

2013 Global Game Industry Survey



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Executive Summary

This report contains the results of a survey of tabletop game companies in March 2014. The companies surveyed are companies that make money by means of traditional and modern tabletop games, which are games that are not sports (ball games, yard games, billiards, bar, and similar games) and not video games (console, PC, mobile, and handheld electronic games).

I collected information from nearly 300 companies from over 20 countries and from 40 US states. Of those companies that didn't close, the overwhelming majority are doing fine or better than last year. 13% report doing worse than last year (down 2% from last year's survey); this percentage doesn't take into account companies that closed.

More than half of responding publishers use, or plan to use, a crowdfunding source such as Kickstarter to publish their games.

Among responding retailers, Hasbro's *Magic: the Gathering* CCG, Game Workshops' *Warhammer* miniatures and rules, Mayfair Games' *Catan* board and card games, and Paizo's *Pathfinder* RPG products were at the top again this year, as they have been for the last three years. Rio Grande Games' *Dominion* games sales dropped; its place in the top five was taken by Konami's perennially popular *Yu-Gi-Oh* CCG.

Pathfinder products outperformed Wizards of the Coasts' *Dungeons & Dragons* products by 2.5 to 1 – even more than last year – while players wait for D&D 5th edition to be released later this year¹. Gaming accessories, such as card sleeves, and items consumed by gamers, such as soft drinks, continue to be strong dependable sellers. RPG and miniature products from smaller publishers were included in the bestselling product lines of some retailers.

Strong new sellers this year include Fantasy Flight Games' *Star Wars X-Wing* miniatures, Fantasy Flight Games' *Star Wars Edge of Empires* RPG, and basically all Fantasy Flight Games' living card games (LCGs), especially *Android Netrunner* (many retailers simply listed "Fantasy Flight Games" as their best selling products).

Another big new seller at responding retailers is *Cards Against Humanity*, a perverse alternative to more traditional and safe party games. Amazon already listed this game as a top-seller during most of 2012, but the survey respondents are now catching up.

¹ <http://company.wizards.com/content/wizards-coast-announces-thrilling-dungeons-dragons-launch-summer-2014/>

Contents

Executive Summary	1
Contents	2
Introduction.....	3
Company Types	3
Mainstream Games and Retailers	4
More Information.....	5
About Purple Pawn.....	5
Participate	5
Responses.....	6
Responses by Company Type	6
Responses by Company Location	7
Responses by Company Ages (in Years)	9
Responses by Company Size (in Employees).....	9
Results	10
Sales Results	10
Sales Results by Company Type	11
<i>Suppliers</i>	11
<i>Publishers</i>	11
<i>Distributors</i>	12
<i>Retailers</i>	12
Comparison for Respondents Who Also Answered in 2012	13
Best Sellers	13

Introduction

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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 created for tabletop war games
- 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, package, or facilitate the play of these games

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

I visit over 8,000 websites and contact by email all of the companies that I survey as well as several hundred others. This year's data and analysis reflects my research and the pool of responses, so its representation as regards the industry as a whole must be weighed accordingly.

Company Types

I currently limit the companies surveyed 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, cardboard, paper, paint, and plastic manufacturers, designers, illustrators, painters, consultants, printers, 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.
- **Distributors:** Buy or take on consignment games that they did not publish and sell or distribute these games to retailers. If a company only distributes their own games, I don't count them as a distributor.
- **Retailers:** Receive from publishers or distributors games that they did not publish and sell these to the general public. Includes toy, hobby, and comic stores, as well as museums, supermarkets, department stores, and so on.

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).

Mainstream Games and Retailers

Mainstream games such as *Monopoly* and *Scrabble* were not reported by the retailers who responded to this survey, which do not include major retailers such as Wal-Mart, Target, or Toys-R-Us. Amazon.com listed *Cards Against Humanity*, *Qwirkle*, *Spot It*, *Ticket to Ride*, and *UNO* highly around the end of the year. Wal-Mart, Target, Toys R Us, and Barnes and Noble listed well-known mainstream games among their top sellers, typically branded editions of *Scrabble*, *Operation*, *UNO*, *Connect 4*, *Sorry*, and a token *Monopoly* edition. Also listed were original games such as *Disney Princess*, *Apples to Apples*, *Five Crowns*, *Scattergories*, *No Stress Chess*, children's games such as *Let's Go Fishing*, and other games not appearing in this report.

Mainstream game sales are generally driven by brands and licenses from movies and TV shows. In turn, Hasbro leverages its Monopoly brand through licensing to other game publishers, such as Winning Moves and USAopoly, and through Monopoly-related merchandise such as movies, restaurants, slot machines, and clothing. Hasbro's revenues from the actual sales of in-house produced Monopoly board games is unknown. Hasbro does not reveal sales specifics, but its annual report indicates that its game and puzzle sales in 2013 were up 10% driven by *Magic: The Gathering*, and *Monopoly*², as well as *Elefun & Friends*, *Jenga*, and *Twister*. Mattel's toy sales are driven by Disney, Barbie, and so on, with little attention paid to their game properties. Big sellers such as UNO are not mentioned in their annual report. Mattel's Radica electronic games (*20Q*, etc) were down 6% in 2013³.

Like in previous years, I believe that *Magic: the Gathering* was the best-selling proprietary game in the world in 2013, in terms of both unit sales and revenue. This is even more likely if you include *Duel Masters*, a *Magic: The Gathering* spin-off whose English version was abandoned by Wizards of the Coast but is still published by Japan's Takara Tomy and is wildly popular in Japan (as of 2013, over 3 billion *Duel Masters* cards have been sold⁴). I also believe that *Magic* rivaled *Yu-Gi-Oh* (and may have beaten it if you include *Duel Masters*) as the best-selling proprietary

² <http://investor.hasbro.com/releasedetail.cfm?ReleaseID=824366>

³ <http://news.mattel.com/News/Mattel-Reports-Fourth-Quarter-and-Full-Year-2013-Financial-Results-and-Declares-Quarterly-Dividend-3ef.aspx>

⁴ http://www.takaratomy.co.jp/ir/financial/pdf/annual/13_annual_all.pdf

game in the world in 2013, in terms of unit sales (despite the Guinness-verified “world record” awarded to Konami in March 2011 for their 25 billion cards sold⁵). Unfortunately, I did not get many responses from Asian retailers, so there is no way to know for sure.

2013 brands that drove mainstream game sales included movies like *The Hunger Games*, *The Hobbit*, *Marvel* properties, *Monsters University*, and *Despicable Me 2*, and TV shows *CSI*, *Glee*, *Doctor Who*, and *A Game of Thrones*. In 2014 we can look forward to properties such as *Divergent*, *The Maze Runner*, and *The Giver*, as well as several *Marvel* sequels, *The LEGO Movie*, a *Teenage Mutant Ninja Turtles* reboot, *How to Train Your Dragon 2*, the next *Muppets*, the next *Hobbit*, and the next *Hunger Games*.

Despite optimistic projections⁶, video games and accessories were mixed or flat in 2013, with sales boosts due to PS4 and Xbox 1⁷.

More Information

If you would like specific information about anything in this survey, additional analysis from the responses, additional information by market location or segment, or would like to contract a specially-run survey, contact me at shadejon@gmail.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. 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 game publishers, designers, and game journalists. I have published a game in three editions (also as an app) and have designed several other games and expansions. I design and run game events at conventions and for companies and consult on game design and 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 shadejon@gmail.com.

⁵ <http://www.guinnessworldrecords.com/world-records/7000/best-selling-trading-card-game>

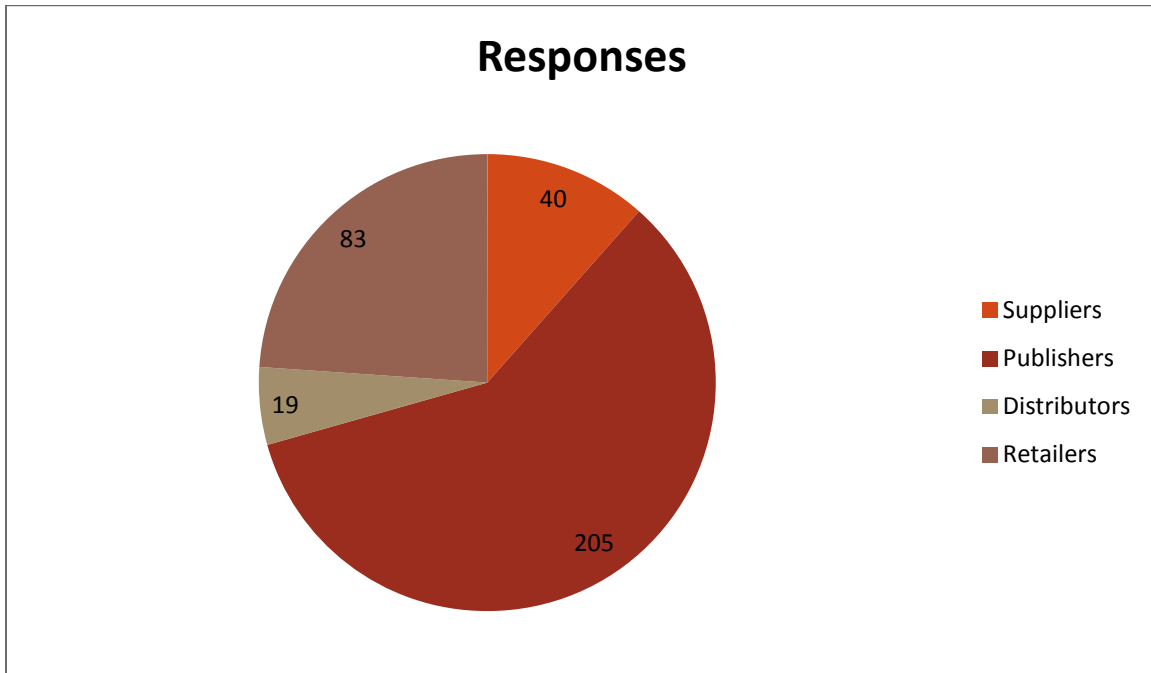
⁶ <https://www.gartner.com/newsroom/id/2614915>, for example

⁷ <http://news.gamestop.com/press-release/business/gamestop-reports-2013-holiday-sales-results>, for example

Responses

I asked 7,854 companies to respond to the survey. In addition, companies could fill out the survey as a result of being referred to it. I received 294 responses for a rate of 3.74%. 27 companies responded for the fourth time (all surveys to date), 36 responded for the third time, and 88 responded for the second time.

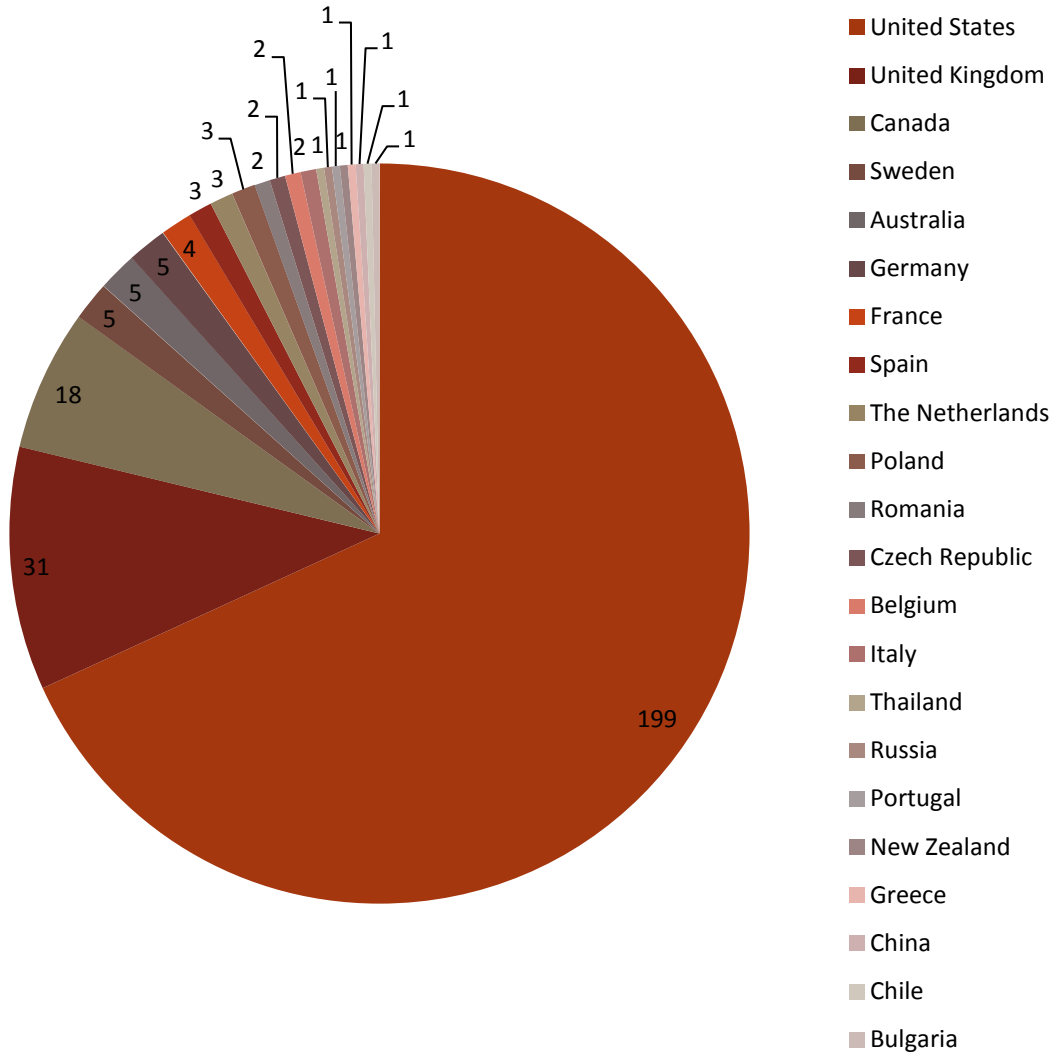
Responses by Company Type



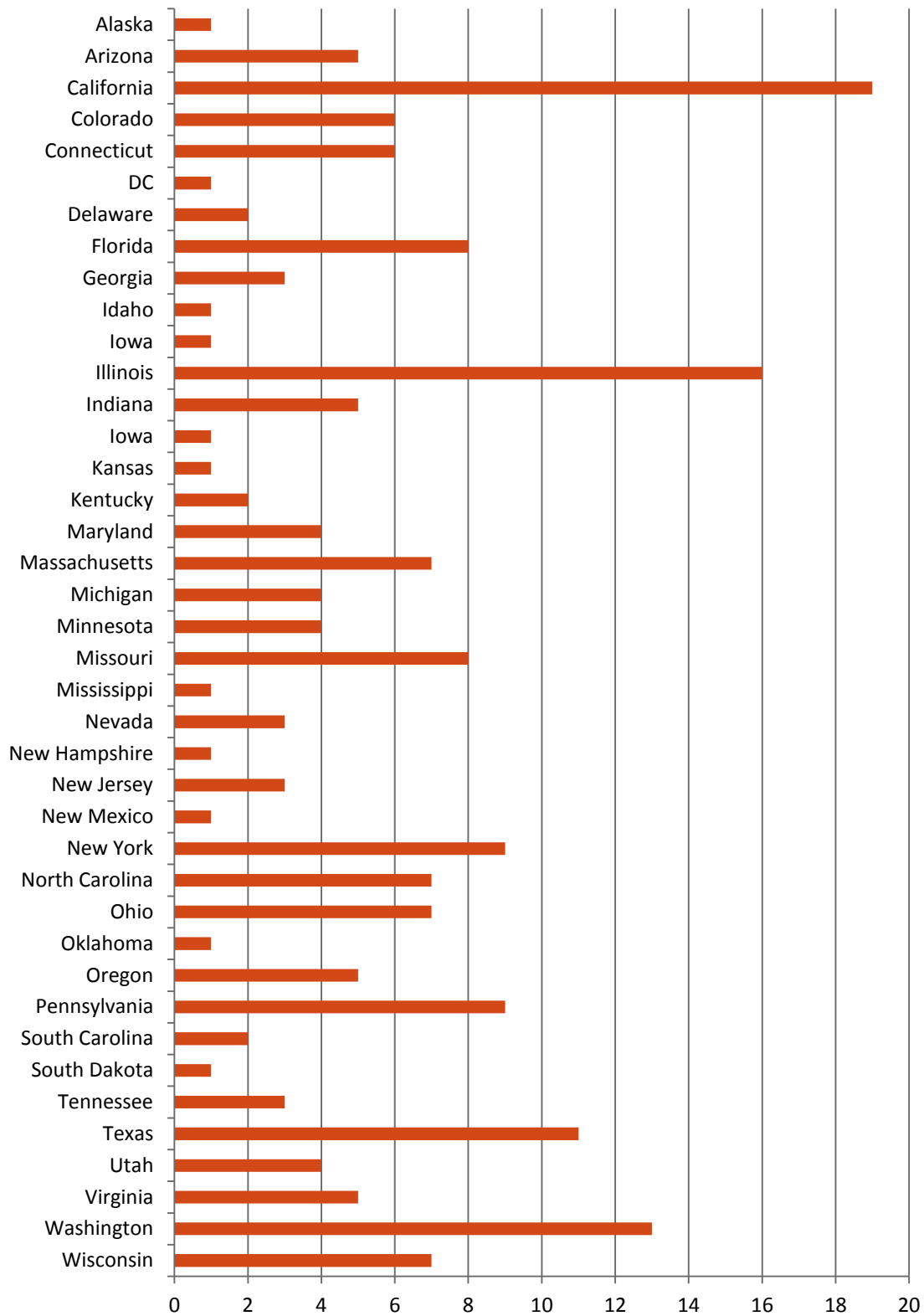
Note that some companies belong to multiple types and are counted in each type.

Responses by Company Location

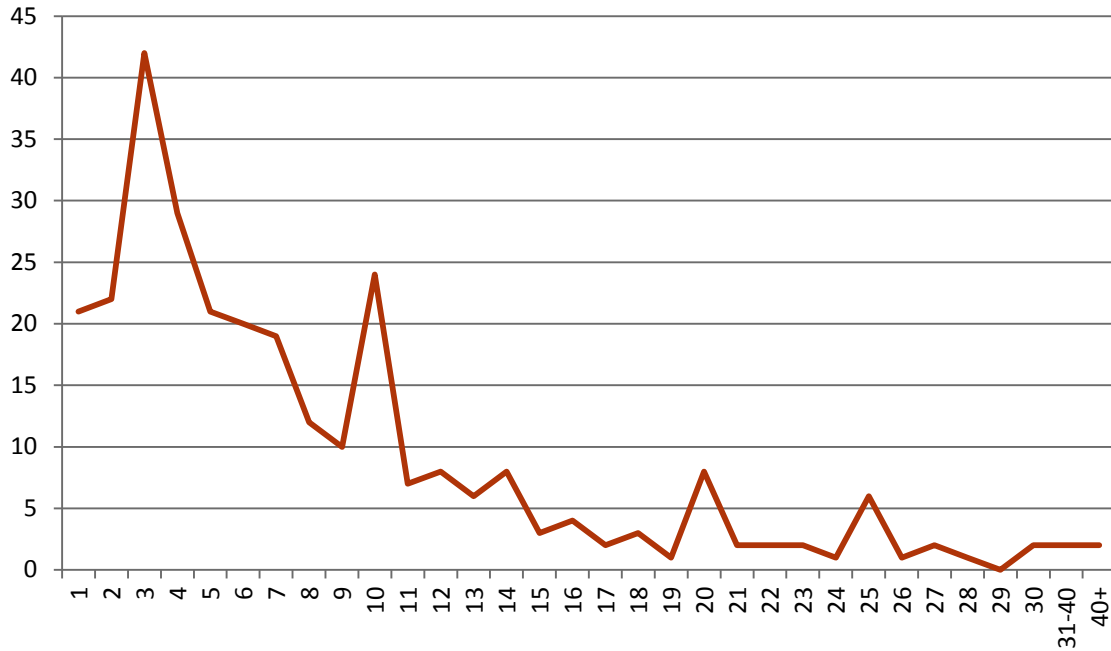
The responses came from 22 countries, primarily from the United States.



In the US, the responses came from 40 states (counting DC):

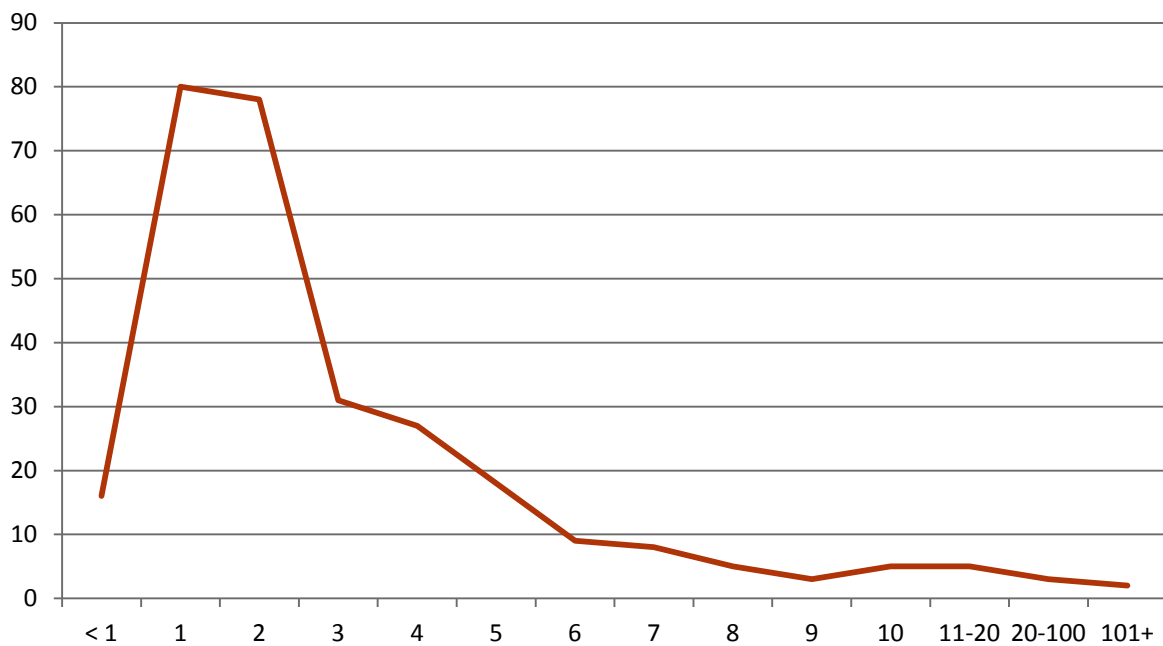


Responses by Company Ages (in Years)



Not every respondent included their company's age. Looking at the above chart, I suspect that some of the respondents rounded their ages to the nearest 5 years.

Responses by Company Size (in Employees)

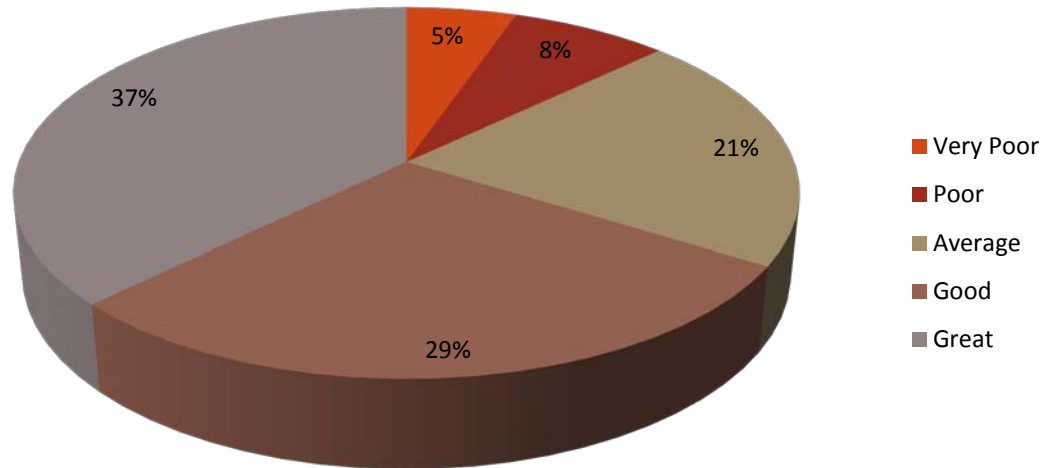


Not every respondent included their company's size. I counted part time employees as 0.5 people. Many companies with 1 or 2 people are run as hobbies or side work by people with day jobs.

Results

Considering only the respondents, 11 companies consolidated while 107 expanded (employees, product lines, space, or acquisition). A few companies are in the process of refocusing or changing their names.

Sales Results

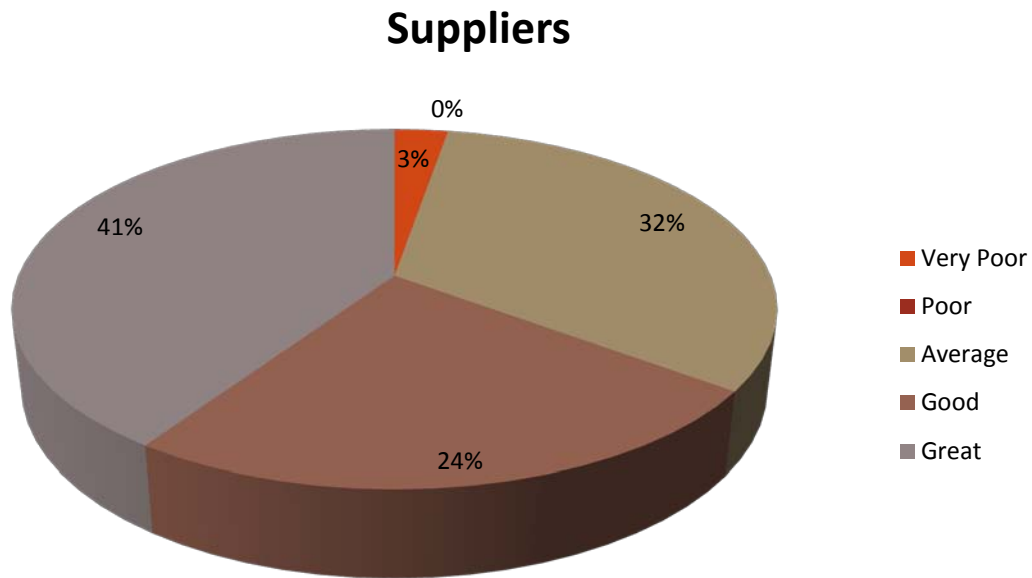


- Great = +10% profit or more
- Good +2% – +9%
- Average -1% – +1%
- Poor -9% – -2%
- Very poor -10% or less

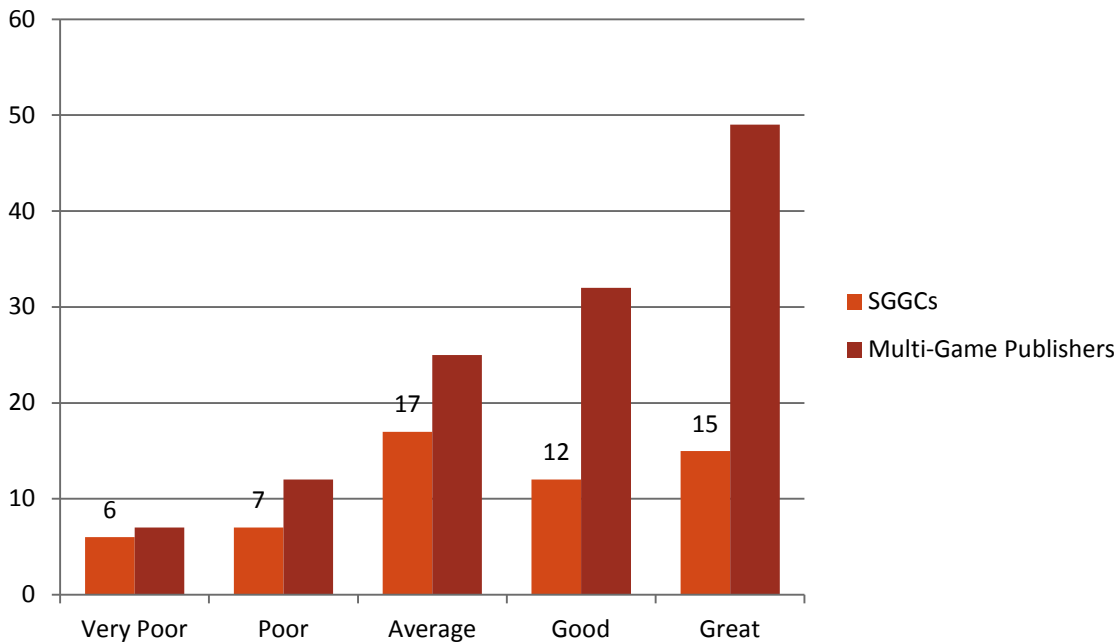
In last year's survey, 8% reported very poor, while 50% reported great. Considering that the results came from mostly different companies and were given voluntarily without any means of verification, the results are not scientific. Companies may wish to tell me that they are doing better than they are, for whatever reason. Companies not doing well may elect to not report their results.

Sales Results by Company Type

Suppliers



Publishers



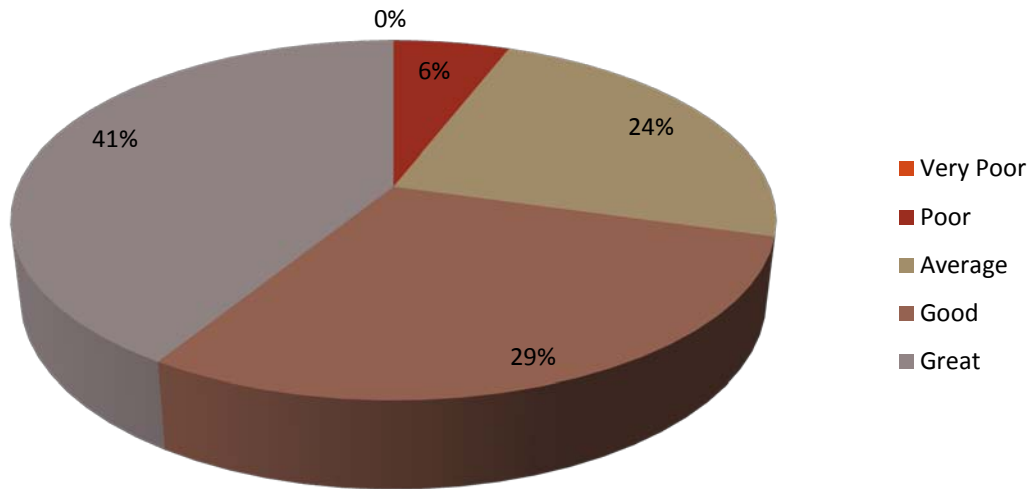
SGGCs, or single-game game companies, generally have a tough time making a profit, and they close at a higher rate than companies with multiple game lines.

Publishers use a wide variety of means to get their products to consumers, including direct sales to consumers, sales to retailers, and sales to distributors. Nearly half (100) of the publishers

have digital versions of their products (practically all RPG publishers), and more than half (123) have used Kickstarter or some other crowdfunding source or plan to do so this year.

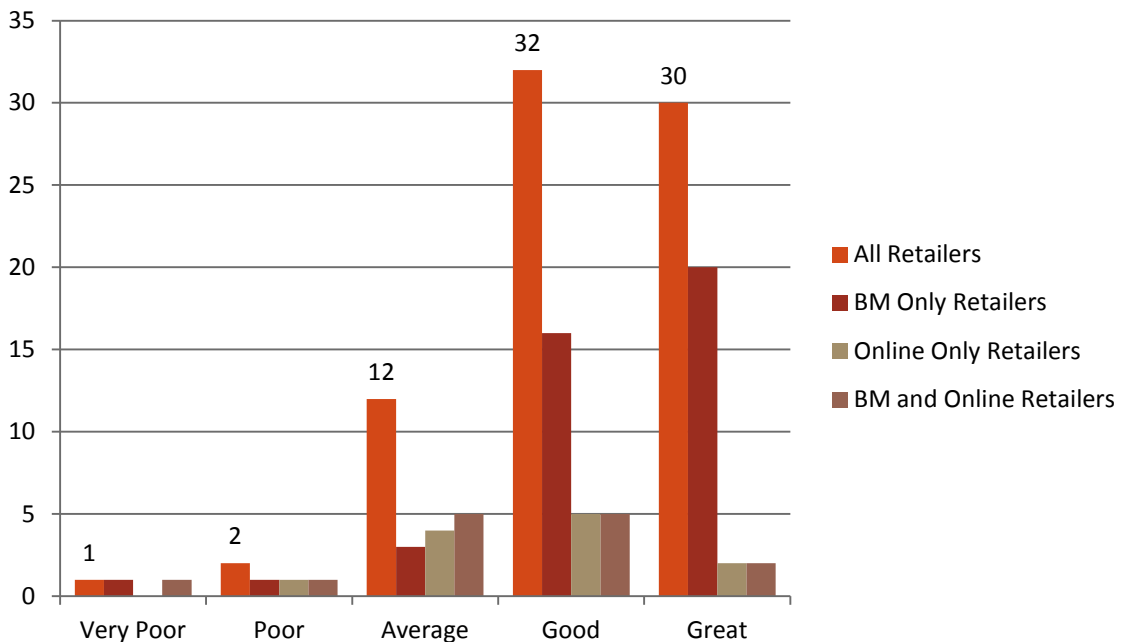
Distributors

Distributors



Last year, almost all distributors (82%) reported that they were doing great.

Retailers



BM = brick and mortar retailers (retailers with one or more physical stores). Online-only and mixed retailers are getting by (average to good), while BM retailers are generally doing better (good to great).

Comparison for Respondents Who Also Answered in 2012

2012 / 2013 → Very Poor Poor Average Good Great

Very Poor	—	1	2	1	1
Poor	—	1	—	2	—
Average	—	1	6	2	3
Good	—	3	3	6	2
Great	3	1	4	13	20

Best Sellers

The following are bestsellers from 76 retailers, considering only items that appear in at least two responses. The numbers in parentheses is last year's bestsellers (from 47 retailers).

Product	Publisher	Sales (prev)	Comments
Magic CCG line	Hasbro / Wizards of the Coast	54 (24)	Magic continues to be a strong seller in all types of retail outlets.
Warhammer lines	Games Workshop	27 (11)	Including minis and RPGs. GW produces new products every year.
Catan line	Mayfair Games	22 (14)	Catan is available in digital versions and could already be considered mainstream.
Pathfinder line	Paizo Publishing	20 (8)	Pathfinder outperformed D&D more than 2 to 1.
Yu-Gi-Oh CCG line	Konami Digital Entertainment	15 (7)	These numbers would be different if I had more responses from Asia.
Warmachine/Hordes lines	Privateer Press	12 (5)	
Munchkin line	Steve Jackson Games	10 (5)	
Pokemon CCG line	Pokemon	10 (3)	

Product	Publisher	Sales (prev)	Comments
Star Wars X-Wing minis	Fantasy Flight Games	10	A new and highly popular tactical combat game.
Ticket to Ride line	Days of Wonder	10 (8)	
Android Netrunner	Fantasy Flight Games	9	A reboot and re-theme of a classic Wizards of the Coast CCG.
Cards Against Humanity line	Cards Against Humanity	8	A party game for adults with perverse humor. Has several expansions.
Dungeons and Dragons lines	Hasbro / Wizards of the Coast	8 (4)	5th edition was announced in Jan 2012, but it won't arrive until summer 2014. ⁸ Reprints of older editions helped boost sales.
HeroClix line	WizKids	8 (4)	WizKids rebooted its company in 2012.
Dominion line	Rio Grande Games	7 (10)	A large drop for this line.
Carcassonne line	Rio Grande Games	6 (6)	
Forbidden Island / Desert	Gamewright	6 (2)	
card sleeves	Ultra Pro, etc	5	Very popular among CCG players
King of Tokyo	IELLO	5	A quick themed dice game.
Love Letter	Alderac Entertainment Group	5	A quick bluffing and deduction card game.
A Game of Thrones LCG	Fantasy Flight Games	4	Boosted, no doubt, by the popular TV series

⁸ <http://company.wizards.com/content/wizards-coast-announces-thrilling-dungeons-dragons-launch-summer-2014/>

Product	Publisher	Sales (prev)	Comments
Pandemic	Z-Man Games	4	Fell off the charts last year, but back on again.
Star Wars: Edge of Empire RPG	Fantasy Flight Games	4	A new RPG from FFG.
<i>dice</i>		3	
<i>soft drinks</i>		3	
Firefly: the Game	Gale Force Nine	3	A new game based on the short-lived TV series with a cult-like status.
Legend of the Five Rings line	Alderac Entertainment Group	3 (2)	
Spot It	Blue Orange	3	
7 Wonders	Asmodee	2	
<i>classic games</i>		2	Chess, backgammon, etc
Boss Monster	Brotherwise Games	2	A themed deck-building game funded on Kickstarter.
Descent line	Fantasy Flight Games	2	
Flames of War line	Battlefront Miniatures	2	
Fluxx line	Looney Labs	2 (2)	
Gloom	Steve Jackson Games	2	
Lord of the Rings LCG	Fantasy Flight Games	2	
Pig Iron Production miniatures	Pig Iron Productions	2	In addition, smaller lines of miniatures from other companies also sell well at some retailers.

Product	Publisher	Sales (prev)	Comments
Shadowrun	FASA / Catalyst Game Labs	2	The RPG and the miniatures are published by different companies.
Smash Up	Alderac Entertainment Group	2	

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

Five additional retailers listed “Fantasy Flight Games” as bestsellers, but did not specify which lines. These have not been included in the above table.

Note that gaming accessories, such as dice, tokens, card sleeves, and other supplies such as drinks, when taken together provide a significant amount of revenue for many retailers.

Note that 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 than second one did.

Notably absent because it scored 4 on last year's list is *Cardfight: Vanguard* from Bushiroad Inc. (though it continued to sell well, according to some retailers).