

# THE SELLERS OF CATAN: THE IMPACT OF *THE SETTLERS OF CATAN* ON THE UNITED STATES LEISURE AND BUSINESS LANDSCAPE, 1995-2019

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While *Monopoly* is still one of the best-known board games in the United States today, increasing attention is paid to *The Settlers of Catan*, a mid-1990s German immigrant to the United States and a mid to late 2010s staple in popular culture and on store shelves. However, the one place where *Catan* has seen a drop in popularity over the past decade is in its first world, that of hobby board games. With so many new and innovative games and mechanics flooding the hobby market each year, *Catan* struggles to find a place. This struggle is due in part to its lack of innovation, attempt to keep pace with game trends, and seemingly, a reluctance to buy into the popularity of app-supported games (though solely mobile versions of *Catan* exist), crowdfunding, and new mechanics. This research explores *Catan's* history in the United States to illustrate the paradox of its growing popularity with the general public while also experiencing a downturn in accolades from within the hobby, all while functioning as a barometer against which we can measure trends in the selling and playing of hobby board games.

“*Die Siedler von Catan*” came to the United States in 1995 as *The Settlers of Catan* (or just *Catan* after a 2015 rebranding) as a German immigrant. In that same year that it took home the *Spiel des Jahres* (SdJ), the German Game of the Year Award. The *Spiel des Jahres* is the most prominent annual award in hobby board gaming.<sup>1</sup> Since its trip across the Atlantic, *Catan* has remained the quintessential hobby board game and a gateway game for new members to the world of hobby gaming. Board and card games have found their way into leisure activities for centuries, and, with the Industrial Revolution, coupled with increased disposable income and leisure activity, the popularity of games exploded.

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<sup>1</sup> “*Catan*,” BoardGameGeek.com, accessed July 23, 2019, <https://boardgamegeek.com/boardgame/13/catan>

Defining a hobby board game, as trends change rapidly, can be a moving target. Marco Arnuado begins by describing the hobby gamer as

a person who considers playing board games as a hobby of major importance in their life. This is someone who actively peruses opportunities to play games... has one or more regular groups of equally committed friend to play games with, stays informed... reads, watches, or listens to reviews of board games with some regularity.<sup>2</sup>

Arnuado's definition for the hobby gamer is essential as he uses it as a base from which to "define pragmatically [a hobby board game] as the type of game that hobby board gamers mainly play and enjoy."<sup>3</sup> This definition allows for fluidity in the definition of hobby board games and a crowd-sourced consensus on the status of a game by the community itself. Additionally, for this research, those games considered hobby games tend not to align with the fundamental characteristics of games on the other side of the spectrum, those not played by hobby gamers or mass-market ones. There are three notable features of a mass-market game. Firstly, publishers for mass-market games are generally Mattel, Hasbro, and Parker Brothers. Secondly, a mass-market game's box or cover rarely attributes credit to the game's designer, just the publisher. Thirdly, and increasingly complex, mass-market games appear mostly on the shelves of big-box retailers rather than small hobby shops, though hobby board games are moving into this space as well. *Catan* has come to exist in a grey area. While it does not meet the criteria for a mass-market game, and ranking for the game has dropped within the hobby board game community, it can still be considered a hobby game, while behaving in many ways like a mass-market game given its expansion into new retail markets and popular culture but out of many hobby gamer's rotations on game night.

Board games began to be churned out by the likes of Parker Brothers *en masse* starting with the 1933 game, *Monopoly*.<sup>4</sup> During the Great Depression,

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<sup>2</sup> Marco Arnuado, "The experience of flow in hobby board games," *Analog Game Studies*. November 29, 2017. <http://analoggamestudies.org/2017/11/the-experience-of-flow-in-hobby-board-games/>

<sup>3</sup> Arnuado, 2017.

<sup>4</sup> "Monopoly," BoardGameGeek.com, accessed August 29, 2019, <https://boardgamegeek.com/boardgame/1406/monopoly>.

a game about having money and property was the “American dream.” During the Cold War, board games took on the themes of war with popular titles such as *Risk* and *Stratego*. Finally, in the mid-1990s, after the fall of the Soviet Union, the world of German board games made its way to the shores of the United States with Klaus Teuber’s *The Settlers of Catan*. Already a popular game in Germany, the game’s complexity, focus on strategy and resource management, as well as negotiation, made it a popular game in the United States. Regardless of the reasons, *Catan*’s American trajectory was one of success upon its arrival. Today, to a growing majority in the hobby board game community, the game is a declining giant, now comparable to perceptions of the mass-market game, *Monopoly* to those in the community. This feeling is due to the different advancements to the hobby, the hundreds of new games arriving each year, and the new mechanics employed by new games since *Catan*’s arrival 24 years ago.<sup>5</sup>

Despite criticisms, it is undeniable that *Catan* changed the board game industry in the United States. Due in part to this game, the distinct realms of mass-market and hobby board games have, in recent years, melded together to define a period of popularity, accessibility, and receptiveness to hobby board games in the general popular culture. *Catan* was a watershed game for the United States board game industry. It brought a widely popular foreign board game to the United States and was able to maintain and grow its popularity to the level of ubiquity by the early 2010s. For example, the popular CBS American television show, “The Big Bang Theory,” featured the game in an episode in 2012. In 2015 *The Escapist* ran an article detailing how the game had become a hit with the Green Bay Packers, so much so that it monopolized locker room talk for the team.<sup>6</sup> The popular culture surrounding the game was one that individuals and families could easily take part in starting in the 2010s when the game and other

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<sup>5</sup> A Mechanism describes the primary mode of play for a game. Most mass-market games use a roll-and-move mechanism where a player rolls a die and moves according to the roll of the die. This mechanic leaves no room for player choice and autonomy and removes strategy from a game. As complex as *Monopoly* may seem, the only real decision for players this: to purchase the property they landed on or not. There were 53 game mechanisms listed on BoardGameGeek in July 2019. A single game can utilize multiple mechanics in its play. For example, *Catan* uses dice rolling, a modular board, route/network building, and trading., “Board Game Mechanics,” *Boardgamegeek.com*, accessed July 23, 2019, <https://boardgamegeek.com/browse/boardgamemechanic>

<sup>6</sup> Marshall Lemon, “The Green Bay Packers are ‘Addicted’ to *Settlers of Catan*,” *The Escapist*, January 16, 2015, <http://www.escapistmagazine.com/news/view/139501-Green-Bay-Packers-Are-Obsessed-With-Settlers-of-Catan>.

hobby board games began to appear widely in quintessential American retailers, Target, and Wal-Mart to broaden exposure to the public, ensuring more profit. As online commerce infringes on all forms of brick and mortar shopping, particularly for niche hobbies, extending sales into the mainstream through popular retail outlets advances the hobby and the publisher's profit. Still, it poses a threat to the core of the hobby's original source of games, hobby game stores. This prevalence in big-box and online stores helps to blur the lines between mass-market games and hobby games. Both types of games now occupy the same shelf space and allow those who study and play games to wonder what such distinctions mean and how essential they are in the consumer space. The 2015 rebranding move shortened the title to a moniker already commonly used in place of the full title by removing "The Settlers of" from each printing, which had to be translated into languages printed across the globe. The new rebranding featured a cleaner, brighter, and more modern box cover art, giving the exterior of the game a more updated look and increased shelf appeal. During its 25-year tenure, demand for *Catan* served as a barometer for the hobby board game industry in the United States from its widening collection of expensive additional content for the game as an example of American mass-consumer culture to its viral fame in the late 2010s, an increasingly more conventional path to notoriety over the last decade. The game's presence in popular culture combines with its recent retail availability to open the public to a game and a hobby that is expected to leak out of its niche market and become a multi-billion-dollar industry. Beyond being just a board game, *Catan* is a lightning rod for what the hobby game industry has come to be. *Catan* helps to measure how the hobby changed to reflect American's changes concerning economics, culture, and even foreign relations. Recently released content for the game features popular franchise branding and story-driven scenarios that mirror the real-world problems faced by the world today, specifically about climate change and resource availability. It can also demonstrate multiple aspects of the hobby board game industry, including cultural, economic, and business trends. Yet, as of 2019, *Catan* itself has yet to evolve in a way that is on-par with modern gaming trends as a way to reinvigorate fervor for the game from within the hobby and keep it from fading from memory as the "cult of the new" dominates the gaming scene of the late 2010s. *Catan* has maintained relatively high popularity despite its lack of evolution, so it does not need to evolve, but perhaps it should. This produces a dichotomy in the role of *Catan*, counterintuitively maybe not as the model for the ideal board

game, but for what it can speak to about the people who play games and the world they live and play in. This research will explore *Catan's* influence on hobby board gaming as it has affected the hobby to the present day as an illustration of its impact that both shapes and reflects the social, cultural, and economic spheres of the lives of Americans. The path that *Catan* takes is one where it leads the way in the public sphere when it comes to the perceptions of hobby board games while it also simultaneously falls to the back of the pack within its hobby.

### ***The Settlers of Catan***

*The Settlers of Catan* begins with the random placement of numbered tokens on different hexagons (“hexes”) on the game board. Each hex has a background indicating the type of resource it produces. The possible resources are wood, grain, ore, brick, and wool. On their turn, each player will roll two dice, and the sum of those two dice, from 2-12, will determine the resources received by each player. The player will receive one of the corresponding resources shown on the hex for each settlement a player has placed on the vertex of the hex with the rolled number. Following the roll and distribution of resources, players may choose to spend their resources on roads, settlements, or cities. These are placed on the board to develop routes in the hope of not only touching more resources but also accumulating the 10 points necessary to win the game. Players may also initiate resource trades with other players. Play continues until a player earns their 10th point. The game itself is simple at its core, making it an easy game to introduce new players to the hobby.

*Catan's* designer Klaus Teuber pointed out in a 2014 interview with *The New Yorker* that because the roads, settlements, and cities all required a combination of resources to build, a player could not succeed if they attempted a “monopoly” of one type of resource. Players are instead required to diversify and work with other players despite the competitive nature of the game.<sup>7</sup> *Catan* set itself apart from mass-market games of the time by employing multiple gameplay mechanisms and asking players to develop competitive and cooperative strategies. These strategies may

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<sup>7</sup> Adrienne Raphel, “The Man Who Built Catan,” *The New Yorker*, February 12, 2014, <https://www.newyorker.com/business/currency/the-man-who-built-catan>

fluctuate based on board setup, dice roll, and even the group dynamics of the players.

*The Settlers of Catan* was brought to the United States in 1995 by Mayfair Games.<sup>8</sup> Mayfair Games retained the publishing rights to the game through the 2015 rebranding of the game to *Catan* and the first printing of the fifth edition.<sup>9</sup> *The Settlers of Catan* was recognized as the biggest game in 1995, according to *Popular Science's* recount of popular games over the last half-century. It is no fluke that a game with the game's staying power managed to become the number one game according to that list in the U.S. in the same year of its United States release. Despite *Catan's* popularity, another hobby board game, *Carcassonne*, did not appear on this list until 2000, at which time the hobby board games took the honor for almost each of the following years. *Catan's* early entry to the list, followed by four more mass-market titles before returning to hobby games, supports the game's explosion as a first entry into the United States hobby gaming industry.

### **Expansions, Spin-offs, and New Versions: Building the World of *Catan***

Within one year of the release of *Catan*, Mayfair released the first expansion. Expansions are almost synonymous with hobby board games to provide an opportunity to increase the variability, and, replayability, to popular games. In the case of the first expansion, the goal was not to add more content to the game but to expand the experience by allowing for 5 or 6 players rather than capping the player count at 4. Without changing the rules, the designer and publisher were able to produce and sell an expansion by boxing up extra cards and player pieces in two new colors. In doing this, Mayfair Games and Teuber also set up the expectation to gamers for the release of 5-6 Player Expansions. Within one year of the 5-6 Player Expansion, Teuber and Mayfair released a new expansion, *Seafarers* (1997).<sup>10</sup> Unlike its predecessor, this expansion added new content by literally expanding the game board with water tiles around the island and adding ships as additional player pieces. In 1998 *Knights & Cities* joined the *Catan* universe, followed in 2007 by *Traders & Barbarians*. In 2013, *Explorers*

<sup>8</sup> "Catan," *BoardGameGeek.com*.

<sup>9</sup> "Catan," *BoardGameGeek.com*.

<sup>10</sup> "Catan Seafarers," *BoardGameGeek.com*,

<https://boardgamegeek.com/boardgame/325/catan-seafarers>

☞ *Pirates* rounded out the core expansions to the original. Following the precedent set by the base game, each of these three expansions was followed by 5-6 Player expansions, creating an expansion to the expansions.<sup>11</sup> Designers also re-imagined *Catan* in a modified, shortened version of the game, designed to be suitable for children in *Catan Jr.* The concept of children's versions of 'heavier' board games is not new in gaming; for example, *Monopoly Jr.* is a pared-down *Monopoly* for children. *Ticket to Ride*, published a children's version in *Ticket to Ride: First Journey* in 2016.<sup>12</sup>

While structurally different but operating in the same universe as the board game, *Catan* cards games were also printed to leverage the world of *Catan* in a more portable form factor. *Rivals for Catan* and *The Struggle Over Catan* are card games set in the *Catan* universe. These games function as separate games rather than expansion content or content that can be mixed into the base game for expanded gameplay.

As the mechanic of legacy games and campaign games rose in popularity in the late 2010s, *Catan* capitalized on the trend with scenarios for the game that asked players to address particular questions and problems, rather than the generic race to 10 Victory Points. These two games (at the time of writing) are *Catan Scenario: Legend of the Sea Robbers* (2017) and *Catan Scenario: Crop Trust* (2018), but these both fall short of an actual legacy game. *Catan's* base design, modular board, and the entire concept of creating and growing settlements and cities is one that arguably begs to be modified into a 'legacy-style' game as the popularity of such games explodes in the late 2010s. Legacy games are a developing style of game, beginning with *Risk: Legacy* (2011) and popularized by *Pandemic Legacy: Season 1* (2015).<sup>13</sup> *Catan Studio* shows no signs of offering a version of *Catan* that allows the cities, roads, and choices that players make in one game to carry over to the next.

Other versions of *Catan* have imagined the base game concept in an Intellectual Property (I.P.) world as cross-branded spin-offs. The first released was *Star Trek Catan* in 2012, and in 2017 the studio implemented the theme of the wildly popular HBO show *Game of Thrones* into *A Game*

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<sup>11</sup> "Catan," *BoardGameGeek.com*.

<sup>12</sup> "Ticket to Ride: First Journey (U.S.)," *BoardGameGeek.com*, accessed September 19, 2019, <https://boardgamegeek.com/boardgame/205125/ticket-ride-first-journey-us>.

<sup>13</sup> "Risk: Legacy," *BoardGameGeek.com*, accessed September 19, 2019, <https://boardgamegeek.com/boardgame/105134/risk-legacy>., "Pandemic Legacy: Season 1," *BoardGameGeek.com*, accessed September 19, 2019, <https://boardgamegeek.com/boardgame/161936/pandemic-legacy-season-1>.

of *Thrones Catan: Brotherhood of the Watch*.<sup>14</sup> These versions of the game add additional elements that make these games more complex than the original and draw public attention through popular I.P.s. *A Game of Thrones Catan: Brotherhood of the Watch* incorporates The Wall as a component of the board that players must guard and fend off enemies who spill over The Wall. These cross-branded spin-offs double profits by capitalizing on the game's success on its own but also the new demographics to be drawn in who are fans of the Intellectual Property on which the cross-branded versions are based.

Another strategy for the growth of *Catan* has been to build for the digital world. Drawing on crowds who desired to save bookshelf space and dog-earned pages with e-books, mobile device and app-based versions of popular games reach a wider audience by offering the same experience at a lower price point. Multiplayer versions across devices or by passing the device in a circle allow for multi-user play strikingly similar to the physical game experience. Additionally, with the advancements in Artificial Intelligence reaches a new demographic, a solo player, who can now play with computer-driven characters to simulate the multiplayer experience. Multiple versions have also been released for mobile devices, beginning with the release for Blackberry in 2009. As of September 2019, there are various versions of the *Catan* app for iOS devices (iPhones and iPads) as well as Android devices. A 2018 *Popular Science* ranking of the best board game apps by William Herkowitz places *Catan's* mobile iteration on the list stating that:

The app version of *Catan* is nothing if not a faithful port of the 1995 masterpiece. In the app, you can either play against multiple A.I. or link up with the online multiplayer to roll your dice, build your roads, trade your sheep, and move that damn thief that keeps blocking your brick production. This app is so well put together that, afterwards, normal *Catan* starts to seem too slow and clunky.<sup>15</sup>

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<sup>14</sup> W. Eric Martin, "Westeros Meets Catan in A Game of Thrones Catan: Brotherhood of the Watch," *BoardGameGeek.com*, accessed September 19, 2019, <https://boardgamegeek.com/blogpost/66906/westeros-meets-catan-game-thrones-catan-brotherhoo>

<sup>15</sup> William Herkowitz, "The 15 Best Board Game Apps," *Popular Mechanics*, January 19, 2018. <https://www.popularmechanics.com/culture/gaming/g2210/the-10-best-board-games-apps/>



Some in the hobby are hesitant to accept technology into analog games, but, technology and board games have a future together if the number of board game adaptations to mobile devices or new games with companion apps is any indication. In 2019 *Catan* joined *Carcassonne* in the Nintendo Switch catalog, further blurring the line between video and board games.

In addition to the overwhelming amount of content that a passionate fan of *Catan* could procure, an overwhelming price tag accompanied it. Using the catalog provided by Asmodee, the Manufacturer's Suggested Retail Price (MSRP) for *Catan*, *Seafarers*, *Knights & Cities*, *Traders & Barbarians*, *Explorers & Pirates*, as well as their companion 5-6 Player expansions cost an individual a staggering \$383. This cost can be difficult to justify considering that a player pays almost \$400 for what is at its core, one game. Despite the price tag, completionists and collectors are happy to pay it, providing no incentive for the company to lower the cost to consumers.

While *Catan* is not a cheaply attained game through retail channels, it is a widely available game. As a result of an expanded retail market, the game is still selling new copies consistently to the general public and, as a result, is still turning a profit, though now from the more casual gamer than the hobbyist. As a result, while some within the hobby are critical of the game, Catan Studio does not need to pay much heed to those comments as the profits continue to roll in from this new casual market. Consequently, studio and publisher alike can reap the monetary benefits of their game in its second incarnation of general popularity without investing many changes into the core game, making it unlikely from a business standpoint, that new changes will be forthcoming. American (and global) capitalism, guided by the almighty dollar, makes clear how the game's popularity is a positive feedback loop between the reputation with the public, the corporate drive to make a repeat customer, rampant American over-consumerism and a supply and demand curve that pushes any commodity to focus on quantity over quality. *Catan* may not have begun as an American game, have been designed to be set in America, or even be the country where the game is the most popular, though, its business model and life cycle on this side of the pond mirror the capitalist ideals that are no stranger to American shores.

### ***Catan* in the United States**

As *Catan* and hobby games grew, mass-market games like *Monopoly* began to wane in popularity. While better game design, more player autonomy, and less left to the luck of the die are essential factors in understanding this

change, a significant contributing factor in the shift was the people playing the games and the society and culture in which they had begun to live. A 2010 article in *The Houston Chronicle* encapsulates one of the fundamental differences between *Catan* and *Monopoly* in a brilliant summation of what social and economic assumptions underpin each game:

[*Catan*] presents a world in which resources are limited, and fortunes are intertwined and serve as a model for solving contemporary problems such as trade imbalances, nuclear proliferation, and climate change. If we are reaching the end of a period of American supremacy, a winner-take-all game such as *Monopoly* teaches bad habits.<sup>16</sup>

*Monopoly* had its time during the Great Depression when owning monopolies of property, building hotels, raking in rent, and winning by forcing out other players appealed to the average American. In the current climate and energy crisis, these types of games cease to be relatable to the general American player. *Catan* itself seemed to recognize this with the publication of its Oil Springs scenario as well as the 2018 *Catan Scenario: Crop Trust*. Crop Trust “requires players to balance the goal of farming and harvesting crops with the collective aim of preserving diversity by saving some of their seeds in a vault,” in a scarily close-to-home depiction of the climate and food crises of our real-world framed around the real-life seed vault intended to preserve our ecology.<sup>17</sup>

While the expansions for *Catan* bring its themes closer to the real-life crises of the 21<sup>st</sup> Century, the base game seemed devoid of such allusions, at least on the surface. The base game takes place on a fictional island. It, therefore, is not inherently depictive of a real place, though, the naming of expansions such as *Trader & Barbarians* and *Cities & Knights* suggests a European setting aligning with its German birth. In contrast, the game's island setting encourages players to transverse the board to gain access to harbors with better conversion rates for trading resources and bonus points for the longest continual road. This goal could be interpreted to Americans as a subconscious representative of Manifest Destiny due to its physical

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<sup>16</sup> Blake Eskin. “COMMENTARY: A New Board Game for the Ages? Settlers of Catan Puts the 21st-Century Spin on Some Old Monopoly-Era Problems.” *The Houston Chronicle* (Houston, TX), December 3, 2010.

<sup>17</sup> Thin Lei Win, “How Settlers of Catan Aims to Save the World,” *Global Citizen*, November 8, 2018, <https://www.globalcitizen.org/en/content/settlers-of-catan-crop-trust-donate/>.

manifestation of getting from “sea to shining sea” to access new ports for better trading advantages. A 2013 article by Lorenzo Veracini reflects upon just these aspects of the game that relate it to the Americas, the United States, and the ideas of settler colonialism. By drawing parallels between the drive for resources, the empty land to settle on, and the goal to settle that land, the connection is clear. Veracini doubles down on the general “resources rather than economics” arguments made in other news and media publications when he postulates that the “robber” in the game (a piece that moves around and prevents resource collection) is a stand-in for Indigenous Peoples. In Veracini’s framework, it becomes the job of the robber piece to function as a Native American, and move around the board to thwart the settlers’ ability to secure resources and encourage the failure of their efforts. Veracini asks, “Is it by chance that [the robber] should be represented by black pieces (even if in 2007 they were recast grey)?” as a possible allusion to racial ideas of settler colonialism<sup>18</sup> Despite Veracini’s modern perspective, a 1990s German game would be unlikely to symbolize settler colonialism in this radical way intentionally. While the notion that *Catan* stands in for Manifest destiny or settler colonialism cannot be expressed as the original intent of the goal of the game. This example illustrates how the changing trends in U.S. historiography, public and popular memory, and the lenses which we can apply to games as their meanings to historians and gamers may change over time as many historical events have in the past decades of historical thinking. These questions about what *Catan* might mean to us today, though different than in 1995, give Veracini’s article timeliness to conversations about not only board games, but the public and popular memory of U.S. settler colonialism and nationalistic expansion, even if only to American audiences.

### **Entry Into Big-box Retailers and Advertising**

Games such as *Catan*, *Cards Against Humanity*, and other games that could only be found online or in a hobby specific Friendly Local Gaming Store (FLGS) began to appear in big-box stores such as Target and Wal-Mart in the mid-2010s.<sup>19</sup> This new market invigorated the public’s interest in hobby

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<sup>18</sup> Lorenzo Veracini, “Board Game of Our Time: Settlers of Catan,” *Settler Colonial Studies* 3, no. 1 (2013).

<sup>19</sup> The Friendly Local Gaming Store or FLGS is considered the mom and pop shop of the gaming world. Usually not set up as chains, although some FLGSs own a few stores

board games and whetted appetites such that new releases were un-delayed in appearing on shelves. A *Wired* article by Erik Wecks from 2012 describes a facet of the advantage of these partnerships in the wake of the success of board game web series “Tabletop,” hosted by Wil Wheaton, running from 2012-2017.<sup>20</sup>

Picture the casual gamer wandering down the aisles at Target, looking for Lego sets. They have seen an episode or two of TableTop but are still stuck playing Sorry. Suddenly they come across a familiar green logo [the Tabletop logo], and, rather than buying the Lego set, they purchase a game instead and fall in love with great games. These new gamers are then much more likely to go and explore games not available at Target, at their local game store.<sup>21</sup>

Wecks remarks that this partnership will bring in new gamers to the hobby by broadening the audience they reach. This article gives credit to Tabletop’s owners, Geek & Sundry, for the partnership parameters, criticizing Mayfair games, the publisher of *Catan* for signing an exclusive deal with Target to sell *Star Trek: Catan* in their stores. Wecks correctly argues that exclusivity with Target may exclude hobby gamers who often prefer to do business with local hobby game shops. Geek & Sundry’s deal allowed games to be sold anywhere, but with the green “As seen on Geek & Sundry” sticker at Target to create recognition with shoppers.

There is a distinct difference between what Felicia Day and Geek & Sundry have done and what Mayfair did. The marketing deal which Geek & Sundry has with Target does not stop the little guy from selling the games featured on TableTop. I really doubt

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bearing their name, these shops offer a variety of services to board gamers. Typically these are places where one can go to purchase games. These spaces usually also serve the niche market of Trading Card Game (TCG), Collectible Card Game (CCG), or Living Card Game (L.C.G) gamers. Another facet of the FLGS that sets it apart are tables where patrons can play games, either during free play times or specific games during events. There are FLGS that have grown their reach to include an online shopping presence.

<sup>20</sup> “Tabletop,” *Geek & Sundry*. Accessed May 14, 2020.

<https://geekandsundry.com/shows/tabletop/>

<sup>21</sup> Erik Wecks, “Good Board Games Are Hitting Target, But Are They Missing the Point?,” *Wired*, August 4, 2012. <https://www.wired.com/2012/08/catan-geek-sundry-target/>

that many people who were already customers of their local game store are going to transfer their business to Target simply because some round green stickers got added to certain games there.<sup>22</sup>

Online shopping and exclusive deals with Target simultaneously seek to open the hobby game world to new players but may pose a grim future for local hobby game stores. Regardless of location, *Catan* is sold, and Mayfair, Asmodee, and other publishers involved in an array of partnerships will profit.

As partnerships continue to succeed, Target will continue to draft up more, with even further success. In 2018, Target won the right to sell 95 exclusive titles in its stores.<sup>23</sup> Though not all of these titles were considered hobby board games, new versions of popular hobby games like *Ticket to Ride: New York* found a single home on Target's shelves. The most played game in 2018 (at over 120,000 plays), *Azul* (also the 2018 SdJ winner) was almost immediately for sale on Target shelves thanks to the groundwork laid by placing older hobby games out to test the waters.<sup>24</sup> It is worth arguing that without the immediate placement of *Azul* on Target's shelves, it could not have been the most played game of 2018 or 37th in ownership less than two years after publication and that *Catan* made it possible.<sup>25</sup> Target's successes in the hobby games market and the resulting exclusive titles from hobby board game publishers were pivotal in cementing its place in the genre.

Despite its entry into big-box retailers, a cornerstone of the hobby board game industry is its notable lack of mainstream advertisements. This lack of advertisement is in stark contrast to mass-market games featured in well-known T.V. commercials such as *Mr. Bucket* and *Hungry, Hungry, Hippos*. Hobby board games do not appear in additional T.V. spots around the holidays or in T.V. spots at all. Curiously enough, despite lack of television

<sup>22</sup> Wecks, "Good Board Games Are Hitting Target, But Are They Missing the Point?"

<sup>23</sup> Nicole Bunge, "Target Ups the Ante with 95 Exclusive Games," *ICv2*, August 6, 2018. <https://icv2.com/articles/news/view/41073/target-up-the-ante-95-exclusive-games>

<sup>24</sup> "Games played by game," <https://boardgamegeek.com/geekplay.php?userid=0&redirect=1&startdate=2018-01-01&dateinput=2018-01-01&enddate=2018-12-31&dateinput=2018-12-31&action=bygame&subtype=All>. Accessed July 24, 2019.

"Azul," *BoardGameGeek.com*, accessed July 24, 2019. <https://boardgamegeek.com/boardgame/230802/azul>

<sup>25</sup> "Browse Board Games," <https://boardgamegeek.com/browse/boardgame?sort=numowned&sortdir=desc>. Accessed July 24, 2019.

ads, Google Search Trends data for “*Catan*,” Board Games,” and “*Ticket to Ride*,” all see marked spikes beginning in November and carrying through the holiday season each year in five-year data from 2014 to 2019.<sup>26</sup> (see Figure 1)

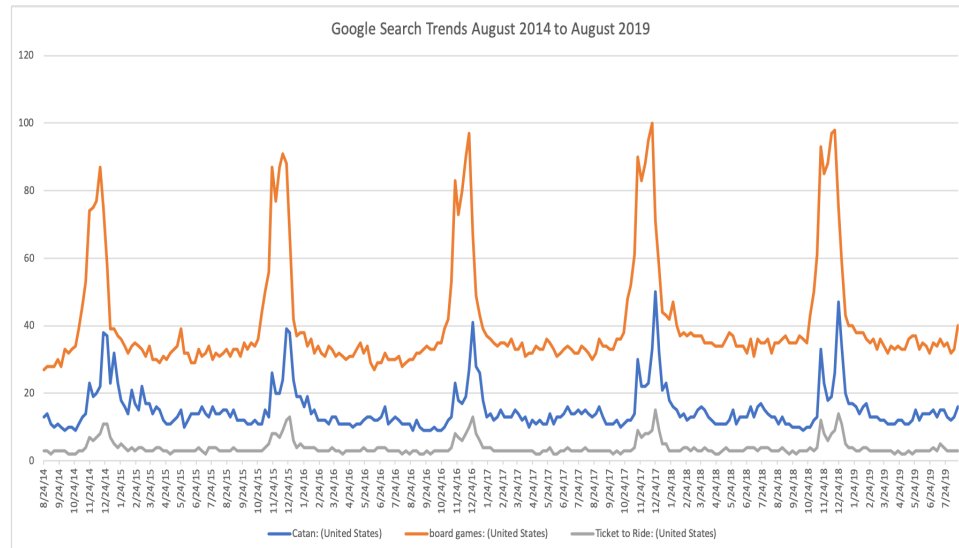


Figure 1: Google Search Trends: August 2014 - August 2019

### *Catan*’s Place in Modern Gaming

*Catan*’s popularity, rebranding, expansion into Target, and famous branded versions of the game have likely been just the beginning. Research on board games had shown what was possible for board games and socialization. By the mid-2010s, the media was showing how it had already started happening. As of September 2019, the game ranks at #12 on the Amazon list of top-selling board games.<sup>27</sup> *Catan* is reported as the most owned game, by BoardGameGeek users, at 127,449 copies in August

<sup>26</sup> Google Trends, accessed August 21, 2019, <https://trends.google.com/trends/explore?date=today%205-y&geo=US&q=Catan,board%20games,%2Fm%2F050jzx>

<sup>27</sup> “Best Sellers in Board Games,” *Amazon.com*, accessed September 3, 2019, <https://www.amazon.com/Best-Sellers-Toys-Games-Board/zgbs/toys-and-games/166225011>.

2019.<sup>28</sup> *Catan* is one of only three games with ownership reports of more than 100,000 copies. The other two games are *Pandemic* (2008) and *Carcassonne* (2000). Together, these three games form what many in the industry consider gateway or introductory games to the hobby, and their adoption data supports this. Notably, *Catan* is five years older than *Carcassonne* and 13 years older than *Pandemic* but does not lead these games by much, despite a significantly longer print run.

Reviews of *Catan* both praise and criticize the game, and large quantities of each exist. There exists a correlation in the source of the evaluation that corresponds to the opinion. Online magazine publications that focus on board games specifically will generally speak in a way that praises the game. The reviews and internet forums that are less kind come from websites geared toward those within the hobby. This dichotomy of opinions can show how the game is perceived differently by the general public versus those who consider themselves “hobby board gamers.” To a casual gamer, *Catan* is a more in-depth, more strategic, and more advanced game than *Monopoly*, *Clue*, or *Chutes and Ladders*, and therefore, it is easier to exist as a breakthrough game for the ages. By contrast, those who fill shelves in their homes with various hobby board games, participate in the community forums of BoardGameGeek or follow YouTube Channels dedicated to hobby board games such as The Dice Tower, BoardGameGeek, Watch It Played, or r/hado find it easier to recognize the impact of the game on their hobby but then to move past *Catan* and not focus on a single game approaching its quarter-life crisis.

The reason for such crisis is apparent when *Catan* is analyzed in comparison and contrast to the perceived vital components to the growing industry that topped \$1.5 billion in 2017.<sup>29</sup> A 2016 *BusinessWire* report analyzed the three trends expected to impact hobby board gaming

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<sup>28</sup> Boardgamegeek is an online database for board games that functions as a community site where users can create forums, post reviews, rate games, and manage their board game collections. Boardgamegeek is considered to be one of the most influential resources for board game information and data that exists for hobby board gamers. This data is crowd-sourced, and with that comes limitations but can be relied upon when comparing a game to another game on the site.

“Browse Board Games,”

<https://boardgamegeek.com/browse/boardgame?sort=numowned&sortdir=desc>.

Accessed August 2, 2019.

<sup>29</sup> Milton Griep, “Hobby Games Top \$1.5 Billion: In 2017,” *ICV2*, July 30, 2018, Accessed July 27, 2019, <https://icv2.com/articles/news/view/41016/hobby-games-top-1-5-billion>.

(positively) by 2021: 1) a growing organized retail sector, 2) the increase of crowdfunding platforms to introduce games such as Kickstarter, and 3) the evolution of new games.<sup>30</sup> While the report itself is laden with technical jargon, hobby board gamers recognize these three trends as 1) the growth of board game retail outlets, whether they be Friendly Local Game Stores, Board Game Cafes, online retailers, or big-box retailers 2) more of the wildly popular Kickstarter funded games such as *Zombicide*, *Rising Sun*, and *Dinosaur Island*, and 3) newer games with new themes, mechanisms, and gameplay tactics. This analysis shows that the hobby board game industry is evolving, becoming more efficient over time, whether that be to sell in stores like Target or to help publishers frontload the costs of the first print run of a game onto the consumer via crowdfunding. In short, *Catan* can continue to sell and maintain popularity, despite lacking the crowdfunding and evolution prescribed in the report. While newer games need to engage these tactics to differentiate from the influx of new titles each year, established games such as *Catan*, *Pandemic*, and *Ticket to Ride*, do not have to keep the same pace to flourish.

The dominance of North American publishers in the hobby board game and retail space cannot be overstated. North American companies have exploded in popularity and revenue by publishing games with concepts resembling Euro(pean) games in mechanics and themes where war games previously dominated the North American space. Crowdfunding by North American publishers has similarly expanded and dominated the Kickstarter platform. Leading the way for multi-million dollar campaigns for games that sell for around and upwards of \$100 each is Atlanta, Georgia based publisher CMON Inc. Providing new content via crowdfunding is likely the trend with the most potential impact. Kickstarter is one of the most popular ways to get new games to market in the late 2010s, particularly for North American publishers, whether a company is brand new or is already a publishing giant who wants to offer exclusive content to Kickstarter backers. Exclusive content fuels the cult of the new mentality in board games as well as feeding the player's desire to have everything available for their favorite games or by their favorite designers. CMON Inc. launched their first Kickstarter in 2015 with *Zombicide* earning \$781,597 and has had, as of May 2020, 43 Kickstarter projects, including top earners such as *Ankh* (2020,

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<sup>30</sup> "Top 3 Trends Impacting the Global Board Games Market Through 2021: Technavio," *BusinessWire*, December 28, 2016, Accessed July 27, 2019, <https://www.businesswire.com/news/home/20161228005057/en/Top-3-Trends-Impacting-Global-Board-Games>.



\$3.2 million), *Zombicide: 2<sup>nd</sup> Edition* (2020, \$3.4 million), and *Rising Sun* (2018, \$4.2 million).<sup>31</sup> The popularity, and profitability, of these titles often rests largely on overproduction of plastic miniatures and Kickstarter exclusive content or even Kickstarter exclusive titles. This means they will not be sold by the publisher following the campaign's end, continuing to drive the concept of the cult of the new and the collection mentality that can tend to accompany gaming expansions, accessories, and editions of series-based games. *Catan* does not fuel the cult of the new because the persistence of *Catan* on store shelves does not drive the near million-dollar sales that CMON Inc. sees in their 30 to 45-day bursts driven by exclusive content and a scarcity model given the limited crowdfunding window. When someone can simply walk into the store or log onto Amazon.com and purchase at any time, the urgency to do so lessens. In another example of its ability to operate in paradoxes, *Catan* is not unprofitable for Asmodee, despite its avoidance of the most significant phenomenon in hobby board gaming. Ironically, it is not even a game or mechanism but rather a way to purchase games.

Anniversary editions of games are a familiar tactic to reengage and resell games, 10<sup>th</sup> Anniversary editions of *Pandemic* (2008 and 2018) and *Ticket to Ride* (2004 and 2014) and in August of 2019, the 15th Anniversary edition of *Ticket to Ride* (2019) have been produced by the time of writing. *Catan* saw seen a 15<sup>th</sup> Anniversary edition in 2010, and Kosmos, the German publisher of *Catan*, announced the 25<sup>th</sup> Anniversary edition would be available via traditional channels. A similar release in the U.S. market was expected in the U.S. in June 2020, though at the time of writing, the COVID-19 Pandemic may shift that release date.<sup>32</sup> The newest edition of the game follows in the footsteps of some of the current gaming trends for game releases and re-releases. For example, the 25<sup>th</sup> Anniversary edition of *Catan* will feature the 5-6 Player Expansion, previously sold separately. It will also improve its component (game piece) quality and design, a small facet of production in 1995, but now essential to success in most games, particularly those who begin as Kickstarter campaigns. These improvements continue

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<sup>31</sup> "Zombicide," *Kickstarter*. Accessed May 14, 2020.

<https://www.kickstarter.com/projects/cmon/zombicide>

"Ankh," *Kickstarter*, accessed May 14, 2020.

<https://www.kickstarter.com/projects/cmon/ankh-gods-of-egypt>

<sup>32</sup> "Catan: 25<sup>th</sup> Anniversary Edition," *CoolstuffInc.com*, accessed May 14, 2020,

<https://www.coolstuffinc.com/p/295830>.

with custom dice, card sleeves, and custom trays for the cards.<sup>33</sup> Before this 25<sup>th</sup> Anniversary release, *Catan* had somehow been able to defy the logic of the 2018 *BusinessWire* article and still achieve profits despite the lack of previous crowdfunding and significant evolutions to the game itself. *Catan* is a common ancestor of sorts for so many hobby and even mass-market games on the market today and to see *Catan* circle back to utilizing many of the techniques employed by games it helped pave the way for shows just how influential modern board game design, production, and marketing have become.

Hobby board game sales, the ubiquity of hobby board games in media, and in big box stores, trace back to *Catan*, which became a hobby board game sensation that leaked over into the niche markets of Barnes & Noble and then into the public sphere. Popularized by television shows and sports teams, *Catan* helped to bring hobby board games into the mainstream of the United States, heading into the second decade of the 21<sup>st</sup> Century. It remains popular in public, and though possibly shunned by insiders, its ability to open doors to the hobby is undeniable.

Despite its public popularity, some criticize *Catan* for its dependence on the result of a dice roll, random game setup, and lack of genuine player autonomy, critiques reminiscent of *Monopoly*. New hobby games rely on more in-depth strategy, less luck, and more thoughtful player interaction than the thin layer of negotiation added onto *Catan*. Despite an assumed desire to escape from reality in board games, there is also arguably a need for a tether to that same reality. As current generations attempt to make their way in the world, games that rely on luck are understandably less attractive. Chance as a dominant factor in success is in direct competition with clichéd American notions of “the American Dream,” “make your luck,” and working hard for success. Focus on the individual also gives rise to the popularity of games with unique player roles that provide asymmetric special player powers to each player, making each player feel and act differently in the game, influencing play style, strategy, and outcomes.

## Conclusion

Despite a more extended history, board games have been relatively new additions to the American leisure landscape that positions them as rivals to

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<sup>33</sup> “Catan: 25<sup>th</sup> Anniversary Edition.”

video game dominance in a similar space. While board games long predate video games, the mainstream popularity of hobby, rather than mass-market board games, lagged in popularity behind *Monopoly*, *Sorry*, and *Clue* as well as the *Pong*, *Pac-Man*, and *Halo* titles. With the introduction of hobby board games to mobile devices and handhelds, their rise to notoriety in pop culture, and their overflow into big-box retailers and living rooms, there is an increase in the number of researchers willing to look at board games to examine skills and psychology. Board game research is as essential to cultural history as the history of baseball, video games, and American business and consumerism as a way to measure, with scholarly approaches, the trends, and impacts of hobby board games. As the hobby board game grows, national and international business markets will no doubt be increasing their attention to the hobby. As research into hobby board games builds in all directions, it will become easier for scholars and enthusiasts alike to mark the path of *Catan* and its peer games through the public consciousness of the 21st Century. Despite a lack of scholarly research, the evidence of the game's impact on hobby board games as an industry and hobby games, in turn, on American culture is palpable. *Catan* has become part of the public vernacular in the way that *Monopoly* has. *Catan* is now part of American cultural identity in a way that few other leisure activities aside from *Monopoly* and baseball have been able to achieve. There can only be speculation about whether a new explosive success from the hobby world will make an equivalent splash into the public realm as *Catan* has done. *Catan's* impact has been so significant that not only will it be hard for a future game to measure up, but it may not be necessary for the proliferation of hobby board games into American homes to continue. Regardless of its popularity, *Catan* has been shown here to reflect American leisure shifts (tracking *Monopoly* to *Catan*), broadening consumerism (expansions, crowdfunding, completionism, mass-market retail, sales, and popular culture), what is relevant to the gaming hobby (and how *Catan* is and is not participating in those trends), and the priorities of the culture that plays games (real-world scenarios and problem-solving, and a feedback loop with broadening consumerism). While there are arguably "better" hobby board games on the market with regard to mechanics, variability, replayability, and production quality, none can match *Catan's* ability to tell us about ourselves through its perception and reception in American consumer culture.

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