


 By Jasper Oorthuys

IS THERE HOBBY IN NUMBERS?

THE GREAT WARGAMING SURVEY 2015

After the amazing results of 2014's Great Wargaming Survey, I suppose it was inevitable to try and see if its success could be repeated. Not just because that would be great fun (it is!), but also to correct some errors. Also, only a repeated survey would come close to indicating continuing trends in this hobby. Hence the Great Wargaming Survey 2015.

Obviously before this survey started, we took a good look at last year's offering and decided to clean up, change and add both new open and multiple-choice questions. In future editions, we plan to alternate sections of questions on topics we don't expect to change very often, in order to address these topics regularly while keeping the overall survey fairly short.

Do the results have any general validity? Last year's warning still applies: the results of the Great Wargaming Survey only speak to the collective of respondents to this survey. Yes, with 8173 responses and a completion rate of 93.4%, we've put together another large sample in absolute terms, but without a known population size, the sample validity cannot be calculated.

To find out whether we were just polling our own readership or also getting some wider traction, we used slightly different links for different websites or groups of sites. Obviously, that system isn't perfect. If someone picks up – and luckily many do so – a link from, say, our newsletter and posts it on their blog to attract more attention to the survey, any responses coming via that blog (or forum, or social media site...) will be counted as responses to our newsletter. With that caveat, 52.1% of responses arrived via our own site, newsletter or social network sites. 31.4% came via the Beasts of War website, newsletter or in response to the Weekender show on which they discussed it. Somewhat surprisingly, only 9.1% of responses came via Wargaming news sites. Another 7.4%

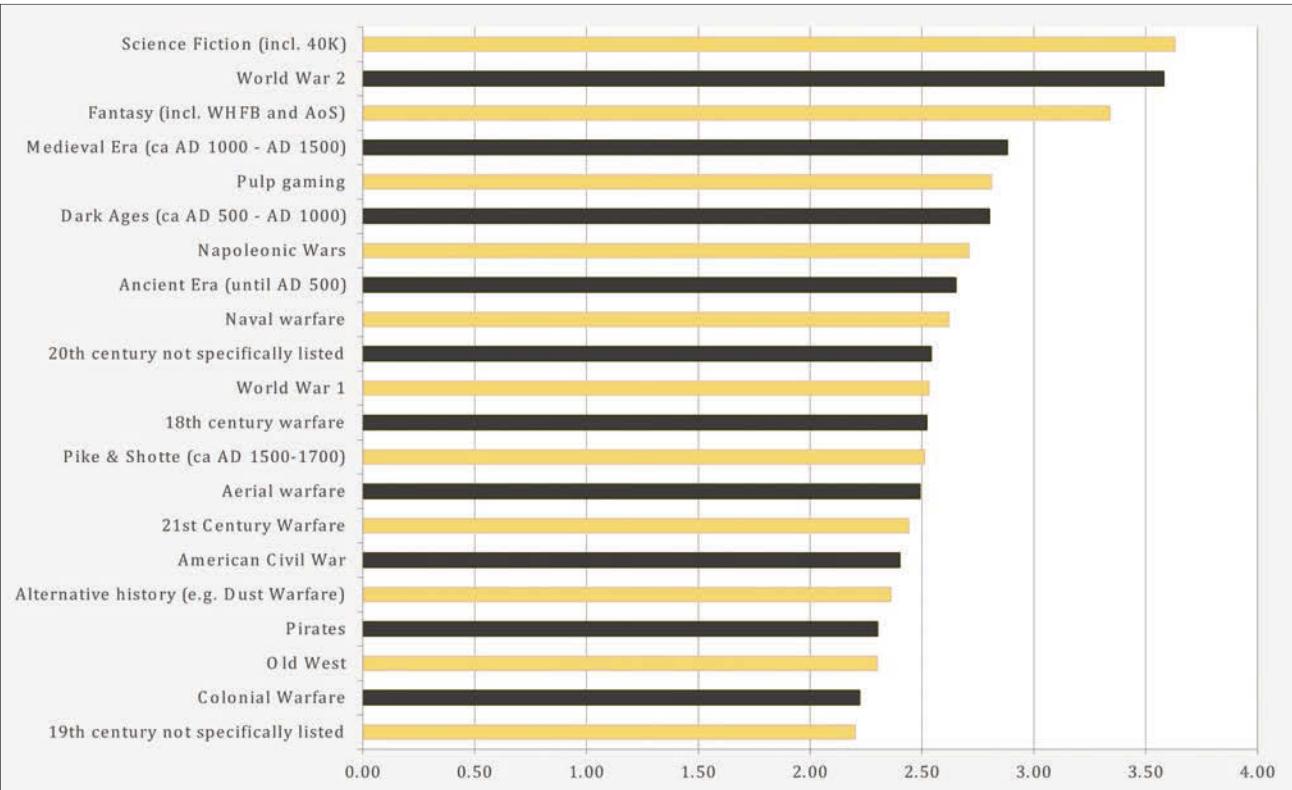
came via blogs and a variety of wargaming forums. It would be interesting to compare the above to the sources of last year's respondents, but unfortunately we did not use separate links in 2014. Lesson learnt for 2016.

THE QUESTIONS

As before, the survey consisted of several sections. First, "The Wargamer" established some basic details about the respondent – age, gender, region of the world, time in the hobby and whether he or she took part in the survey last year. Section two, "You as a wargaming hobbyist", posed questions about the relative importance of the various aspects of wargaming, asked after the estimated yearly budget for the hobby, where that money was spent online or in the real word, and which sources of research were most important. In section three, "Playing the Game", respondents were asked to indicate their favorite periods and settings for wargames, their favorite size of miniatures and size of game by army size, game length and number of players, and how often they actually get to play games. The next section looked at the social aspects of wargaming, with questions about the size of the respondents' regular gaming group, their relative ages, the physical location where games are played, and finally attendance and participation at shows and conferences, as well as online in wargaming forums. We then asked respondents about their periodical reading habits and finally, there were two new free-form sections in which we asked respondents what they liked best about their hobby and what they'd like to see changed.

RESULT HIGHLIGHTS

- 50.4% has wargamed for over 20 years, and only 10.6% for less than 5.
- For 46.7% of respondents, friends and relatives were influential for getting them into the hobby.
- Enthusiasm and determination are very high. Only 1.1% do not expect to keep going, though the survey may be self-selecting in that respect.
- 30.6% took part in both this and last year's survey.
- Brick and mortar stores, manufacturer webshops and independent retailers are almost equally important when it comes to spending money.
- Respondents play often: 35.5% play at least once a week, while another 42.1% gets a game in at least once a month.



Periods and settings popularity ranked by weighted average.

RESULTS

On to some actual wargaming information - though note we can't address all questions here. When asked about the varied origins of their peculiar hobby, with multiple answers allowed, respondents in 2014 indicated their friends were most often to blame. That has stayed the same, though to a lesser degree (41.5% versus 36.4%). However, this may have been caused by a larger number of options (seven in 2014 versus ten in 2015, including 'other'). The option 'introduced by a family member', for instance, did not exist in 2014 and got 10.4% of responses in 2015. Interestingly, kids are mentioned very often in the 'do you expect to keep gaming in the near future' question, both as a reason for a decline in the hobby – children in their role as time-sink, so to speak – and as a reason to game more – children in their role as potential adversaries across the gaming table. The only other external influence, schoolteachers, was selected in only 2.3% of responses (2.7% in 2014). In all other cases, the road to wargaming seems to be a journey of individual discovery, be it as a natural progression from playing with toy soldiers as a

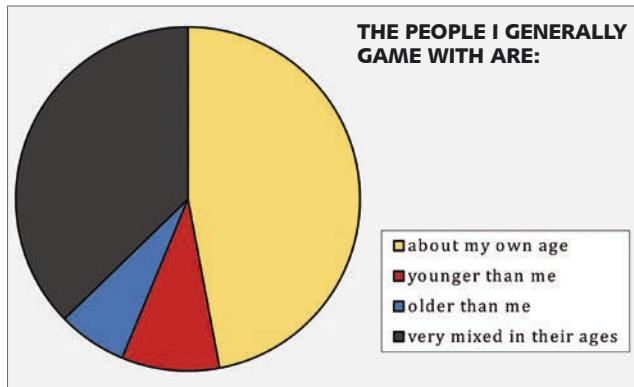
child (31%), to painting and modeling (19.3%), reading (19.4%), finding the hobby online (5.3%) or visiting a game store (21%).

Regarding the future, the slightly younger respondents of 2015 seem to be more ardent in their enthusiasm. No less than 67.1% answered they "love this hobby and are determined to keep going" with another 28.6% stating that they'll keep at it as long as 'real life' allows. From the comments, we know that this has more than a little to do with the availability of wargaming friends. The ambivalent or negative answers are almost exactly the same, percentage-wise, as those in 2014.

The tough, confrontational question of wargaming expenses, was next. Last year, we surmised that many wargamers guessed at a round monthly expenditure of '50-odd' in local currencies. That idea seems to be relevant this year as well. Strikingly, however, whereas the top choice (over 800 GBP/1000 EUR/1400 USD) last year only got 16.3% of the vote, that option and the extra high level together got 26.9% of responses! It's interesting to speculate what caused that to happen, but that's for another occasion.

MAIN CHANGES VERSUS 2014

- The respondents are on average younger, with 53% under 40.
- The number of female respondents has more than doubled to 1.8%.
- Hobby expenses seem to have gone up, with 26.9% indicating that they spend more than 800 GBP / 1000 EUR / 1400 USD per year.
- Science Fiction gaming has pushed WW2 off the top spot, but 28mm and heroic 28mm remain the most popular size of miniature.
- Researching military history came in fourth instead of second as 'important aspect of wargaming'



Worrying sign: are wargamers too segregated by age?

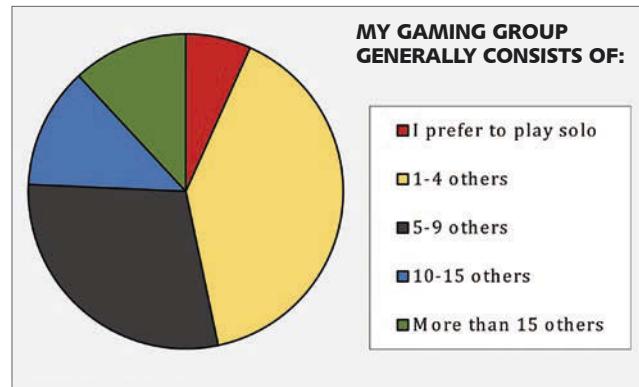
A new question this year asked respondents where they purchased their hobby necessities, with more than one option possible. From the answers, it would appear no single outlet is much more important than any other. Brick and mortar stores, manufacturer webshops and independent online retailers are all used by roughly 60% of respondents, with a difference of less than 5% between the most (independent retailers) and the least popular option (manufacturer webshops). EBay and other second-hand online marketplaces are used by some 43%, while shows, evidently limited by their schedule and geographical constraints, are used as a shopping option by 31% of wargamers.

PLAYING THE GAME

When it comes to the post popular periode, it should be noted we posed the question slightly differently than before. In 2014, we asked the respondent to choose between 'not interested', 'I might play in someone's game or paint a figure', 'I'd like to collect and / or play this but now now' or 'this is a favorite'. This year, we simply asked them to rank each period or setting from 1-5, with 5 being most popular.

In 2014, the top three most liked settings were World War 2 (51.4%), Science Fiction (42.4%) and Fantasy (33.8%). This year, number one and two traded places. Science Fiction is now first with 42% ranking it at 5, closely followed by World War 2 (38.2%) and Fantasy still in third place (29.9%), despite many complaints about *Age of Sigmar* in the comments throughout the survey. Interestingly, the top three for periods ranked at 4 is Fantasy (21.5%) and shared second place for World War 2 and the Medieval Era (21.3%). The latter is actually in fourth place overall, and bookends Pulp wargaming (7th in 2014) with Dark Ages. Note that the results in the graph on page 29 are weighted averages.

Another new question asked how often, on average, wargamers were able to 'get a game in'. It appears that only a small section of the respondents are lucky enough to play several times a week, but over 35% play at least once a week. However, 18.4% play at least once a month and 23.6% play several times a month. Another new question looked at how many gamers people enjoy having at the table at once, with multiple options possible. It's probably no surprise that the overwhelming majority likes the classic 1v1 (71.1%), but 2v2 is quite popular too with 31.7% giving it the nod. Other options – solo, or more than 2v2 – all get only single digit responses.



Most wargamers have a fairly small circle of friends.

WARGAMING SWOT

Say, for argument's sake, you wanted to use this survey to make a SWOT analysis (strengths, weaknesses, opportunities and threats) for wargaming as a hobby. What would that look like? This is definitely food for pub discussions, and depends a lot on the open-ended answers rather than the hard data. Strengths are clearly varied, and equally important. Wargaming is a hobby that offers many appealing options: research, collecting, painting, socializing, competition, and tactical thinking. Its main weaknesses are two-fold: the first is that the bar to entry is pretty high. It often requires an initiate to do the actual introducing, and a substantial amount of money and time is required to get that first army on the table. The second weakness is the availability of people to play with. Though solo-wargaming is a very valid sub-section of wargaming, most respondents clearly prefer to share their hobby with others.

The opportunities are obvious: there must be many more wargamers joining the fold. Most obviously, women, as there are certainly a growing number with related interests who could be tempted into wargaming as well. The lack of female wargamers is certainly remarked upon throughout the survey. Hopefully, the fact that more women responded this time around is a good sign. Threats, finally, can be discerned in the period/setting preferences. Wargaming as a hobby is incredibly fragmented and an era some find engrossing turns other fanatical wargamers off entirely. Outside threats, in the form of other distractions, are of course manifold too. Boardgames are perhaps the most 'clear and present danger', scratching many similar itches without the effort of collecting, painting and setup and some of the other stigmas and baggage often associated with wargaming.

That said, I gather from survey responses and reactions online that both the respondents and the analyst find the survey an enjoyable inventory of an even more enjoyable hobby. I think I'll keep going... **WS&S**

Like last year, we started publishing results from the survey as soon as it ended. There's much more to say and show than we can possibly put in this short article, so there'll be more to come online. A list of relevant articles can be found at: www.wssmagazine.com/gws2015