 group (44.44%). This indicates that as people age, they might prefer engaging in board games as a leisure activity while traveling.

Online: Online gaming shows a peak in the 25-34 age group (40.62%) and declines in the older age group (11.11%). The youngest group has the least preference for online gaming (20%).

Figure6 provides a visual comparison of the gender-based preferences in board game environments for both female and male participants, focusing on three key locations.

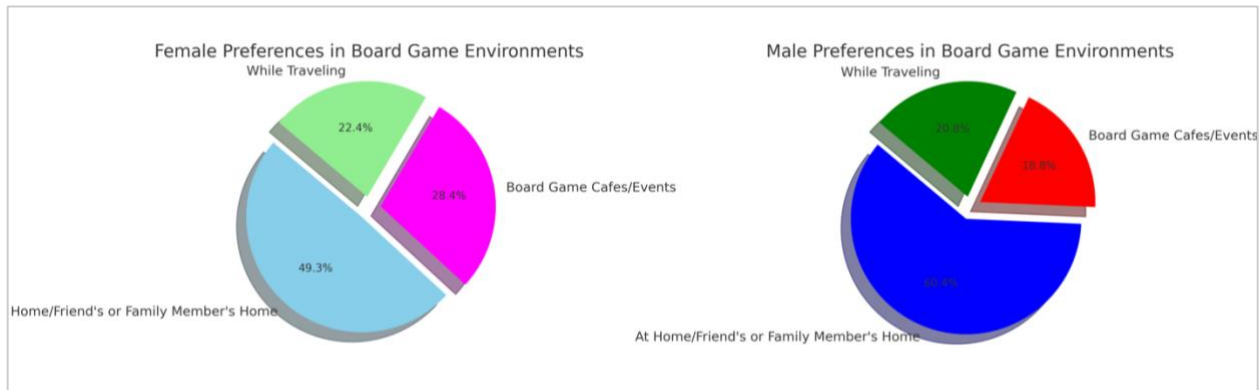


Figure 6: Gender-Based Board Game Playing Preferences by Location

At Home or Friend's/Family Member's Home: Both genders show nearly equal preference for playing at home, with over 95% of both females and males enjoying board games in this familiar and comfortable setting.

Board Game Cafes/Events: Female participants have a notably higher engagement in board game cafes or events, with 55.88% participation compared to 30% for males. This significant difference can be attributed to the observation made by Adam Singer, who notes that "... girls are more willing to play party games." Board game cafes typically offer a wide variety of games, including numerous party games, which allows females to explore multiple options in a social setting. (A. Singer, personal communication, April 10, 2024).

While Traveling: Females also show a greater inclination to play board games while traveling, with 44.12% compared to 33.33% for males. This suggests that females may view board games as a preferred leisure activity during travel, providing entertainment and social interaction.

- Data for ages above 45 and non-binaries is not substantial enough to draw reliable insights or trends for older demographics.

Peak Playtimes: Preferences for Board Game Sessions

Figure 7 displays the preferences for different times when participants choose to play board games.

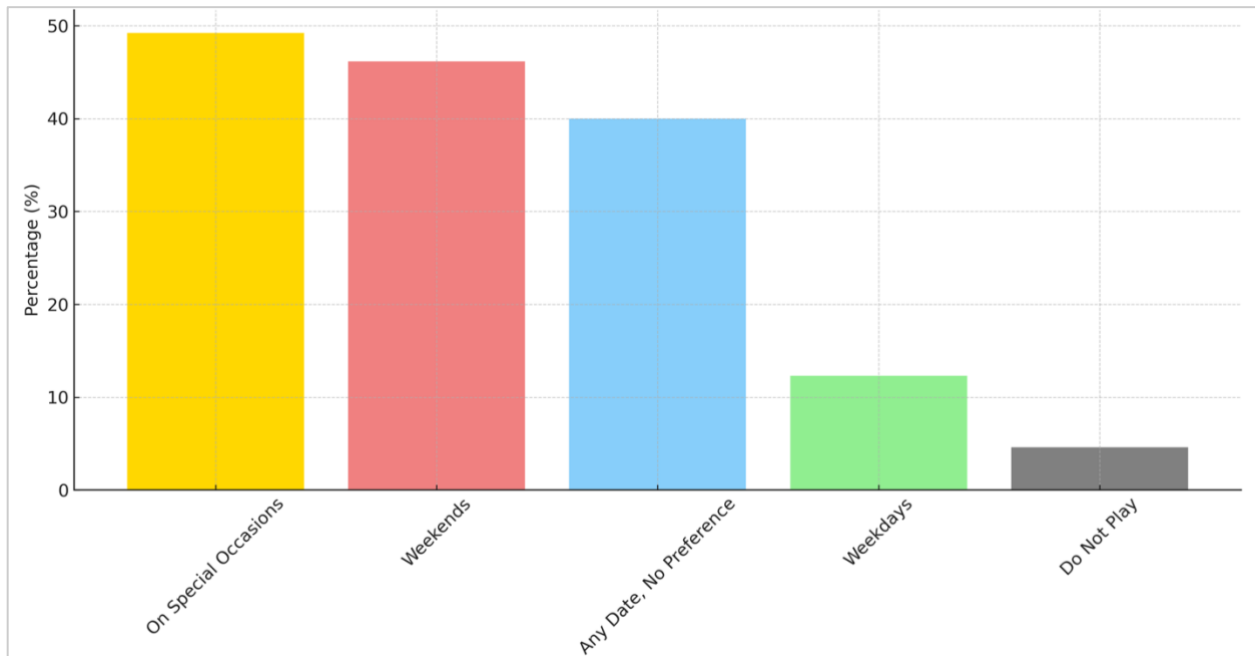


Figure 7: Preferences for Board Game Playing Times

On Special Occasions: This time category stands out as the most popular, with 49.23% of participants indicating a preference for playing board games during special occasions and holidays. The significant influence here is the notably high percentage of females (67.65%) who prefer this time, which is more than two times the percentage of males. This strong preference among females for special occasions likely drives the overall high rate for this category.

Weekends: Close behind, weekends are almost as popular, with 46.15% of participants enjoying board games during these more leisurely days. This suggests that weekends remain a traditional and favorable time for engaging in leisure activities like board games.

Game Session Preferences

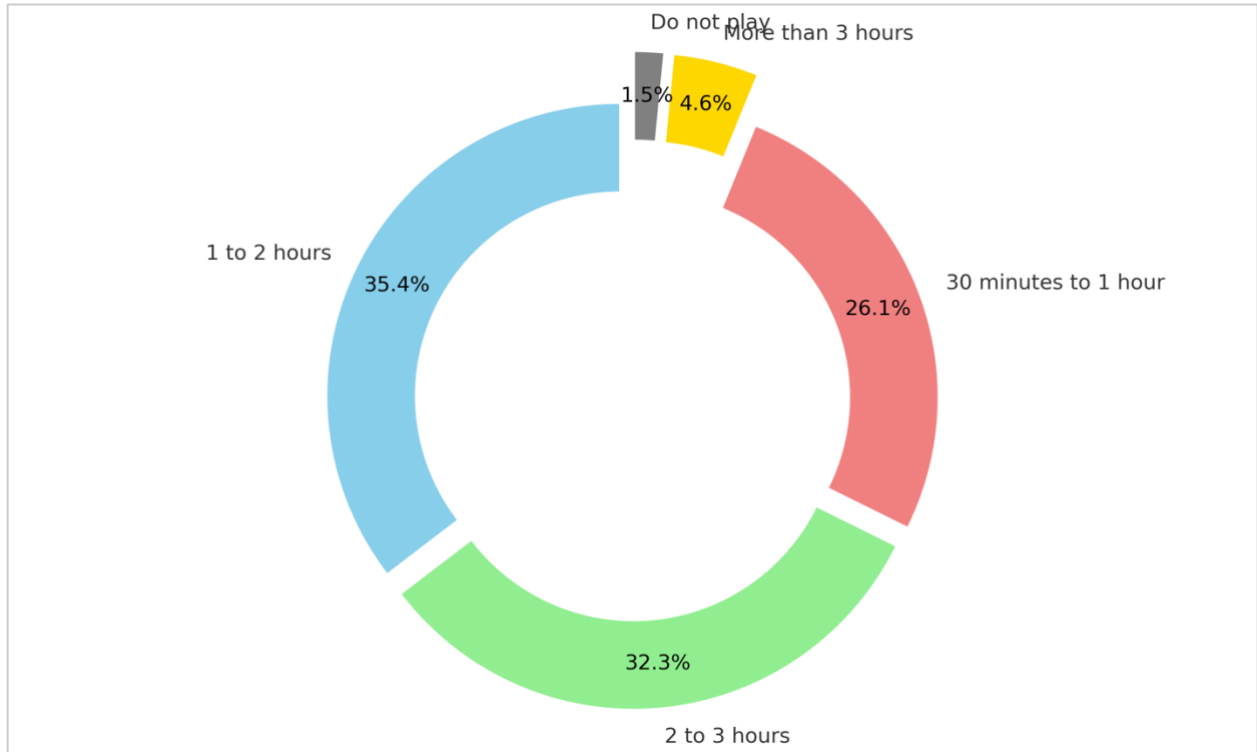


Figure 8: Overall Session Length Preferences

Most Preferred Duration: The most preferred time duration for board games is 1-2 hours, accounting for 35.38% of the responses. This suggests that players generally favor sessions that are long enough to be engaging but not so long that they become burdensome.

Preference for Longer Sessions: The willingness to engage in games lasting more than 3 hours drops significantly, down to just 4.62%. This indicates that only a small fraction of players are interested in very long gaming sessions.

Gender Preferences for Short Sessions: Females show a higher preference for shorter gaming sessions (30 minutes to 1 hour) at 32.35% compared to males at 20%. This might suggest that females prefer quicker, more concise gaming experiences.

Age Preferences for Short Sessions: Among ages, 40% of players aged 18-24 prefer short games lasting from 30 minutes to 1 hour. This aligns with younger players' lifestyles, which may favor quicker, more dynamic gaming experiences.

Context from Industry Experts: Referring to insights from Eden Bradley regarding customer behaviors in board game cafes like Snakes and Lattes, where he notes, *"If they want a long game, they don't want several hours. When people say long game, they mean 45 minutes, right? It's only the hardcore crazy experts that want a game that's like three hours long."* (E. Bradley, personal communication, April 3, 2024)

Preference in Board Game Cafes: Previous insights noted that females and younger players (18-24) are more likely to frequent board game cafes. This suggests that these venues should cater to preferences for shorter game durations to match their main customer base's desires.

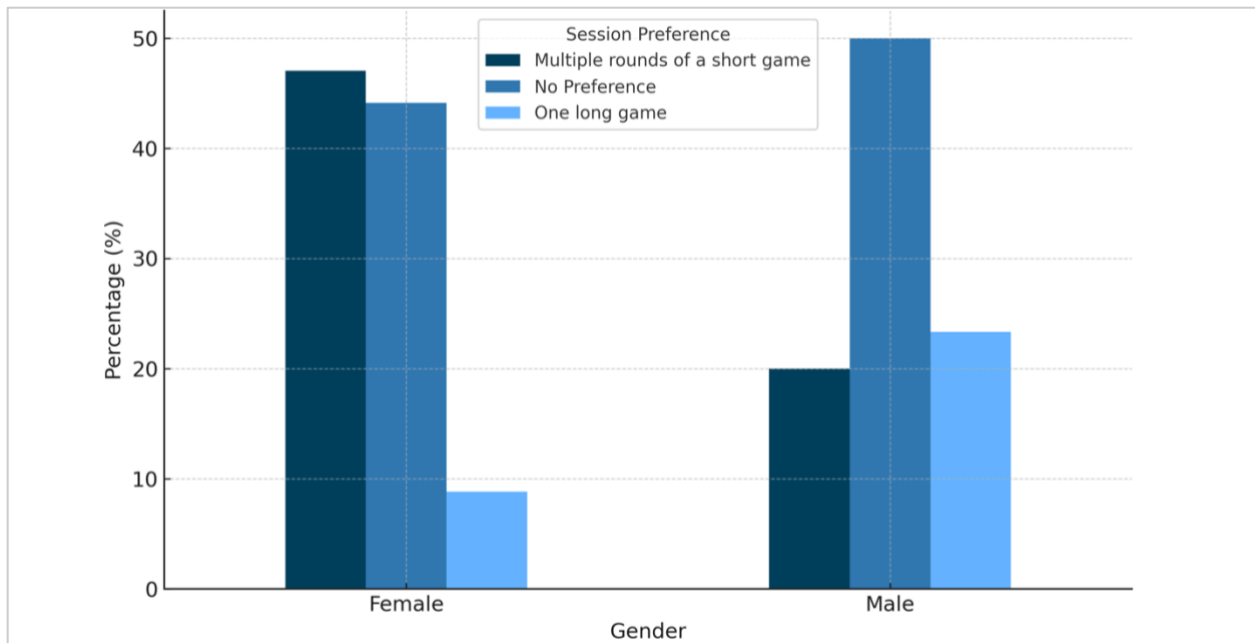


Figure 9: Board Game Session Preferences by Gender

Although many individuals across both genders do not have a strong preference regarding the format of their game sessions, distinct differences are evident in the preferences that do emerge.

Females: A significant 47.06% of females prefer playing multiple rounds of shorter games, which reflects their preference for quick and varied gameplay. Conversely, only 8.82% of females opt for one long game, showing a substantial preference for shorter sessions.

Males: In contrast, males exhibit a broader distribution of session preferences. While only 20.00% prefer multiple shorter games—significantly lower than females—23.33% of males favor playing one long game, indicating a stronger interest in more immersive, lengthy gaming experiences compared to females.

Main Obstacles to Playing Board Games

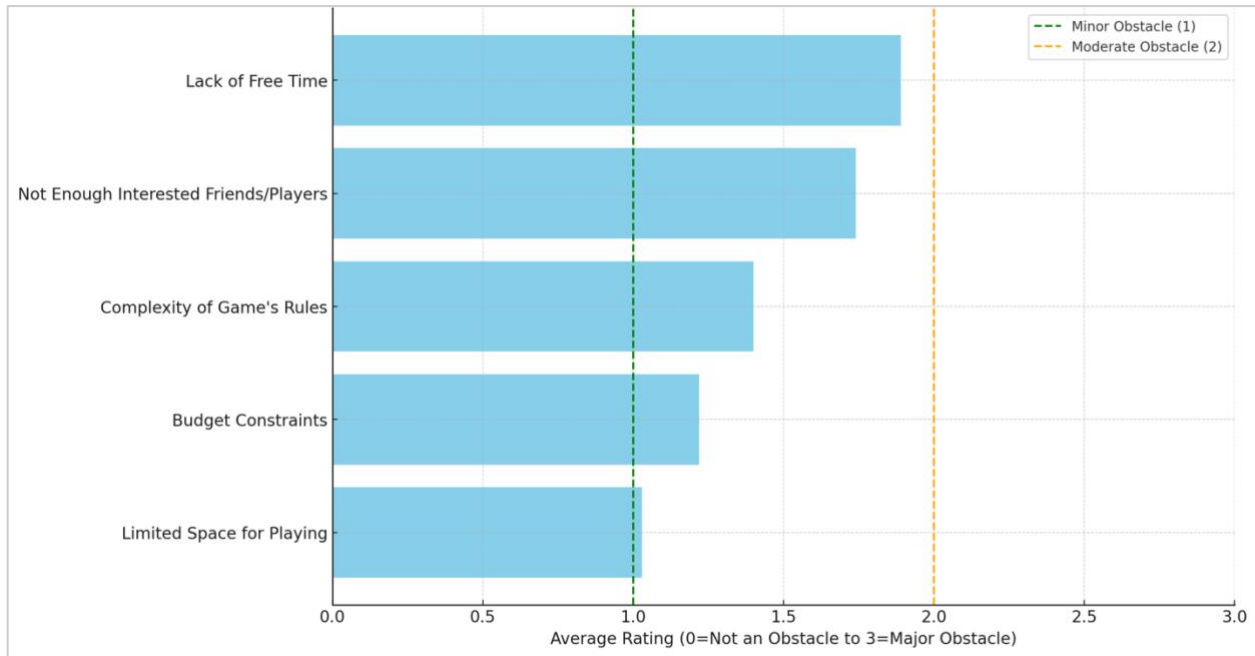


Figure 10: Average Rating of Obstacles to Playing Board/Card Games

Lack of Free Time is rated as the most significant obstacle with an average rating of 1.89. This suggests that finding time to engage in leisure activities like board games is a challenge for many participants.

Not Enough Interested Friends/Players follows closely with an average rating of 1.74, indicating that many people find it difficult to gather a group for such games.

Complexity of Game's Rules: Although it was rated as a major obstacle by approximately 16.92% of users—less than the percentages for "Lack of Free Time" and "Not Enough Interested Friends/Players"—it remains a significant barrier. The complexity not only affects how long it takes to learn new games, which can be up to an hour or more before actual gameplay begins, but

it also indirectly contributes to other obstacles. Specifically, the steep learning curve can deter potential new players, leading to a reduced pool of interested friends or players.

Eden Bradley, an expert in the field, comments on the issue: *"They take up to an hour to learn sometimes before you even start playing and that's gonna shut some people down right away. To be honest, even as a game expert, somebody's supposed to learn all this stuff, I find it a daunting task to get the like willpower to try to learn one of these things. And so the more they add to it, not even in complexity but kind of in like just how much you have to know before you can even make a first move is just, some people just aren't into it. And um, that doesn't mean the game is not good. It just means a lot of games go untried, untested just because of this."* (E. Bradley, personal communication, April 3, 2024)

Additionally, Casto Chan highlights the preferred balance in game design: *"Elegance is a big thing for me; something that is simple in rules but complex in strategy."* (C. Chan, personal communication, April 5, 2024)

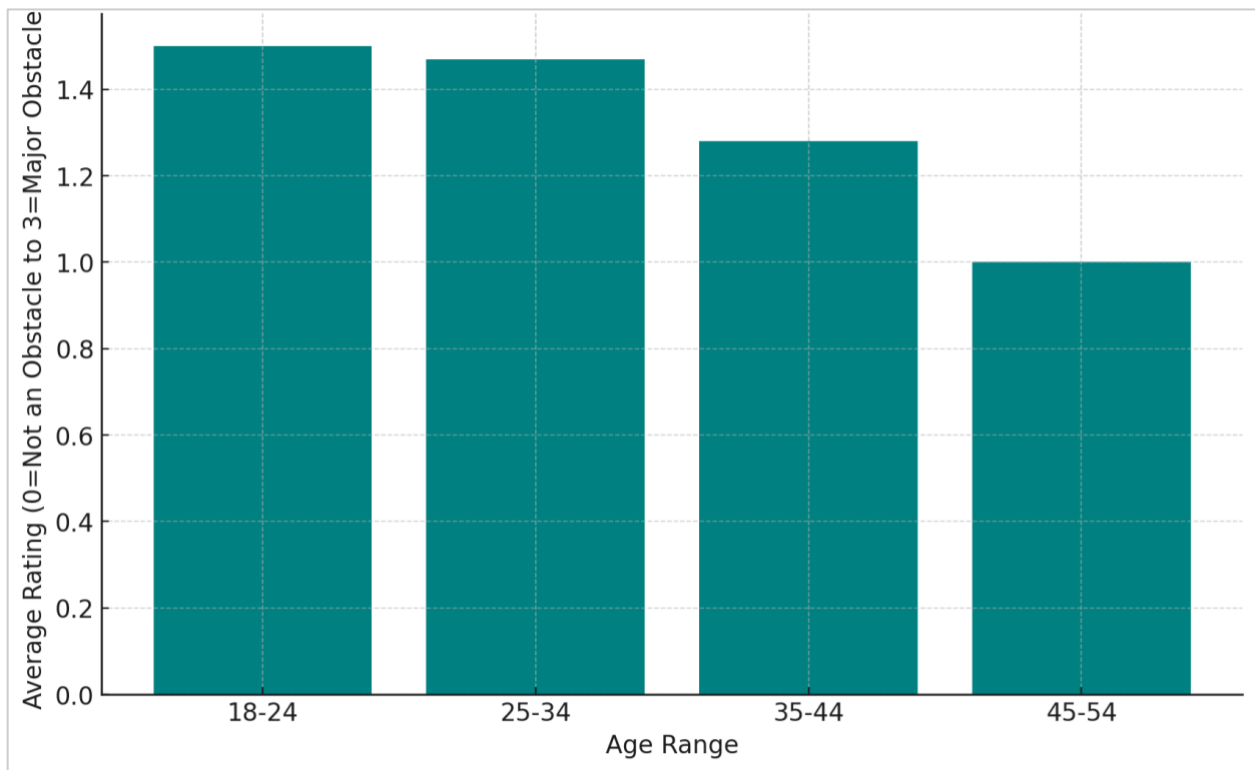


Figure 11: Average Complexity Rating of Game Rules by Age Group

Figure 11 suggests a noticeable trend where younger age groups perceive the complexity of game rules as a more significant obstacle compared to older groups. This observation aligns with the

idea that as players age and gain more experience with various game mechanics, they find complex rules less daunting.

As players mature and are exposed to a broader range of game dynamics and strategies, they naturally develop a deeper understanding and skill set, making it easier to engage with games that have more intricate rules. Casto Chan captures this progression well, noting:

"I have a friend who was just started getting into the hobby, and I've been showing her a lot of, like, smaller games. Right. And it's really helpful to build up skills because oftentimes, a lot of complex games are basically just an amalgamation of smaller mechanics. So, it's very helpful to kind of like go level by level to try to get to the point where you can play something that is an intense three-hour experience partially because a lot of heavier games require a sort of a development of your personal skills to play. I.e., if you're looking at something like Pandemic, right? You need to understand action points; you need to understand hand management." (C. Chan, personal communication, April 5, 2024)

Most Preferred Genres in Board Game

Figure 12 displays the percentage of participants who rated each game genre as "Most Preferred."

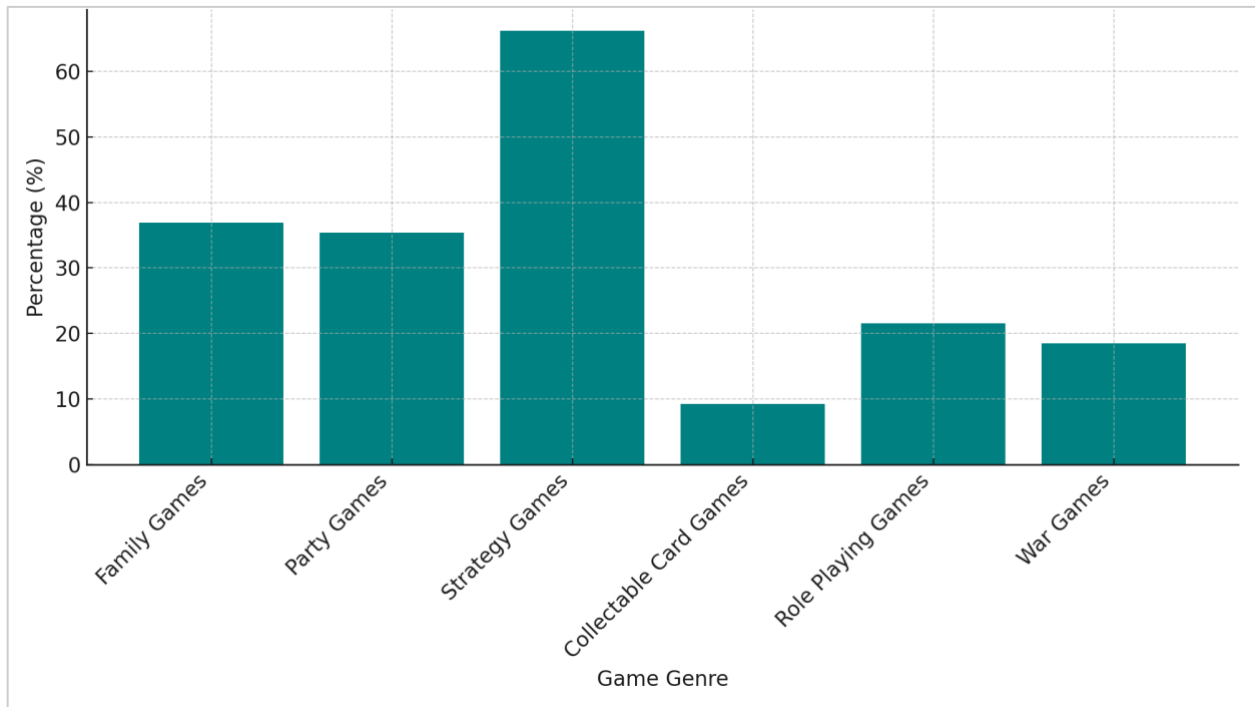


Figure 12: Most Preferred Game Genres

Overall Pattern: All demographics tend to follow a similar pattern in game preferences, strongly favoring strategy games. This suggests a universal appeal across different age groups and genders.

1. **Strategy Games:** Average Score = 3.17
2. **Family Games:** Average Score = 2.46
3. **Party Games:** Average Score = 2.22
4. **Role Playing Games:** Average Score = 1.69
5. **War Games:** Average Score = 1.38
6. **Collectable Card Games:** Average Score = 0.98

Strategy Games: 66.15% of participants chose Strategy Games as their most preferred. Casto Chan and Eden Bradley reflect on this preference: *"People have bad memories of playing Monopoly at home because it feels that you have no control of your own fate. Because all the classic games have is like 'It's your turn, roll the dice and see what happens'"* (C. Chan, personal communication, April 5, 2024). Eden adds, *"When they say, oh, I want to play a game and I ask them, what do they like to play? Nine times out of 10, They say strategy. And strategy is in every single board game. And so I have almost to interrogate them, I always ask them like, what kind of games do you play normally? Right? Because I need to narrow down into genres and specifically not genres but pieces of the game, what elements they're looking for in whatever the new game is. Because if they say Catan, right, there are two major elements for that. There's territory control and the economics."* (E. Bradley, personal communication, April 3, 2024)

Family and Party Games: While also popular, these genres are preferred to a lesser extent compared to strategy games.

Collectable Card Games: These games show niche appeal, with 60.00% of even Board Game enthusiasts selecting it as their least preferred. This suggests that while there is a dedicated fan base, it remains quite specific and limited.

Game Theme Preferences

Table 2 represents the mean scores for each game theme, broken down by female and male participants. Preferences are rated on a scale from 0 (least preferred) to 3 (most preferred).

| Rank | Game Theme | Overall Mean | Mean Score - Female | Mean Score - Male |
|------|--|--------------|---------------------|-------------------|
| 1 | Mystery/Detective | 1.97 | 2.35 | 1.60 |
| 2 | Adventure/Exploration | 1.77 | 1.97 | 1.53 |
| 3 | Family/Fun (e.g., casual, light-hearted themes) | 1.73 | 2.24 | 1.53 |
| 4 | Fantasy | 1.57 | 1.76 | 1.37 |
| 5 | Science Fiction | 1.54 | 1.47 | 1.60 |
| 6 | Historical | 1.43 | 0.97 | 1.60 |
| 7 | Abstract | 1.43 | 1.53 | 1.33 |
| 8 | Horror | 1.00 | 1.12 | 0.93 |
| 9 | Urban/Modern Life | 1.12 | 1.35 | 1.00 |
| 10 | Animal/Nature | 1.11 | 1.09 | 1.10 |
| 11 | War/Military | 1.07 | 0.68 | 1.43 |
| 12 | Educational | 1.03 | 1.24 | 0.93 |
| 13 | Political | 0.92 | 0.94 | 1.60 |
| 14 | Economic/Business | 0.92 | 1.18 | 1.17 |
| 15 | Licensed Themes (e.g., movies, TV series, video games) | 0.80 | 1.21 | 0.67 |
| 16 | Sports/Racing | 0.78 | 0.85 | 0.77 |

Table 2: Game Theme Preferences

Mystery/Detective games hold the top spot in overall preferences, particularly favored by female participants.

Adventure/Exploration and **Family/Fun** (e.g., casual, light-hearted themes) games are also highly ranked, indicating a strong preference for engaging and socially interactive game types.

Female participants show the strongest preference for Mystery/Detective themes, followed closely by Family/Fun and Adventure/Exploration. These themes suggest a favor for story-rich and interactive games.

Fantasy Theme games, while not making the top three, also shows a significant liking, indicating an interest in escapism and imaginative play.

Male preferences are more varied, with Science Fiction and Historical themes sharing the highest scores alongside Mystery/Detective. This suggests an interest in themes that either offer a futuristic or technologically advanced setting or those that provide a historical context.

Consumer Attitudes Toward New Board Games

Figure 13 reveals a significant openness among consumers towards exploring new board games. Specifically, 53.8% of respondents indicated they are always open to any type of new game. While there are pronounced preferences for specific genres and themes, the majority's willingness to experiment with new offerings suggests a dynamic market landscape where innovation and novel game designs can find receptive audiences. Adam Singer encapsulates a common sentiment among more discerning players: *"I just want the best in each class. So, if I play a game that's similar to one I already have and I like the one I already have better, then I won't buy the other game mostly."* This trend underlines the importance of game developers continuing to introduce diverse and innovative products to meet evolving consumer interests (A. Singer, personal communication, April 10, 2024).

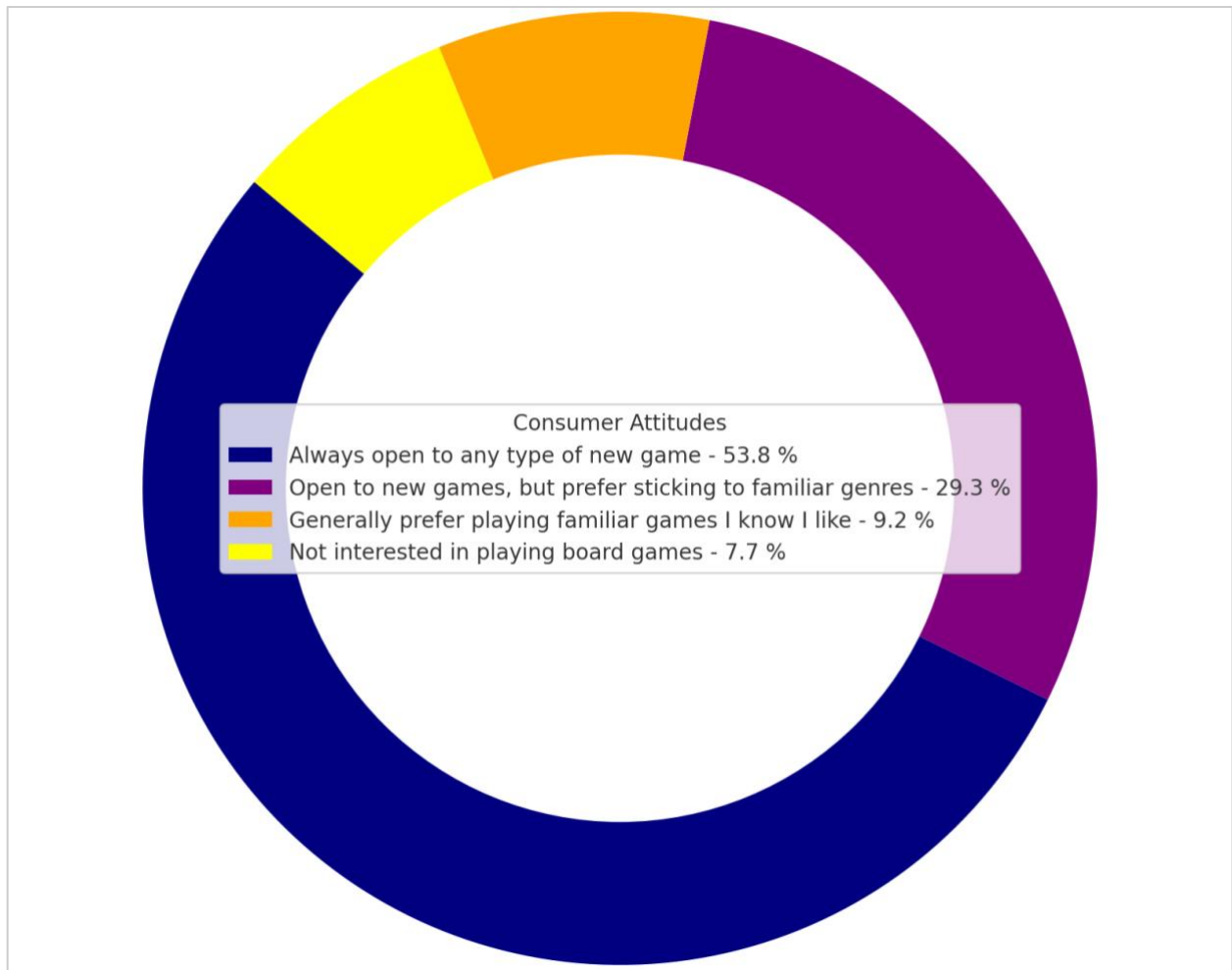


Figure 13: Consumer Attitudes Towards Trying New Board Games

Physical vs. Digital Board Game Preferences

Preference for Physical Board Games: More than 60% of participants indicate a preference for games with only physical components, highlighting a strong inclination towards traditional gameplay without digital integration. Adam Singer articulates a common perspective among these participants: "I just like to play the game and be able to play it without my phone, but I think it's a nice option and I'm glad it [tech-integrated games] exists and if I played it... I'm sorry. I'd have fun. I just don't buy them."

Concerns About Hybrid Games: The relatively low preference for hybrid games may be attributed to security concerns and the hassle of integrating digital elements into gameplay. Eden Bradley shares an observation that supports this viewpoint: "There's a game called Unlock that plays kind of like an escape room but with a deck of cards and then here's the hard part, right? There's a download link and an app you have to download for your phone... It's just a hard sell because no one wants to download something on their phone. But once they do, they tend to have a great time with it... I think it's security and also they just deem it unnecessary that it's kind of like, 'Oh, I'm here to play a board game. Why does this one be invasive?' You know, like, it's also like an app that you've never heard of before. Right. So, it's just, it can be scary." These insights suggest that while the novelty of tech-integrated games can be appealing, the initial barriers and perceived risks significantly influence consumer decisions.

Growing Interest in App-Based Games: While the majority of participants show a strong preference for physical board games, it's notable that nearly a quarter of respondents prefer digital board games, either online or app-based. This trend indicates a significant segment of the market that is open to, and actively seeking, digital gaming experiences. This shift towards digital platforms can pose a threat to traditional board game formats, suggesting that developers and marketers in the board game industry may need to adapt their strategies to either incorporate digital elements or compete with these emerging preferences.

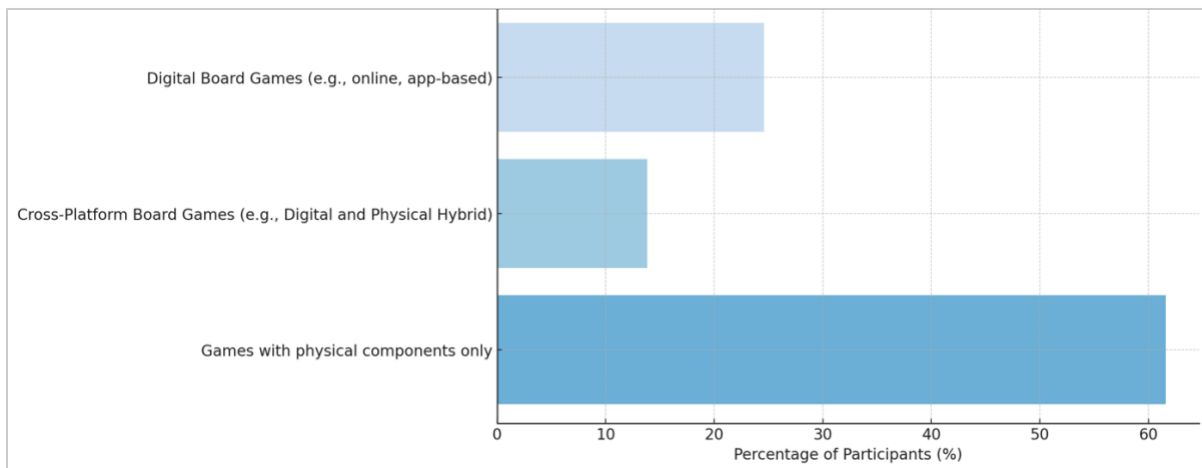


Figure 14: Consumer Reception to Tech-Integrated Board Games

Key Purchase Decision Factors

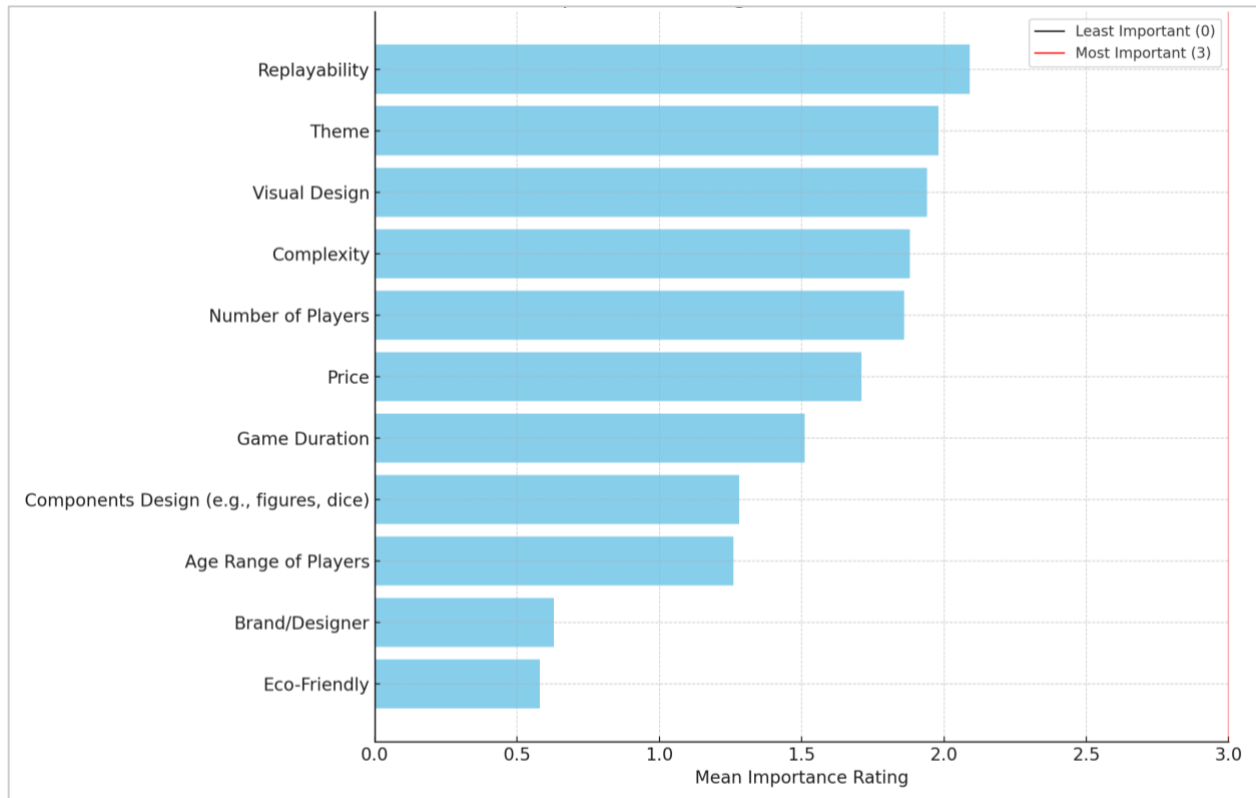


Figure 15: Importance Rating for Board Game Purchase Factors

Replayability: Approximately **49.23%** of participants rated replayability as "Most Important," indicating that the potential for multiple enjoyable playthroughs is a crucial consideration for buyers. A board game that offers varied experiences, challenges, or story outcomes on each play tends to be more appealing, suggesting that innovation in game mechanics that boost replayability can be a key selling point. Spencer Moore emphasizes this perspective, stating, 'if we back [purchase] a game it is because we want to specifically not just play the game once. We can do that at a tabletop cafe if needed, but we want to play it multiple times and own it.' This highlights the value consumers place on replayability when deciding to purchase and own a game, rather than just experiencing it once."

Theme: The theme of a board game is almost as important as its replayability. This suggests that the narrative or conceptual backdrop of the game plays a significant role in attracting customers.

Games with engaging, unique, or well-integrated themes likely resonate more with players, potentially influencing their purchasing decision strongly.

Visual Design: Close behind theme, the visual appeal of a board game—including its artwork, layout, and overall aesthetic—significantly influences consumer decisions. This highlights the importance of investing in high-quality, appealing visual design to attract buyers, as it enhances the overall gaming experience. Braydon Popke, the Store Manager of Bergo Design, reinforces this observation by noting, *"I think a lot of consumers will look at things from a visual standpoint rather than what's inside it."* This underscores the critical role that visual presentation plays in attracting consumers, who often make purchasing decisions based on the external aesthetics of a product (B. Popke, personal communication, March 21, 2024).

Brand/Designer: Surprisingly, the reputation of the brand or the fame of the designer is one of the least influential factors in purchasing decisions. This suggests that while a well-known designer or brand can attract attention, other factors like the game's mechanics, theme, and design are more pivotal in the final decision to purchase. This finding presents a significant opportunity for indie designers, indicating that if they can develop compelling games and achieve sufficient market visibility, they need not be overly concerned about their lack of renown compared to mass publisher brands.

Eco-Friendly: Eco-Friendly: About 53.85% of participants rated eco-friendliness as "Least Important", suggesting that over half of the respondents do not consider environmental impact a key factor in their board game purchasing decision. Additionally, only 12.31% of participants rated it as "Important" or "Most Important," indicating that a smaller segment of the market views eco-friendly attributes as a significant aspect when choosing board games. Chris George, a Canadian YouTuber, echoes this sentiment, stating:

*"I don't think people care about sustainability whatsoever. I think some publishers are doing great jobs in terms of trying to push sustainability, and *Burnt Island* is one—they did a game, *Endeavor: Age of Sail*, where their trays were made out of sugar. I think it was a way of using bamboo and sugar rather than normal plastic. That hasn't been delivered yet, but I remember that standing out to me as being interesting. Any game that has a nature theme will go out of its way to say how environmentally friendly they are because they don't want to be hypocritical. Many publishers, if they know you want plastic, they'll stuff it to the brim with plastic forever. *Chip Theory Games*, all their whole thing is plastic, waterproof, and extremely chemical, you know what? I mean, these heavy-duty products are built to last. People care more about these lasting for a long time and they care more about the potential resale value of their games than they ever would with contributing money to the environment. You'll have the outlier who actually does care, but in general, I don't see board gamers or board game companies really caring whatsoever."* (C. George, personal communication, April 18, 2024)

Consumer Spending Patterns on Board Games

Figure 16 displays the typical budget ranges for purchasing a board game, either for oneself or as a gift.

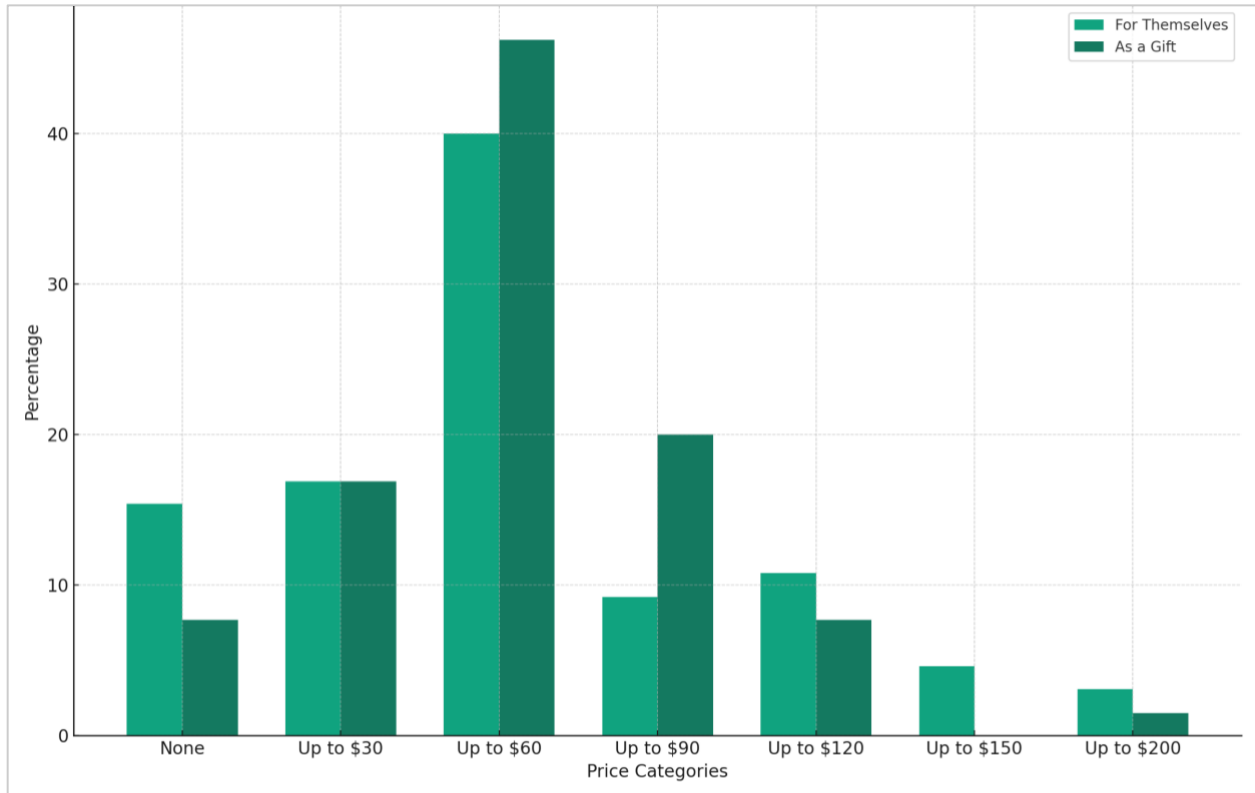


Figure 16: Typical Budget for Board Games (Own vs. Gift)

Higher Spending on Gifts: Consumers tend to spend more when purchasing a board game as a gift compared to buying for themselves, particularly in the \$60 to \$90 range, where there's a significant increase (20% for gifts versus 9.2% for personal purchases).

Most Common Budget Range: The \$60 budget range is the most popular choice for both personal purchases and gifts, capturing 40% and 46.2% respectively. This price point is perceived as a reasonable compromise between affordability and quality. Craig Sakula, General Manager of Bergo Design, supports this observation, noting, *"I think if you wanted to tell volume, like just personal advice, the \$50 range is probably best... I think like, box aside, a game experience, in my mind, is worth a maximum of \$60, like a maximum of 65 bucks. Like if I was going to buy a new board game and I went to a store that wasn't ours and bought code names. I'd expect it to be like 45 to 55 bucks just in my head."* This suggests that even industry insiders view

this range as a sweet spot for balancing cost and the quality of the game experience (C. Sakula, personal communication, March 21, 2024).

Limited High-End Spending: Spending above \$120 is notably less common. For personal purchases, the percentages decline steadily above this range, while for gifts, it drops to 0% at the \$150 range, indicating a clear ceiling for gift spending even among those willing to spend more.

No-Spend Participants: Among the participants who do not spend money on board games for themselves, a noteworthy half still consider purchasing board games as gifts for others. This insight highlights an interesting aspect of consumer behavior: even those who are not personally enthusiastic about board games recognize their value as thoughtful and enjoyable gifts. This suggests that board games hold a dual appeal—both as a personal hobby and as a universally appreciated gift option, making them relevant even among those who don't actively participate in the hobby themselves.

Consumer Preferences for Board Game Purchase Locations

Figure 17 shows the distribution of preferred purchase locations for board games.



Figure 17: Preferred Purchase Locations for Board Games

Dominance of Online Retail: Online retail websites, such as Amazon, are the most popular purchase channel, with 69.2% of respondents choosing them. This underscores the convenience and wide selection that online platforms offer to board game shoppers.

Strong Support for Local Stores: A significant 53.8% of respondents still prefer buying from local game, hobby, or toy stores, indicating a robust community preference that values hands-on selection and supporting local businesses.

Niche Markets and Direct Sales: Specialized channels such as crowdfunding platforms and direct purchases from publishers or at conventions/expos also play notable roles, illustrating that enthusiasts are willing to engage directly with creators and seek out unique, sometimes limited edition, game experiences.

Lesser Role of Big-Box and Drugstores: Big-box retailers and drugstores are less favored for board game purchases, which might reflect a limited selection or a lack of specialized offerings in these venues compared to more focused outlets.

How Consumers Discover New Board Games

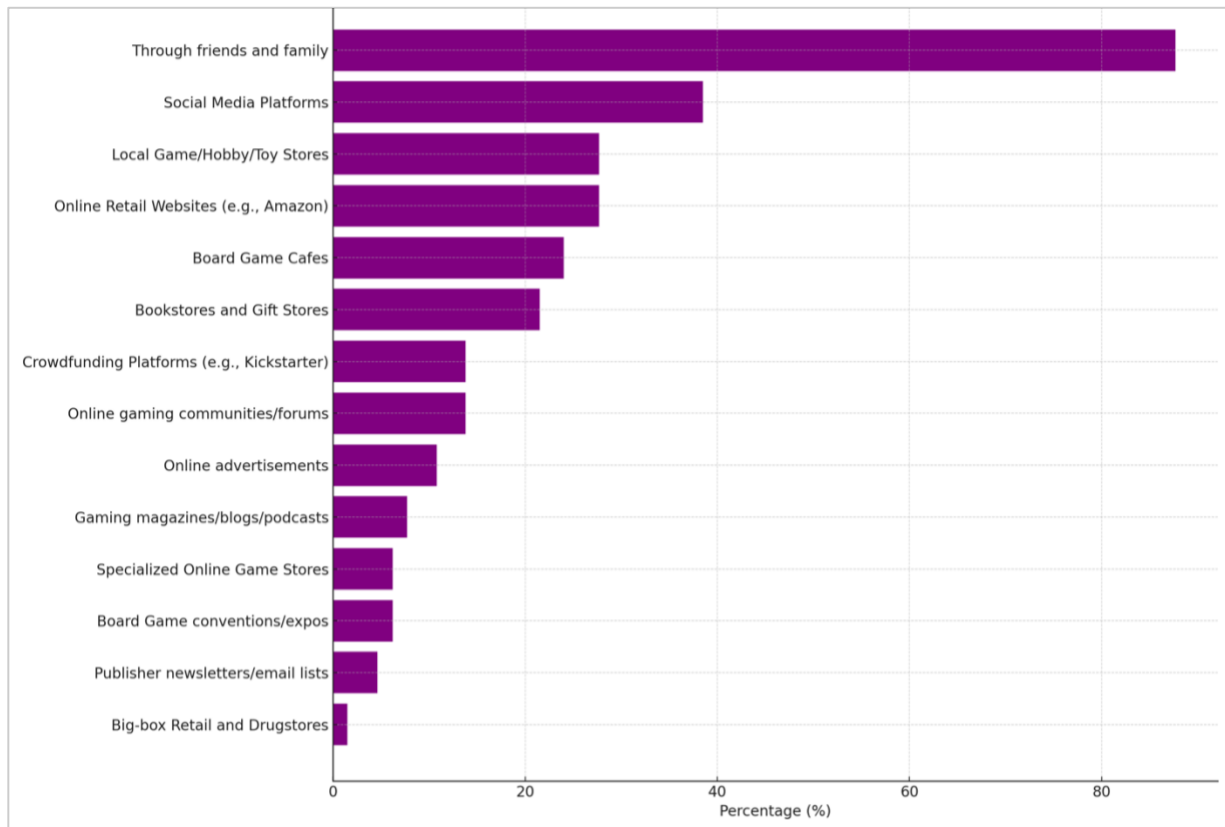


Figure 18: How Consumers Discover New Board Games

Dominant Role of Personal Networks: The highest percentage of consumers (87.7%) discover new board games through friends and family, emphasizing the significant role of personal networks in influencing gaming choices.

Impact of Social Media: Social media platforms are a major discovery channel at 38.5%, indicating the effectiveness of these platforms in reaching and engaging potential board game players. Eden Bradley further illuminates this point by noting, *"It will just be some Instagrammer or something like that. It will be like, 'oh, look at this game!' That's it. And then that game will fly off our shelves for a couple of weeks."* This statement underscores the powerful influence social media influencers can have on the popularity and sales of board games, as their recommendations can quickly turn a game into a must-have item (E. Bradley, personal communication, April 3, 2024).

Retail and Online Presence: Both local game/hobby/toy stores and online retail websites (e.g., Amazon) account for 27.7% each, suggesting that both physical and digital storefronts play crucial roles in new game discovery.

Growing Influence of Board Game Cafes: Standing closely behind online stores and local game shops with a 24% discovery rate, Board Game Cafes are increasingly significant in the board game discovery process. Their interactive and social environments not only allow for hands-on game trials but also facilitate community building around gaming. This engagement level makes them a potent venue for introducing and popularizing new games among enthusiasts and casual players alike. Their impact highlights the importance of experiential marketing within the board game industry.

Niche Channels and Events: Specialized events like conventions and expos also contribute to game discovery, though at lower percentages. These venues offer immersive experiences that can introduce consumers to new games they might not encounter otherwise.

Minimal Impact from Big-box Retail: Big-box retail and drugstores are the least effective at 1.5%, reflecting perhaps a lack of targeted marketing or a smaller selection of games compared to specialized stores.

Sources for Validating Board Games

Figure 19 compares importance ratings for various sources in validating the quality or appeal of a board game, broken down by overall averages and separated by gender (Male and Female).

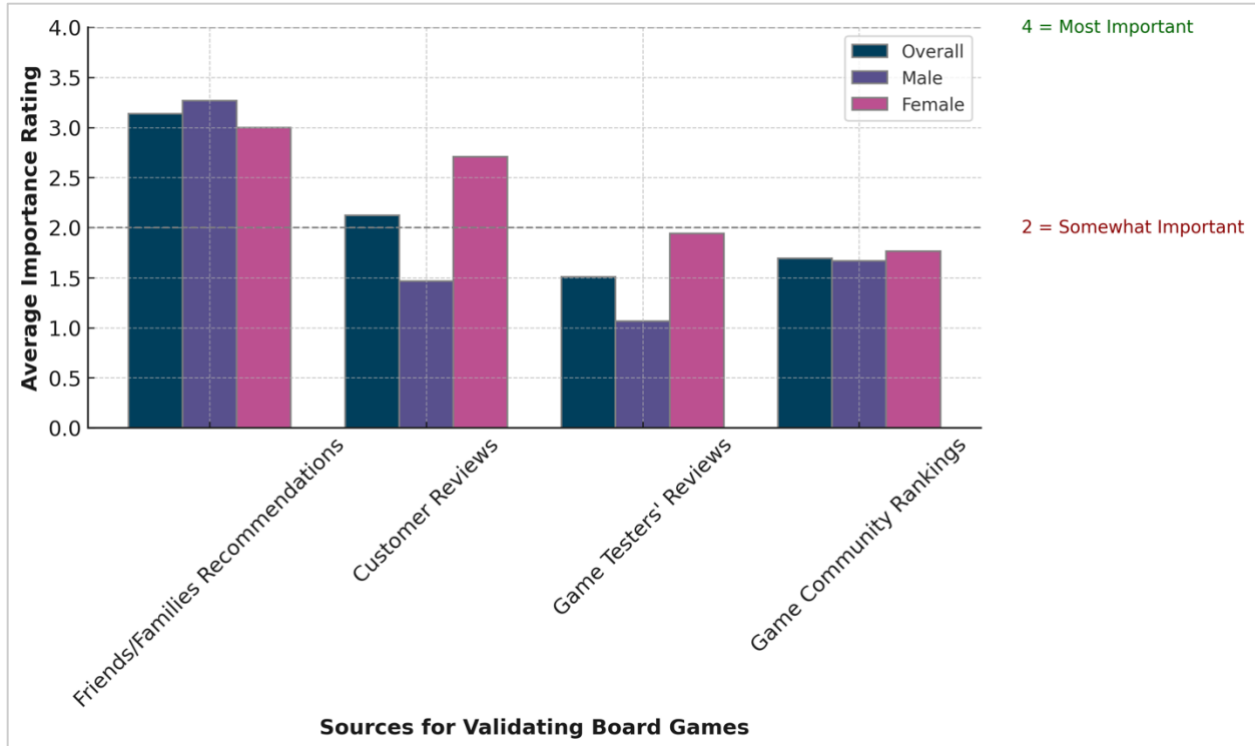


Figure 19: Ratings of Sources for Validating Board Games

Recommendations: Friends are considered the most important source across all gender categories, indicating a strong trust in personal connections over other forms of validation when choosing board games.

Women: They tend to value reviews more highly compared to men, whether those reviews come from customers, game testers, or game communities. This suggests that women might be more detail-oriented and reliant on external feedback before making a purchase decision.

Conclusion

Embracing Eco-friendly Alternatives

As we stand amidst a renaissance of board games, with an industry forecasted to burgeon to unprecedented levels, our research underscores a pivotal reflection point—the pressing need for ecological consciousness. While the allure of grandiose boxes and detailed plastic miniatures continues to captivate consumers, the urgency for sustainable practices cannot be overlooked. Our investigation reveals a dichotomy between consumer demand for tangible luxury and the environmental necessity for restraint and innovation in materials used.

Initiatives by companies like Ravensburger, achieving an 89% reduction in plastic waste (Ravensburger, n.d.-b), and Burnt Island's inventive use of sugar and bamboo, illuminate a path forward (C. George, personal communication, April 18, 2024). These examples serve not only as commendable actions but also as a testament to the feasibility of integrating eco-friendly substitutes without compromising the aesthetic or tactile appeal that enriches the gaming experience. It is incumbent upon the industry to widen the scope of such endeavors, transitioning from the exceptional to the normative.

The consumer's role is equally pivotal in this ecological pivot. The impetus for change often begins with the end-user whose preferences can steer the market. Hence, increasing awareness among board game enthusiasts about the environmental impacts of their choices is crucial. Educating customers on the significance of sustainable components and the long-term benefits they hold can catalyze a shift in purchasing patterns. Our study indicates that when consumers are informed, their buying decisions can become a powerful catalyst for eco-centric innovation.

Embracing Full Accessibility in Board Games

As the board game market continues to expand, the imperative for accessibility within the industry grows ever more crucial. An increase in accessibility can, in turn, catalyze further market growth, creating a virtuous cycle of inclusivity and expansion. Enhanced accessibility not only invites a wider audience to engage with board games but also enriches the gaming experience for all, fostering a more comprehensive and diverse community. As noted by Eden Bradley, *"I guess what a lot of designers have to remember is that uh accessibility"* (E. Bradley, personal communication,

April 3, 2024). This recognition underlines that designing for accessibility is not just a niche consideration but a central aspect of broadening the industry's reach.

When we speak of accessibility, it extends far beyond the common conception of color blindness accommodations. We delve into a multi-faceted approach that addresses the various barriers players may encounter:

- **Visually Accessible Board Games:** Incorporating high-contrast visuals, large print, braille, and tactile elements that allow players with visual impairments to engage with games more fully.
- **Physically Accessible Board Games:** Designing with components that are easy to handle, boards that are approachable from different positions, and gameplay that is possible with limited dexterity, thus welcoming players with physical impairments.
- **Cognitively Accessible Board Games:** Simplifying rules, reducing game complexity, and offering customizable difficulty to cater to players with cognitive impairments, ensuring that games are straightforward and enjoyable for all cognitive abilities.
- **Socio-Emotionally Accessible Board Games:** Creating environments that encourage cooperative play and clear social interaction, which support players with social or emotional challenges and foster a positive social experience.
- **Financially Accessible Board Games:** Making games more affordable through options like print-and-play versions, tiered pricing, or game libraries, thus removing financial barriers to entry.
- **Culturally Accessible Board Games:** Featuring diverse themes, artwork, and stories that resonate with a global audience and offer multiple language options to ensure cultural inclusivity.
- **Technologically Accessible Board Games:** Providing digital versions of board games with robust accessibility features, making games approachable for those who may find physical components or in-person interaction challenging.

By embracing these dimensions of accessibility, the board game industry can not only anticipate and serve the needs of a broader constituency but also take a leading role in the global push for inclusive recreation. This proactive stance is not just a moral imperative but also a strategic opportunity to nurture a more resilient and dynamic market.

The Critical Role of Innovation in Board Gaming

As the board game industry flourishes, the influx of new titles each year is staggering. However, quantity does not equate to quality, nor does it ensure innovation. Joe Slack crystallizes this

sentiment, pointing out that *"Sometimes you pick up a game... this is just another game that's already on the market. But, just a slight change, but it's not different enough"* (E. Bradley, personal communication, April 3, 2024). This observation brings to light the necessity for genuine innovation rather than replication with minor alterations.

The distinction between innovation and invention within board gaming is nuanced but vital. Invention implies the introduction of something entirely new, a concept that, while fresh, may alienate players due to its unfamiliarity. As the board gaming community values a sense of recognition, total novelty might be received with skepticism—"this is weird" or "too different." Innovation, in contrast, involves creative reconfiguration; it is the art of weaving together familiar elements in novel ways, crafting an experience that is both recognizable and refreshingly original.

Our Consumer Insights reveal a market receptive to experimentation: 53.8% of users are open to trying new games, indicating a fertile ground for innovative designs. The challenge for designers lies in balancing familiarity with ingenuity, merging mechanics and themes from diverse sources to forge games that captivate. Preferences among players tend to lean more towards mechanics than game types, suggesting a strategic entry point for innovation. As Eden Bradley highlights, when players express a preference for "strategy," they often refer to a broad category that encompasses multiple elements, necessitating a deeper inquiry into the specific mechanics they enjoy—be it territory control, economic systems, or other game features found in classics like Catan.

Joe Slack further articulates this approach: *"So having some familiarity... But something also that's neat, interesting that hasn't been done, a combination of mechanics and theme that has not been seen before but there's still... It's tiling like this but there's also something else over here, some different type of scoring, some other type of mechanism... these piles go away in a different way that makes it different and stand out from all the other games out there."* (J. Slack, personal communication, April 10, 2024)

Such an innovative ethos invites designers to become architects of engagement, masterfully blending the old with the new to create games that are not just another shelf addition but a destination for excitement and discovery. It is through this commitment to innovation that the board game industry can continue to evolve and enchant its ever-growing audience.

Next Steps

The exploration of the board game industry presented in this research is a foundation upon which further investigative work must be built. Our understanding of the industry's landscape,

while comprehensive, opens the door to two critical areas that demand a deeper dive in pursuit of innovation and sustainability.

Firstly, the dynamic realm of crowdfunding platforms stands as a testament to the democratization of board game production. These platforms have undeniably altered the market environment by empowering independent designers to carve out niches alongside established gaming behemoths. Yet, as these platforms burgeon and become leveraged by well-known publishers, the challenges for indie designers escalate. Many grapple with the complexities of manufacturing, distribution, and the intricacies of market visibility. Adam Singer's perspective sheds light on the overlooked potential within the industry: *"There's really good designers that are better than the really famous ones, but they didn't get lucky or they didn't get the recognition the same opportunity"* (A. Singer, personal communication, April 10, 2024). Therefore, our next step is to delve into this ecosystem, identifying and bridging gaps that not only elevate designers' visibility but also bolster their ability to publish and thrive. We aim to craft a more equitable landscape where talent and innovation receive their due recognition, irrespective of scale.

Secondly, the critical conversation around sustainability within the board game industry cannot be understated. As we pivot towards greener practices, it is imperative to investigate deeper into the roles and responsibilities of manufacturers, raw material suppliers, and distributors. The objective is to unearth and develop sustainable and eco-friendly solutions that do not compromise the quality or the financial viability of board games. This endeavor seeks to create an innovative, inclusive business model that acts as a catalyst for change—addressing not just the gaps in the market but setting a new benchmark for ecological responsibility.

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Appendix

Appendix A: List of Interviewees

Brayden Popke

- Occupation: Store Manager
- Company: Bergo Design, Distillery District, Toronto, Canada
- Date of Interview: March 21, 2024

Craig Sakula

- Occupation: General Manager of Sales Operations & Logistics
- Company: Bergo Design, Distillery District, Toronto, Canada
- Date of Interview: March 21, 2024

Eden Bradley

- Occupation: Board Game Expert
- Company: Snakes and Lattes - College Branch, Toronto, Canada
- Date of Interview: April 3, 2024

Marissa Elizabeth

- Occupation: Board Game Designer and Editor
- Notable Work: Breadwinner
- Date of Interview: April 5, 2024

Spencer Moore

- Occupation: Board Game Designer
- Notable Works: Breadwinner, Chasing Adventure
- Date of Interview: April 5, 2024

Casto Chan

- Occupation: General Manager

- Company: Snakes and Lattes, Toronto, Canada
- Date of Interview: April 5, 2024

Adam Singer

- Occupation: Content Creator for Board Games, Board Game Reviewer
- Channel: ShelfClutter
- Date of Interview: April 10, 2024

Joe Slack

- Occupation: Board Game Designer, Publisher, Course Instructor, Author
- Notable Works: Relics of Rajahivara, Mayan Curse
- Date of Interview: April 10, 2024

Chris George

- Occupation: Content Creator for Board Games, Board Game Tester
- Channel: Room and Board
- Date of Interview: April 18, 2024

Note: Consent was obtained from all individuals for their names and affiliations to be included in this appendix.

Appendix B: Interview Question Guides

Below are the guides for the different types of interviewees engaged in the study. Please note that while these guides provided a framework for the interviews, additional questions were asked in response to the interviewees' expertise and the direction of each conversation.

Retail Managers

1. (Warm-up Question) Tell me about your favorite board game and the reasons behind your choice. Is this game available at your store?
2. Where do you typically search for new board games to stock?
 - How do you keep up with the latest game releases and industry trends?
 - Is customer feedback a significant factor in your decision-making for new game orders?
3. Can you walk me through the process of selecting a new game to add to your store's collection?
4. How do you decide which board games to stock in your store?
 - What criteria do you use to determine which board games to carry in your store?
 - Are there specific themes or types of board games you tend to favor?
 - What attributes do you look for in a board game before deciding to stock it?
 - How factors like packaging design, weight, game descriptions, or components your purchasing decisions for new inventory?
 - How do you balance popular mainstream games with niche or indie titles?
 - How do collaborations with smaller publishers or independent designers differ from dealings with established companies or distributors?
 - Do you have a rotation system for board games, and how often do you refresh your stock?
5. What trends have you noticed in the board game market from a retail perspective?
 - Have you seen shifts in customer preferences over time?
 - Have you noticed any trends in purchasing behavior among different demographics?
 - How do seasonal trends affect your board game sales?

- Are there any genres or types of games that are currently seeing increased popularity?
 - Can you describe a trend that took you by surprise?
6. What are some of the challenges you encounter in the sale of board games?
- What support do you receive from game publishers in terms of marketing materials or demos?
 - How does selling board games compare with other products in your store in terms of advantages and challenges?
 - How do you train your staff to be knowledgeable about the games you sell?
 - What resources do you provide to help customers learn about games?
7. Do you stock games that originated from crowdfunding platforms?
- What has been the customer response to crowdfunded games compared to those from traditional publishers?
 - How do you evaluate the quality and playability of games that come from crowdfunding sources?
8. How do customers in your store react to new game releases compared to established, popular titles?
- Do you find that the descriptions and presentations for new games are sufficient for customers to understand what the game offers?
9. Have digital board game platforms had any noticeable effect on the sales of physical board games in your store?

Game Designers

1. (warm up question) Can you share a bit about your background in gaming and what drives you to design board games?
2. Can you walk me through the development process of your last game, from initial concept to publishing and distribution?

- Does your design process follow a strict sequence, or have there been times you had to revise and backtrack?
 - What are some notable challenges you face in game design, balancing, publishing, and distribution?
 - How do you tackle the issue of balancing various game mechanics and elements?
3. Could you walk me through how you gather and implement user feedback?
- Have co-design approaches influenced your game design, and how?
 - How do you balance your creative vision with the desires and expectations of the players?
 - Can you provide an example of a design decision directly influenced by user input?
 - What obstacles did you encounter when incorporating user feedback?
4. Can you describe your approach to game testing and the impact of playtesting on design choices?
- What criteria do you use to select playtesters, and what kind of feedback do you seek?
 - Can you describe a specific instance where playtesting led to a significant design change?
 - What challenges have you encountered in playtesting, and how have you addressed them?
 - At what point do you feel a game is ready to progress from playtesting to final production?
5. What obstacles do you encounter in the publishing phase, and how do you overcome them?
- How do you manage costs during the publishing process?
 - Can you recount an instance where you had to adapt your game to fit publishing requirements?
 - How does the publishing process affect your production timeline?
 - When do you start considering publishing during the game design process?
6. Can you discuss any difficulties in the distribution of your games and how you address them?
- Have logistics or distribution ever influenced the design or components of your games?
 - When do distribution concerns begin to influence your design process?

7. What has been your experience with using crowdfunding for your game projects?
 - Can you discuss the advantages and disadvantages you've encountered with crowdfunding?
 - How has crowdfunding influenced the way you market and promote your games?
 - What would you say to other designers considering crowdfunding as an option?
8. Have you approached larger game companies to publish your designs, and what has that experience been like?
 - Can you share any insights from dealing with gate keepers and major game publishers?
 - How do you pitch your games to potential publishers, and what do you think makes a successful pitch?
 - Have you had to modify your game significantly to meet a publisher's requirements?
 - What advice would you give to other designers looking to partner with established game companies?
9. Reflect on your experience with presenting your games to retailers, such as at trade shows.
 - What challenges have you faced when presenting your games to retailers?
 - How do you prepare for it?
 - What networking approaches have worked well for you?
 - Can you share a success story from these interactions?
10. What improvements or changes are you hoping to see in the board game market?
 - How do you think these changes would benefit the industry and players?
 - What barriers exist that you believe should be addressed to foster innovation?
11. Have you noticed any trend (positive or negative) lately in the market that you believe it may influence the market? And how?
 - How do you think these trends started, and what do they indicate about player preferences or industry directions?
 - Have these trends influenced your own game design approach or philosophy?
 - How do you adapt your game designs to align with or counter these trends?
 - Are there any trends you intentionally avoid or challenge in your designs?

12. How do you perceive the impact of technology on board game design now and in the future?
- How do you see traditional board game elements emerging with technologies?
 - Can you give an example of a technological integration that enhanced a game's experience?
 - What potential do you see for technology to expand the board game audience or market?
 - How do you think technology will change the way we design, play, and experience board games in the coming years?

Game Testers (Content Creators)

1. (Warm-up Question): Tell me about yourself and your journey into game testing. What sparked your interest in becoming a professional in this field?
 - What role do you believe game testers have in helping the board game industry?
2. Reflecting on the games you've tested, which one really stands out and why? What elements do you look for that make a board game exceptional?
 - When assessing board games, what criteria do you use to judge whether a game is high-quality and worth playing?
 - How do you weigh different factors like gameplay depth, artwork, and theme in your assessment?
 - What is a deal-breaker for you in game quality?
 - What common red flags alert you to potential issues in a game?
3. In your opinion, which aspects of board games today are most in need of improvement?
 - How do you think player expectations are driving the need for improvements?
 - What innovations are you hoping to see in the future of board game design?
4. What recurring issues have you encountered in the games you've tested?
 - How do these issues impact the overall gaming experience?

5. How do crowdfunded games compare to other games you've tested, and what's your take on them?
 - What unique qualities do you find in crowdfunded games?
 - Can you share your experience with a crowdfunded game that exceeded or fell short of expectations?
6. If given the opportunity, which mass-market game would you replace with another, and why?
 - What factors lead you to choose that particular game for replacement?
 - From your perspective, how does the mass market affect the board game industry?
 - How do you envision the ideal balance between mass appeal and depth in board games?
 - How do you see the relationship between indie developers and the mass market?
7. What genres or types of games do you feel are currently underrepresented and should be more prevalent in the market?
 - Why do you think there is a shortage of these types of games?
 - How could the industry benefit from a greater variety of these games?
 - What do you think is holding back the production of these game types?
8. What aspects of explaining a game's dynamics do you find most challenging to convey to your audience?
 - How do you prepare to explain complex game mechanics in an accessible way?
 - Can you share techniques you use to ensure clarity in your explanations?
9. What changes are you looking forward to in the board game market, and how do you think these will benefit the industry?
 - How do you think these changes would benefit the industry and players?
 - What barriers exist that you believe should be addressed to foster innovation?
10. Have you spotted any significant trends in the board game market recently, and what impact might they have on the industry's future?
 - How do you think these trends started, and what do they indicate about player preferences or industry directions?
 - How do trends influence your content creation or testing priorities?

11. What are your thoughts on the integration of technology in board game design, and how do you see it shaping the future?
 - Can you share examples of games that have successfully incorporated technology?
 - How do you think technology can influence the traditional board game experience?
 - What potential do you see for technology to expand the board game audience or market?

Game Experts

1. Can you tell me about yourself. What is your favorite board game or card game? Do you have it here? Why it stands out for you?
2. What elements do you look for that make a board game exceptional?
 - When assessing board games, what criteria do you use to judge whether a game is high-quality and worth playing?
 - How do you weigh different factors like gameplay depth, artwork, packaging, and theme in your assessment?
 - What is a deal-breaker for you in game quality?
3. Have there been times when a board game did not meet your expectations? Could you elaborate?
 - What recurring issues have you encountered in the games you've tested?
 - What common red flags alert you to potential issues in a game?
 - How do these issues impact the overall gaming experience?
4. In your opinion, which aspects of board games today are most in need of improvement?
 - What innovations are you hoping to see in the future of board game design?
5. What genres or types of games do you feel are currently underrepresented and should be more prevalent in the market?
 - Why do you think there is a shortage of these types of games?

- How could the industry benefit from a greater variety of these games?
 - What do you think is holding back the production of these game types?
6. How do crowdfunded games compare to other games you've tested, and what's your take on them?
- Can you share your experience with a crowdfunded game that exceeded or fell short of expectations?
 - How do you judge a game by their crowdfunding campaign page? What makes it compelling and convince you to back the project?
7. What type of demographics you usually have in here? What is the major age of them? Who they come with to play? Families? Friends? Partners? Or colleagues? Classmates? In what numbers?
- How often you see familiar faces here? I mean what is your assumption of the ratio between new costumers and loyal costumers here?
 - Is there any specific occasion you noticed that makes costumers come here to play? At what times you find here more crowded? Why?
8. What type of games they are looking for to play with here?
- Do they try different games here or prefer to play one game once or multiple times?
 - Games with what duration they prefer to play?
 - Are there any specific game or games they mostly prefer to play or ask for? Why is that?
9. Have you noticed any trend among players? Or any shift in them? In their demographics? Their selecting and playing behavior?
10. If you want to suggest a game to your costumers, what are the factors you include in your suggestion? And what do you typically suggest? Why?
- Have you ever suggested a game and in feedback you found that the players couldn't connect with it or enjoy it? What was the reason as your point of view?
11. What aspects of explaining a game's dynamics do you find most challenging to convey to your audience?
- How do you prepare to explain complex game mechanics in an accessible way?