



By Jasper Oorthuys

THE STATE OF OUR HOBBY, IN NUMBERS

THE GREAT WARGAMING SURVEY

Like most wargamers, when we're not actively rolling dice or painting our miniatures, we love to discuss the 'state of the hobby'. As far as we could see, however, much of that debate was based on anecdotal evidence. We needed data. That need, coupled with ingrained curiosity, bore fruit as the Great Wargaming Survey 2014.

There have been surveys before, of course, and any wargaming business serious about what it does, should do market research. But the outcome of all that is usually kept secret; it is valuable market information after all. As a magazine, we feel it's our responsibility to share what we know "for the greater good".

Online material

We started to publish material from the survey as soon as it ended on the WSS website. A list of all relevant articles can be found at: www.wssmagazine.com/survey2014

Before we start on a short summary of the questions and then report on the results, here's a quick note on how it was promoted. We ran the survey, online only, throughout the month of July of this year. Promotion started of course with our own website, Facebook pages, Twitter, newsletter and YouTube channel. A news item was subsequently posted on TheMinaturesPage, BellofLostSouls, TableTopGamingNews, Beasts of War and a large number of forums and blogs (both in the English-speaking wargaming world as well as in a variety of wargaming sites throughout Europe). In total, the news was posted on some three-dozen websites, and was repeated on the main news site at least twice more throughout the month.

7759 wargamers took the time to respond, of whom about 95% completed the entire survey. That is certainly a considerable sample size, and should provide reasonably relevant results for historical miniature wargamers, and perhaps even all miniature wargamers (see our online articles for notes about bias). However, for the sake of accuracy, we should point out that the results are strictly speaking only relevant for the respondents. That should always be kept in mind.

THE QUESTIONS

Going into the survey, we were determined to ensure that the survey was doable in a very short amount of time – 5 to 10 minutes – knowing that the longer it'd take, the more likely that people would stop and surf elsewhere. We therefore attempted to frame all questions and topics we wanted to discuss in the

least number of questions with the least number of permutations in the answers. That ensured we had a limited number of options, for each of which we'd have a large number of responses, increasing the odds that the results reasonably accurately reflect the group as a whole. However, this determination has inevitably also resulted in some questions having too few, or too vague options. We also attempted to avoid using brands and specific rulesets, only using them as examples to clarify a question. Luckily, many of the respondents took the time to provide feedback either within or outside of the survey, and the valuable lessons learnt will be brought into practice for repeat exercises.

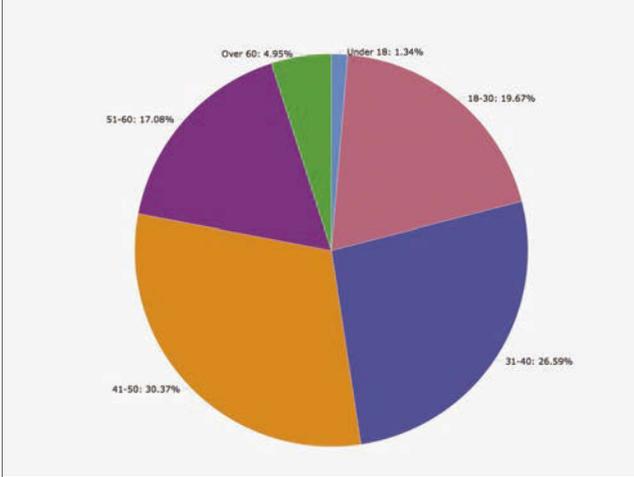
The survey had six sections. "The Wargamer" had a few succinct questions to determine something about the actual respondents – worldwide location, age, introduction to the hobby, future expectations and how long the respondent had been a wargamer. To the surprise of some, we did not ask more sociodemographic questions. We decided against that because of the intentions mentioned above, as well as the problematic frame of reference for a worldwide survey ('Middle Class' may not mean the same everywhere). The second section asked about preferences in regards to the different aspects of wargaming, a rough estimate of yearly expenses, and the preferred ways to do research. We then asked about aspects of "Playing the game": preferred setting or period, figure size, game length, size of game, and a series of preferences in regards to the rules. Fourth, we tried to determine how important the "Social Wargamer" is as part of the hobby: club membership, online participation in forums, email lists etc, whether or not respondents wanted to meet new wargamers, and finally whether visiting shows and conventions was considered important. The fifth section, "Inspiration," dealt with sources of that precious quality that engenders wargaming mojo. The sixth and final section, "Magazines and Periodicals" investigated our own position in comparison to our colleagues.

RESULTS

We already reported on the results of some of the sections on our website, but I'll give a short summary here anyway. Our respondents came from all over the world, with the follow-

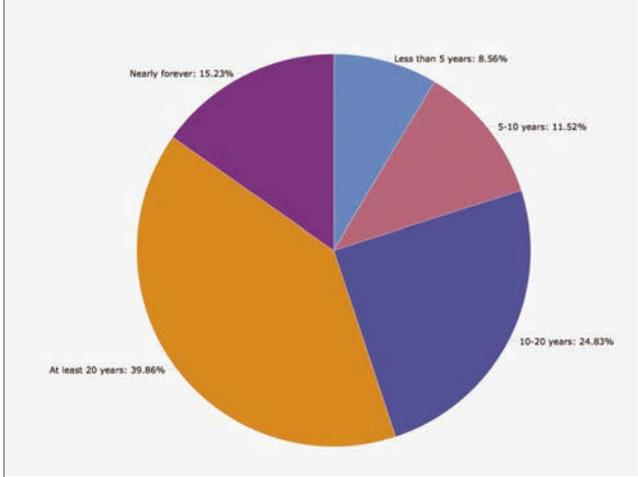


HOW OLD ARE YOU?



Most wargamers are solidly middle-aged.

HOW LONG HAVE YOU BEEN A WARGAMER?



It seems that they've also been at it for quite some time!

ing division (out of 7520): 8.1% from Australia and New Zealand; 23.8% from Continental Europe; 30.8% from the United Kingdom and Ireland and 37.3% from North America. 183 wargamers indicated they fell outside of those four categories, with most living, often as expats, in South America, South Africa, Malaysia, Singapore, Japan or China. The average wargamer is between 30 and 50, with some 21% under 30s, 22% over 50 and the rest in between. It won't be a surprise to hear that the wargamer is overwhelmingly male. As an extra option in the gender question we'd included the option "Who cares? Anyone can play tabletop wargames!". Interestingly, wargamers under 30 selected that option over twice as often (6.5%) as wargamers over 50 (2.5%). Perhaps we could, very tentatively, conclude that stereotypical attitudes of wargamers towards women are changing? Hopefully, in due course we'll add an entire demographic for potential growth!

It is of course possible that wargamers who feel their hobby mojo waning did not respond to the survey (and therefore the results to the following questions are coloured by self-selection), but it seems wargaming is a hobby for life. 40% has had this hobby for more than 20 years, while the superlative "Don Featherstone taught me how to roll dice!" was selected by another 15%. Similarly, 63% indicates that they "Love this hobby and will keep doing it come hell or high water", and an additional 33% adds the proviso "As long as I can afford it and combine it with real life". That leaves just about four percent who are either ambivalent, expect to have to leave it behind, or just feel they're losing interest. That suggests that at least the existing pool of wargamers will be around for quite some time yet, but until there are more of these surveys, we won't be able to answer the age-old question about 'the greying of the hobby'.

HOBBY PREFERENCES

The first question of the second section was already addressed extensively online. It attempted to rank the various aspects of wargaming as a hobby by asking about the relative importance of each. "Hanging out with friends" came out as "definitely important" most often, followed by "Research" and "Playing the game". At the bottom of the list were scenario preparation

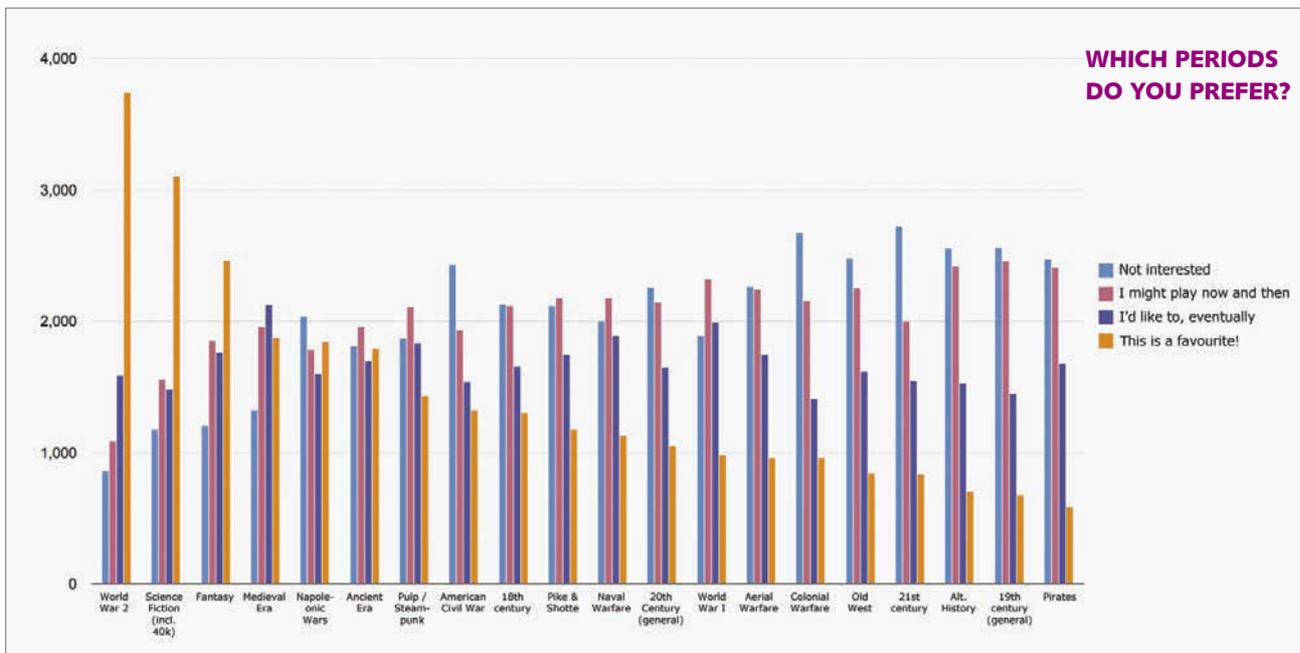
and fiddling with rules – this is a nice example where passive consumption of scenarios is very popular, but actively creating them not so much – followed by list-building and collecting rulesets. Again, very interesting results as the stereotype suggests that the latter options would play a larger role.

The second question, regarding the amount of money spent on wargaming, was also addressed online. It's one of the few questions where broadly comparable results for another survey seem to confirm the rough picture. The validity is brought into question, however, by the fact that the most popular results work out to 50 USD/GBP/EUR per month, which might be a very likely guesstimate for a wargamer asked about his hobby budget.

Finally, we asked about the means of research. It appears that roughly 3 percent really doesn't care at all, some 7 percent is happy with what the rulebook offers, and the remaining 90 percent is equally divided between books (digital or paper) and the power of the internet to help out.

PLAYING THE GAME

The next section addresses what, in the end, it's all about: what kind of games do we enjoy? It won't be a surprise that, in a survey where the respondents are proportionally more interested in historical wargaming, the most popular era is World War 2. This was closely followed by Science Fiction and Fantasy and the Medieval Era (this almost invariably remained the second-most popular era no matter how the survey results were sliced, undoubtedly testifying to the success of SAGA), with Ancients rounding out the Top 5. The largest percentage of "Not interested" was gathered by 21st Century Warfare, closely followed by Colonial Warfare and 19th century excluding Napoleonics and ACW. Our question regarding favourite miniature sizes asked respondents to rank the options. Overall winner was 25-28mm. This was followed in descending order, by Heroic 28mm, 15-18mm, 20mm, 6mm, 10mm, 3mm and smaller, 40mm, and finally larger than 40mm. Most wargamers prefer a game that lasts an afternoon or evening (with 65%), while "short and sweet" games still garner 20% of the votes. Longer games, that last a weekend, or even a campaign game – an option that shouldn't have been there – each got about 7%.



World War 2. It's the wargamer's favourite by quite a big margin.

Preferred army size – something of course closely related to budget, time constraints and preferred miniature size – is fairly evenly divided. This was again a ranking question, with Small Army level (75-250 miniatures) most often selected first, followed by Skirmish or Platoon level games (25-75 miniatures), which was selected as the second option most often as well. Small skirmish was number three, and trailing somewhat was Large Army sized games.

Next, we asked respondents to indicate whether they agreed with statements about aspects of rules design. Winner by a country mile, with 65% agreeing, was “I enjoy rules that encourage historical tactics”. Though this result is bound to lead to much debate, we are just here to report the facts... The runner up, with 48% agreeing, was “I enjoy rules with clever new mechanics”, closely followed (46%) by “I enjoy rules with a clear points system”, “I enjoy random events” (43%) and “I enjoy a randomized turn order” (41%). Oddly enough, considering the statement about points, “I enjoy detailed, very clear and strict rules, fit for tournaments” received a nod from 27%, and a shake from another 27%. That might be interpreted to mean that many wargamers enjoy the flexibility of a points system for e.g. pick-up games.

THE SOCIAL WARGAMER

Stereotypical wargamers may have a bad image when it comes to their social behaviour, but this perception does not confirm to the answers given in this survey. We've already seen how the game is, for many, really a vehicle to hang out with friends. The results from the questions in this section reinforce the notion that the social aspect of wargaming is very important. 43% is member of a club and another 39% would like to be. 55% interact with other wargamers online and have met some of them as a result, while another 31% take part as well, without meeting anyone. A whopping 82% would like to meet new wargamers to play games with! 14% prefer to play within an existing circle,

while 4% prefer to play solo games. Visiting conventions is a popular thing to do. 15% visit as many as possible, 57% go to a select few, while 23% would like to go, but do not have any within reasonable distance. Only a very small minority indicate that conventions or shows don't offer what they'd like to see, or that 'wargamer funk' is too off-putting.

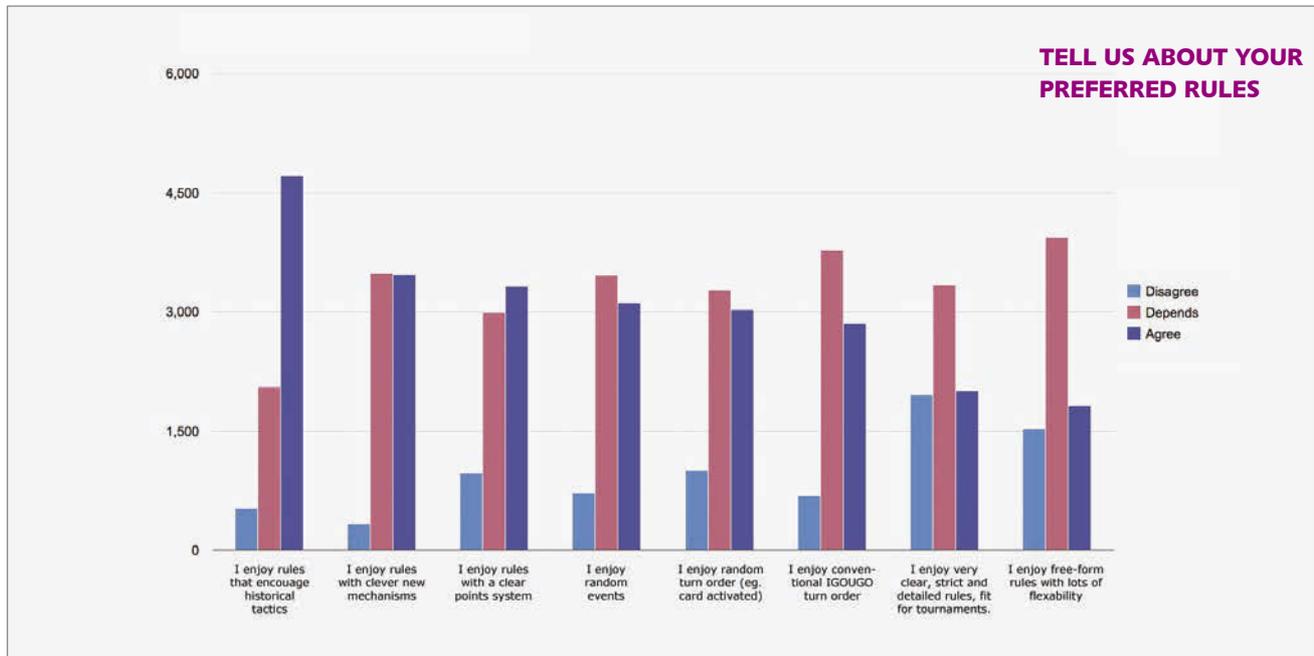
INSPIRATION AND PERIODICALS

As very related topics, these two sections can easily be taken together. “Sources of inspiration” was again a ranking question. “Historical events” was chosen most often as providing inspiration, followed very closely by “reading or watching fiction” and “discussions with my gaming mates”. Again, as for the question about the origins of the hobby, friends play a big role. Novels, films and other works of fiction also seem to have a big influence. Wargaming forums – essentially an extension of talking to your friends – are in fourth place, followed by blogs, magazines (clearly this should be taken as an injunction to do better!), online galleries, YouTube and, finally, Podcasts.

Magazine interest, finally, was for us of course an important question. It's one thing to check sales figures, but quite another to poll your readers and potential readers. No, we're not going to provide a ranking – we're pleased with the results though – and those who read WS&S have provided very useful feedback on how to improve this magazine. Thanks for that! Of course, those who do not read any magazine also give useful feedback. Some 13% of respondents indicated they do not buy wargaming magazines, which is both their loss, and a warning to magazine publishers elsewhere, as these respondents were on average younger!

CATEGORIZING WARGAMERS

In some very broad strokes, that's the general picture emerging from the 2014 Great Wargaming Survey. Again, additional



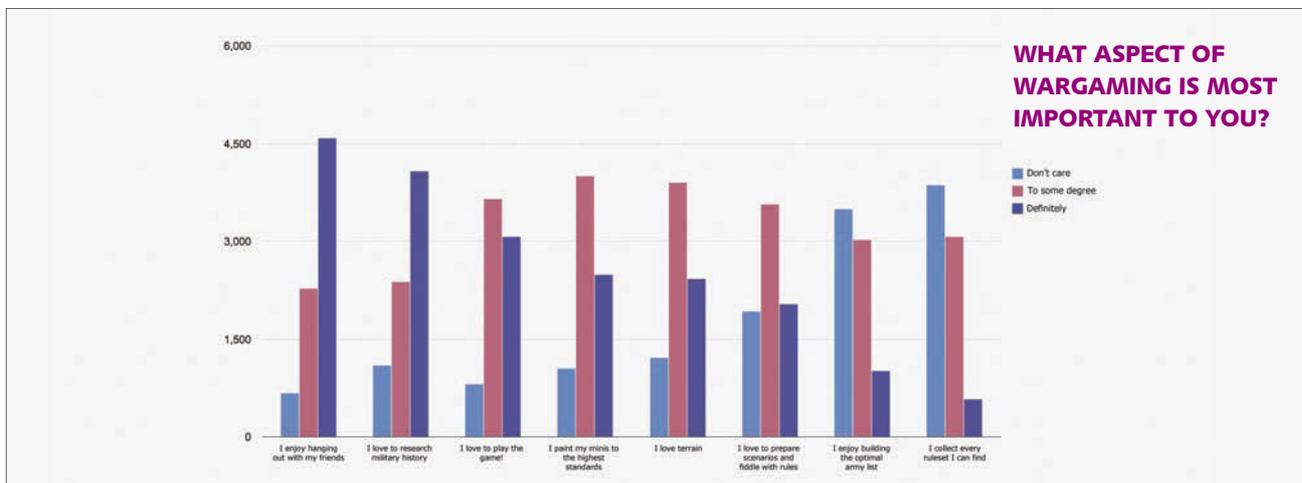
Apparently simulating historical tactics is very important to many wargamers.

information is available online for those interested in more detail. For now, it might be interesting to apply some filters to the data. The software allows us to select only those respondents who gave answer X for question Y, and then consider the results for only that group. So let's delve into some categories and see how that changes the results. First up: young and old.

1629 wargamers indicated they were, at the time, 30 or younger. There are fractionally more women in that group and, as stated above, significantly more state they don't care about the gender of the person across the table. Most young wargamers live in Continental Europe (34%) and, unsurprisingly, many have not been wargamers that long, though 44% has already been 'at it' for 10 years. Friends were essential in getting them into the hobby (52% for this group instead of 42% overall), as well as the FLGS (34% vs 23%). Interestingly, nearly four percent said something caught their interest while they were looking for computer wargaming online. Not everyone is as convinced that they'll keep wargaming forever (57% versus the average 63%). Another 38% plan to continue as long as they are able to (versus 33% for all ages). Perhaps this should not be a surprise considering the general 'life' distractions in that age group. Friends are again the main motivator for wargaming itself. 71% state that "Hanging out with friends" is very important, followed by playing the game (47%), research (45%) and painting miniatures (34%). Amount of money spent is, understandably, a bit lower, and, hardly a surprise, the internet is a much more important tool for research (64%). Favourite periods change as well, with the top five in descending order consisting of Science Fiction, Fantasy, WW2, Pulp, and the Medieval era. There's no meaningful change in miniature size, game length or game size. It's also not surprising given younger wargamers' favourite period preferences that "Historical tactics" have taken a dive in the favourite aspects of the rules. Instead, a clear points system is considered most impor-

tant, followed by clever rules and then historical tactics. More younger wargamers want to be, or already are, a member of a club. Being presumably less mobile, younger wargamers interact online as much as anyone, but have met fewer people as a result. They're more eager yet to meet new wargamers (90%!), and more indicate they have no conventions within reach. The latter is unsurprising: Continental Europe could use more!

In contrast, veteran wargamers of 50 years and older (1708) live more often in the UK and US, and 93% have wargamed for at least 20 years. 33% started on their journey by reading a book or magazine, but friends were still influential for 31%. Having been wargamers this long, they expect to keep going (73%), if at all possible (23%). This group really enjoys research (76%) and hanging out (50%). 52% indicates "Playing the game" is important "to some degree". They spend on average a bit more, and do their research in their (digital) book collection (70%). Science Fiction and Fantasy completely drop out of the top five favourite eras or settings, which now looks as follows: WW2, Napoleonic, Ancients, Medieval and ACW. The heroic 28mm figure, which typically goes with SciFi and Fantasy, is a lot less popular and cedes second place to 15-18mm. Game length and size do not change much. Historical tactics are important in rules for 84%, followed as most popular aspects in games by a randomized turn order and random events. Clever new mechanics are only important to 34% (perhaps they've seen them all?). About half of this group is a member of a club, and another 30% would like to be. More than half have met people as a result of interaction online and even after many years of gaming, 72% would still like to meet new wargamers to play with. Half the solo wargamers are found in this category. Conventions and shows are also quite popular with older wargamers. 21% go to as many as they can, while 63% visit a select few. With such high marks for research, it shouldn't be a surprise that studying historical events is the main source of inspiration.



In the end, it's really all about friends and having fun.

TOURNAMENT GAMERS

Another category worth looking into is the tournament gamer. We never asked specifically whether respondents self-identified as such, but filtering for those who really like Points Systems and Tournament-ready rules gives us a selection of 1509 wargamers. They are on average younger (31% under 30, 13% over 50) and hail from North America and Continental Europe more than on average (41% and 29% respectively). 41% have wargamed for at least 20 years, and another 27% less than 10 years, again showing the signs of a slightly younger group. Friends and the FLGS again played the most important role when it came to introducing this group to wargaming, but, interestingly, one in four say they segued from painting miniatures to playing with them. There are no significant differences in regards to future expectations. As for the younger group, hanging out with friends is “definitely” an important aspect for 71%, and, fittingly, 57% said that playing the game is important. Only 29% of this category indicated that “Building the optimal army list” was an important aspect of their hobby! Whether this group runs out to purchase the latest killer-unit cannot be determined from their expenses, but they do seem to spend a little more than on average. Research is done online (56%), though the rulebook suffices more often (12%). The top 5 of popular settings here are, in descending order, Science Fiction, WW2, Fantasy, Pulp and Ancients. Miniature size and game size are as expected and obviously, 63% prefer a game that lasts an afternoon or evening.

Besides liking points systems and good tournament rules, these gamers also prefer rule sets that encourage historical tactics (still!), clever rules mechanisms and, much higher than on average, the conventional turn order. Exactly half of these wargamers are members of clubs and 38% would like to be. 61% interact online and have met new people because of that, and another 26% haven't yet, but do chat with other wargamers on forums, email lists and social media. 88% - slightly less than the young wargamer group - would like to meet new wargamers, while 11% plays their competitive rules in a limited group. In itself that's an interesting outcome. That does leave 1% who prefer to play solo... Show and convention visits are about average, and for inspiration, the number one spot is held by “discussions with my gaming mates”.

It would, of course, be possible to endlessly slice and dice these results to find a particular group of wargamers, or determine adherents for a specific ruleset. However, that would very quickly lead to near-meaningless samples, or subsets based on incorrect assumptions. A few quick examples: Flames of War might be identified by a preference for points systems, tournament ready rules, 15-18mm figures and World War 2. Tagging those four criteria filters the set of 7759 results to a subset of only 243 respondents. That doesn't mean that only 3% of respondents play this game. It only means that 3% selected 15-18mm as their number one favourite miniature size, and that they consider FoW as a ruleset fit for tournaments. Casting the net wider, for a combination of 15-18mm as first or second choice combined with WW2 as favourite period, narrows the set from 7759 to 1741. That's still quite a considerable sample, but these may not all use FoW, but prefer, e.g. Battlegroup Kursk instead. Similarly, 25-28mm, WW2 and a preference for points systems might lead one to suspect that 515 out of 7759 wargamers play Bolt Action, whereas 1276 wargamers prefer 28mm and WW2. A correlation is, however, not a given.

CONCLUSION

Running a survey has been an interesting, and very educational, exercise. Tempting though it is, we've tried to limit our assumptions, conclusions and extrapolations. We'll leave that to discussions over the gaming table, at the club or online. There is now data to prove that talking about our hobby is very important to all of us. Most of all, we were encouraged to learn that wargaming seems to be a long-term hobby with an extremely strong social aspect. If anything is a guard against the intrusion of computer games, that should be it. **WS&S**

We would like to express our thanks to our sponsors, 4Ground, Warlord Games, North Star Miniatures, Osprey Publishing, Pen & Sword and Casemate. Their prizes made the survey even more tempting. Finally, we want to thank everyone who took the time to respond. Without those nearly 8,000 wargamers, we would've had a pretty useless survey. On to 2015, and the discovery of trends!