



KANTAR

The social power of **BOARD GAMES**

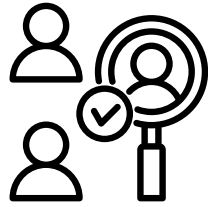
Asmodee x Kantar International Barometer 2026
How people play, connect and come together across 5 markets

A simple, robust and repeatable methodology

Nationally representative surveys

across **France, Germany, Sweden, the UK** and the **US**

5 countries · 5,000 respondents · 15 questions · **Annual** tracking



Sample

1000 respondents
per market
(aged 18+)



Method

Online survey, representative
by age, gender, region, and
socio-professional category

Designed to **compare** board game practices, motivations
and perceptions across markets — and to **track** their evolution over time.



Always on. Less together.

24%

of people worldwide say they feel **very or fairly lonely**

66%

of adults wish they spent **less time on their devices**

82%

of adults say phone use in social gatherings **hurts the conversation**

Source: Meta-Gallup, Global State of Social Connections, 2023

Source: Deloitte Digital Consumer Trends, 2024

Source: Pew Research Center, Americans' Views on Mobile Etiquette

What role do board games play in society today?

From family moments to friendship rituals, from screen breaks to shared emotions, board games reveal a renewed appetite for *meaningful experiences*.

They offer more than entertainment: a way to connect, to feel, to belong, and to *bring something back* from the time we spend together.



Board gaming sits at the crossroads of 5 major shifts

Board gaming is no longer just a leisure category:
it reflects deeper shifts in how people *connect*, *unwind*, *play* and *belong*



ANTIDOTE TO DIGITAL OVERLOAD



A RITUAL OF PRESENCE



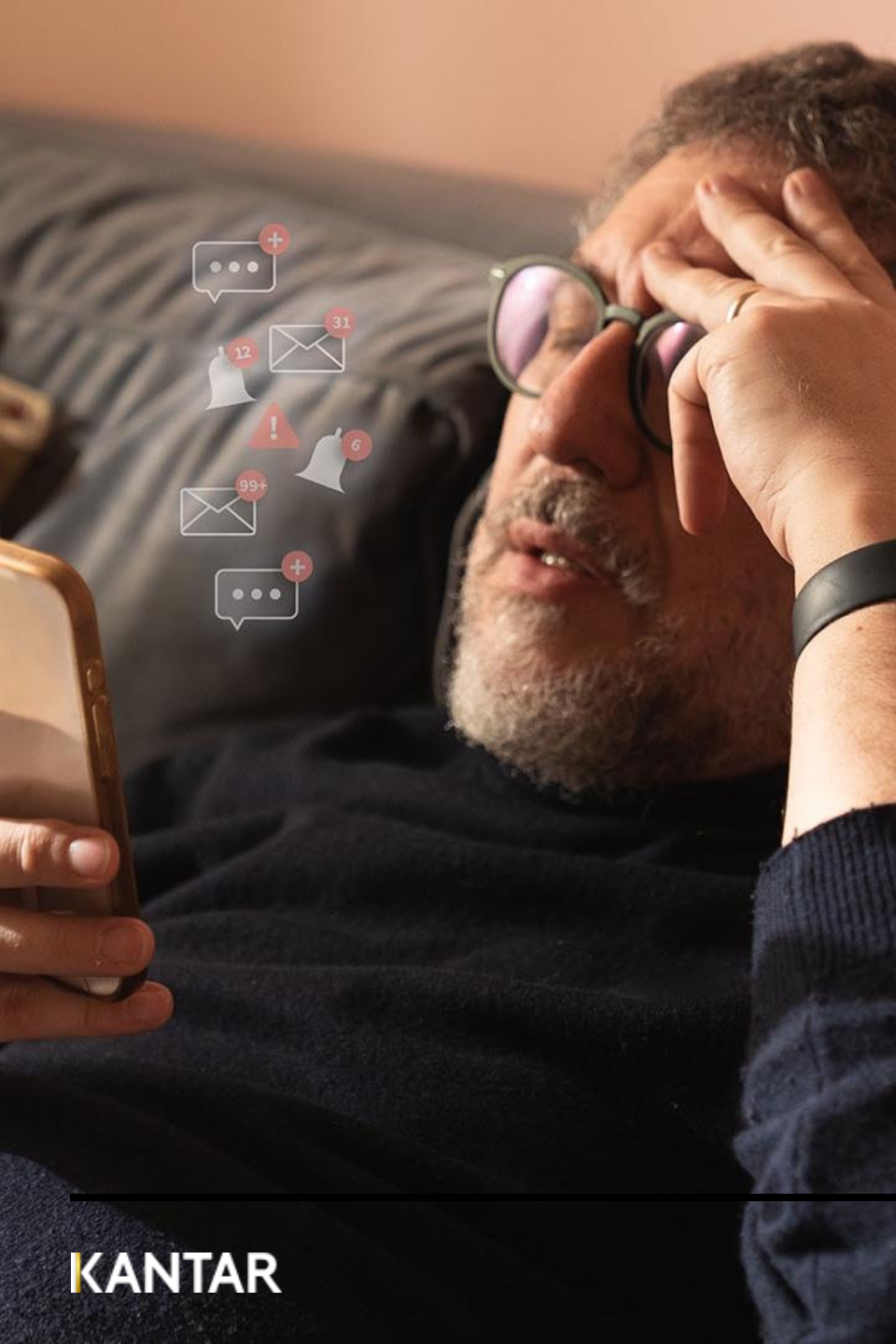
A SOCIAL (RE)CONNECTOR



A FORM OF CULTURAL EXPRESSION



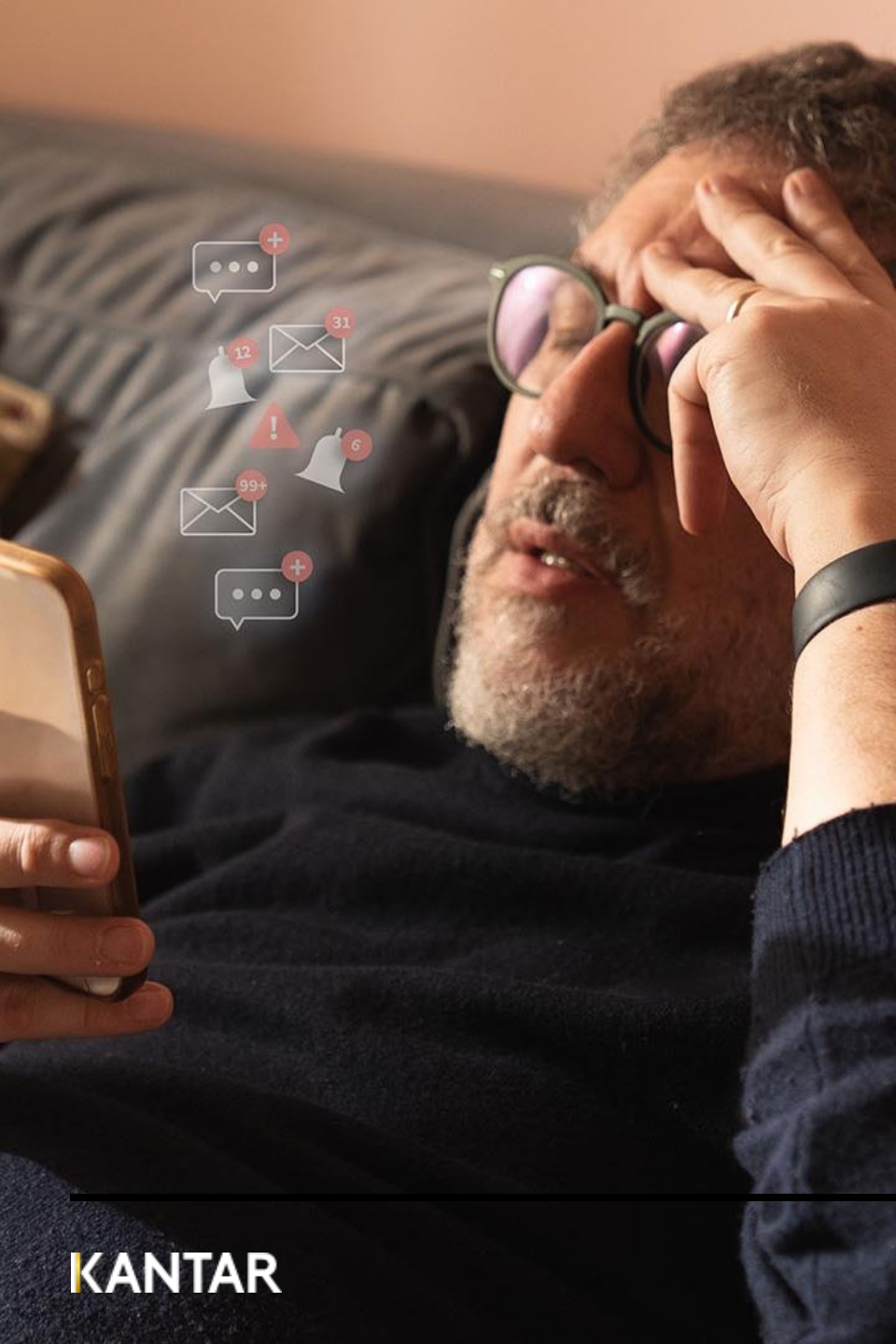
A MORE MAINSTREAM KIND OF SHARED ENTERTAINMENT



SHIFT 1:

BOARD GAMING

is becoming an antidote
to digital overload



Together at the table

Over half the population play
board games monthly



6h38

spent online
every day
by the average
global internet
user

Source : DataReportal, Digital 2025 Global Overview Report

In a world saturated with screens, notifications and always-on digital interactions, board gaming offers a rare form of intentional disconnection.

As digital life becomes increasingly fragmented: scrolling between apps, multitasking across devices, responding to messages in real time... Board games create a different kind of moment: slower, more focused, and deliberately shared.

They invite people to put phones aside, gather around the same table and invest their attention in something tangible: cards, pieces, rules, gestures, reactions, eye contact. Whether it is a quick family game after dinner, a weekend session with friends, or a party game during a social gathering, board gaming creates a space where people are not just connected, but genuinely present.

This does not mean rejecting digital life. On the contrary, board games can act as a valuable counterbalance to it. They offer an analogue experience that feels increasingly meaningful precisely because it restores what digital interactions often dilute: focus, patience, shared attention, and the pleasure of doing one thing together.

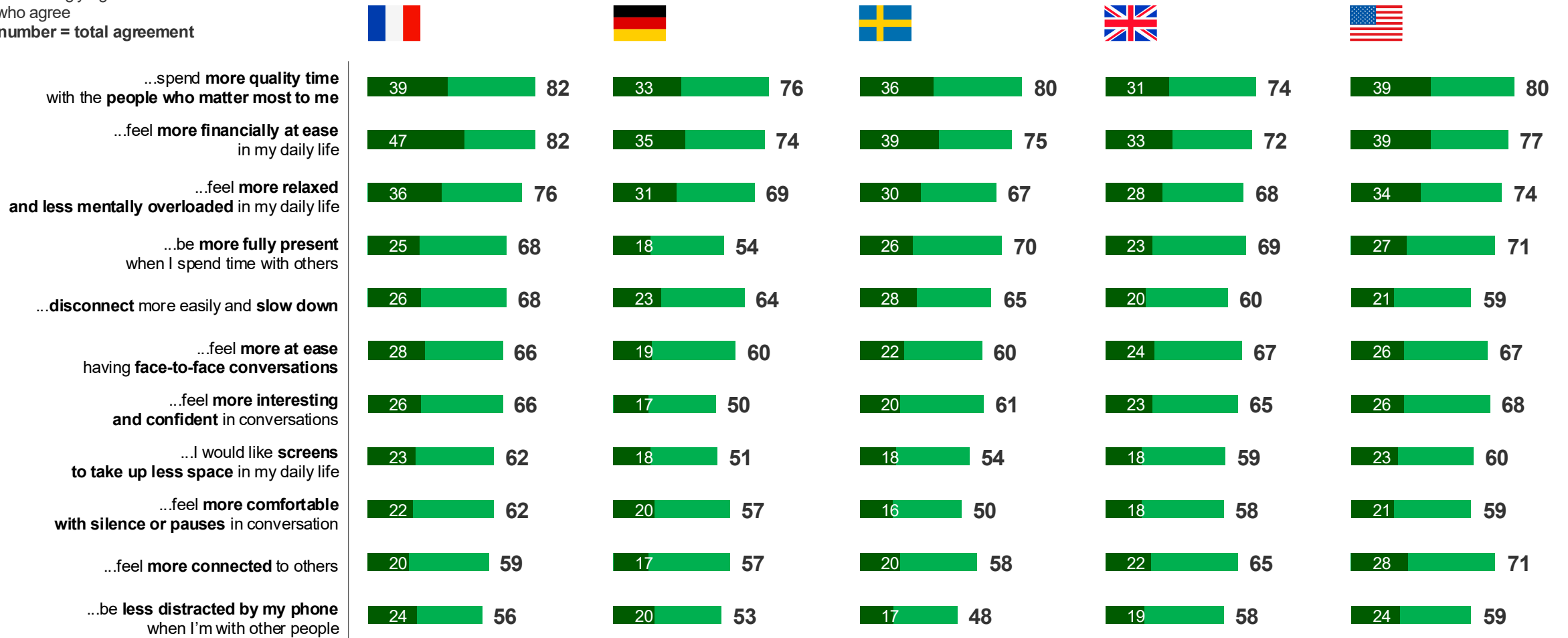
What it means for board games:

Board games can grow by positioning themselves as a much-needed pause in an always-on world: not anti-digital, but deeply complementary to digital lifestyles. Their strength lies in offering a simple, accessible and emotionally rewarding way to reclaim quality time, presence and human connection in the age of distraction.

***A way to slow down, disconnect from screens,
and reclaim more intentional moments.***

The age of distraction is fueling a need for togetherness

■ % who strongly agree
 ■ % who agree
 End number = total agreement

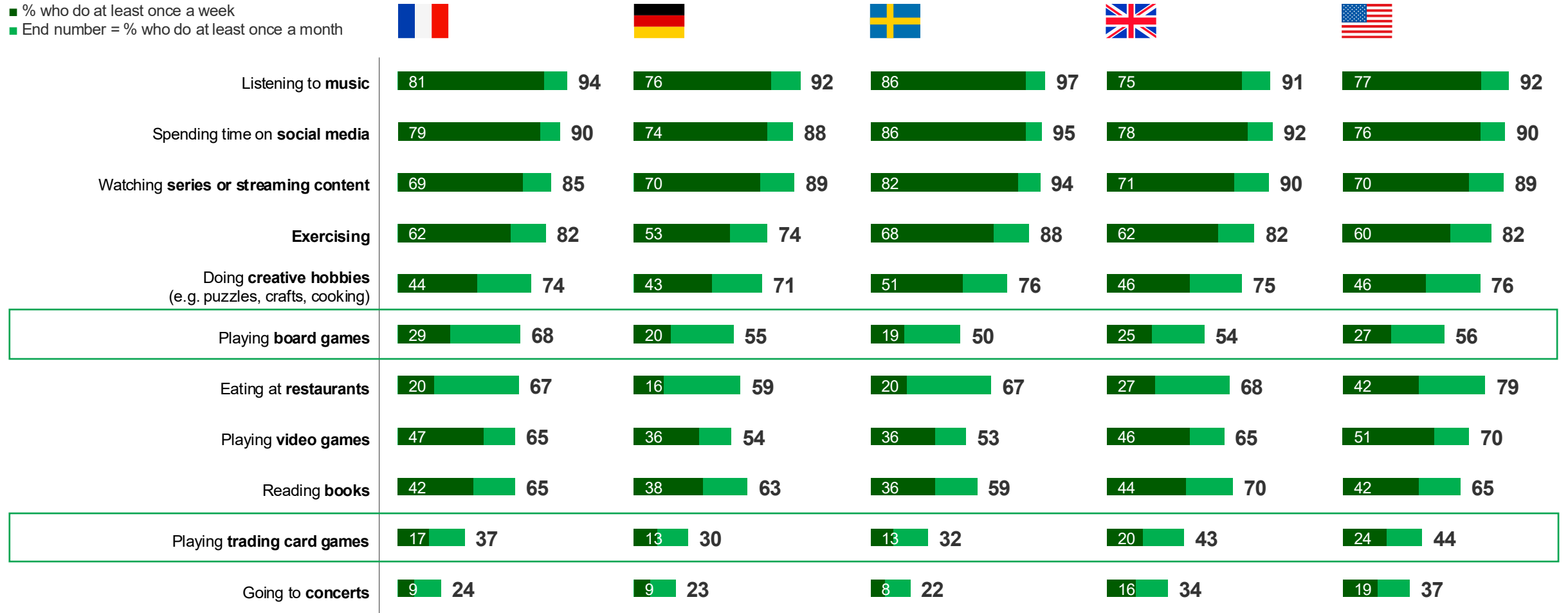


Question: To what extent do you agree with the following statements about today's world and your daily life? I would like to ...

There are many ways to unwind... and board games are clearly part of the mix!

■ % who do at least once a week

■ End number = % who do at least once a month



Question: How often do you engage in the following activities?

Board games are becoming the best response to a lot of different needs

Being together, for real

They help people **SWITCH OFF FROM THE NOISE.**

A healthy alternative to screens, they create moments where people can slow down, feel present and escape daily stress.

They help people find their **WAY BACK TO EACH OTHER.**

They bring generations together, revive happy memories and restore a sense of real human connection.

They make **TIME TOGETHER FEEL EASIER.**

By creating a shared focus, they take pressure off social moments and open the door to more natural, meaningful conversations.





SHIFT 2:

BOARD GAMING

is becoming a ritual of
presence



Game night is the new night out

Over half the people prefer playing a board game than going out on a Saturday night.



74%

of Gen Z
think in-person
experiences are
more important
than digital ones

Source : Deloitte Digital Consumer Trends, 2024

In a world of constant acceleration, remote interactions and fragmented attention, people increasingly seek experiences that help them feel fully present again.

Board games answer this need in a simple but powerful way: they create a shared ritual, with a clear beginning, a shared set of rules, and a moment where everyone agrees to be part of the same experience.

Unlike many forms of entertainment that can be consumed alone, in parallel or half-distracted, board games require people to gather, listen, react, wait for their turn, read each other's expressions and engage with the group. Around the table, presence is not abstract: it becomes visible through gestures, laughter, eye contact, tension, cooperation, surprise and collective emotion.

This is why board games are no longer just perceived as “entertainment”. They increasingly resonate with a broader societal need for balance, wellbeing and real-life connection. A short game after dinner, a Sunday family ritual, a game night with friends, or a deeper immersive session all answer the same need: creating a protected moment where people can be here, now, together.

What it means for board games:

Board games can position themselves not only as a hobby, but as a wellbeing and social reconnection category: a simple, accessible and emotionally rich way to restore presence, balance and quality time in everyday life.

***A simple but powerful occasion to be fully together,
here and now, around the same table.***

Board gaming is a mainstream social ritual but not for the same reasons everywhere

Board games are becoming a mainstream social ritual across markets.

More than a break from screens or a way to spend time, they create intentional, affordable and emotionally rewarding moments together — moments where people can slow down, reconnect, laugh, talk and feel present.

But this ritual is not expressed in the same way everywhere.

Each country reveals its own playing culture: from family and childhood memories to social bonding, mental wellbeing, party games, expert formats or trading card communities.

This confirms the strength of board gaming as a flexible cultural territory: mainstream enough to speak to everyone, but diverse enough to adapt to different audiences, occasions and local cultures.



More than a break from screens

■ % who strongly agree
 ■ % who agree
 End number = total agreement



Tabletop games are a **healthy alternative to screentime**



Tabletop games create **moments where people are fully present**



Tabletop games (like other offline hobbies) have a **real positive impact on mental health**



Tabletop games help me **disconnect** from daily stress & create a **positive escape**



Playing tabletop games helps me **slow down & ground myself** in the present



Question: To what extent do you agree with the following statements about tabletop games?

More than a way to come together

■ % who strongly agree
 ■ % who agree
 End number = total agreement



Shared activities like tabletop games help to **bond with people from another generation**



Playing tabletop game reminds me of **happy childhood memories**



Tabletop games help restore **real human connection in a digital world**



Tabletop games **bring together people** who might not otherwise spend time together



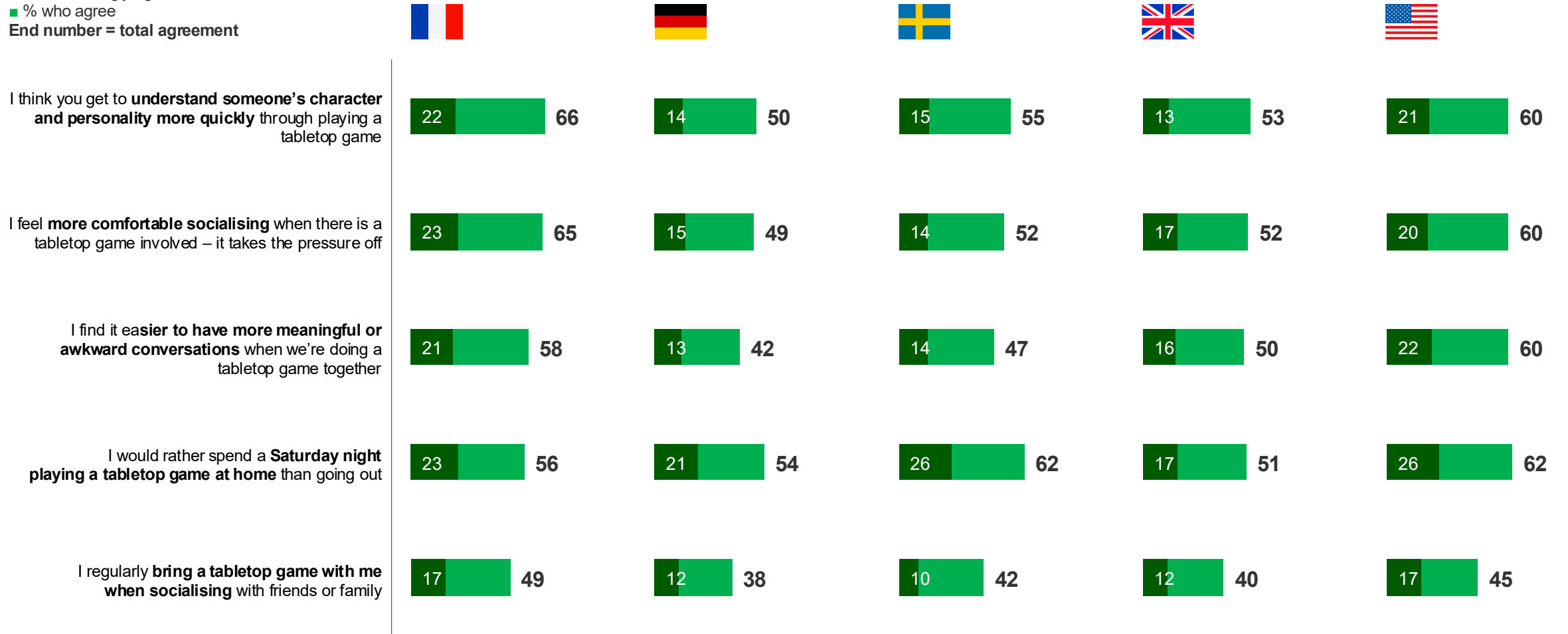
Shared activities like tabletop games help me to **feel closer to my friends and family**



Question: To what extent do you agree with the following statements about tabletop games?

More than a way to spend time

■ % who strongly agree
 ■ % who agree
 End number = total agreement



Question: To what extent do you agree with the following statements about tabletop games?



SHIFT 3:


BOARD GAMING

is becoming a social
(re)connector



Board games against loneliness

73% of board gamers say playing helps them meet new people



64%

of people use
tabletop games to
bring their
families
together

Source : Asmodee / Censuswide global study, 2025

As social lives become more fragmented, board games offer a simple and powerful way to bring people back together.

They do not only create entertainment; they create a shared language, a common set of rules, gestures, reactions and emotions that allows people to reconnect without needing to over-explain, perform or plan too much.

Around a board game, connection happens naturally. People laugh, compete, cooperate, negotiate, bluff, tease, help each other, lose together or celebrate a shared win. A party game can break the ice between friends of friends; a cooperative game can turn players into a team; a family classic can reconnect generations around something everyone understands; a strategy game can create tension, complicity and stories people will remember long after the game is over.

This is what makes board games such a powerful social connector: they provide both a pretext and a structure for togetherness. Behind the game itself, something deeper often happens: people create memories, strengthen bonds and experience the pleasure of being part of the same moment.

What it means for board games:

The relevance of board gaming goes beyond fun: its value lies in its ability to turn play into social glue — a simple, repeatable and emotionally rewarding way to reconnect people, create shared memories and strengthen everyday relationships.

A shared language that helps people reconnect, laugh, compete, cooperate, and create memories.

Board games are seen as mentally enriching, emotionally rewarding and social facilitators

Across all five markets, the strongest and most consistent perceptions relate to mental stimulation.

Board games are widely seen as keeping the mind active, encouraging strategic thinking and offering a rewarding experience that goes beyond simply passing time.

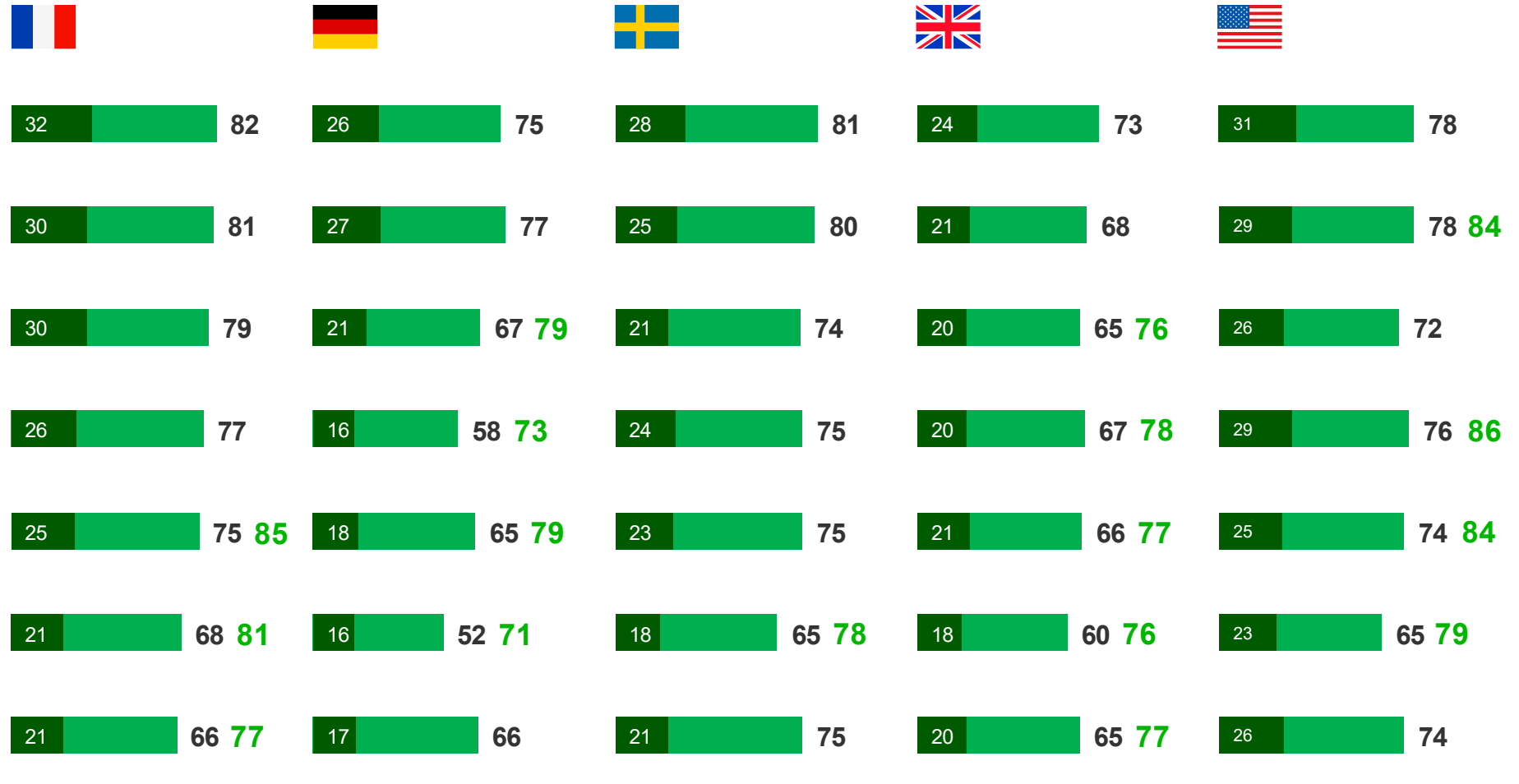
A second layer of value lies in wellbeing and emotional escape.

People also associate board games with creativity, mental wellbeing, presence and a sense of evasion — suggesting that play is not just stimulating, but also restorative.



Sharpening the mind through play

■ % who strongly agree
 ■ % who agree
 End number = total agreement

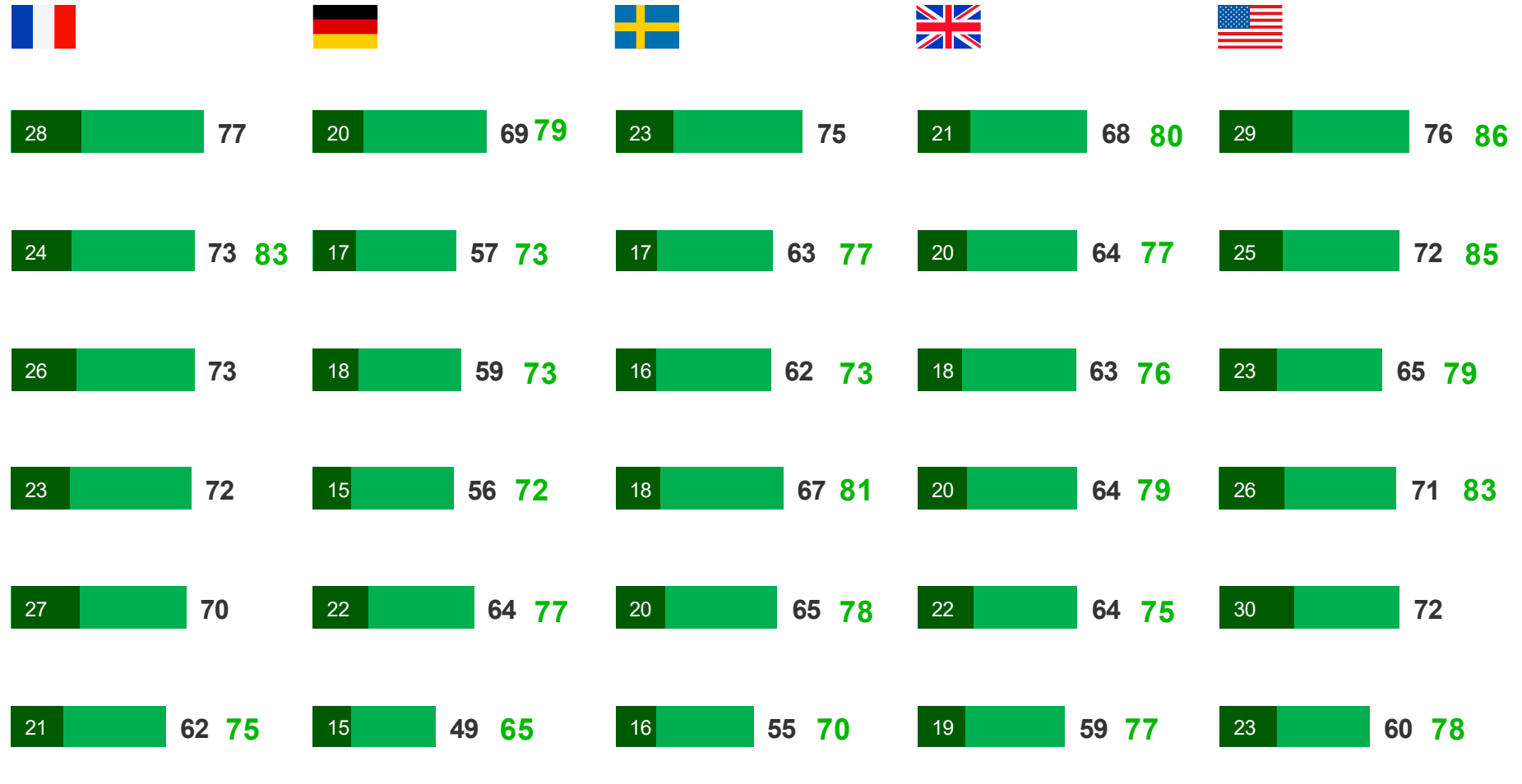


Question: To what extent do you agree with the following statements? Playing tabletop games ...



Finding escape and wellbeing through play

■ % who strongly agree
 ■ % who agree
 End number = total agreement

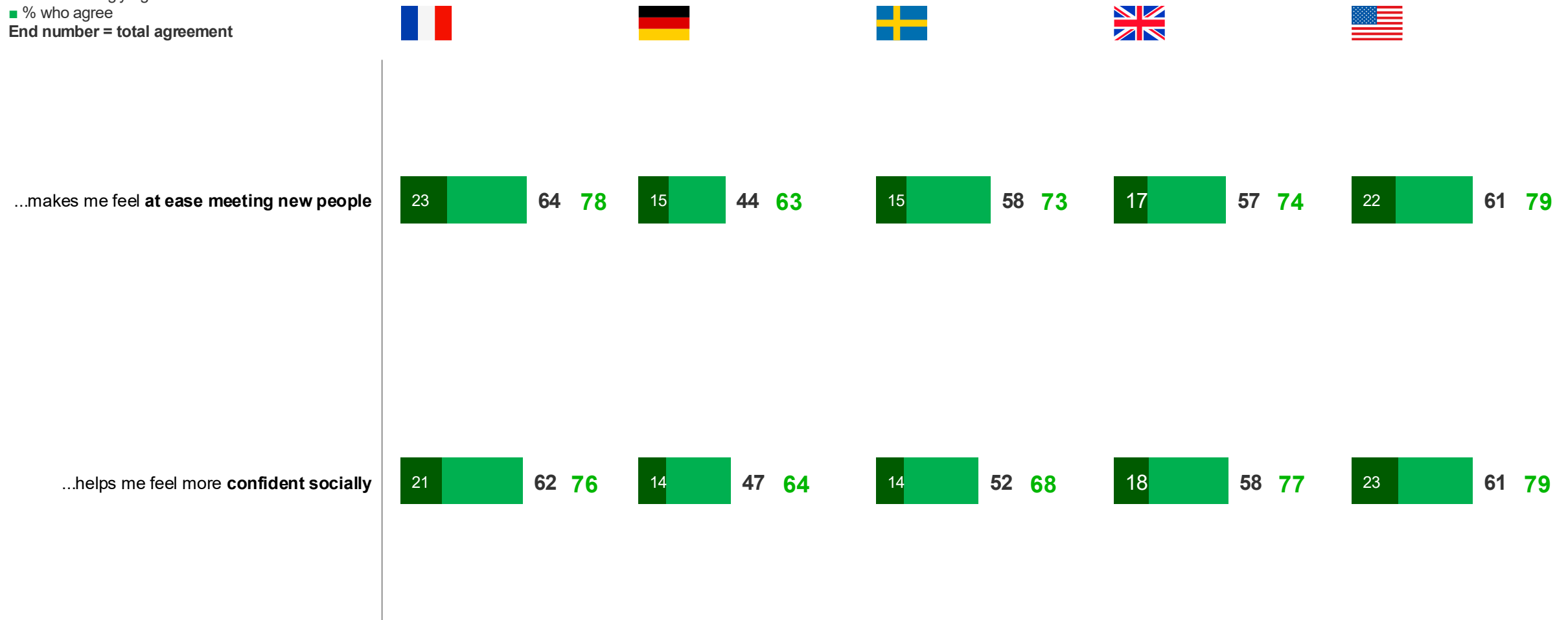


Question: To what extent do you agree with the following statements? Playing tabletop games ...



Making social connection easier through play

■ % who strongly agree
 ■ % who agree
 End number = total agreement



Question: To what extent do you agree with the following statements? Playing tabletop games ...





SHIFT 4:

BOARD GAMING

is a form of cultural
expression



Play at the center
of identity and
experience



64%

of fans say
their fandom is
a defining part
of their identity

Source: Amazon Ads, Anatomy of Hype, global fan research

In a world of fandoms, communities and cultural tribes, board games are becoming a powerful form of self-expression.

People do not choose a game only for its rules or mechanics. They also choose a world, an aesthetic, a mythology, a level of expertise, a community and a way of saying something about who they are and what they love.

This is especially visible in trading card games, but it also applies to many forms of board gaming. Collecting cards, building a deck, completing a set, choosing a faction, mastering a universe or displaying rare objects all turn play into a personal and cultural statement. Like stamps, sneakers, vinyls, cars or watches, collections give people something tangible to hold onto, a physical, reassuring and curated expression of taste in a world that often feels fluid, unstable and fragmented.

Collections also create belonging. They help people find others who share the same passion, speak the same codes, recognise the same references and value the same objects. A card is therefore never just a card: it can become a memory, a signal of expertise, a badge of identity, a gateway into a community and a reason to keep coming back.

What it means for board games and TCG:

The opportunity is to build worlds people want to make their own: not only games they play, but universes they collect, display, discuss, trade, follow and use to express who they are.

A way for people to express who they are, what they like, and the worlds, stories or communities they belong to.

What has changed for board gaming, and what comes next?

Board games seem to be moving beyond nostalgia: they are increasingly perceived as a *living, evolving form of entertainment*, able to reinvent itself while staying rooted in shared moments.



Board games are seen as having broadened their appeal... and are now expected to reinvent the experience further!

In recent years, board games are seen as having moved beyond their traditional image.

They appear more adult, more varied, more inclusive and more relevant than five years ago.

In the years ahead, expectations shift from expansion to transformation.

People expect board games not only to keep broadening their appeal, but also to reinvent how they are experienced, through new formats, greater personalization and selected forms of technology.

The future imagined for board games is therefore one of evolution, not rupture.

The category is expected to modernize and open up further, while remaining rooted in what makes it distinctive.





SHIFT 5:

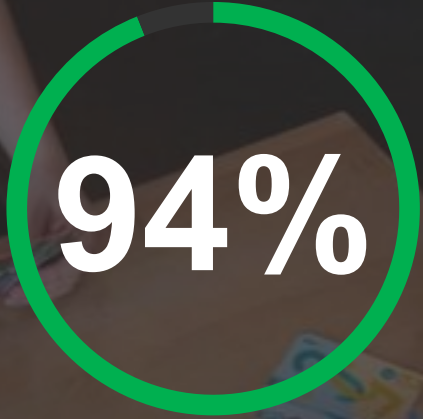
BOARD GAMING

is a more mainstream kind
of shared entertainment



Board Games have grown up

Most players say board games convert mere spectators into active players



94%

of people
agree that
**play matters
at every age**

Source : Mattel, The Shape of Play, global study, 2025

In today's societies, board gaming is moving beyond a niche hobby to become a mainstream form of shared entertainment.

It now sits at the crossroads of leisure, culture and social life: easy to access, increasingly diverse, often immersive, and able to bring together very different audiences around the same experience.

What makes board gaming powerful is its ability to remain collective without being uniform. A quick card game, a family classic, a party game, a strategy game, a cooperative adventure or a trading card session do not all answer the same need — but they all belong to the same broader culture of play. This flexibility allows board games to speak to children, teenagers, adults, families, casual players, expert players and fan communities in different ways.

This is why board gaming feels increasingly legitimate in contemporary entertainment culture. It offers something that many other entertainment formats struggle to deliver at the same time: accessibility, interaction, immersion, replayability and real-life connection. It can be light or deep, spontaneous or ritualised, competitive or cooperative, intimate or collective.

What it means for board games:

The opportunity is to position board gaming as one of the most powerful formats of shared entertainment today: not one single model of play, but a broad, flexible and culturally relevant ecosystem where different generations, lifestyles and communities can all find their own way in.

***An experience that sits between leisure, culture and social life
accessible, immersive, and increasingly mainstream.***

BOARD GAMES



A RITUAL OF PRESENCE

Game night is the new night out

Over half the people prefer playing a board game than going out on a Saturday night.

74% of Gen Z think in-person experiences are more important than digital ones



ANTIDOTE TO DIGITAL OVERLOAD

Together at the table

Over half the population play board games monthly

6h38 spent online every day by the average global internet user



A SOCIAL (RE)CONNECTOR

Board games against loneliness

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64% of people use tabletop games to bring their families together



A FORM OF CULTURAL EXPRESSION

Play at the center of identity and experience

64% of fans say their fandom is a defining part of their identity



A MORE MAINSTREAM KIND OF SHARED ENTERTAINMENT

Board games have grown up

Most players say board games convert mere spectators into active players

94% of people agree that play matters at every age

When life feels always-on,
BOARD GAMES bring people
back to the table

The future of entertainment is
SHARED, SOCIAL AND REAL



A group of four diverse people are sitting around a table in a train carriage, playing a board game. The table is covered with a map-themed board game, featuring various colored pieces and cards. A warm lamp is on the table, and a window in the background shows a blurred landscape. The overall atmosphere is cozy and social.

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Thank you!

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