

Global Board Games Market - Focused Insights 2024-2029

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Report description:

The global board games market is expected to grow at a CAGR of 11.76% from 2023 to 2029.

MARKET TRENDS & DRIVERS

Increasing Board Game Digitization

This trend encompasses integrating digital technology into traditional board games, creating fully digital versions of board games, and increasing online platforms and apps that facilitate digital gameplay. This trend reshapes how players interact with board games and opens new opportunities for consumers and developers. Augmented Reality (AR) and Virtual Reality (VR) technologies allow players to interact with digital elements overlaid on physical boards, enhancing immersion. For instance, AR can bring game characters to life on the board, while VR can create fully immersive gaming environments. The merging of physical and digital elements allows for innovative game mechanics that were previously impossible. For example, a digital component can manage dynamic rule changes based on player decisions or real-time data input, adding a new dimension to gameplay. Digitized board games often have associated online communities where players can share strategies, discuss game updates, and organize events. This fosters a sense of community and loyalty among players. Digital elements allow for easy multiplayer options, both locally and online, making board games a more social activity. This can attract players who value social interaction as a key part of the gaming experience. Gloomhaven by Asmodee, originally a physical dungeon-crawling board game, has been digitized to offer an immersive, tactical role-playing game experience.

Rising Shift Towards Eco-Friendly Board Games

As awareness of environmental issues like climate change, deforestation, and plastic pollution increases, consumers are seeking products that align with their values. This has led to a demand for board games that are produced in an environmentally friendly manner with reduced ecological footprints. A key aspect of eco-friendly board games is the use of sustainable materials. Many companies are switching to recycled paper, cardboard, and biodegradable plastics for game components, reducing the reliance on

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virgin resources and minimizing waste. HABA Familygroup, a prominent vendor of games and toys, is known for its commitment to sustainability, particularly in using natural materials. The company uses wood sourced from sustainable forests certified by the PEFC (Programme for the Endorsement of Forest Certification). Companies increasingly seek certifications like FSC (Forest Stewardship Council) for wood and paper products or other eco-labels that verify their commitment to sustainable practices. These certifications help build trust with environmentally conscious consumers. Crowdfunding platforms like Kickstarter have seen an increase in eco-friendly board game projects. These campaigns often highlight sustainable production methods as a key selling point, allowing consumers to support products that align with their environmental values. The shift towards eco-friendly board games reshapes the market by aligning it with broader societal values around sustainability and environmental responsibility.

Rise In Demand for Analog Experience

In an era where digital devices dominate daily life, many people experience digital fatigue. Continuous exposure to screens for work, communication, and entertainment can lead to a desire to unplug and seek out activities that don't involve screens. Board games provide a tactile, face-to-face experience that contrasts sharply with the digital world, offering a form of relaxation and connection that digital games and online interactions often can't replicate. Board games evoke a sense of nostalgia, reminding players of simpler times spent with family and friends. This connection to the past resonates particularly with older generations who grew up playing board games and now seek to pass these traditions on to younger family members. Gathering around a table to play a board game can evoke memories and foster a sense of continuity and tradition. Board games offer a multisensory experience that digital games lack. The physical components of board games, such as cards, dice, boards, and pieces, engage players' sense of touch and sight in a way that digital interfaces cannot. The act of physically moving pieces, shuffling cards, or rolling dice adds a tangible, engaging dimension to the experience that many find satisfying and immersive. As families look for alternatives to screen-based activities, board games provide a screen-free option that encourages face-to-face interaction and engagement.

INDUSTRY RESTRAINTS

High Presence of Alternative Options

The board game market is flooded with various games across various genres and themes. This saturation means that consumers have an overwhelming number of options, making it difficult for individual games to stand out. The rise of digital games, including mobile apps, online games, and video games, presents a significant alternative to traditional board games. Digital games often offer convenience, lower cost, and instant access, making them attractive options for consumers. As digital games continue to evolve and offer new experiences, they may attract potential board game players who might otherwise be interested in traditional tabletop gaming. This competition for leisure time can impact board game sales. The wide range of board games caters to diverse interests and preferences, leading to a fragmented market. Consumer interests and trends in the board game market can shift rapidly. What is popular today may not remain popular soon, and the high presence of alternatives makes it challenging to predict and respond to these changes. The sheer volume of available board games can lead to decision fatigue among consumers. With so many options, it becomes harder for buyers to make informed choices, leading to indecision or the postponement of purchases. These factors can hinder the growth of individual games and impact the overall market dynamics.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global board games market by product is segmented into puzzles, tabletop board games, collectible card games, card & dice games, miniature games, and RPG board games. The puzzles segment holds the largest market share in 2023. Puzzle board games are diverse and can range from traditional jigsaw puzzles to more complex games that incorporate logic puzzles, word

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games, or abstract strategy. These games can be played solo or with multiple players, offering a wide range of engagement levels. Puzzles often involve piecing together various elements to achieve a specific goal, such as assembling a jigsaw puzzle, solving a mystery, or completing a complex task within the confines of the game. Many puzzle games are designed to be educational, teaching players about geography, history, mathematics, or language. This educational aspect makes them appealing to parents and educators, boosting their popularity among children and young adults.

By Product

- Puzzles
- Tabletop
- Collectible Card Games
- Card & Dice Games
- Miniature Games
- RPG Board Games

INSIGHTS BY THEME

The global board games market by theme is categorized into educational, strategy & war, fantasy, sports, and other board games. The strategy & war board games segment shows prominent growth, with the fastest-growing CAGR during the forecast period. Strategy and war board games are highly popular due to their engaging and intellectually stimulating nature. These games require players to employ strategic planning and decision-making skills, creating a sense of immersion akin to real battle scenarios. By developing a competitive spirit and enhancing strategic thinking, these games offer a challenging and interactive experience. These games, which cater primarily to enthusiasts, are known for their complexity and time-consuming nature. The demand for strategy games notably increased during the lockdown periods as people sought to engage in indoor activities. Strategy and war board games offer several advantages for children of various ages. They promote critical thinking, strategic planning, and understanding political and military environments. The educational value of these games contributes to their high relevance and popularity, particularly in countries like South Korea, Germany, Japan, and China.

By Theme

- Educational Board Games
- Strategy & War Board Games
- Fantasy Board Games
- Sports Board Games
- Other Board Games

INSIGHTS BY DISTRIBUTION CHANNEL

The offline segment dominates with the largest global board games market share by distribution channel. Offline distribution channels remain crucial to the board game industry, facilitating discovery, purchase, and engagement. Stores such as specialty game stores, toy stores, department stores, hobby and craft stores, supermarkets, etc., offer a variety of board games. Specialty game stores are prevalent in North America, Europe, and Asia. In the US, stores like GameStop and independent game shops are popular. In Europe, stores like Thalia in Germany and Fnac in France serve similar functions. Toy stores introduce board games to younger audiences and families, often driving sales through seasonal promotions. Though not primarily focused on toys or games, supermarkets often carry a selection of board games. Chains like Tesco (UK), Carrefour (France), and Walmart (globally) carry board games in-game sections. The convenience of picking up a board game during regular grocery shopping, combined with competitive pricing, makes supermarkets a surprisingly effective channel for board game sales.

By Distribution Channel

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- Offline
- Online

GEOGRAPHICAL INSIGHTS

North America dominates the global board games market share, followed by APAC. The board game market in North America is being driven by families with children, millennials, and Gen Z. As Americans increasingly prioritize spending quality time with their families, the demand for board games has surged. The COVID-19 pandemic significantly boosted the popularity of board games in North America. As offices closed and people spent more time at home, they turned to board games to pass the time and cope with lockdowns. The resulting increase in household free time led to a surge in demand for games, particularly card and dice games.

By Geography

- North America
 - o□The U.S.
 - o□Canada
- APAC
 - o□Japan
 - o□China
 - o□India
 - o□Indonesia
 - o□Australia
 - o□South Korea
- Europe
 - o□Germany
 - o□The U.K.
 - o□France
 - o□Italy
 - o□Sweden
 - o□Russia
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Columbia
 - o□Argentina
- Middle East & Africa
 - o□Turkey
 - o□South Africa
 - o□Saudi Arabia
 - o□UAE

COMPETITIVE LANDSCAPE

The global board games market report contains exclusive data on 30 vendors. The global board games market's competitive scenario is intensifying, with global and domestic players offering diverse products. Companies in this market are continuously innovating to develop better and new games. A few major players dominate the market in terms of market share. Some companies currently dominating the market are Asmodee, Hasbro, Mattel, and Ravensburger. Key strategies include product

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innovation, mergers and acquisitions, and partnerships to enhance market presence and expand geographical reach. Many board game companies use crowdfunding platforms to gauge interest and secure funding before full-scale production.

Key Vendors

- [] Asmodee
- [] Hasbro
- [] Mattel
- [] Ravensburger

Other Prominent Vendors

- [] Buffalo Games
- [] Goliath
- [] Masters Traditional Games
- [] Gibson
- [] Rebellion
- [] CMON
- [] Simba Dickie Group
- [] North Star Games
- [] Spin Master
- [] Games Workshop
- [] Reggie
- [] IELLO
- [] HABA Familygroup
- [] Indie Boards and Cards
- [] PlayMonster
- [] Schmidt Spiele
- [] Usaopoly
- [] University Games
- [] Czech Games Edition
- [] Disney
- [] Bezier Games
- [] Clementoni
- [] Funko
- [] Grey Fox Games
- [] Panda Game Manufacturing
- [] Thames & Kosmos

KEY QUESTIONS ANSWERED:

1. [] How big is the global board games market?
2. [] What is the growth rate of the global board games market?
3. [] What are the key drivers of the global board games market?
4. [] Which region dominates the global board games market?
5. [] Who are the major players in the global board games market?

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