

Purple Pawn's

2011 Worldwide Game Industry Survey

Covering non-sports, non-video games

<http://purplepawn.com>

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Introduction

This report contains the results of a survey sent to over 6,900 companies in January, 2012. The companies surveyed are companies that make money by means of analog, tabletop games, which are games that are not sports (ball games, yard games, billiards and similar games) and not video games (console, PC, mobile, and handheld electronic games). Products of interest include:

- Board games
- Card games and collectible or trading card games
- Tile games
- Dice games and poker materials
- Role-playing games
- War games and miniatures
- Puzzle or Solitaire games (but not true puzzles, such as jigsaw, brainteaser, etc)
- Any product or service used to create, enhance, organize, market, sell, ship, or package these games

Any company, regardless of its primary industry, that makes money through analog games – via licensing, publishing, producing, selling, and so on – was considered.

Summary

Over the course of a year, around 7.5% of the companies I follow closed. Single-game game companies, brick-and-mortar retailers, and miniature manufacturers closed at a higher frequency than other companies. Sometimes new retailers open in the same locations as ones that closed.

I received 391 responses from 35 countries and 39 US states. 2011 apparently was much like 2010. Of those companies that didn't close, the overwhelming majority are doing fine or even better than last year – only 13% report doing worse than last year.

Among the responding retailers, the top performing game lines from last year – MtG, Catan, Dominion, and Warhammer – were the top again this year. Pathfinder products outperformed D&D products by 2 to 1 (last year they were about even).

More Information

If you would like specific information about anything in this survey, additional analysis from the responses, or would like to contract a specially-run survey, contact me at admin@purplepawn.com to arrange specifics.

Names and specific identifying information about the companies that participated in this survey are not available. The database of game companies and their contact information is not for sale.

About Purple Pawn

Since 2008, Purple Pawn's followers include top industry professionals and influential fans. With over half a million highly-targeted views in 2011, our readers and listeners get the best in industry news and trends. For year-round coverage of game news and industry information, visit Purple Pawn at <http://purplepawn.com>.

I have been writing about games since 2004 and have a personal relationship with the owners of many game publishers, designers, and game journalists. I have published a game in two editions (now also an Android app) and have designed several other games and expansions. I run game events at conventions and for companies and consult about the game industry to aspiring designers and publishers. My personal blog is at <http://jergames.com>.

Participate

To participate in future surveys, send your name, company name, website address, and email address to admin@purplepawn.com.



Overview

I currently limit the companies to those that have a working website and those that have an email contact. I limit the companies to those that made money from games; organizations that give away games for promotion or other reasons I exclude.

I divide the industry into the following categories:

- **Suppliers:** Provide products or services to help other companies make or play games, including miniature manufacturers, designers, illustrators, painters, consultants, printers, paint, plastics, and paper manufacturers, and other companies with ties to the game industry.
- **Publishers:** Create in-house games, products, and books; may use suppliers to help create the products, and distributors and retailers to help sell them.
- **Single-game Game Companies:** A subset of publishers, an sggc designs, publishes, and markets a single game or line of games (including differently themed versions of the same game, or college or junior versions of a single game). Sggcs are often startup or designer-owner companies and generally perform differently than other publishers.
- **Distributors:** Buy or take on consignment games that they did not publish and sell or distribute these games to retailers. If you only distribute your own games, I don't count you as a distributor.
- **Retailers:** Receive from publishers, sggc's, or distributors games that they did not publish and sell these to the general public.

Note that some companies fit into more than one category.

In out of the way countries, i.e. ones that don't have strong original game publishers, game retailers are nearly always also game distributors, and often also game publishers, in that they produce the games locally in the prevalent language, either legally (by license) or illegally.

There are two additional categories of companies in the game industry that I do not survey: facilitators (convention organizers, lotteries, casinos, etc) and journalists (web sites, books, etc).

Questions

These were the questions that I asked:

1. What is the name of your company and your name? If you are a subsidiary of another company, what is its name? If you have subsidiaries that would fit into one of the above five categories, what are their names?

Note: This was asked for two reasons. One, I wanted to ensure that the information I pulled from their web site was correct and up to date. Many web sites are simply unclear about the nature of their business. And two, if the response I get is not from an email to which I originally sent the survey, as it often was, I will have no idea for what company the respondent is answering.

2. Where is your main office located (city/country)?

3. With respect to your game offerings or consultations only, where are the people who buy your goods or services located (cities, regions, or countries)?

This was interpreted by the respondents as either a) to where do you market, or b) where are your actual buyers.

4. How many years has your company been involved – in any way – with the game industry?

“In any way” confused some people, but most answers were sensible.

5. With respect to your game products only, how many people does your company employ directly, including part-time? Do not consider outsourced suppliers (painters, designers, component manufacturers, etc) who may receive their own copy of this survey.

I should have added the following: A) Include yourself. B) Count all part-time employees as 0.5. This is how I massaged the responses.

6. With respect to the game industry only, into which categories would your company fall (Supplier, Publisher, SGGC, Distributor, Retailer)? Did this change from last year?

Last year I emailed everyone by hand, and so tailored this question to each recipient with my guesses (generally correct). This year I simply asked them to tell me. As I said earlier, some people don't like my categories and answered in their own way: they're a designer, or manufacturer, or what have you. I mapped their answers to my categories, and massaged their responses as required.

7. With respect to the game industry only, did your company start, expand, consolidate, merge with another company, acquire another company, or cease to operate in 2011?

“Expand” is too liberal a word; I will have to be clearer next year.

8. With respect to the game industry only, and compared to 2010, how was 2011 for your company? Great (+10% or more), good (+2% – +9%), average (-1% – +1%), poor (-9% – -2%), very poor (-10% or less). Indicate if your response is with respect to units sold or profit collected. Skip this question if your company did not operate for at least 6 months in 2010.

Note: I figured that this question, rather than one asking for specific profit values, would be more likely to receive an answer.

9. If the question makes sense for your company and with respect to the game industry only, what were your best selling products (or product lines) in 2011? Indicate if your response is considering units sold or profits collected. Please also indicate if there is a wide difference in sales results by region or country.

Some companies answered separately regarding units sold and profits collected. Although I have this information, I left the details out of this report.

10. Which products would you like Purple Pawn to mention or review on its site during the next year? Does your company have a story or company profile that would be of interest to our readers?

Note: This question was a not-so-subtle attempt to increase the number of respondents by offering them something in return for answering the questions. However, the information will actually be used (and is already being used) for posts on our site. There is mutual benefit for companies to give us interesting information and for us to have access to that information.



Closures

My company list contained 8,634 companies whose existence I had catalogued over the last two years, not including those I already knew to have already closed by the end of 2010. A closed company is one that no longer existent, was acquired, or no longer sells games.

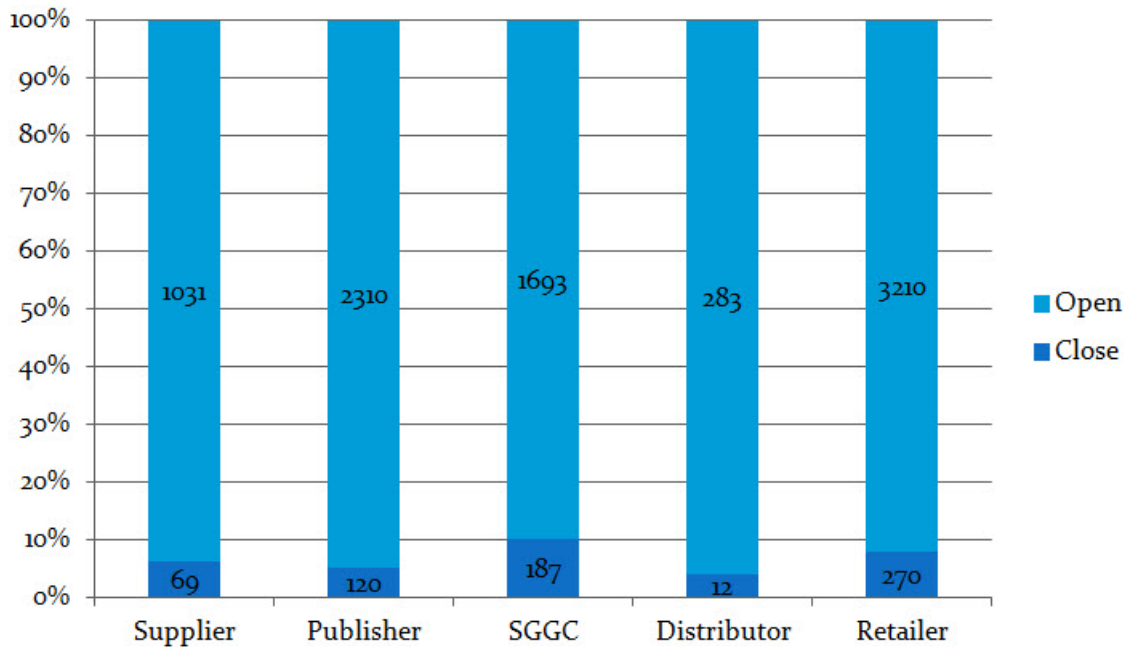
Of the 8,634 companies, 635 I found to have closed since last year, for a closure rate of 7.35% in one year.

To collect this information, I visited the web sites of all 8,634 companies. If the site appeared to be disused or non-existent, I followed up by searching Google, Facebook, and various forums to see if there was any news of the company. When in doubt, I assume that company is still functioning.

A functioning website is no proof that a company is still functioning. Conversely, a non-functioning website is no proof that a company is not functioning. Some sites that I consider closed may have re-opened with another name and web site but without any redirection to the new site. I did not look closely at all web sites to see if they continue to sell games, so some companies that I listed as open may, in fact, be closed.

Unlike last year, NO companies that I track maintain an active presence on MySpace any longer; A few MySpace sites are still listed in my records, but only because I have no other site for them but no proof that they are dead. Their last MySpace log entries are from over a year ago, generally much older. Several companies have abandoned a web site exclusively in favor of a presence on Facebook; many more companies have both a web site and a Facebook presence (and sometimes a Twitter presence). Some have a Google Plus presence. Most retailers that I track have quit using web site hosting companies like Beckett or Popshop.

Closures by Category



10% of the SGGCs I listed in my database closed within the last 1-2 years; many more perhaps maintain a web presence but are closed or have no effective sales. Retailers closed at a 7.76% rate; some were acquired by other retailers or replaced by new ones. A high number of the closures in Suppliers were miniature manufacturers.



Responses

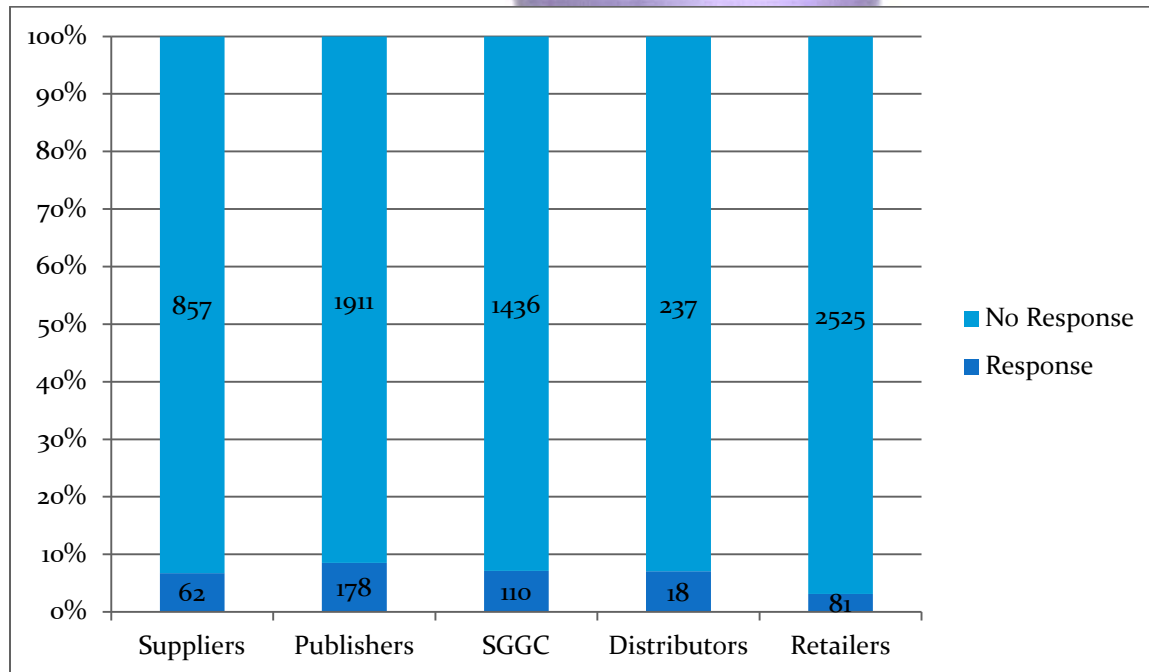
Of the 7,999 companies which remained in my database after eliminating those that had closed, I emailed 6,941 of them. The companies I didn't contact are those for which I did not have a contact email or those who had requested me not to contact them.

Response Rate

I expected a response rate of between 5% to 10%. I received 391 responses for a rate of 5.63%, less than last year's response rate of 6.35%.

567 companies were surveyed this year for the first time (they were not on last year's list). 263 companies responded to the survey for the first time (they may not have responded last year or they may have been among the above 567 who were surveyed for the first time). 128 companies responded for the second time, i.e. to both this year's and last year's survey.

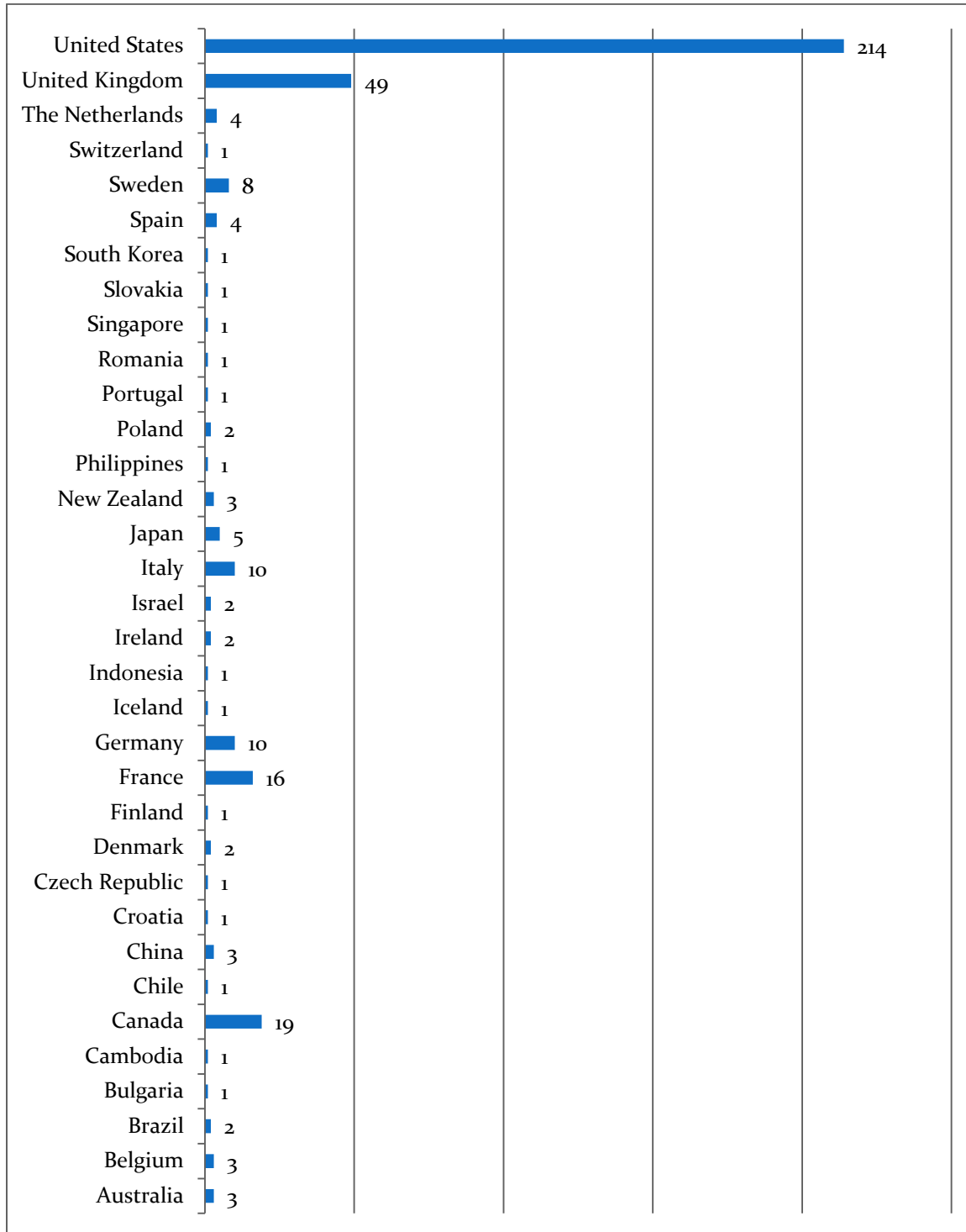
Responses by Company Type



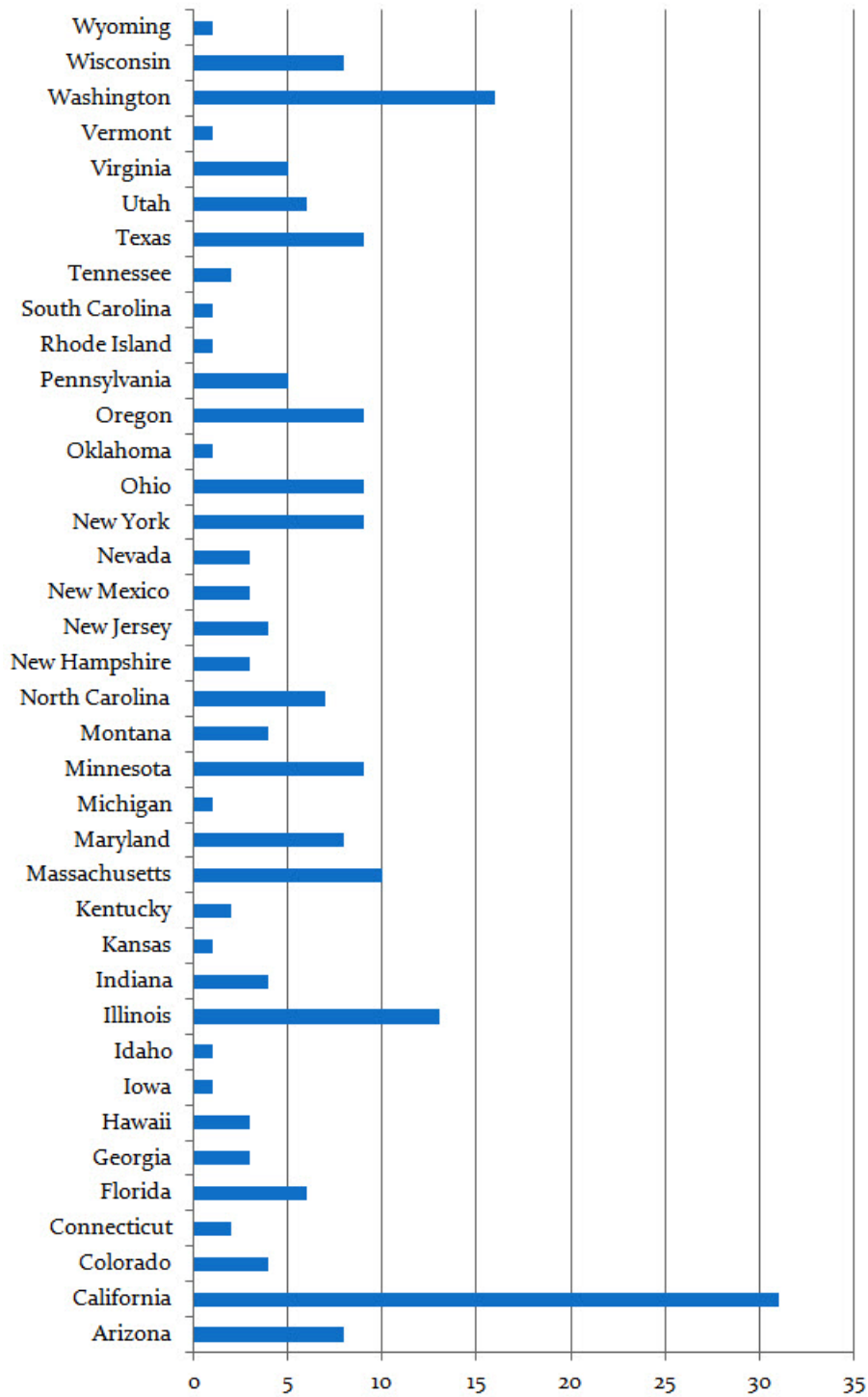
Note that some companies belong to multiple types and are counted in each type. Retailers continue to have the lowest response rate. Last year SGGCs had the highest response rate, but this year, publishers edged them out. I'm not sure why.

Responses by Company Location

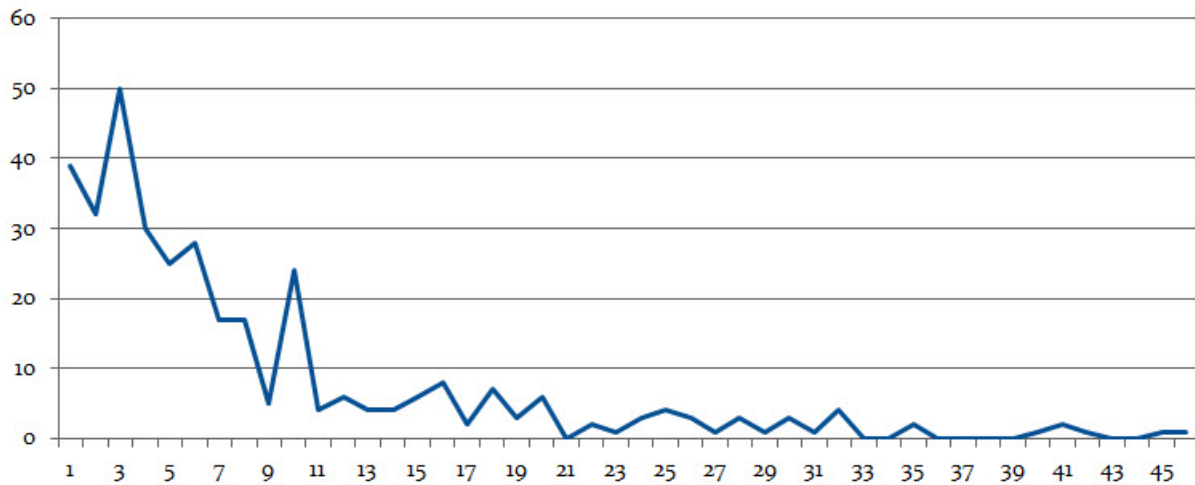
The responses came from 35 countries, though primarily from the United States. Asking the questions in English, and being associated with an English-language news site, may have something to do with this.



In the US, the responses came from 39 states:

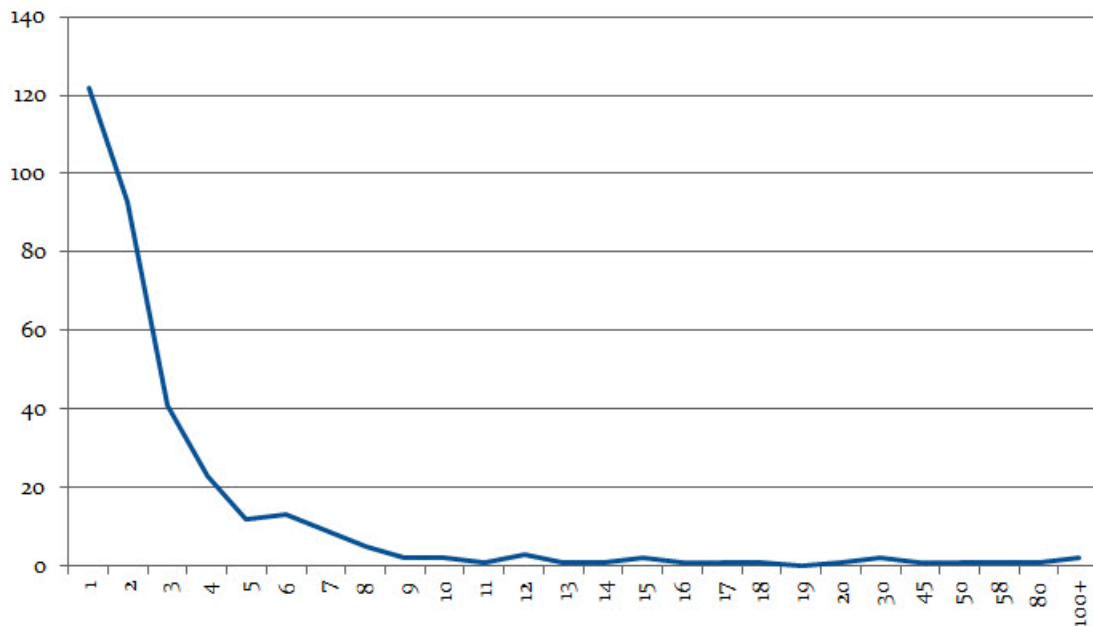


Responses by Company Age



Not every respondent included their company's age. That last number on the end there is not 46 or 47, it's 101. I counted anything less than a full year as a full year, so "2 years" includes companies who have been around for 1¼ years.

Responses by Company Size



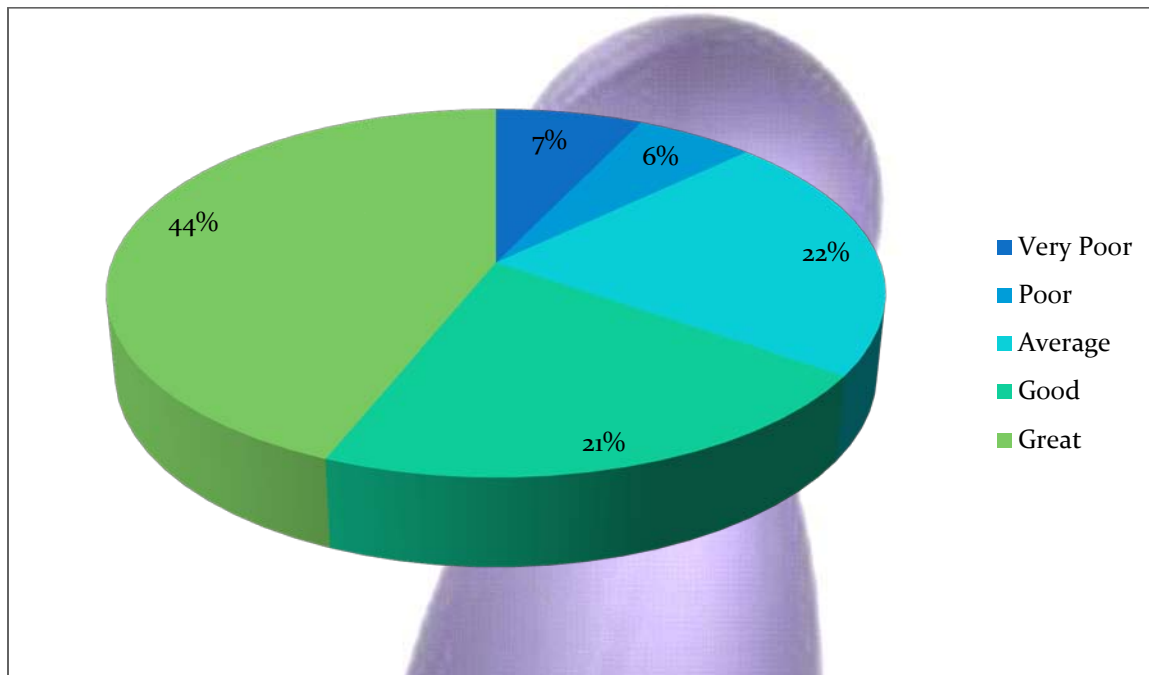
Not every respondent included their company's size. I counted part time employees as 0.5 people. After 20 people, there were single responses for 30, 45, 50, 80, 100, and 100+. Many companies with 1 or 2 people are done as hobbies or side work to people with day jobs.

2011 Results

Considering only the respondents, five companies consolidated while 71 expanded (including acquiring another company or another company's stock). Two expanded by creating digital versions for their games. One consolidated in one place and expanded in another. 41 companies started (or rebooted or moved into board games).

Among companies that closed, only a handful responded to tell me this.

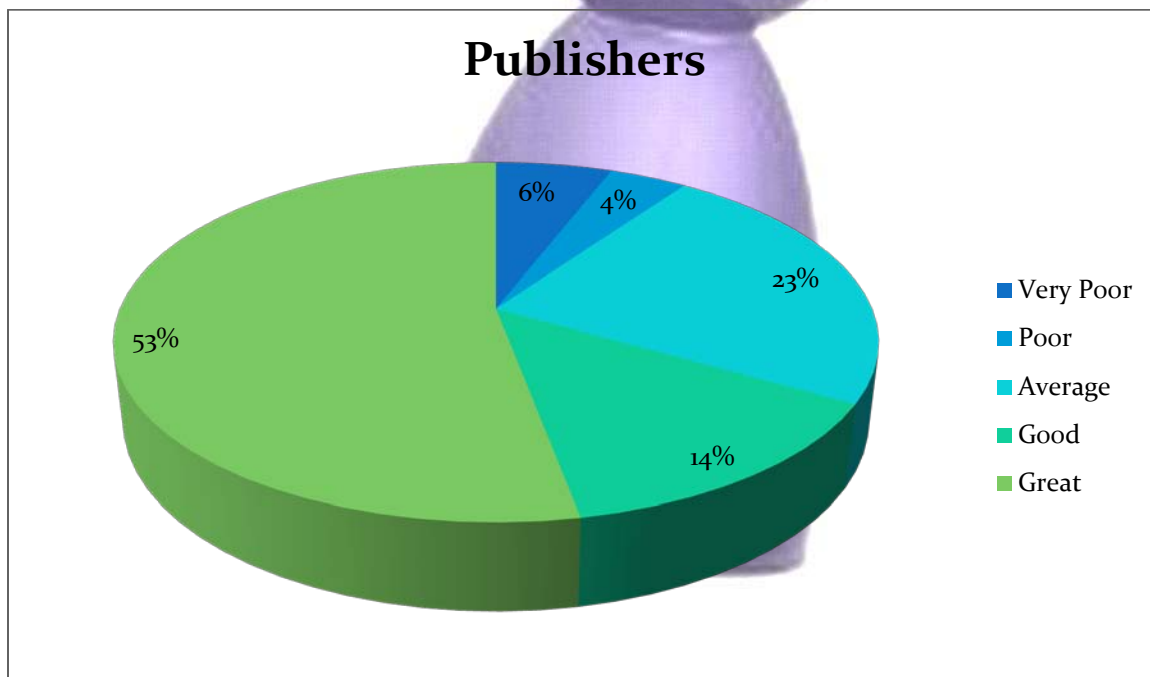
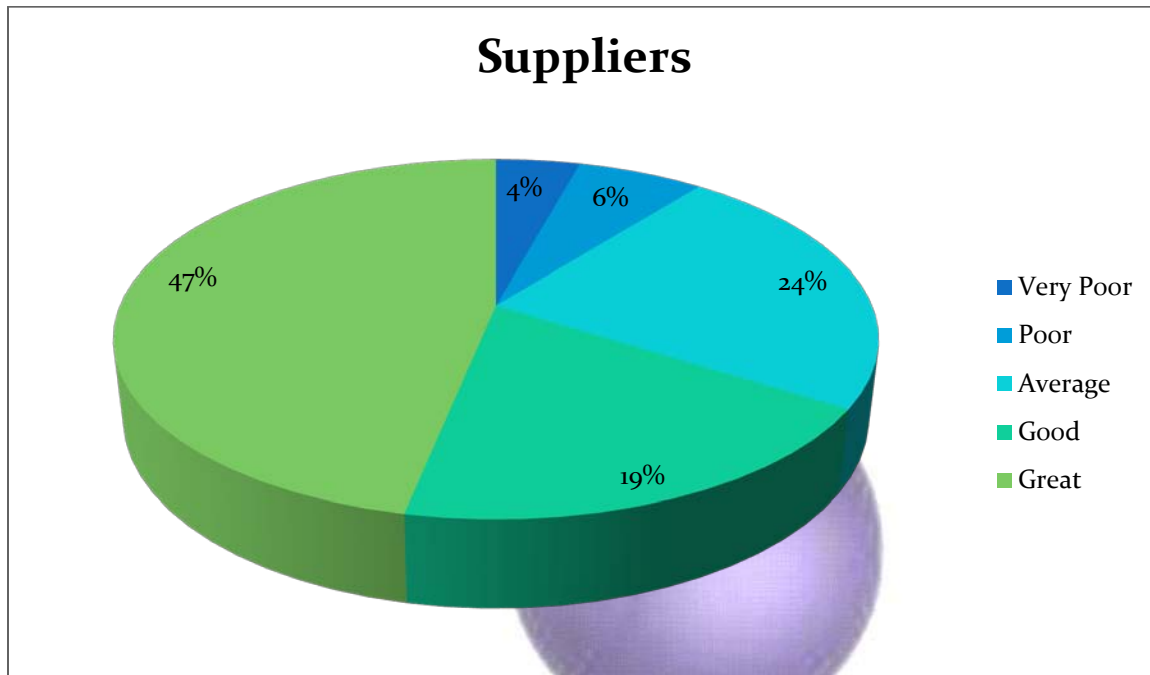
2011 Sales Results

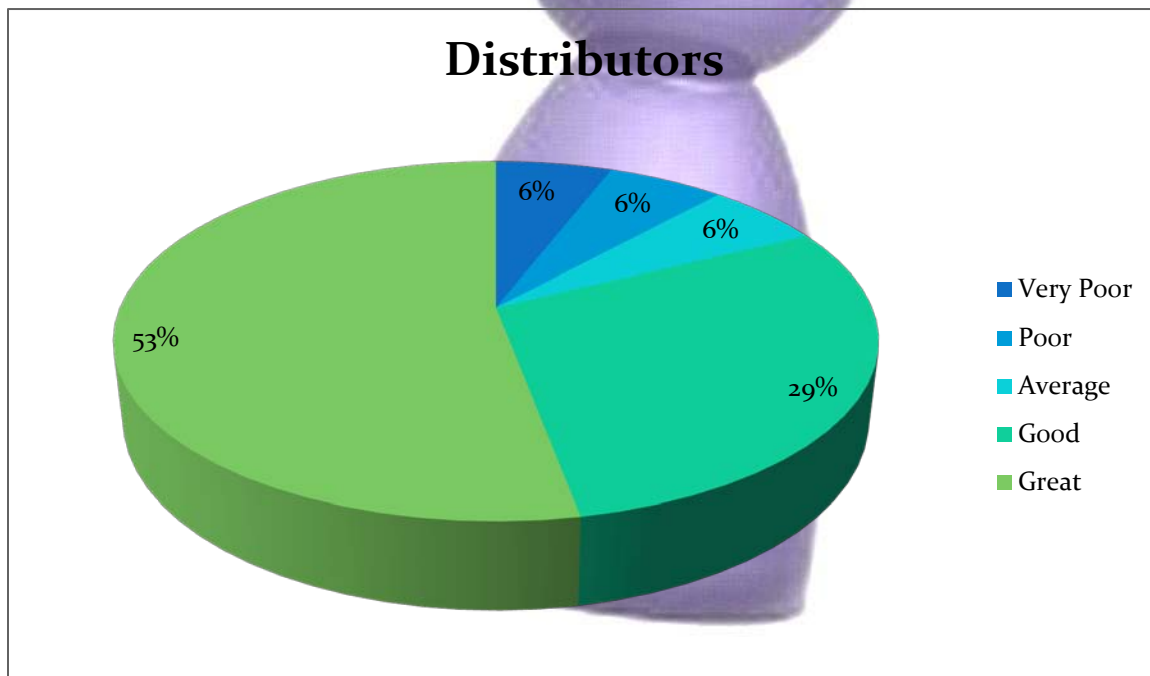
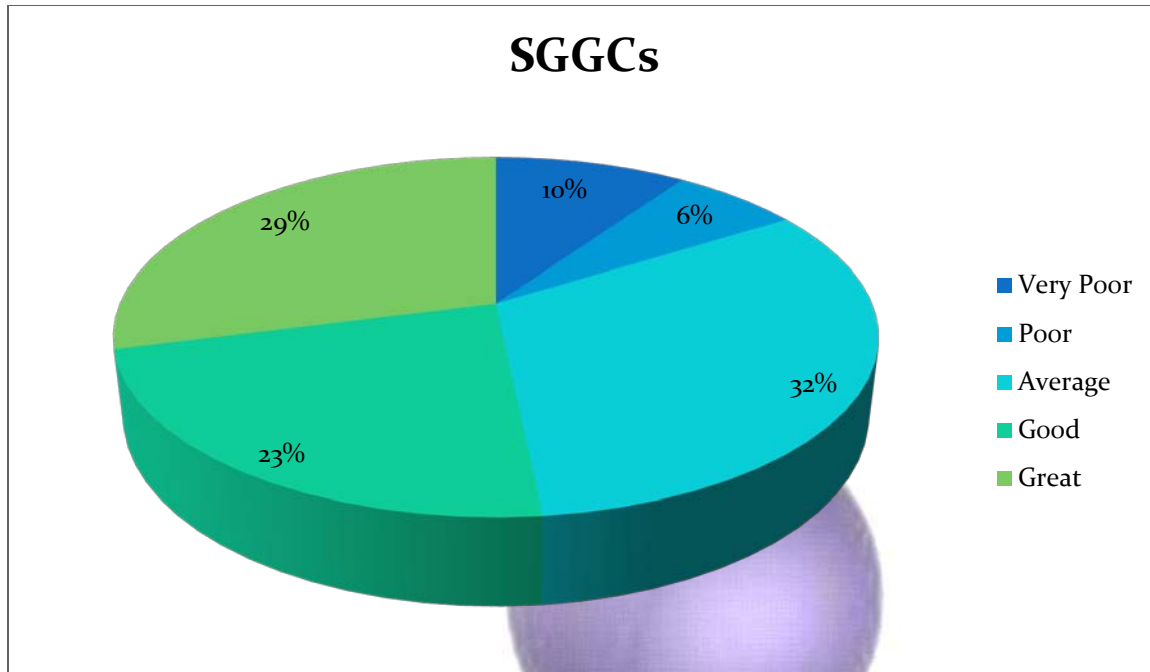


- Great = +10% or more
- Good +2% – +9%
- Average -1% – +1%
- Poor -9% – -2%
- Very poor -10% or less.

Very poor, poor, and average are each down a percentage point from 2010, and good and great are up two percentage points. Considering that the results came from mostly different companies and were given voluntarily without any means of verification, the results are not scientific. Companies may wish to tell me that they are doing better than they are, for whatever reason. Companies not doing well may elect to not report their results.

Sales Results by Company Type







Sales Results of Respondents Who Also Answered in 2010

| 2010 / 2011 → | Close | Very Poor | Poor | Average | Good | Great |
|---------------|-------|-----------|------|---------|------|-------|
| Very Poor | 4 | — | — | — | — | 4 |
| Poor | — | 1 | 3 | 4 | — | 3 |
| Average | 2 | 2 | — | 5 | 5 | 1 |
| Good | 2 | 2 | 2 | 6 | 6 | 4 |
| Great | 1 | 3 | 3 | 6 | 5 | 24 |

Best Sellers

The following are bestsellers from retailers, considering only items that appear in at least two responses. The numbers in parentheses are last year's responses; bear in mind that I received more responses last year.

The top four performers (MtG, Catan, Dominion, and Warhammer) were the same as last year.

| Product | Publisher * | Count (last year) | Comments |
|------------------------|-------------------------------|-------------------|---|
| Magic CCG line | Hasbro / Wizards of the Coast | 31 (32) | Magic continues to be a strong seller in all types of retail outlets. |
| Catan line | Mayfair Games | 14 (22) | Catan and Dominion were again neck and neck for top family game lines. |
| Dominion line | Rio Grande Games | 13 (21) | Solid performance for two years running. |
| Warhammer lines | Games Workshop | 13 (12) | Including minis and RPGs, 40k and fantasy. GW produces new products every year. |

| Product | Publisher * | Count (last year) | Comments |
|-----------------------------------|-------------------------------|------------------------------|--|
| Ticket to Ride line | Days of Wonder | 10 (7) | |
| Pathfinder | Paizo Publishing | 9 (7) | Pathfinder outperformed D&D by 2 to 1 going by the respondents. |
| Warmachine/Hordes | Privateer Press | 9 (8) | Last year these performed nearly as well as GW; this year they still performed well. |
| Carcassonne line | Rio Grande Games | 7 (11) | |
| YuGiOh CCG line | Konami Digital Entertainment | 7 (8) | |
| Munchkin line | Steve Jackson Games | 6 (8) | Still a strong seller, with much crossover appeal. |
| HeroClix | WizKids | 5 (3) | WizKids rebooted its company this year with several board games as well. |
| Pokemon CCG line | Pokemon | 5 (4) | |
| 7 Wonders | Asmodee | 4 | New in 2011, won several awards. |
| Dungeons and Dragons lines | Hasbro / Wizards of the Coast | 4 (8) | Mainly 4e material. |
| Fantasy Flight lines | Fantasy Flight Games | 4 (8) | Lord of the Rings card game, Arkham Horror, Battlestar Galactica, etc |
| Card sleeves | Ultrapro, etc. | 3 | Various sizes and brands. |
| Dixit | Asmodee | 3 (7) | |
| Fluxx line | Looney Labs | 3 (2) | |
| Jungle Speed | Asmodee | 3 (3) | |
| Pandemic | Z-Man Games | 3 (4) | Seems to be going strong, despite the cheaper Forbidden Island. |
| Axis & Allies line | Hasbro / Milton Bradley | 2 (3) | |
| Bohnanza | Rio Grande Games | 2 (2) | |
| Checker/Chess | Public | 2 | |
| Colorku | Mad Cave Bird Games | 2 (2) | |
| Mexican Train (Dominoes) | Public | 2 | |
| En Garde RPG | MyLing Spel | 2 | Third edition came out Dec 2010. |
| Forbidden Island | Gamewright | 2 (7) | |
| Jok-R-Uummy | Sejenna (Jennick) | 2 | |
| Ligretto | Playroom Entertainment | 2 | Based on older games of speed, comes in three colors and a new dice version. |
| Password | Endless Games | 2 | |
| Rory's Story Cubes | Gamewright | 2 (3) | |
| Redneck Life | Gut Bustin' Games | 2 | |
| Small World | Days of Wonder | 2 (2) | |

| Product | Publisher * | Count (last year) | Comments |
|---------|-------------------|----------------------|----------|
| Spot It | Blue Orange Games | 2 | |
| Wizard | US Games Systems | 2 | |

* Multiple publishers publish most game/game lines; only one is presented in the table.

Notably absent because they were on last year's list: Word of Warcraft CCG, Agricola, Bananagrams, Katamino, L5R CCG, Rat-a-Tat Cat, Saboteur, Set, Wits and Wagers, Zombie Dice.

Just because a game sold well at 10 retailers, but a second game sold well at only 2, doesn't mean that the first game sold more units or produced more profit overall than second one did.

