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STUDY NOTES

Market in Focus: Tabletop Gaming in the UK

Levels: BTEC Level 3   **Exam boards:** Edexcel

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This resource provides a summary of some of the key features of the Tabletop gaming market in the UK and potential approaches that manufacturers of tabletop games can raise awareness of their brand to reach potential customers.

THE TABLETOP GAMING MARKET

What are Tabletop Games?

According to Wikipedia, tabletop games are "games that are normally played on a table or other flat surface, such as board games, card games, dice games, miniatures wargames or tile-based games".

Using this definition of tabletop games, it can be seen to include quite a wide variety of game formats, with the defining feature that the games in question are physical in nature rather than delivered or played digitally.

There is clearly some brand overlap between tabletop games and digital games. For example, some of the most popular tabletop games such as Ticket to Ride (with over 6 million games sold) are available as both physical and app-based versions. Similarly, the Warhammer game franchise operated by Games Workshop also has app editions.

Tabletop Gaming magazine is a good place for students to spend a little time getting used to the kind and range of products included in the Tabletop gaming market.

Market Size & Growth

- According to Euromonitor, global board game sales increased to $9.6 billion in 2016 from $9.3 billion in 2013.

- In 2016, the global tabletop market was valued at approximately US$3.2 billion. The global market is expected to grow to US$8.1 billion by 2021 *(source: Technavio)*.

- The overall UK games market is valued at £5.11 billion and grew by 12.4% in 2017.

- **According to the UK Games Expo exhibitor guide, in 2018 the UK tabletop gaming segment of this market is worth £350 million.**

- According to the market research company NPD, sales of tabletop games in the UK rose 20 per cent in 2016.

The key points for students exploring this market are, therefore:

- More than just a niche market - the UK market for tabletop games is worth hundreds of millions of pounds

- Strong growth - much higher than the overall toy market

Product Development

- The rapid growth of the board game market has encouraged many new entrants into the global market.

- According to the Washington Post, in 2017 over 5,000 board games were introduced into the U.S. market alone

- A large number of new tabletop games are developed and launched by independent publishers, many making use of crowdfunding platforms like Kickstarter to both raise finance for, and publicise the game's development. You can view examples of the latest tabletop games being developed by UK manufacturers and seeking crowdfunding on Kickstarter here.

Distribution: How TableTop Games are Sold

- Tabletop games are sold using a variety of distribution channels. The most popular titles are sold online by e-commerce giants such as Amazon as well as an increasing number of specialist online retailers of games such as Games Radar, Games Lore and GamesQuest

- In 2009, there were 479 specialist games and toy stores in the UK. Since then, this number has increased year-over-year, with figures reaching 901 in 2016. Specialist toy stores are also widening the range of tabletop games they stock

- A high percentage of tabletop games sold in the UK are English language versions of popular European games (where tabletop gaming is a better-established and more mainstream leisure activity). The leading distributor of these games, acting as an intermediary between manufacturers and retailers is Asmodee UK.

- Most tabletop gaming manufacturers also sell direct to consumers using their websites. The most popular tabletop games tend to have dedicated websites too providing players with tips, tricks, forums and support

- An interesting development in the market has been the growth of tabletop gaming cafes, including in the UK. These act as a source of community for players as well as a means of promoting new games by manufacturers

Promotion of Tabletop Gaming by Manufacturers

The barriers to entry in the tabletop gaming market are relatively low. For an investment of less than £10-25k it is possible to get a game concept designed, trialled and launched.

As a consequence, there is strong flow of new product development which makes it harder for manufacturers to get their games and brands noticed (until they discover a successful format).

Word of mouth recommendation and reviews by tabletop gamers is a particularly important source of demand. PR and social media activity therefore play a key role in promotion.

This useful article describes the promotional activities of tabletop gaming manufacturers who were looking to build awareness of their new product as they prepared for, and launched a crowdfunding campaign. The comments from the entrepreneurs highlights the importance in promotion campaigns of:

- Engaging with existing social media audiences specialising in tabletop gaming (e.g. getting feedback from market experts)

- Making use of tools such as Facebook groups, Instagram and Twitter to build an engagement audience and generate interest and excitement

- Using paid-for advertising on social media (the targeting capabilities of Facebook were particularly cost-effective for many projects)

Another key promotional activity in this market is the use of **exhibitions and conventions**.

Whilst the target audience for tabletop gaming manufacturers is growing and becoming less dominated by the so-called "nerds", there is still a very strong sense of community amongst the gamer audience.

Attendance at gaming exhibitions and conventions has grown strongly in recent years, not just in traditionally strong gaming countries like the US and Continental Europe, but also now in the UK.

As this promotional document for UK Games Expo (2019) illustrates, such conventions are now spread over several days and attract tens of thousands of potential customers, stockists and other relevant stakeholders.

For a relatively low promotional spend, a tabletop gaming manufacturer might consider taking stand space at an event such as UK Games Expo 2019 (and/or tabletop gaming live 2019).

As you can see from the UK Games Expo details, attendance is significantly cheaper than attending the longer-established international events such as GenCon 2019 which is a large tabletop gaming convention running over 4 days in the US.

The largest board and card game convention in the world is Internationale Spieltage, usually just called Spiel, held in Essen, Germany each October.

USEFUL ARTICLES TO READ ABOUT TABLETOP GAMING IN THE UK

https://www.theguardian.com/lifeandstyle/2018/may/12/millennials-drive-board-games-revival

https://www.theguardian.com/technology/2016/sep/25/board-games-back-tabletop-gaming-boom-pandemic-flash-point

https://www.board-game.co.uk/success-of-tabletop-gaming/

https://www.businesswire.com/news/home/20161228005057/en/Top-3-Trends-Impacting-Global-Board-Games

RESEARCH VIDEOS

Tabletop Gaming on the Rise in Nottingham

"The Board Game Boom" Documentary