

# Sourcing Trends in Tabletop Gaming



# Introduction

## Current situation

Tabletop games enjoyed a surge in popularity during the Covid-19 pandemic. “We grew in all regions over the last year. We grew the fastest in the US and in the UK,” Clemens Maier, CEO of German board game maker Ravensburger, told DW. He added that in 2020 the company increased its revenues by 20% and its board game sales by 22%.

As social distancing and other anti-pandemic measures recede, the “old normal” is starting to reassert itself.

Gen Con 2022 saw 50,000 unique attendees, up dramatically from the 35,000 attendees at a rescheduled show the previous September. “While a healthy number, 2022 attendance represents roughly a 25% decline from the last pre-Covid Gen Con in 2019,” market analysis company ICv2 reported, “when nearly 70,000 uniques attended the show. Prior to 2019, Gen Con had been drawing around 60,000 unique attendees each year since 2015.”

“Our goal this year was a return to the level of scale and spectacle that make Gen Con a can't-miss annual event for gaming fans from around the world, and we absolutely feel we achieved that,” Gen Con President David Hoppe told ICv2. Over 500 companies exhibited at the event and reported strong sales.



## Shipping & Logistics

The Covid-19 pandemic saw a surge in shipping costs that has yet to abate. Supply chain disruptions caused by the pandemic, exacerbated by the Russian invasion of Ukraine, have created long delays in getting goods to customers and an increase in the cost of getting them shipped.

“Ultimately, too few ships and an explosive recovery of demand conspired to send freight costs into orbit,” Engineering News’ Irma Venter reported in August 2022, “with the Statista Freight Rate Index (SFRI) increasing from \$1 262 a container during the third quarter of 2019, to \$10 362 in the third quarter of 2021 – an unheard-of increase of 721%.”

Banana Chan of New York-based game publisher Game and a Curry singled out shipping cost changes as a particularly acute issue for crowdfunded projects: “When we finished laying out Jiangshi, we had everything ready. And for that specific project, we funded at \$100,000 on Kickstarter,” said Chan in a panel discussion on Global Sources Live. “So we had this impression that, we were going to be able to pay off the shipping, the manufacturing, everything. But when it came to shipping, that’s when we saw that there was a bit of an increase. We ended up



spending somewhere between 30 and 40 percent of what we had gotten from the Kickstarter, in terms of like shipping the product from China to the warehouse in the US. And so that set us back a lot.”

Atlas Games, a tabletop game publisher based in Minnesota, funded its game Dice Miner via Kickstarter, and had units ready to ship from the factory in December 2020, with delivery to the US expected in the first quarter of 2021. But as Chinese cities – and their ports – repeatedly went through snap lockdowns, the vessels those boxes were supposed to travel on did not leave



port. "That hurt quite a lot," Atlas founder John Nephew told Global Sources. "We had paid for the printing, and it was literally sitting on the factory floor, week after week with new shipments being scheduled and then canceled. And in the end, where our original expectation had been to perhaps on the high end spend five or six thousand. And on the low end, the best quote I had seen back in 2019 was for \$3,000, for a 40-foot container to the port of Duluth here, we wound up spending \$26,000. And I know that that's been the case for a whole lot of other publishers – it just blew their budgets out of the water."

container. "I hope that that will get better. But we have to build our budgets around the assumption that that's just the new normal, and set pricing and expectations accordingly."

***"You're sort of short-selling yourself, or writing a futures contract," Nephew remarks. "Because you're promising to deliver and your income is set. But then, suddenly, costs have become wildly unpredictable."***

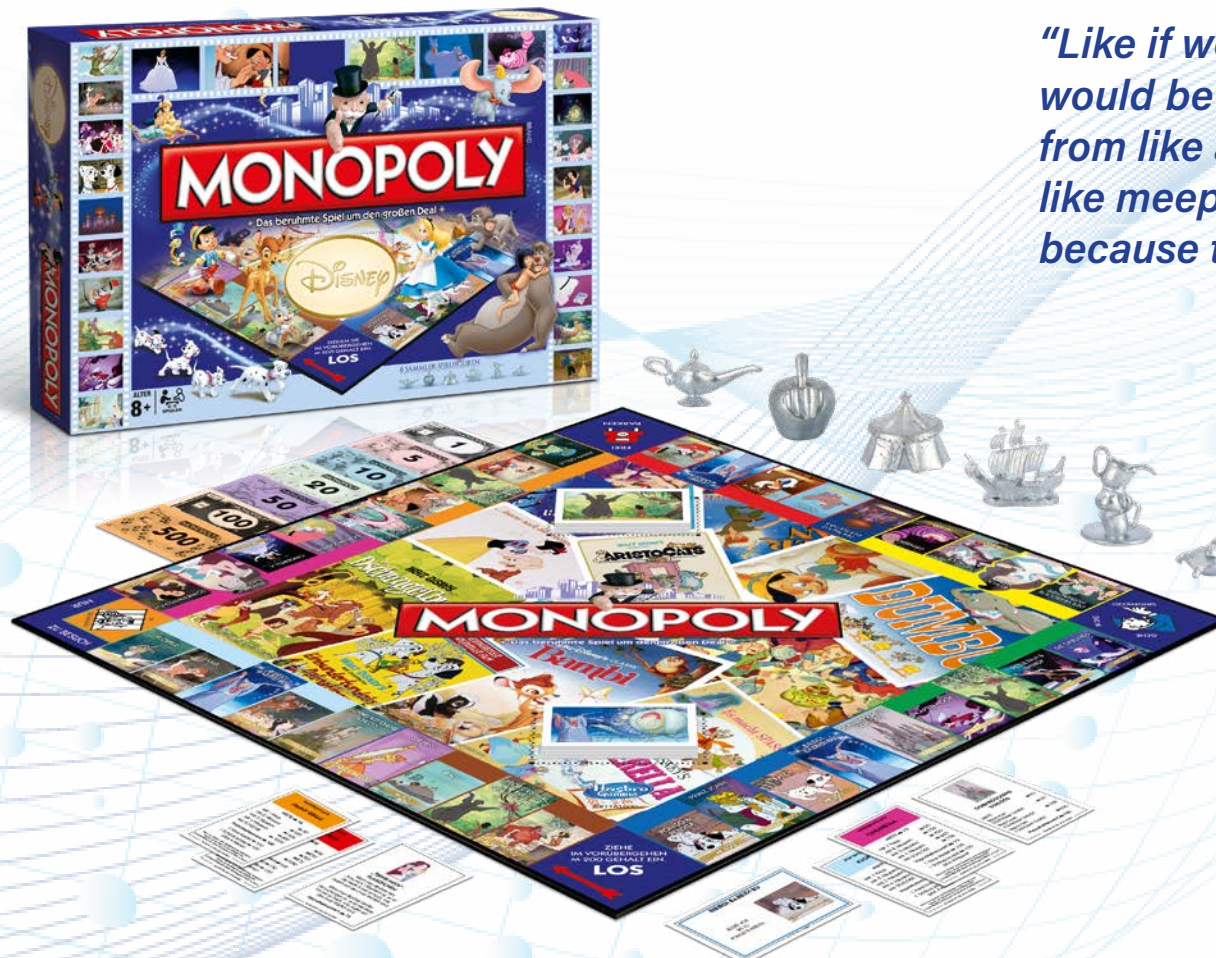
This is a huge challenge particularly with crowdfunding, according to Nephew, because project owners have to set expectations at the beginning in terms of telling backers what the shipping charges will be. "You're sort of short-selling yourself, or writing a futures contract," Nephew remarks. "Because you're promising to deliver and your income is set. But then, suddenly, costs have become wildly unpredictable."

This challenge will continue for the foreseeable future. Atlas Games currently assumes a price of \$15,000 to \$20,000 per shipping

## Time Pressures

As well as costs, lead times have also increased hugely in the last two or three years, because of a range of factors including port closures in China, labor issues on the North American west coast, and even natural disasters such as wildfires and landslides in Canada.

One solution is to reduce potential points of failure, by simplifying the range of a game's physical components or reducing them by focusing on digital content. "I think in the future [Game and a Curry] are going to be pivoting," Chan stated. "Like if we're going to make physical books, it would be just books and trying to stay away from like any other physical components, like meeples, dice, that kind of thing. Mostly because things are so unpredictable."



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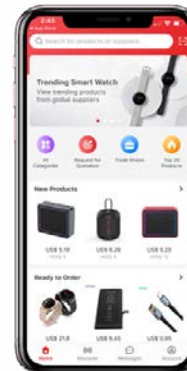
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