

Global Table Top Games Market: Analysis By Type (Board Games, Puzzle and Playing Cards), By Distribution Channel (Brick And Mortar, and E Commerce), By User Group (Below 8 Years, 8-15 Years and 15 Years & Above), By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global table top games market was valued at US\$23.58 billion in 2023, and is expected to be worth US\$37.11 billion in 2028. Table top games are considered as the physical foundation for children's play. It imparts the values of a particular historical period while directing children's conduct, stimulating their creativity, and shaping their experience. Tabletop games have experienced a resurgence in recent years, captivating players of all ages. These analog pastimes offer a break from digital screens, fostering face-to-face social interaction.

Due to the millennial generation's growing preference for games like board games and card games, there is a rising demand for tabletop games. Recent years have seen an increase in the popularity of board games, card games, and strategy-based games among families, children, and young millennial populations. Another important driver of the expansion of the table-top games market has been the growing acceptance of board games at game bars and cafes. The table top games market is dynamic. Ongoing consolidation may lead to tougher competition in the industry. The table top games market is determined to grow at a CAGR of 5.80% over the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Type: The report identifies three segments on the basis of type: Board Games, Puzzle and Playing Cards. Board games market are further segmented into five products: monopoly, chess, ludo, scrabble and others. Board games segment dominated the market in 2022. Board games have experienced a resurgence in popularity in recent years. The appeal of face-to-face social interaction in an increasingly digital world is a significant driver. Board games provide a tangible and shared gaming experience, fostering social bonds and creating memorable moments. Additionally, the board game industry has benefited from innovation in game design, incorporating immersive themes, complex strategies, and engaging gameplay mechanics.

By Distribution Channel: The report identifies two segments on the basis of distribution channel: Brick and Mortar and E-Commerce. It is anticipated that the E-Commerce channel would experience the highest CAGR during the forecasted period. Online sellers include aggregators and websites operated by manufacturers. In order to better meet customer wants and boost profit margins, manufacturers have recognized the potential of the channel and are operating shopping websites, which is likely to drive the market growth.

By End User: The report provides the bifurcation of table top games market into three segments on the basis of end user: Below 8 Age, 8-15 Age and 15 Age & Above. The below 8 age group is expected to grow at the fastest CAGR owing to the rising popularity of educational activities like puzzles, building, and construction sets among this age group. Parents and caregivers are increasingly recognizing the educational and cognitive benefits of these games, which foster skills such as problem-solving, social interaction, and fine motor skills in young children. Additionally, the growth in this segment is influenced by the availability of age-appropriate games that cater to the specific needs and interests of children below 8 years. Game manufacturers are innovating with colorful and engaging designs that capture the attention of young minds, as well as incorporating popular characters from children's media, further fueling the demand in this age group.

By Region: In the report, the global table top games market is divided into four regions: Asia Pacific, North America, Europe, and ROW. The North American region has emerged as a dominant player in the table top games market. Due to the increased disposable income and spending, presence of several games and puzzle manufacturing companies, and early adoption of board games and puzzles by schools and educators for creative learning, North America market has witnessed a significant growth in the

games and puzzle market in the past few years. Several puzzle sellers in the region have begun to produce puzzles with various themes, such as sports, nature, culture, religion, and festivals, that is projected to increase the adoption of games and puzzle among children and teenagers. Moreover, the factors like availability of crowdfunding platforms for freelancing puzzle designers, board game cafes, and the advancements in 4D puzzles are all expected to drive the growth of games and puzzle market in North America in the coming years.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors such as rapid urbanization, rising online sales of table top games, increasing demand of games and puzzles for kids, shift towards indoor games, commercialization of movies and cartoon characters, and improvements in content and functionality of board games. In recent years, the increased acceptance of educational board games by parents to foster the creative development of their children's brainpower has favorably influenced the market for table top games. Several educational institutions have begun to use educational table top games to improve their teaching approaches and provide learners with a more involved learning experience. Cartoon characters are used extensively in product marketing, particularly in advertisements. Superheroes and Barbie dolls have become indispensable parts of childhood. The stronger the connection of the kids with character, the greater the demand for the character. This attracts youngsters to their favorite superheroes at stores and markets.

Challenges: However, some challenges are impeding the growth of the market such as consumer inclination towards mobile and PC games, counterfeit table top games, etc. Due to a lack of trademark protection in the growing economies like Asia Pacific and Latin America, popular table top games are being counterfeited. Counterfeiting of brands and products is a big cause of worry for industry players. Counterfeit products are frequently created without the appropriate safety norms, putting consumers at danger.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing usage of social media, increasing mental illness, rising popularity of theme based games, introduction of new and innovative puzzles, integration of board games in cafes, etc. Board games are making a comeback as a popular form of entertainment with families, children, and even millennials searching for a new way to socialize. The board game boom didn't only resulted in the production of new games, but it has also resulted in the establishment of board gaming cafes and

bars. A board game cafe is similar to a coffee shop, bar, or restaurant with an unusually large quantity of board games and the games are the distinguishing feature of a board game cafe. Some cafes may contain only 50 or 100 popular titles mixed in with treasured oldies, whilst others, such as Snakes & Lattes in Canada, have over 1,200 board games.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a notable impact on the tabletop market, primarily affecting how people engage with traditional board games, card games, and tabletop RPGs. Initially, the industry faced disruptions in manufacturing and distribution due to lockdowns and supply chain interruptions. The closure of game stores and cafes also led to a decline in physical sales and limited opportunities for in-person gaming gatherings. However, as people spent more time at home during lockdowns and sought alternative forms of entertainment, there was a resurgence in interest in conventional tabletop games. Families and small groups turned to board games and card games as a means of bonding and passing the time together. This renewed interest in tabletop gaming led to an uptick in sales for many classic games and a resurgence in demand for new and innovative tabletop experiences.

While some table top games categories spiked in Q1 2020, there is a long-term trend towards the repositioning of players as entertainment providers on multiple platforms. COVID-19 pandemic has resulted in a rapid adoption of board and card games. People all around the world are adopting board games and puzzles as a result of the growing trend of social alienation and the need to spend quality family time. Ludo, carom, monopoly, and snakes and ladders are just a few of the classic board games that have seen a surge in popularity.

Competitive Landscape:

The market for table top games is fragmented. Prominent market leaders are making substantial investments in research and development endeavors with the aim of broadening their product portfolios, thereby fostering further growth in the table-top games market. These industry participants are engaging in a diverse range of strategic initiatives to expand their market presence. Notable developments in the market encompass new product introductions, contractual arrangements, mergers and acquisitions, increased investments, and collaborations with other entities. In order to thrive and prosper in an increasingly competitive and expanding market landscape, the table top games sector must offer cost-efficient offerings.

The key players in the global table top games market are:

Ravensburger

Mattel, Inc

Buffalo Games

Goliath Games, LLC

Hasbro Inc.

Asmodee

CMON Games

North Star Games

Zobmondo

Grey Fox Games

One of the primary strategies employed by manufacturers within the table-top games industry to benefit their customers and augment their market share involves local production to minimize operational expenditures. Leading entities in the Table-Top Games market, such as Hasbro Inc., Asmodee, Mattel, Inc., Ravensburger AG, Grand Prix International, and Buffalo Games are actively striving to boost market demand through their investments in research and development initiatives. For instance, in April 2023, Hasbro came into partnership with Panini America, a sports trading cards publisher, to introduce NBA Prizm Trading Cards to a new Board Game

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