iOS Board Games
State of the Industry Report
Quarter 3, 2011

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I. Introduction:

Though still somewhat rare, there have been several reports and surveys on various portions of the App Store, ranging from games to mobile health apps. These reports serve as both insights in to the app market as well as guides to developers and potential developers. Because of my connection to iOS board game apps in particular, being a co-founder of the *iOS Board Games Blog* on *BoardGameGeek.com*, I decided to create a report focused on this small niche within the wider iOS game space.

The purpose of this report is to give a greater insight into the iOS board game app niche. The iOS board game app space is an interesting area of study for the following reasons: First, to my knowledge, very few studies and reports have been conducted on such a granulated level in the games genre. Second, of the 84,117 games in the App Store, 16,938, or 20%, of them are board, card and dice games (*148app.biz*). Third, board games apps have the power to exceed expectations, rather than be limited by the platform like many licensed games on iOS. Rather than trying to cram a console experience onto a portable device, board game licenses open up on iOS devices with new features that allow quicker, easier, more varied, and more frequent play. Last, a high percentage of board game apps are available for the iPad, in fact, the iPad is a key tool in the board game app space. Fourth, for those already involved in this market space, this report will be useful to confirm and expand your knowledge of the market and its trends.

This report will present the metric profile of the iOS board game app niche and how its successes and shortcomings compare to the App Store and gaming genre as a whole. It will attempt to show the trends and patterns in the board game app industry.

A. Methodology:

Due to the sensitive nature of much of the data involved with this report, I opted for an anonymous survey when gathering data. The survey was promoted using the following methods:

- Mailing personal developer contacts.
- Posting on various social networking platforms.
- Contacting development companies from the top 200 apps in board, card and dice games on the app store.
- Advertising the survey on the iOS Board Game blog.

The targets of the survey were developers who had created either original or licensed board game adaptations for iOS. Developers of public domain games were generally omitted, as the targets of this report were developers interested in making original or licensed products for iOS. The survey was conducted over the period of one week.

Of those contacted, over 40 responses were received. This is a fitting sample size due to the newness of the concept of this report as well as the limited size of this niche market. A recent survey of the game genre as a whole yielded 225 responses, and our sample size is close to 20% of that number, which seems fitting as board game apps make up 20% of total game apps (Goss, *Streaming Colour*). I hope to receive a larger response in future quarterly editions of this report. Attempts have been made to present the data in the most informative ways possible.

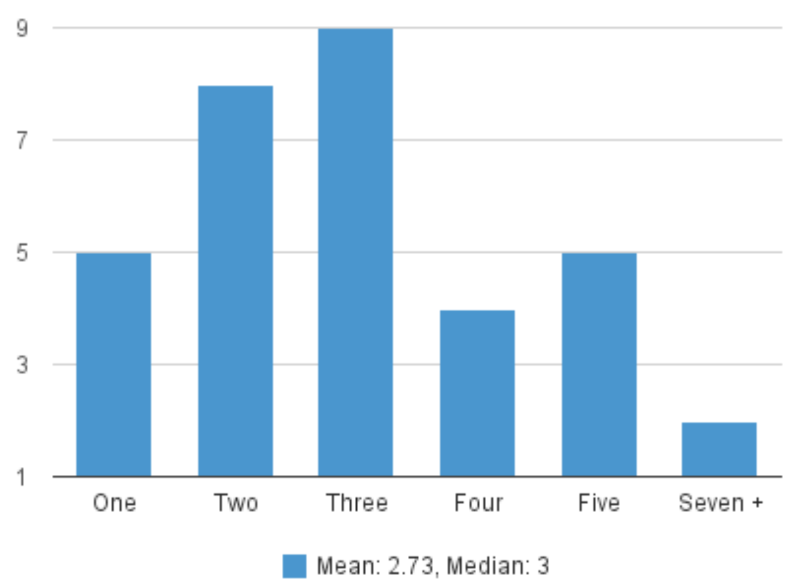
II. Market Metric Profile

In this part of the report we will examine the different trends of apps surveyed. This section will provide a greater understanding about the types of board game apps featured in the app store, and their similarities.

A. Development Team Sizes

The iOS App Store has served to greatly open up the venue of "indie" game development. A single developer has the opportunity to develop an app and submit it to the app store and succeed. According to a recent study of the games genre on the app store, over half of respondents were solo developers (Goss, *Streaming Colour*).

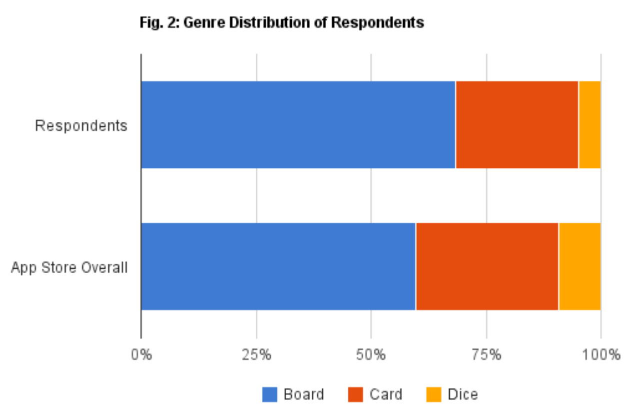
Fig. 1: Developer Team Size Trend

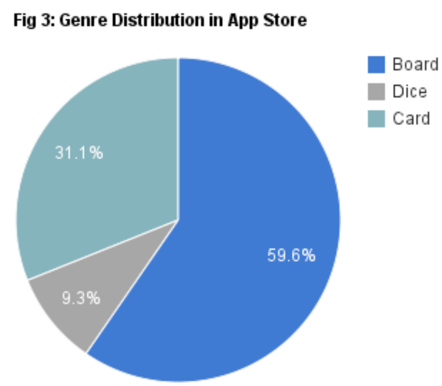


The iOS board game genre paints a different picture. As you can see in Figure 1, with a mean of 2.73 and median of 3, the average board game app development team consists of three individuals. 95% of development teams consist of five or less members, though there were several respondents that appear to work in larger teams. 12% of respondents had a team of one. While there is insufficient data to draw any firm conclusions, it is interesting to speculate as to why the solo team does not dominate in the board game app space. Perhaps it is due to the licensed material most board game apps draw from, thus causing most apps to be developed by more "business" teams rather than mere hobbyists.

B. Genres

The App Store divides table-top game apps into three categories: board, card, and dice. Though the App Store allows overlap and listing under multiple genres, respondents to this survey were asked to define their app under one of these three headings.

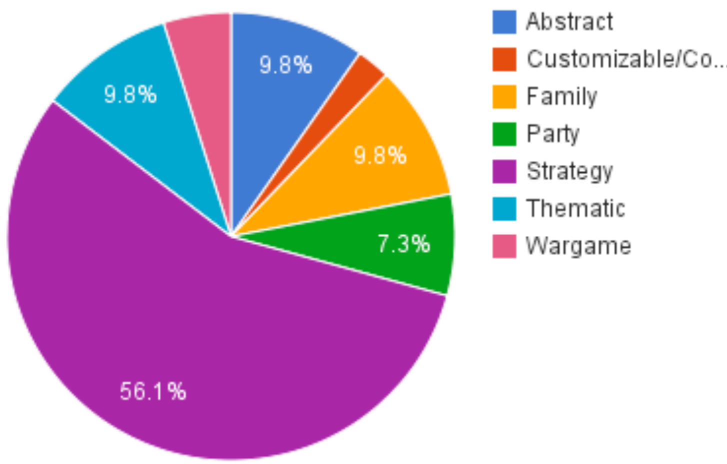




As you can see in Figures 2 and 3, the genre distribution of the respondents follows similar trends to the numbers found in the App Store. More than two thirds of respondents identified their app as a fitting the board game genre. This could be due to the fact that it is by far the broadest genre, but also, board games are a natural translation as the tablet becomes the playing surface. Dice games make up only 4.9% of respondents. This genre must meet challenges in the iOS space as it loses its most basic tactile element, dice rolling, in translation.

Using broad market segments based on a cataloging system by BoardGameGeek.com, the largest board gaming community site on the web, we asked respondents to give us further genre information. These divisions give a clearer picture of the perceived audience of iOS board games.

Fig. 4: App Target Market Segment (According to BGG Categories)



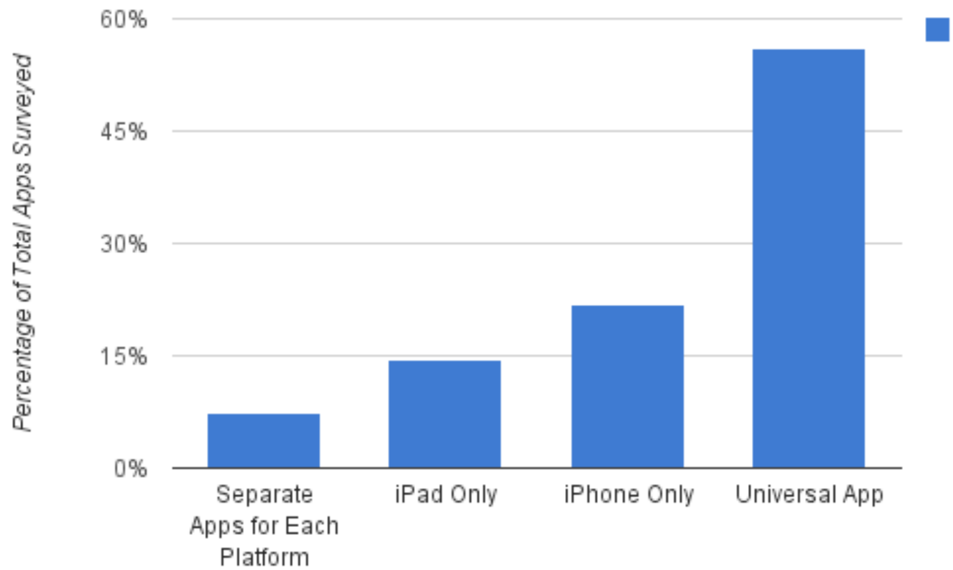
As seen in Figure 4, the "Strategy" market segment accounts for more than half of the respondents. These numbers seem to show that developers are out to capture those looking for deeper game experiences This attempt to capture the more serious iOS gaming market is also marked by the pricing trends of board game apps, as we will see later on. The "Abstract" and "Family" genres make up a smaller percentage of total respondents, but as we will see below, they are making a significant portion of revenue. Trends, in both this survey and the App Store, show that there is a wide market in casual gaming. The board game app genre has done a quality job of serving its strategy crowd, but further success is found in providing titles that fit the wider range of users.

C. Features of Respondents

Board game apps offer unique challenges that must be overcome in development. They sometimes have complex rules that limit accessibility. Board games are also social experiences, and steps must be taken in development to maintain the multiplayer attitude (whether through AI or multiplayer functions). With the correct features, board game apps can overcome these obstacles and, as I stated in the introduction, offer an increased experience on iOS.

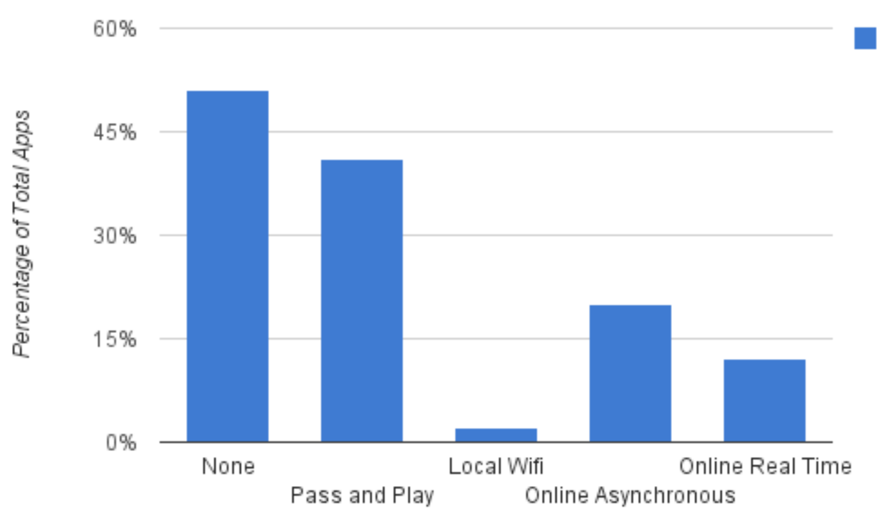
Platform distribution is key in creating accessibility and is, therefore, an important feature. Figure 5 shows the platform distribution of respondents to the survey. 56% of apps surveyed are "Universal", allowing for one purchase across multiple platforms. 78% of apps surveyed are available on iPad which is impressive, considering that according to app store numbers, there are nearly three times as many iPhone board game apps than for the iPad. In this case I believe the numbers show that among our respondents, a group focused on the board game app market segment, the iPad is viewed as an essential key to success.

Fig. 5: Respondant App Distribution by Platform



When querying the respondents on features in their apps, I focused specifically on two features, AI and multiplayer, as well as a list of features deemed most important by users. These biases are made based on a survey conducted by Gabe Alvaro on the iOS Board Games blog (Alvaro, *iOS Board Games*).

Fig. 6: Percentage of Apps with Multiplayer Feature



As explained above, board games are social games, generally requiring more than one player. In Figure 6, it is staggering to see that 51% of apps surveyed do not have multiplayer features. The most common type of multiplayer feature among respondents is “pass and play”, the ability to play a game with multiple players on one device. This further supports the tablet-ready nature of board game apps, as they seek to mimic the board game experience in natural ways. As seen in Figure 7, only 31.7% of apps surveyed feature online play ability. In my experience with the *iOS Board Games Blog* and speaking to other users and critics, online play has been a key in most successful board game apps to date. The new Game Center additions added in iOS 5 may increase the number of online ready apps. Look for more on this in the Quarter 4, 2011 report.

Fig. 7: Apps with Online Multiplayer

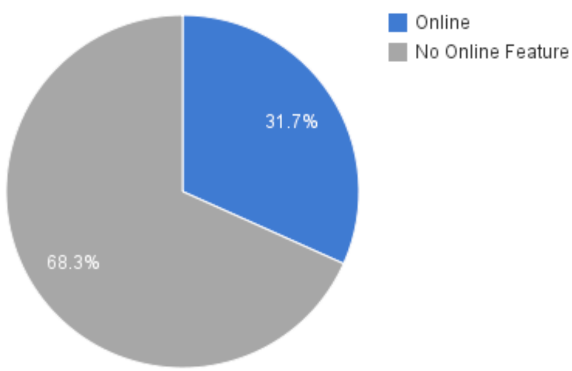
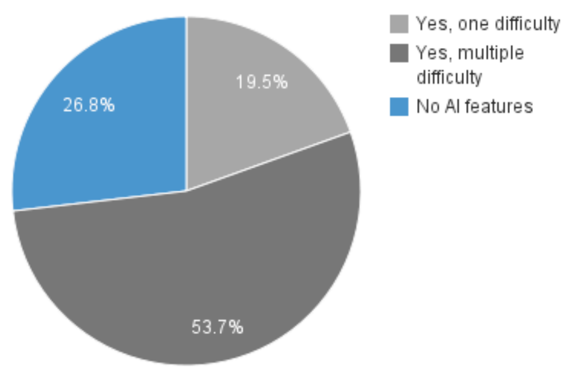
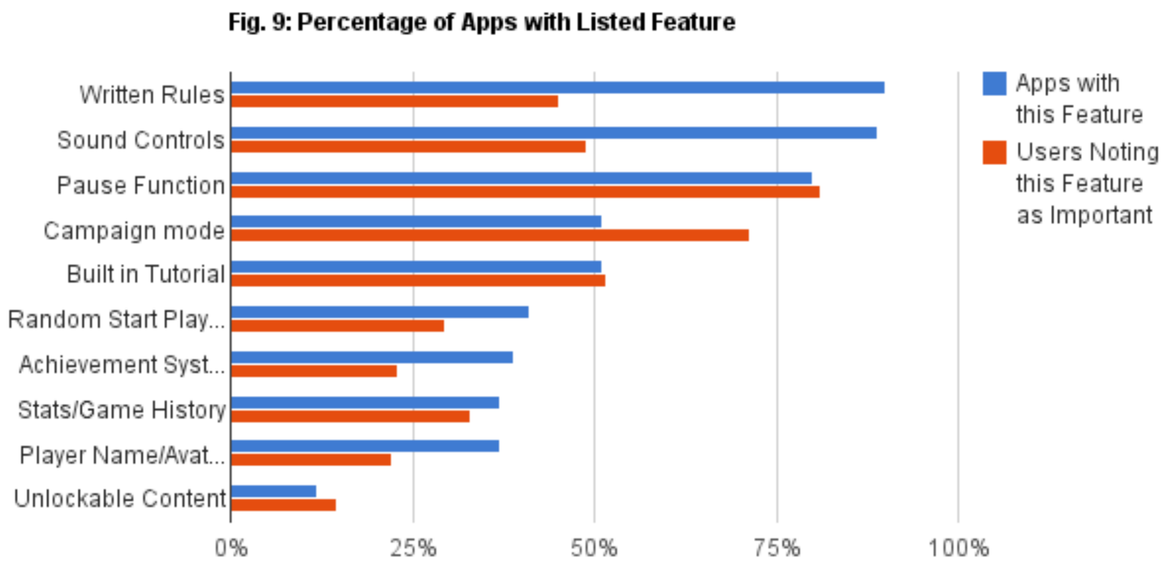


Fig. 8: AI and Computer Player Features



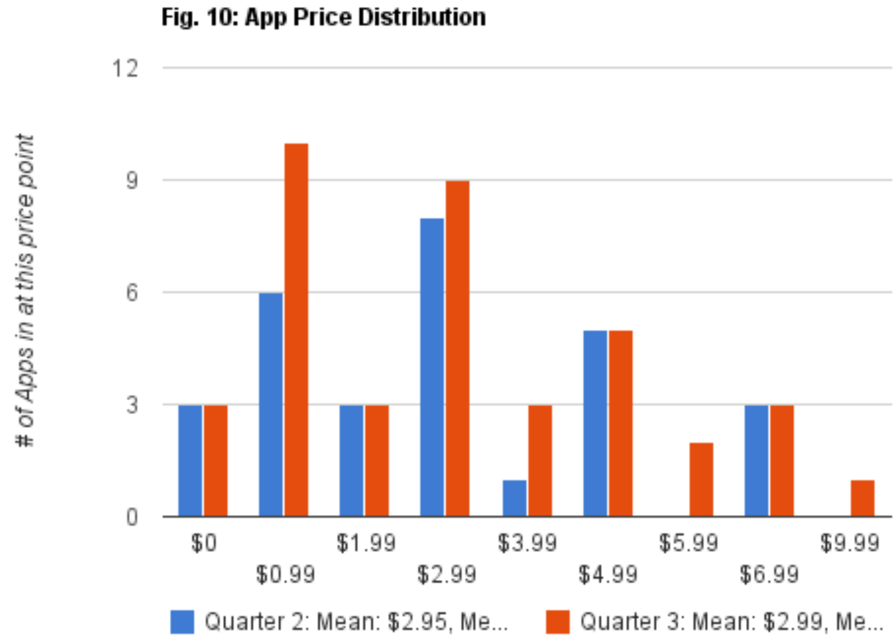
AI, or computer based opponents, are often very important in board game apps as they open avenues for players to learn the more complex rules of a game as well as provide players with the ability to play by themselves while on the go or in other situations. Only 26.8% of respondents did not feature AI features, as seen in Figure 8. More than half of respondents feature robust AI systems with more than one difficulty. Varied levels of AI increase accessibility allowing players to learn on easier levels and continue play against more challenging opponents. The use of AI opens up new markets beyond the tablet space and is very important when targeting the iPhone, as it is a more portable and solo-play oriented platform.



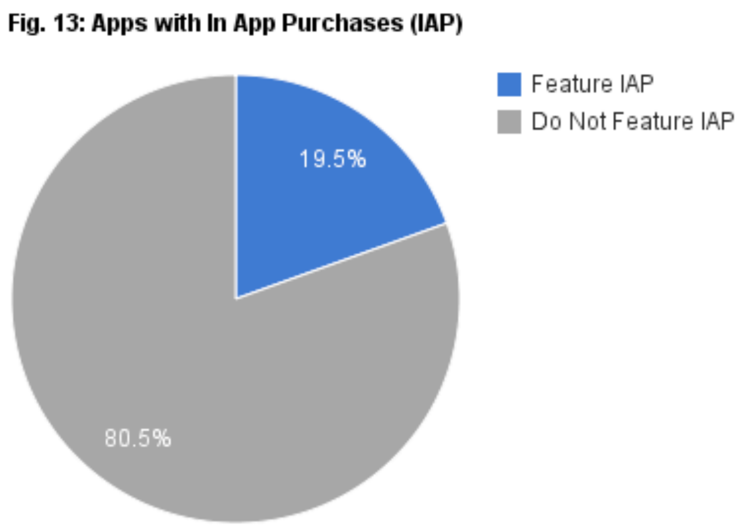
Apart from the two features focused on above, I asked respondents about a varied list of features gleaned from Gabe Alvaro's survey. Figure 9 shows a breakdown of apps with certain features. The majority of board game apps feature written rules, pause functions, and sound controls. Basic features such as these should be included in any premium app. Only 51% of apps feature a built tutorial system, which is quite disappointing as they account for 92% of total Revenue for Quarter 3. The key in app development is to attract an audience as large as possible and a built in tutorial is an important way to help players overcome the obstacle of a complex rule system. The effect of other features on revenue will be highlighted further in the *iOS Board Games Best Practices Report*.

D. Pricing

The cliche App Store price point is $0.99. It is the price point game after game tries to hit in order to reach success. This perception of the $0.99 price point is somewhat of a misconception. The average price of a paid app in the App Store is $3.63, and if free apps are included, the average price of an app drops to $2.70 (GigaOM). Of respondents to the survey the mean price point for Quarter 3, 2011 was $2.99 with a median of the same. That is a slight increase from the Quarter 2 mean of $2.95. Figure 10 shows a break down of price points and exposes a few interesting trends. First, the number of $0.99 apps has nearly doubled since Quarter 2, 2011, according to respondents, the only price point to show a significant increase. It is also interesting to note that several of the Quarter 3 releases show price points on the higher end of the scale. There appears to be a diverging pattern here, with an increase in both bargain and premium apps.



E. In App Purchases



In other areas of the app store and in major areas in the games genre, in app purchases represent a major source of revenue. Companies ranging from start ups like Zynga to industry veterans like SEGA have use in app purchases to create "Freemium" games where players do not pay to play but are encouraged to make micro-purchases for in-game items or advantages. Board game apps provide a unique opportunity for in app purchases as many of them have expansions and additional content that could be provided in small purchase packages. As seen in Figure 13, less than 20% of apps surveyed have in app purchases. These fews apps with in app purchases made a combined total of nearly $80,000 in Quarter 3 2011. The median in app purchase revenue for these apps was $1892 and 62.5% of apps with in app purchases made over $1000. This is an impressive figure when compared with the fact that in Quarter 3 2011, 46% of apps surveyed made less than $1000. It appears in app purchases are an area where developers can seek additional revenue.

F. Android

Fig. 11: Apps also available on Android

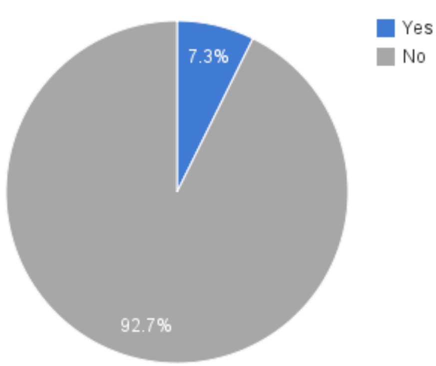
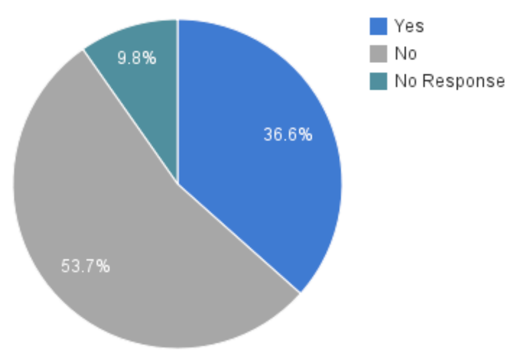


Fig. 12: Interest in Developing for Android

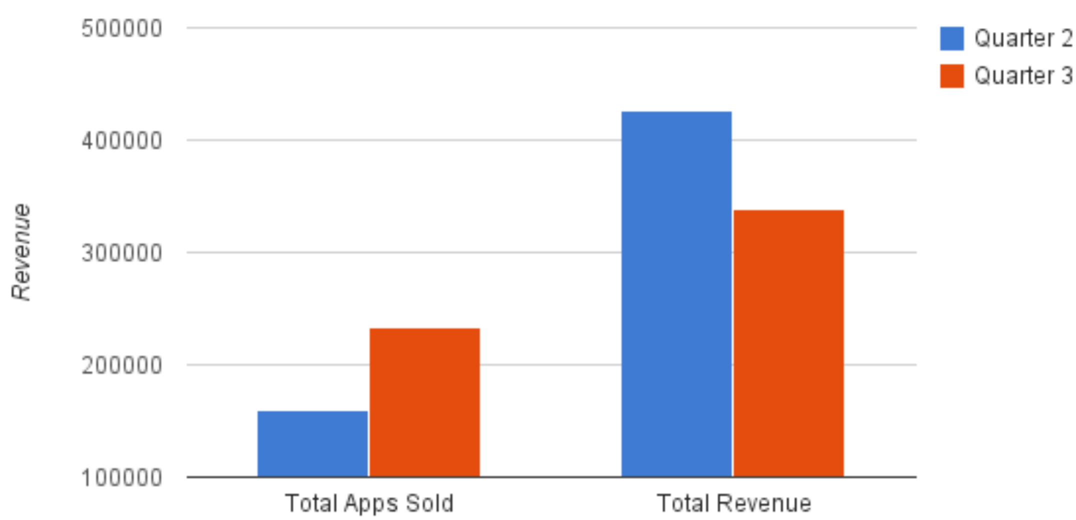


There is much debate in the mobile gaming space on development for Android. Those in favor site a large user install base, and those against point to a lack of app revenue generated and a fear of piracy. I will not attempt to give my opinion, as numbers will vary based on the report you read. In the survey I asked developers if their app was available for Android and if they were interested in developing for the platform. Only 7.3% of apps surveyed were available for Android at the end of Quarter 3, 2011 as shown in Figure 11. Only a little more than one third of respondents explained that they are interested in developing for Android. Leaving the great debate aside, according to the responses from the survey and as shown in Figure 12, most board game app developers are not yet interested in supporting Android. This will be a statistic to watch as the Android Market matures and more cross platform solutions become available.

III. The Numbers

One of the key purposes of the iOS Board Games State of the Industry report is to show the economic state of the board game app industry. We have spent the last few pages exploring the different features and profiles board game apps. We will now take a look at the revenue and sales numbers for board game apps from Quarter 2 and Quarter 3, 2011.

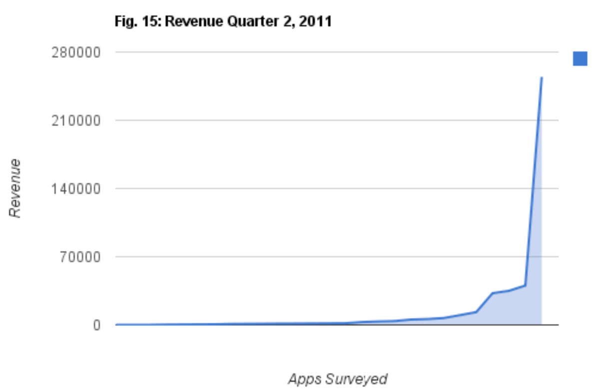
Fig. 14: Overview of Total App Sales and Revenue

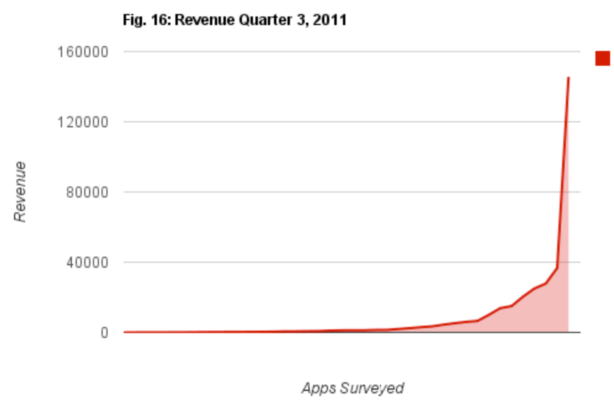


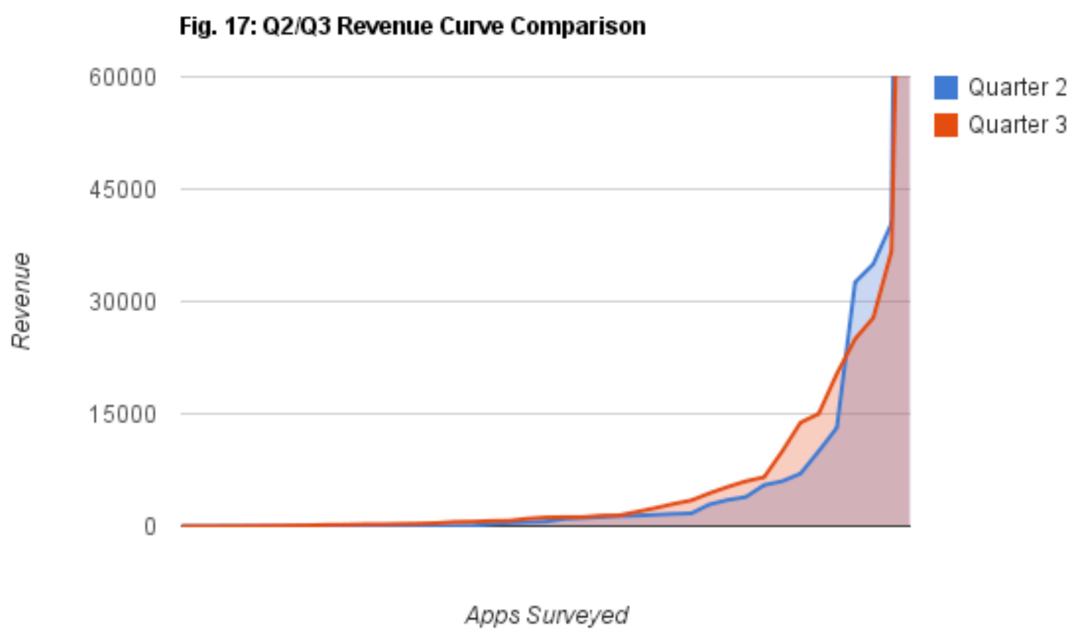
Quarter 3 is an interesting period for the board game industry. This quarter is host to some of the major conventions in the United States. These conventions served as platforms for the announcing of several big name titles that will not be released until Quarter 4, 2011 and beyond. As seen in Figure 14, though total app downloads rose by 46% among apps surveyed, total revenue dropped by 20%. This slight Quarter 3 dip in revenue does appear troubling and could be attributed to several factors: 1. Spiel at Essen, one of the largest game fairs in the world was a target for many developers, we could see a push in Quarter 4 due to this event. 2. The holiday season (Quarter 4) will not only be a time for major releases but also likely a period of increased app sales. Quarter 3 may just be a slight dip before the holiday season push. It is also important to note the additional $80,000 from in app purchases during Quarter 3, which represent a large chunk of additional revenue. Also, a slight dip in total revenue should not be a sign of doom because, in the area of revenue distribution, things are looking up.

The App Store is famous for its revenue distribution being weighted to one side. A small handful of apps make the majority of the revenue. According to a report from

Owen Goss of Streaming Colour 20% of iOS game developers make 97% of the revenue, while the bottom 80% make only 3% of the revenue (Goss, *Streaming Colour*). The iOS board game apps surveyed followed a similar pattern in revenue distribution as we will see below.

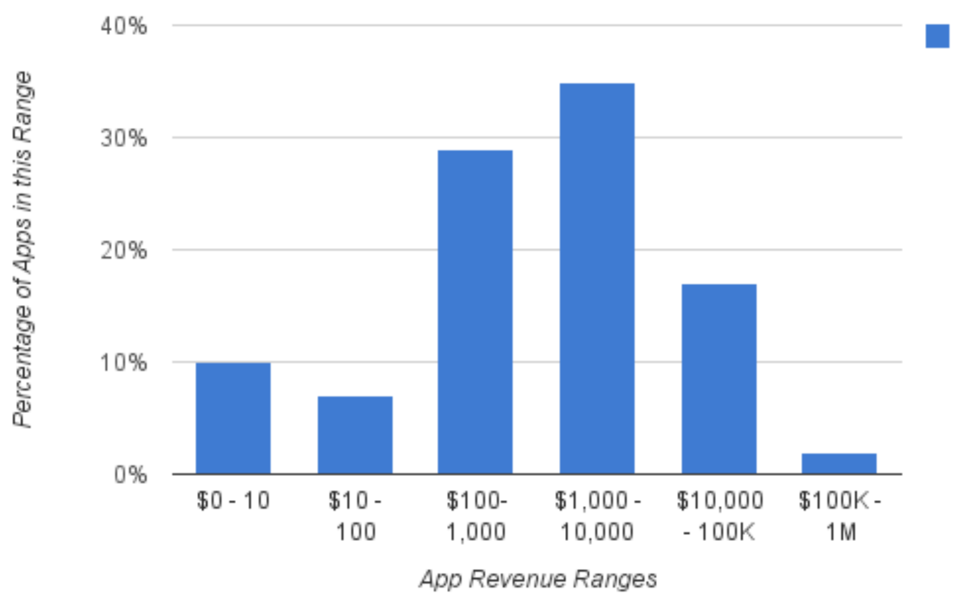






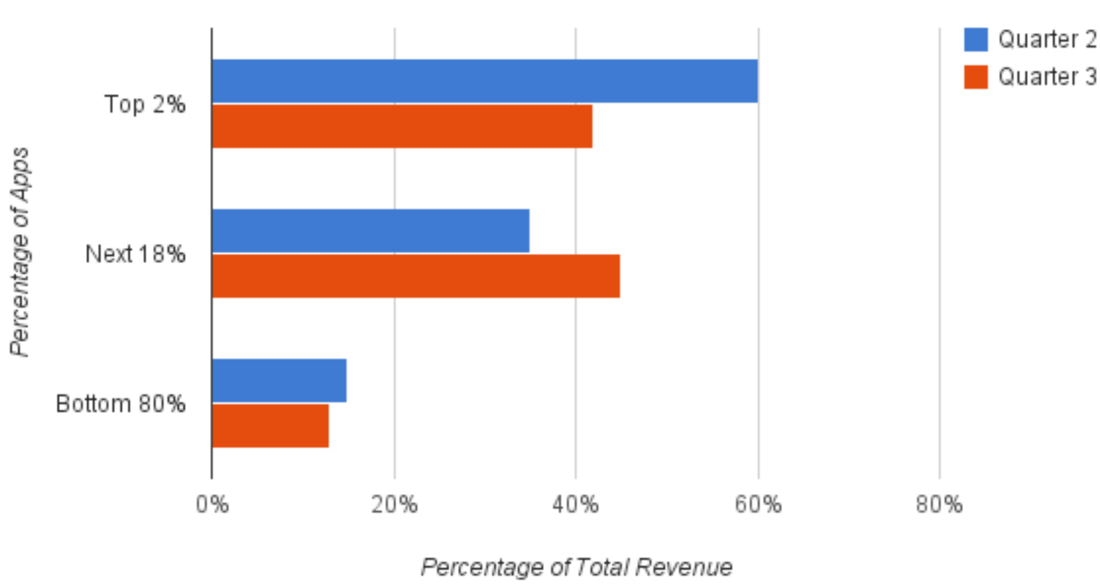
The revenue patterns for both Quarter 2 and Quarter 3 show the majority of revenue represented by a handful of apps (see Figures 15 and 16). When the two curves are compared side by side some positive change is shown (see Figure 17). In Quarter 3, 2011 one can see that the curve is less sharp than Quarter 2. This indicates a broader distribution of revenue and an increase in the number of apps in the top revenue categories.

Fig. 18: Revenue Distribution Quarter 3, 2011



As seen in Figure 18, the most common income group, $1k to $10k, represents 35% of apps in Quarter 3. It is also important to note that 46% of apps surveyed made less than $1k in Quarter 3. The chart follows somewhat of a curve pattern with the majority of respondents (64%) having revenue totals between $100 and $10k. One fifth of apps surveyed made over $10k which is very intriguing. As a consumer it is interesting to consider which apps you would place in this level, what were must buys for you? What sorts of features or elements attracted you to these apps? This is information developers must know in order to enter the upper revenue levels.

Fig. 19: Distribution of Revenue Overview



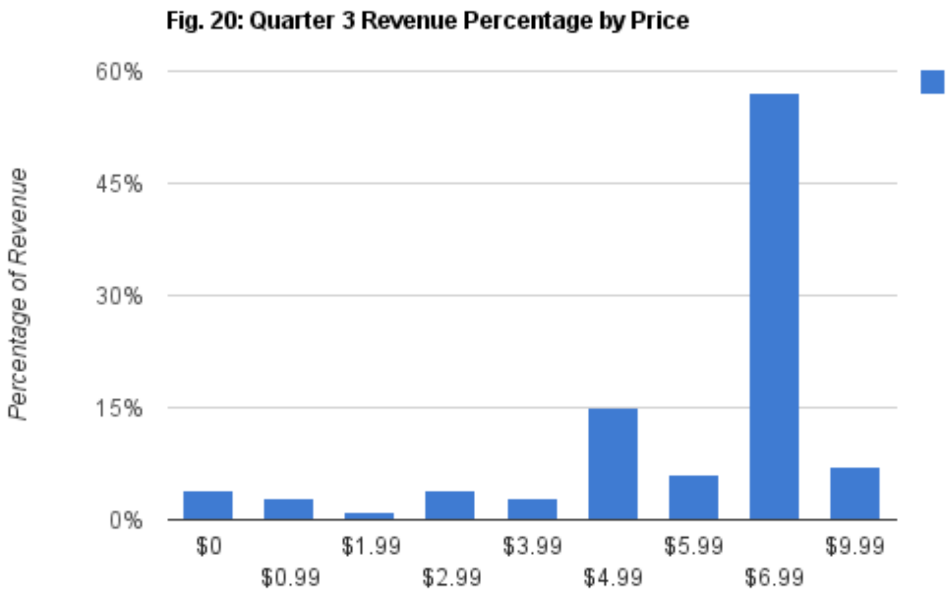
The overall distribution patterns of board game apps do have a wider spread than the games genre overall (see Figure 19). The top 20% of board game apps account for 87% of total revenue for Quarter 3, 10% lower than the same statistic for the games genre overall. This means the bottom 80% of apps account for 13% of revenue for Quarter 3, which far from an even distribution, is a more varied curve than the games genre overall. To be in the top 20% is a goal that developer can and should reach for. The app store does tend to reward a small numbers of apps while ignoring the rest, but for the board game app genre the number of apps in the top 20% is growing. There were 30% more apps in the above $10K range in Quarter 3 than there were in Quarter 2.

IV. Conclusion

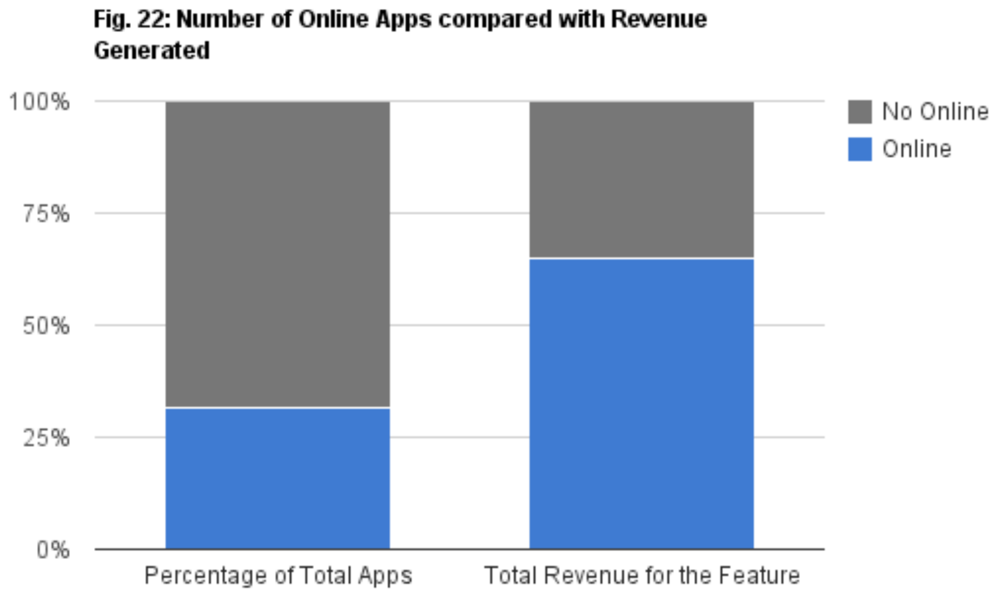
I hope this survey has been beneficial and eye opening to the trends and the commonalities of board game apps. Despite a slight dip in overall revenue during Quarter 3, I am confident in saying the board game app market is growing. The amount of releases are increasing and the number of those that achieve success is also increasing. The iOS board game market is plagued by the same patterns as the App Store in general, a small percentage of apps earn a majority of the revenue, but it features a much less drastic curve when compared to the games genre as a whole. I hope this report serves as a good look into the industry and presents the market as healthy as the App Store in general. This data should be helpful for both developers and board game publishers in defining the bounds and trends of the board game app industry.

V. iOS Board Games Best Practices Report Preview

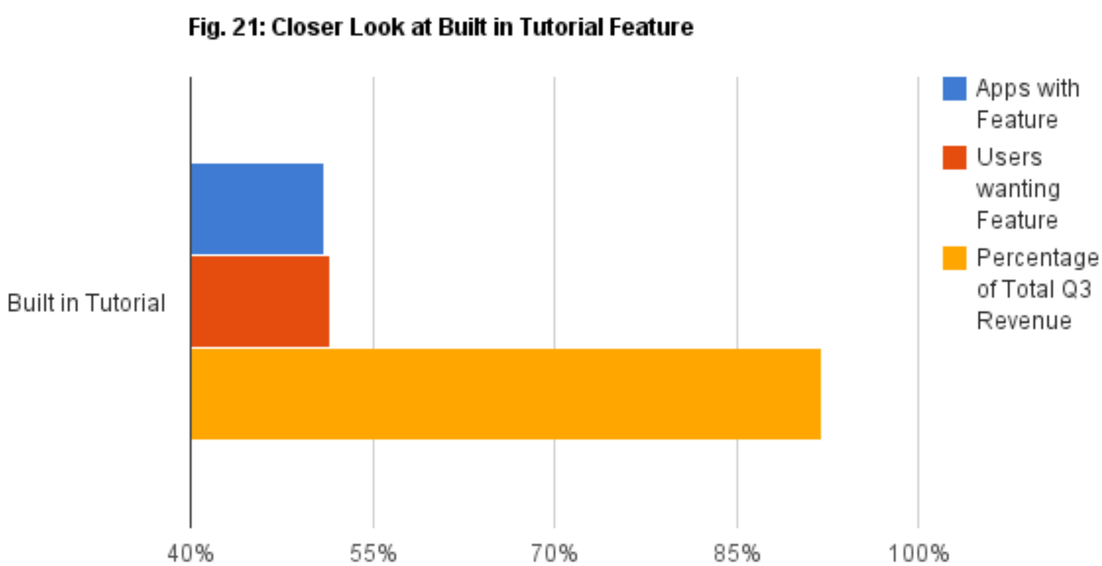
Specifically aimed at developers, publishers, and industry professionals I have completed an additional report called the iOS Board Games Best Practices Report that focuses on what features and developer choices appear to drive revenue, and what rules developers should follow in order to achieve a spot in the top 20%. This report is available for a small fee and I hope it provides useful guidelines for those interested in iOS board game development.



As a slight preview, I have included a few interesting figures that show some of what can be gleamed from a more granulated look at the survey results. The first is Figure 20. I thought it would be interesting to look at the relationship between price point and revenue. As noted previously, both the median and mean price point for Quarter 3, 2011 was $2.99. As shown in Figure 20 the majority of revenue was earned by apps in the $4.99 to $6.99 range. Clearly the majority of board game apps are viewed as premium apps and players are willing to pay premium prices. Developers, then, must provide proper features to justify the higher price point.



In Figure 22 I took a closer look at one such feature, online play. As you can see one third of board game apps feature online play features, however, they account for 65% of total revenue. These figures denote that many players are interested in online features and are voting with their gaming dollars.



This is also true of the tutorial feature as seen in Figure 21. This feature has been missing from many apps as of late and as you can see only 51% of apps surveyed have the feature. However, apps with this feature represent 92% of total revenue for

Quarter 3. Users are craving accessibility and it appears a built in tutorial is a necessary component.

If you are interested in more break downs and analyses about different elements that can factor in to the success of board game apps, be sure to check out the iOS Board Games Best Practices Report, Quarter 3. It is available for purchase and download here: http://iosbgreports.wordpress.com/. Also if you are interested in us taking a closer at your app in particular and how it compares to the market in general, as well as providing advice for improvement, feel free to contact us at iosboardgames@gmail.com.

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