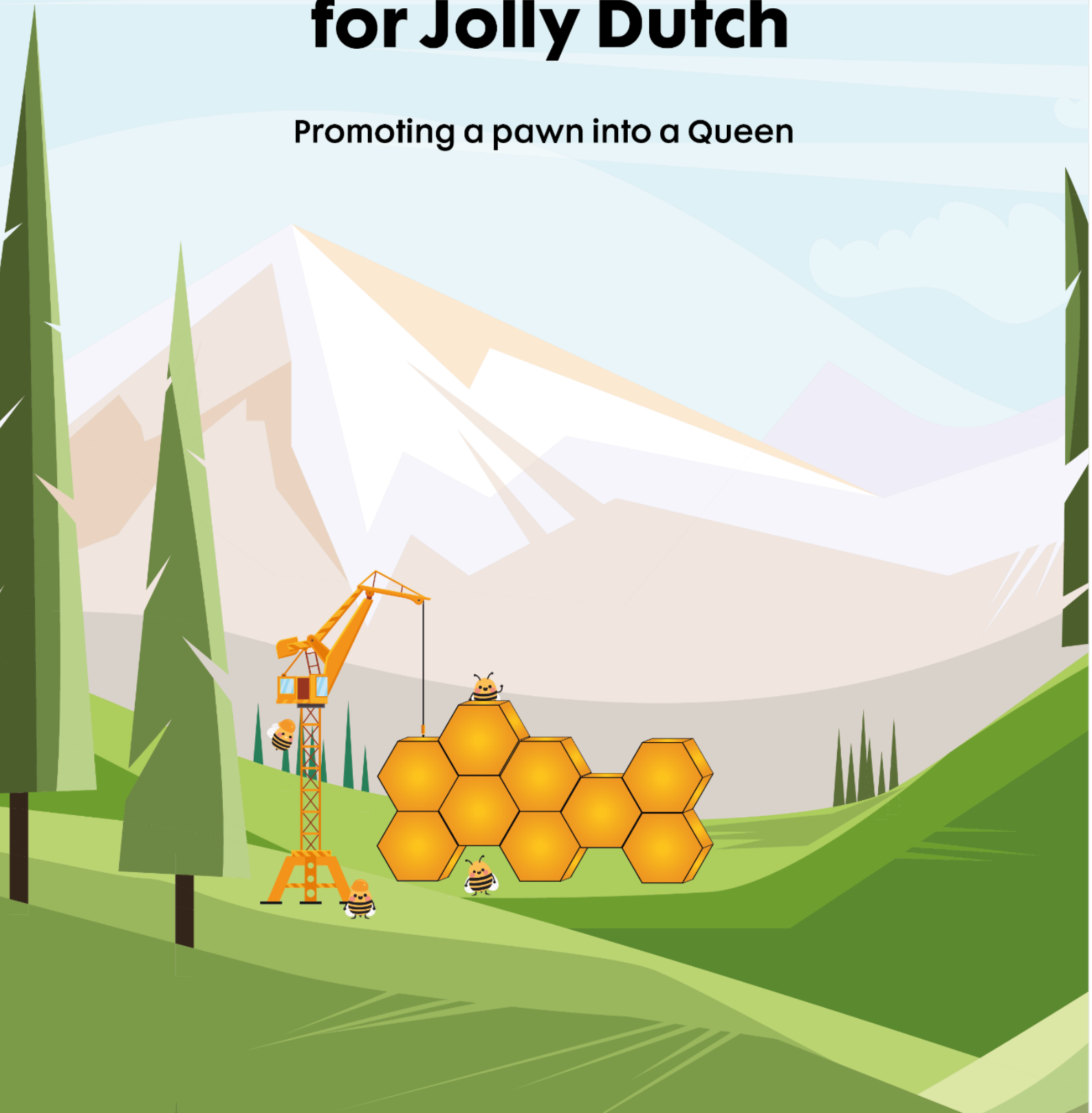
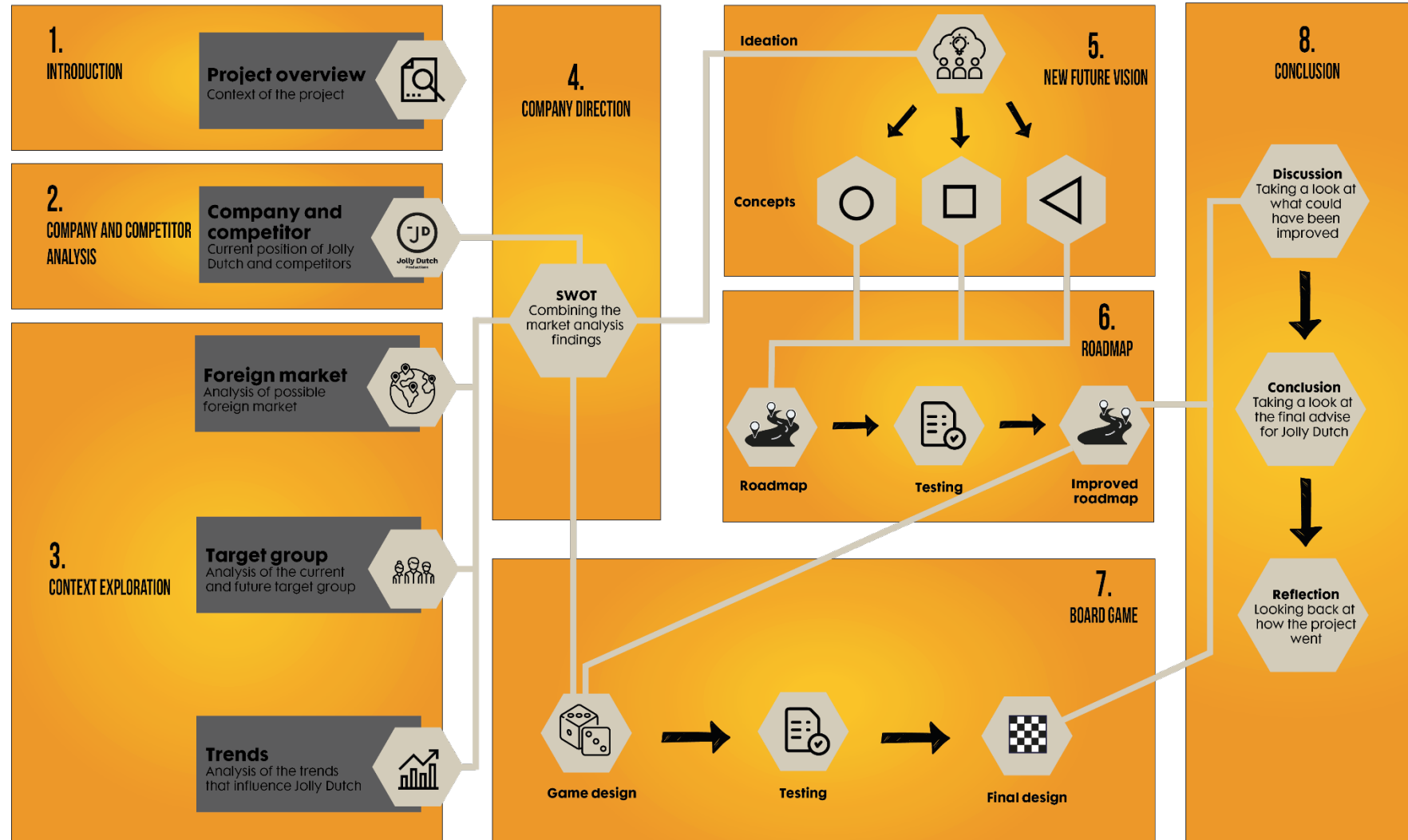


# Creating a new strategy for Jolly Dutch

Promoting a pawn into a Queen



# Reading guide



## ACKNOWLEDGEMENT

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I would first like to thank my chair, Milene Guerreiro and coach Willemijn Brouwer, whose expertise was invaluable for my project. They helped me steer through hard times and made me push for the best results. I am very grateful for all the great advice and tips they gave me to help me improve.

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## ABSTRACT

Jolly Dutch is a Dutch board game company that is trying to grow within the board game industry. The Dutch board game industry is growing rapidly, and it is perfect for new companies to take advantage of this. This report will show the possible opportunities for Jolly Dutch in the Dutch board game market. It will look into new possible strategies for Jolly Dutch and possible board game designs that fit that strategy.

To find the answer to the research question “How can one create a future proof strategy for Jolly Dutch?” different methods were used. First of all, market research was done through multiple interviews with experts of the board game industry, a questionnaire on a board game forum and desk research. With the market research information, search areas were found and eventually converted to a new strategy. As a final step, this strategy was explored through the use of an online interview with potential customers. This resulted in a new strategy for Jolly Dutch and a board game that fits this strategy.

This strategy suggests that Jolly Dutch should continue to focus on their sustainable games and expand this. Jolly Dutch could take the opportunity to focus on creating a subscription service that combines sustainable games with the principles of the subscription model.



# TABLE OF CONTENTS

Chapter 1 Introduction .....	7
1.1 Project Overview .....	7
1.2 Problem description .....	7
1.3 Research objective.....	9
1.4 Methodological approach.....	9
Chapter 2 Company and competitor analysis.....	12
2.1 History.....	12
2.2 The mission .....	16
2.3 The vision .....	19
2.4 Philosophy .....	21
2.5 Organizational structure.....	24
2.6 Resources.....	26
2.7 Growth strategy.....	28
2.8 Competitive strategy .....	29
2.9 Marketing Mix.....	30
2.10 Discussion and conclusion .....	37
Chapter 3 Market analyses .....	39
3.1 Trend analysis .....	39
3.1.1 Subscription models .....	39
3.1.2 Roll and write games .....	39
3.1.3 Sustainability .....	39
3.1.4 Covid-19.....	40
3.1.5 Transportation costs.....	40
3.1.6 Conclusion .....	40
3.2 Target group analysis.....	41
3.2.1 Questionnaire .....	41
3.2.2 General results .....	42
3.2.3 Diving deeper into the data.....	43
3.2.4 Conclusion target group analysis.....	43
3.3 Foreign market analysis.....	44
3.3.1 Country identification.....	44
3.3.2 Preliminary and in-depth screening .....	45
3.3.3 Final selection and choosing the market.....	45
3.4 Conclusion .....	46
Chapter 4 Search areas .....	47
4.1 Potential for Jolly Dutch.....	47
4.2 Search areas.....	50

4.3 Summary of search areas .....	50
Chapter 5 New future vision .....	52
5.1 New company direction.....	52
5.1.1 New mission, vision, and philosophy .....	52
5.1.2 First future vision.....	53
5.1.3 Second future vision .....	54
5.1.4 Third future vision .....	55
5.2 Choosing the future vision.....	55
5.3 Conclusion .....	57
Chapter 6 Roadmap .....	58
6.1 Build-up of the roadmap.....	58
6.1.1 First horizon: Green light district.....	58
6.1.2 Second horizon: subscribe and like .....	59
6.1.3 Third horizon: level up.....	59
6.1.4 Future vision .....	62
6.2 Interviews with potential customers.....	62
6.2.1 Interview findings .....	63
6.3 Improvements roadmap.....	64
6.4 Conclusion roadmap.....	64
Chapter 7 Game design.....	66
7.1 Design brief.....	66
7.2 Concept stage .....	66
7.2.1 Gameplay.....	71
7.2.2 Iterations .....	71
7.2.3 Physical game .....	72
7.3 Focus on sustainability.....	74
7.3.1 Non-sustainable game version .....	74
7.3.2 Sustainable game version.....	75
7.3.3 Comparison.....	76
7.4 Conclusion .....	77
Chapter 8 discussion, conclusion, and reflection .....	78
8.1 Limitations .....	78
8.2 Recommendations.....	78
8.3 Conclusion .....	79
8.4 Reflection.....	80
Bibliography .....	82
Appendix.....	86

# CHAPTER 1 INTRODUCTION

## 1.1 Project Overview

This graduation project will show the process and result of creating a strategy for Jolly Dutch, a board game company based in Zeist in the Netherlands.

This project is divided into eight chapters (see Reading Guide, page 2):

1. The first chapter consists of the project overview and discusses the problem description, the focus of the project, and the methodological approach.
2. The second chapter consists of the company and competitor analysis. These analyses will show the strengths and weaknesses of Jolly Dutch.
3. The report's third chapter discusses the following three analyses: trend, target group, and foreign market analysis. These analyses will show the opportunities and threats for Jolly Dutch.
4. The fourth chapter will discuss the combination of the strength, weaknesses, opportunities and threats (SWOT) of Jolly Dutch. These will then evolve into search areas for Jolly Dutch.
5. The search areas will be used to find possible new future vision concepts for Jolly Dutch. In the fifth chapter, these concepts are discussed, and one concept will be chosen.
6. The sixth chapter will consist of creating a roadmap from the chosen future vision.
7. The roadmap and the result from the SWOT will combine into a board game that will exemplify how Jolly Dutch can implement the strategy.
8. The final chapter will cover the discussion and conclusion of the report. Here the limitations and recommendations of the project will be discussed, and the final results will be shared in the conclusion. The graduation project will conclude with looking back on the research questions of this project to see if the questions are answered and what this means for Jolly Dutch and the board game industry. Lastly, this chapter will end with a personal reflection.

## 1.2 Problem description

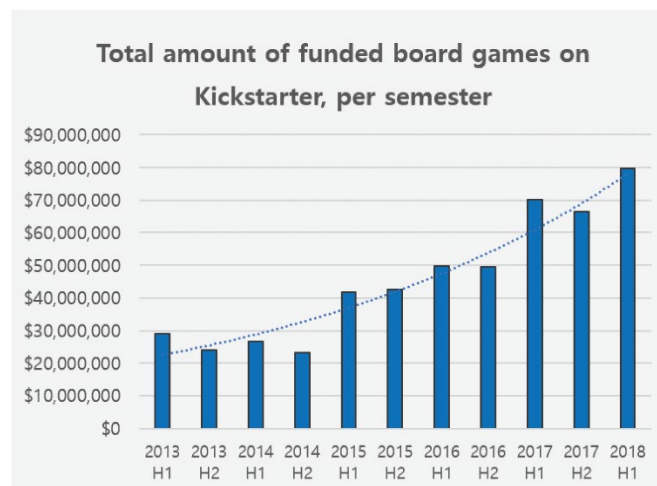
Board games are a well-known activity amongst friends and family. Most people have at least played a board game once in their life. For me, board games are a great way to think strategically and have fun with others. It is a way to be competitive in a relaxed setting. I have played a significant amount of board games and probably own too many. Board games are familiar to me, and I know what I am dealing with. However, this may not be for everyone.

In this graduation project, I will look closely at Jolly Dutch, a board game publisher in the board game industry. I chose to do this project in the board game industry because of my passion and potential. Jolly Dutch is a good fit because they are growing and could need extra insight into their company.

### **Growth in the board game industry**

The board game industry is gaining popularity at an exponential rate (Figure 1) (Kim et al., 2020). The industry is valued at around USD 12 billion in 2018 and, according to Lutter & Weidner (2021), is forecasting further growth. Covid-19 was a catalyst for this continuing growth, leading to increased retail sales in board games (Hoekstra & Leeflang, 2020). But even with this increase in popularity, not all board game publishers are profiting. The board game publishers benefiting the most are the ones that publish classic board games like Monopoly, Settlers of Catan, and Ticket to Ride (Booth, 2020). These classics show to withstand the test of time by still being popular even though being published in 1934 (Lutter & Weidner, 2021), 1995 (CATAN, n.d.), and 2004 (Kaufmann & Gaubil, 2004), respectively. Classics are also games that are generally known by the broad public. Usually, these board games are played by people when they are younger, and thus they can hold nostalgic value once they grow up. Hence these classic board games are easier to pick up since the threshold is lower to buy. People already know how these board games work, and they know these games are 'fun'. Board games such as Monopoly, Settlers of Catan, and Ticket to Ride are doing

fantastic during a pandemic because of this, especially when shopkeepers cannot give advice about which games to buy because of the shift towards more online shopping to maintain social distancing (Hoekstra & Leeflang, 2020).



As mentioned before, board games are more popular than ever, but why is the board game industry growing so fast besides the Covid-19 catalyst?

In 2020 the board game industry had a profit growth of 20% (Tullis, 2021), and the expectation is that the industry will continue to grow (Lutter & Weidner, 2021). Board games have been around for thousands of years, but modern board games are, like Monopoly, reaching global commercial success because of their thematic and more elaborate designs. Many recent games balance cooperative and competitive game mechanisms while focussing on having fun (Lutter & Weidner, 2021). According to Booth (2020), board games have become popular because they challenge people, but they are not too complicated, so people can more easily enjoy the challenge. Another study by Chen (2007) also showed that board games' challenges could grow people emotionally. This brings us to the second point where games have a significant social aspect (Booth, 2020). Collaboration is vital to winning in many games, such as Pandemic (Figure 2) and Mechs vs Minions (Figure 3). In competitive games, the social part is also present with trading goods or even discussing actions (Booth, 2020). Lastly, people can experience new worlds. For example, it is easy to get immersed in a board game's theme when playing board games and feel like you are somewhere else. This immersion gives people a different perspective (Booth, 2020).



Figure 2 Pandemic. Different players with colored blocks work together to beat a pandemic using various cards. Image: livescience.com



Figure 3 Mechs vs. Minions. Players portrayed as little figurines working together to achieve a common goal using die and cards with unique abilities. Image: rockpapershotgun.com

### Innovations in the board game industry

However, the growth of the board game market is not the only interesting thing that is happening. New ideas are trying to influence the board game industry. Gam'inBiz, for example, is in the process of launching its new product Gam'inBox

(Gam'inBiz, n.d.). This will be a subscription service for board games, something that is new to the Dutch market. Another exciting development is the increase in attention to making board games sustainable (O'Donoghue, 2021). The discussion for sustainable board games has started. More people are voicing their opinion of the board game industry taking responsibility since board games tend to use a lot of material. Using board games as an innovative approach to communicate the effects of climate change is also becoming more popular (Fjællingsdal & Klöckner, 2020).

To conclude, the board game industry is growing, even at a faster rate than usual. Besides the growth due to Covid-19, new ideas and opportunities are presenting themselves. But how can a company like Jolly Dutch seize these opportunities and profit from this growth? To help Jolly Dutch grow in the best way possible, research is required about Jolly Dutch, their competitors, and the market.

### 1.3 Research objective

The focus of this project will be to create a strategy for Jolly Dutch and a game that will be fitting to this strategy. This strategy should be future proof and fit Jolly Dutch to make sure they can use it in the future and stand for what Jolly Dutch represents. Creating this strategy will make the vision and direction for the company clear. In addition, it establishes goals for the employees within the company, which prevents individuals from losing sight of the organization's objectives (Evolve, 2019). The purpose of this strategy is to help Jolly Dutch reliably grow its company. A board game will be made to exemplify how Jolly Dutch can realize this strategy. The goal of this project is to create a strategy for Jolly Dutch. Developing this strategy fits well with the master's, Strategic Product Design at the Delft University of Technology. On top of that, the company is relatively young, hence it is a perfect moment to evaluate their strategy.

To find the essence of Jolly Dutch and design a suitable strategy, the following research question is stated:

***“How can one create a future proof strategy for Jolly Dutch?”***

There are eight sub-questions to help to answer the research question:

1. What is the current strategy of Jolly Dutch?
2. What occupies other players in the board game market?
3. What are influential trends for Jolly Dutch?
4. Which foreign markets hold potential for Jolly Dutch?
5. Which target group should Jolly Dutch focus on?
6. Which future vision would suit the current image of Jolly Dutch?
7. How can Jolly Dutch implement a new strategy?
8. What type of board game would fit Jolly Dutch's new strategy?

These questions will be answered throughout this project. The first and second questions will be answered in chapter two, the third, fourth and fifth questions in chapter three, the sixth question in chapter five, the seventh question in chapter six and finally, the last question will be answered in chapter seven.

### 1.4 Methodological approach

The product innovation model by Buijs (2012) will guide this graduation project. This model helps people within a company that will be a part of the innovation process to overview the steps and actions they will have to complete. The model of Buijs, called the Delft Innovation Model (DIM), consists of five steps: product use (I), strategy formulation (II), design brief formulation (III), product development (IV), and market introduction (V) (Buijs, 2012). The DIM is a good fit for this project as it focuses on changing the competitive environment by creating new products or services. The model can also help to plan and manage innovation. This project aims to create a new strategy for Jolly Dutch and exemplify this strategy with a product. The DIM helps to guide this strategy in the changing competitive environment with the final product that will be made. Limitations of the DIM are, however, that it is relatively abstract. This

causes the need for other methods that help guide more concrete activities. These methods are indicated by orange in Figure 4, Figure 5, and Figure 6. The DIM will not be fully used in this project. The first and fifth parts of the model will not be covered in this project, as time does not allow to create a market introduction and the start of the project is at the company's strategic situation. This project will follow steps two, three, and four of the DIM (Figure 7).

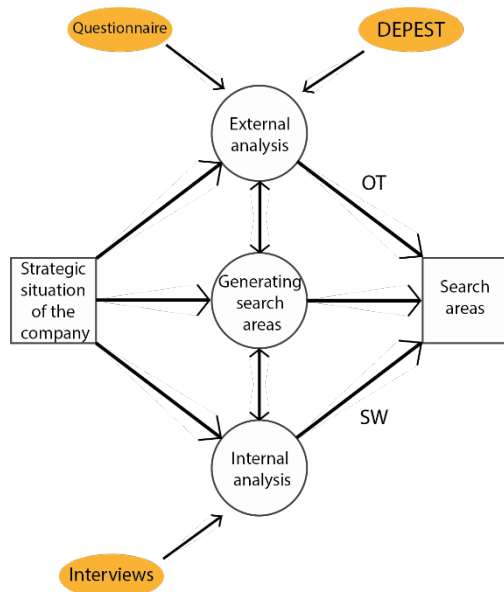


Figure 4 Second step of DIM, Strategy formulation, highlighting the use of questionnaires, the DEPEST method, and interviews.

The project will start with step two, the strategic situation of the company (Figure 7). An internal and external analysis will be performed of the company to find the strategic situation (Figure 4). This analysis will be done with the use of the SWOT method. The SWOT method allows distinguishing between four groups of factors that affect the company's activity: strengths, weaknesses, opportunities, and threats (SWOT) (Shabanova et al., 2015). The four groups of factors will help find search areas in which potential new business opportunities can be found. Three other methods will also be used within this SWOT method: the DEPEST method, a questionnaire, and interviews (Figure 4):

- Interviews will be used to understand better the market and the position of Jolly Dutch and their competitors. Interviews also help in finding out more detailed information. Two shop owners, a board game journalist, a sales agent, and a designer working with a competitor, namely 999 Games, will be interviewed. Van Binsbergen and Kneepkens, the founders of Jolly Dutch, will also be interviewed to get their perspectives. The outcomes of these interviews will be used throughout the company and

competitor analysis.

- The DEPEST method will be used to look at the current trends. The DEPEST method is an easy tool to gather a lot of information. However, the downside of this method is that it lacks the weighing of the different elements (Lucidity, n.d.). The DEPEST method was used to allow strategic decision making (Frue, 2017).
- A questionnaire will also be held within the SWOT analysis. This questionnaire will be used to get a better understanding of the target group of Jolly Dutch. The results can help guide Jolly Dutch in the direction of a new target group. A questionnaire was chosen as these are an easy way to get a lot of information.

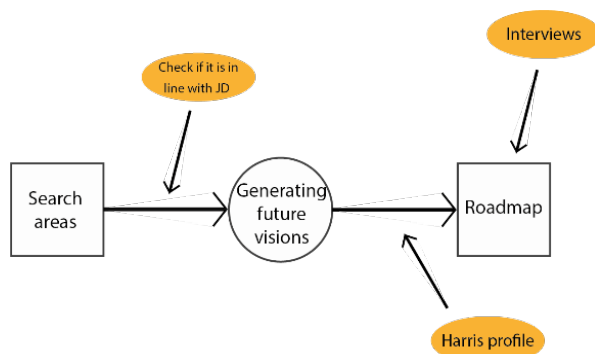
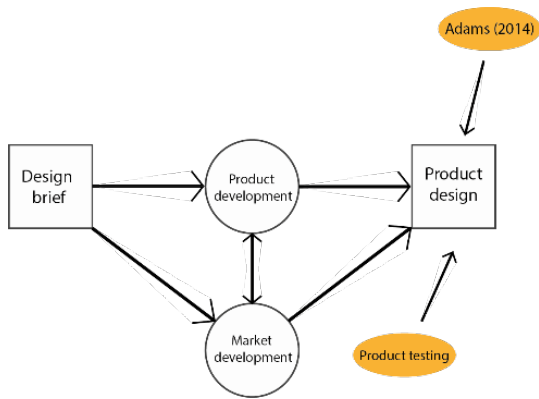


Figure 5 Third step of DIM, design brief formulation, highlighting the use of interviews with potential customers, the Harris profile, and checking whether the search areas fit with Jolly Dutch (JD)

In the third step (Figure 5), I will use the search areas resulting from the SWOT analysis to formulate new strategic directions that will create product ideas and lead to the design brief. The chosen strategic direction will be formed into a roadmap to communicate how Jolly Dutch's future vision can be realized. Interviews with potential customers will be held to see if the future vision and the roadmap have potential. There will be six interviews in which different users will be asked whether they see potential in this idea. This idea will then be adjusted to the potential feedback of the users.





In the fourth stage of DIM and the final stage of this project (Figure 6), the product will be designed. Here, the method of Adams (2014) will be used. This method describes the early design process of games. Lastly, the final product, a board game, will conclude this project.

Figure 6 Fourth step of DIM, product development, highlighting the use of Adams' method, and product testing.

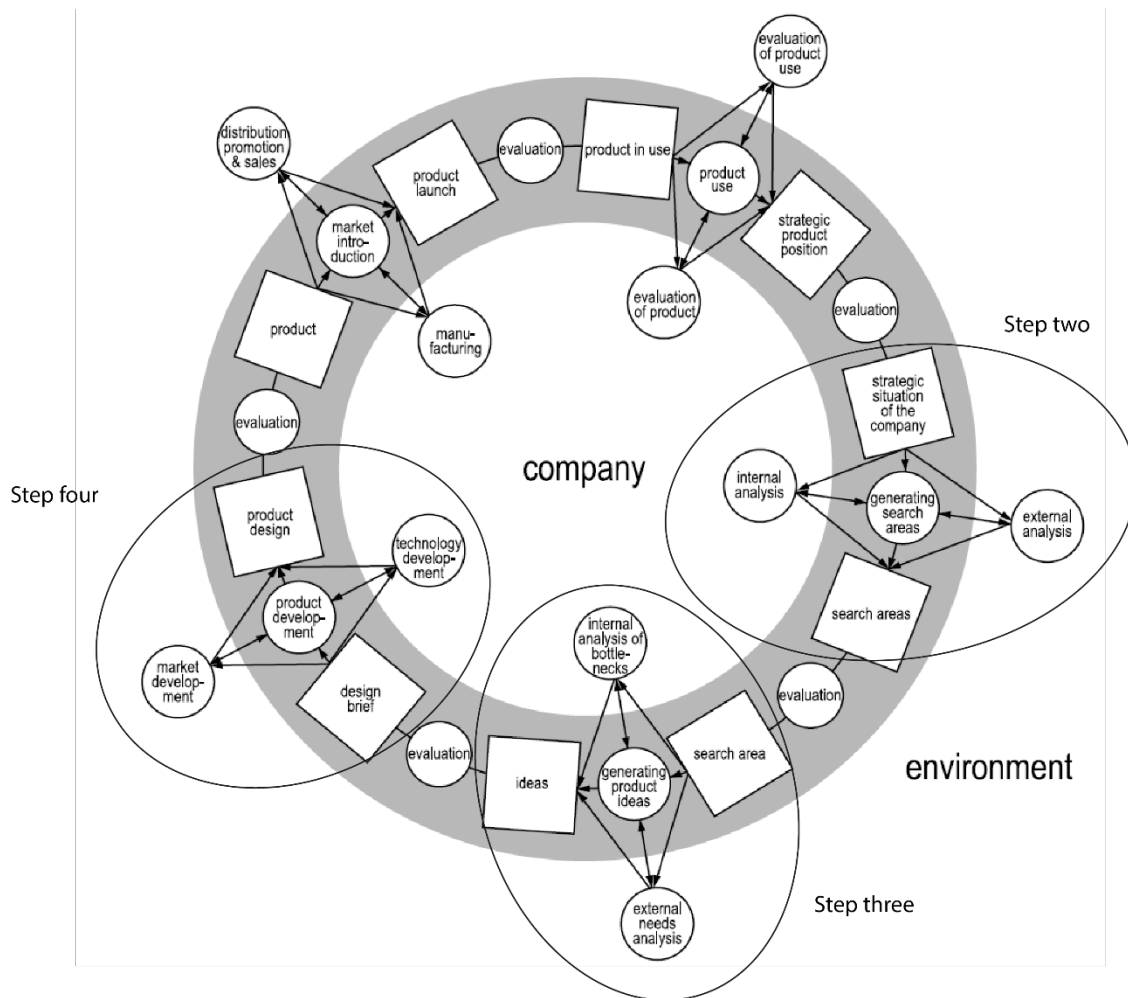


Figure 7 Delft innovation model indicating the three steps used in this project. Image: (Buijs & Valkenburg, 2005)

## CHAPTER 2 COMPANY AND COMPETITOR ANALYSIS

The company and competitor analysis will discuss the history, mission, vision, philosophy, organizational structure, resources, growth strategy, competitive strategy, and marketing mix of Jolly Dutch and three competitors. These aspects are looked at to get a clear image of the current situation of Jolly Dutch and its competitors.

The competitors chosen for this analysis are 999 Games, White Goblin Games (WGG), and the Gamefantry. These companies are selected as competitors as they are all board game publishers, like Jolly Dutch, and represent the relatively large companies, like 999 Games and WGG, and smaller companies, like The Gamefantry in the board game industry. 999 Games and WGG publish yearly around sixty games, making a revenue of \$8 and \$5 million a year, respectively (Zoominfo, n.d.). They have a significant impact on the Dutch board game market, and hence they are interesting in comparison. The Gamefantry is selected as it has a similar philosophy as Jolly Dutch, which is to be a friendly small board game publisher with a favouring factor. The Gamefantry, as of now, holds four games, compared to Jolly Dutch, which has eight. It is interesting to view how a similar company to Jolly Dutch improves their companies' position in the market to see whether Jolly Dutch might be ahead of their game or not.

This chapter will compare the history, mission, vision, philosophy, company structure, growth strategy, the competitive strategy of Jolly Dutch and the competitors. This analysis will be part of the internal analysis of the second step of the DIM (Figure 4).

The aim of this chapter is to answer the first two sub-research questions:

- What is the current strategy of Jolly Dutch?
- How do competitors pose a threat for Jolly Dutch?

### 2.1 History

This chapter will give a general introduction to Jolly Dutch and its competitors. It will highlight how the different companies were founded and where they are now.

#### Jolly Dutch

Jolly Dutch is a small Dutch company founded in 2017 by Arnold van Binsbergen and Alexander Kneepkens. After growing up and playing a fair share of board games when they were younger, they decided to contribute to the board game industry. Van Binsbergen and Kneepkens wanted to make entry-level games for families which do not take too long to play and are not too complicated. Kneepkens mentions: *"I noticed that a lot of people were enjoying board games after a long day's work. But after a long day, you do not want the games to be too complicated and take too long"*. Both Van Binsbergen and Kneepkens have an immense love for board games and came up with their idea for a new game. Kneepkens has a focus on game mechanics and game immersion. Van Binsbergen is more focused on marketing, sales, and making games ready for production. With this variety of skills, they believe they can make great games for the Dutch market.



Figure 8 The change of the cover art of the board game Chartered by Jolly Dutch.



Jolly Dutch notably started their company with a Kickstarter project. Kickstarter is a website where people can share their projects. Potential buyers can then ‘back’ this project by pre-ordering the products. The first Kickstarter project of Jolly Dutch, Chartered, initially failed. According to Kneepkens and Van Binsbergen, it failed because the art was not on point, and the rewards were not exciting enough. After this failure, they decided to change the game's cover and alter its rewards for backing this project. With these changes, the Kickstarter project did become successful (Figure 8). This way of trial and error is a perfect example of their current strategy where Jolly Dutch tries something, finds out if it works or not, and then reflects and tries something new.



Figure 9 Boogie Beasts is a card game under time pressure where players can use lies and bluff to win (Jolly Dutch, n.d.). Image: bol.com

After the success of Chartered, they decided to continue making new games. So, in the summer of 2018, they began making another new game: ‘Boogie Beasts’ (Figure 9). After they completed Boogie Beasts, they decided it was time for a game that fell in a lower cost category and made the third game of Jolly Dutch: ‘Herrlof’.

Jolly Dutch recently finished making their fourth game, ‘Hot Potato!’. Jolly Dutch is also working on a ‘serious board game’ for the company Charim. Serious games are not primarily used for fun but to improve learning and behavioural changes (Roolvink, 2019). These games, however, play a small role in Jolly Dutch and are not mentioned anywhere on their social media.

Jolly Dutch is currently making four new games which will be published next year. Interesting about these new games is that Jolly Dutch is no longer designing them themselves but only publishing. Jolly Dutch will produce a new flip and write, a board game genre in which you flip over cards and write something down, called Polders and three cards games called Télós, If It Fits, and Kobito (Figure 10). Kobito is a special one compared to the others as it will be carbon neutral. This will be done by looking into how much carbon it costs to produce that board game and use other measures to reduce the same amount of carbon.



Figure 10 New Jolly Dutch games: Télós, If It Fits, Kobito, and Polders. Image: jollydutch.com

### 999 Games

Michael Bruinsma started 999 Games in 1990 (Figure 11). 999 Games started as a post-order company. They would send board games to people through the mail. In 1991 Michael Bruinsma started Spellenspektakel, a Dutch board game convention where the public could see and play new games. This convention would become the stage for introducing their first successful product in 1993: Magic the Gathering, which they introduced in the Netherlands. Spellenspektakel later became a separate sister company in 2003 and would then be sold to Libema in 2007.

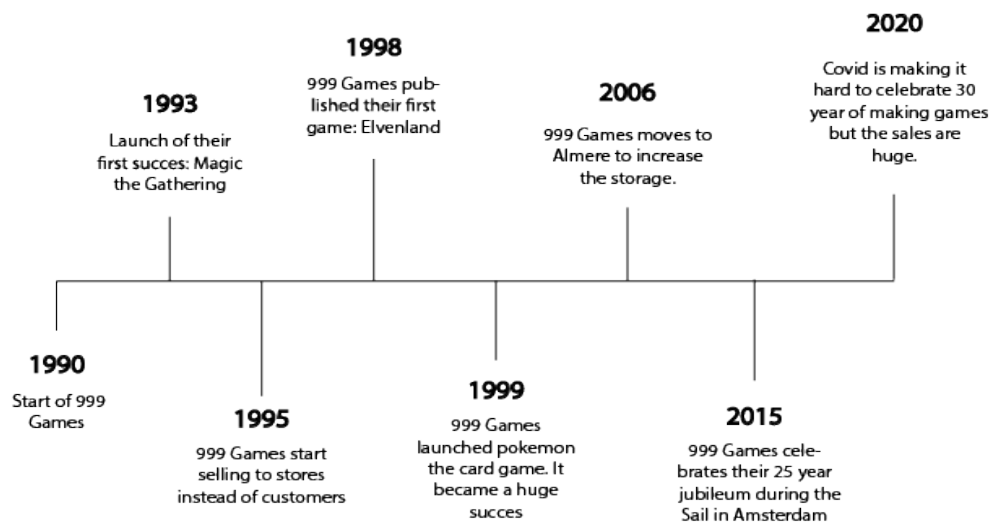


Figure 11 Timeline of 999 Games.

In 1998, 999 Games published their first board game, which they designed themselves Elfenland (Figure 12). Elfenland immediately became the Dutch toy of the year. 999 Games started publishing more games with this success, such as El Grande and Settlers of Catan. They also brought the hugely popular Pokémon card trading game to the Netherlands in 1999, which would help grow 999 Games even more.

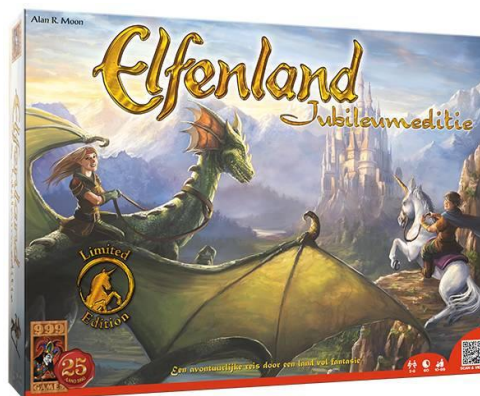


Figure 12 Elfenland, 999Games first own boardgame. Elfenland is a tactical game where players try to visit all 20 cities portrayed on the board. Players, however, can intervene with each other's journey (999Games, n.d.). Image: 999games.com

Michael Bruinsma started another company in 2001, Phalanx, focusing more on the hardcore board games. Today these two companies combined (999 Games and Phalanx) have more than 30 employees and an assortment of several hundred board games (999Games, n.d.).

### White Goblin Games

WGG is a Dutch game publisher founded by Jonny de Vries and Johan Kuipers in 2004. They started, just like 999 Games with Magic the Gathering, by distributing games from outside the Netherlands. In 2006 they collaborated with Quinned games. This collaboration, however, ended rather quickly In 2009 (BGG, n.d.). After this collaboration, both companies went their own way. WGG continued to publish games from other countries, like Mariposas (Figure 13), together with in-house designs. To this day, they still have this strategy of mixing in-house design together with buying licenses from foreign games.



Figure 13 Mariposas is a game where players have to spread their butterflies across Mexico and America, where they can collect flowers and plants to collect points (WGG, n.d.). Image: whitegoblingames.com

### The Gamefantry

The Gamefantry is a young company, being only one year old. They started in 2020 with the publication of four games. They wanted to create a board game company that felt accessible for anyone (Gamefantry, n.d.). People with autism help designing and making the Gamefantry games, especially those who have trouble getting themselves into the labour market. An example of a game design by people with autism is Chameleon (Figure 14). This serves as their primary unique selling point (USP) (Gamefantry, n.d.).



Figure 14 Chameleon, a roll and write game where the players try to get the highest score (Gamefantry, n.d.). Image: (Gamefantry, n.d.)

### Conclusion

Jolly Dutch and the Gamefantry are very young companies just starting their process, while WGG and 999 Games already have a history behind them. They already have more experience and contacts in the board game industry.

## 2.2 The mission

A mission statement is an essential tool in the process of making a strategy. It defines the goal of a company. A company needs to be aware of its mission and act accordingly (Pearce, 1986). Here, the mission of Jolly Dutch will be analyzed to see whether their mission is up to 'good' standards. There are different theories present on what should be included in a 'good' company mission. One theory is David's (1989) theory. According to David (1989) a mission should consist of nine parts:

- |  |  |
|--|--|
| <ol style="list-style-type: none"><li>1. <b>Customers</b><br/>Who are the customers of the company?</li><li>2. <b>Products or services</b><br/>What are the companies major services or products?</li><li>3. <b>Location</b><br/>Where does the firm compete?</li><li>4. <b>Technology</b><br/>What is the companies basic technology?</li><li>5. <b>Concern for survival</b><br/>What is the companies commitment to economic objectives?</li></ol> | <ol style="list-style-type: none"><li>6. <b>Philosophy</b><br/>What are the basic beliefs, values and philosophical priorities of the company?</li><li>7. <b>Self-concept</b><br/>What are the companies major strengths and weaknesses?</li><li>8. <b>Concern for public image</b><br/>What are the companies public responsibilities, and what image is desired?</li><li>9. <b>Concern for employees</b><br/>What is the companies attitude towards their employees?</li></ol> |
|--|--|

Based on the theory of David (1989), it is possible to check if a mission is, in essence, a good mission. With David's (1989) theory, it is easy to pinpoint which specific aspect of a mission is lacking. Another benefit of the model of David (1989) is that when you are creating a new mission, it is easy to grasp as the mission is divided into nine small steps. Because of these benefits, the model of David (1989) is used.

With the chosen model of David (1989), the mission of Jolly Dutch is analyzed. Jolly Dutch's mission is:

*"To give Dutch people an enjoyable evening with their families through well-designed board games."*

This mission is not stated clearly on Jolly Dutch's website or anywhere in their company yet, but their mission became clear through discussions with Kneepkens and Van Binsbergen. The mission immediately covers one of Jolly Dutch's unique selling points where they show they want to cater to Dutch people. They will do this by being a 100% Dutch company. Meaning they are trying to make their brand 100% Dutch, from design to printing the board game. Jolly Dutch's mission mentions:

- the customer: Dutch people
- the product: board games
- location: Dutch market
- philosophy: giving an enjoyable evening

Jolly Dutch, for now, only touches on four out of the nine points according to David's (1989) theory to create a complete mission.

This mission of Jolly Dutch then is compared with their competitors' missions (Figure 15, Table 1). The missions of 999 Games, WGG, and the Gamefantry were created by looking at the values they communicate on their platforms. The mission of the Gamefantry, for example, was found by looking at their Facebook and their website. It is interesting to note that the Gamefantry, 999 Games, and WGG are communicating their company mission poorly. Finding their mission was searching for the right pages and pieces. This was also the case for the philosophy and the vision of these competitors. Compared to more prominent companies such as Asmodee (a big French board game publisher), whose goals and visions are clearly communicated on their site, it becomes clear that these Dutch companies are behind on their communication.

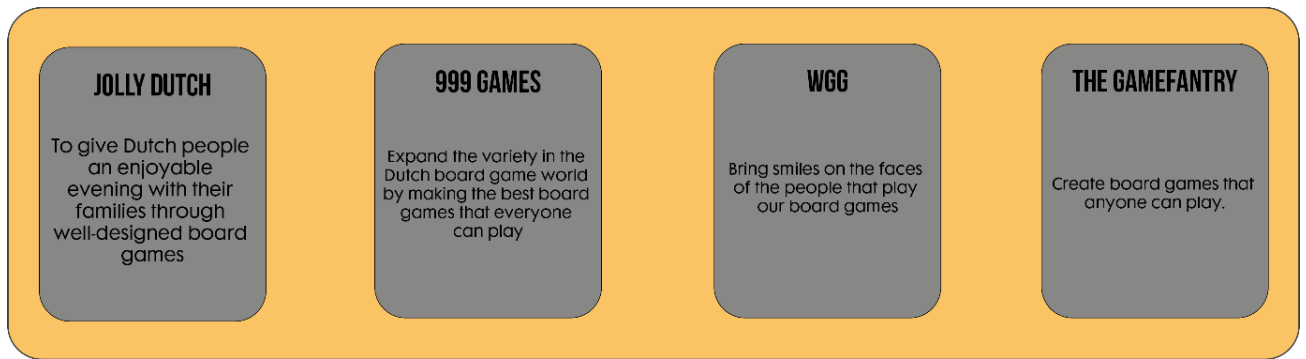


Figure 15 The missions of 999 Games, WGG, and The Gamefantry.

When looking at Figure 15 and Table 1, it becomes clear that Jolly Dutch ticks fewer boxes than the big competitors but more than the Gamefantry. All companies, however, miss two components: technology and the concern for people. This could be caused by the lack of technology in this industry and the concern for employees being communicated more internally than externally.

More interesting than the number of boxes the companies tick is what is actually stated in the mission. One of the most interesting components is that 999 Games and Jolly Dutch are expressing to focus on Dutch people in the Dutch market as main customers, while WGG and the Gamefantry do not mention this in their 'Customers' mission statements. WGG and the Gamefantry decide to not only include Dutch people in their mission but a broader public, namely anyone (The Gamefantry) or people who play board games in general (WGG). As mentioned before, Jolly Dutch catering to Dutch people is one of their USPs. While this can be a significant strength in the Dutch market, it could hold them back in the international market. Are international people interested in Dutch-based games? Do they care? It is advised for Jolly Dutch to focus and put energy in on being Dutch when they possibly want to go international? This is something to consider when Jolly Dutch would like to expand to the international market. If they do, their missions would have to change with them.

### Conclusion

From the mission of Jolly Dutch, it becomes clear that their focus lies with the Dutch people. With this focus, it could become more challenging for them to explore other markets. Their competitors are not focusing specifically on the Dutch customer except for 999 Games. The mission statement of Jolly Dutch lacks in components; however, their competitors, except for 999 Games, are also lacking most components. Nonetheless, these missing components could be an improvement for Jolly Dutch.

**Table 1** Analysis of the missions of Jolly Dutch, 999 Games, WGG, and The Gamefantry based on David's theory (1989).

	<b>JOLLY DUTCH</b>	<b>999 GAMES</b>	<b>WGG</b>	<b>THE GAMEFANTRY</b>
Customers	Dutch people	Dutch market	People who play board games	Anyone
Products or services	Board games	Board games	Board games	Board games
Location	Dutch market	Dutch market	-	-
Technology	-	-	-	-
Concern for survival	-	Expand the variety	-	-
Philosophy	Give an enjoyable evening	Making the best board games	Bring smiles on peoples faces	-
Self-concept	-	Making the best board games	-	-
Concern for public image	-	everyone can play	Bring smiles on peoples faces	-
Concern for employees	-	-	-	-

## 2.3 The vision

Besides a mission, companies also have a vision. The difference between a mission and a vision can be confusing. A mission will answer 'what' and 'how' while the vision answers 'why' (Law, 2021). Vision statements can be a valuable tool to explain the existence of a company or the impact it wants to have (Kirkpatrick, 2017). Vision statements can also play an essential role in changing companies' performance (Goethals et al., 2004; Kirkpatrick, 2012). But what does a company vision need to include to be considered a 'good' vision? How do you create a vision statement that can influence your company positively?

According to Kirkpatrick (2017), a vision statement needs to fulfil five conditions:

1. It needs to be a statement of a long-term idealized future.
2. It needs to focus on how the company will impact or help its customers.
3. It needs to tell why the company is in business.
4. It needs to tell which positive impact the company will have.
5. It needs to be shared with others.

The current vision statement of Jolly Dutch is:

*“Creating a strong Dutch board game brand that works with Dutch designers to create board games that represent their love for the board game industry.”*

Like the mission, the vision was also not clearly stated in Jolly Dutch's company at first, but the vision became clear through discussions with Kneepkens and Van Binsbergen. Jolly Dutch's vision hits two of the five components of a good vision, according to Kirkpatrick (2017). Namely:

1. the long-term idealized future (1): **creating a strong Dutch board game brand**
2. the reason why the company exists (3): **to create board games that represent their love for the board game industry**

Based on Kirkpatrick's theory (2017), the different visions of 999 Games, WGG, The Gamefantry and Jolly Dutch will be analyzed and compared (Figure 16, Table 2).



Figure 16 The visions of 999 Games, WGG, and The Gamefantry.

**Table 2** Analysis of the visions of Jolly Dutch, 999 Games, WGG, and The Gamefantry based on Kirkpatrick's theory (2016).

	<b>JOLLY DUTCH</b>	<b>999 GAMES</b>	<b>WGG</b>	<b>THE GAMEFANTRY</b>
Long term idealized future	Create a strong Dutch board game brand	Make board games that can be played anywhere, anytime	Become the most successful board game publisher	-
Impact on customers	-	-	-	Have a great night with family
Reason of existence	Create board games that represent the love for the industry	Make the best board games	Become the most successful board game publisher	Make accessible board games
Positive impact	-	-	-	Have a great night with family
Shared with others	-	-	-	-



As Figure 16 and Table 2 show comparing the different companies makes it apparent that there is no clear division between the 'bigger' and 'smaller' companies regarding their vision components. Jolly Dutch covers two of the points quite nicely, but has like the other companies, room for improvement. Nevertheless, besides not having a complete vision, 999 Games and WGG are successful. One could argue that perhaps with a better vision, they could improve their business even more. Or on the other hand, voicing a clear vision is not crucial for being a successful business. This is not meant to demotivate businesses from stating their vision clear as visions do help to help in companies' performances, as stated by Kirkpatrick (2016) and Goethals et al. (2004).

Jolly Dutch again voices their Dutch focus in the 'Long term idealized future' component. Notably, 999 Games does not mention this together with WGG. Here the same findings apply as mentioned in the mission. In the 'Reason of existence' component Jolly Dutch focuses on creating board games that represent the love for the industry, whereas 999 Games and WGG are concentrating more on making the best board games (999 Games) and becoming the most successful (WGG). The Gamefantry focuses on making accessible board games. What can be noted here is that Jolly Dutch focuses more on the love for board games than the competitive point like 999 Games and WGG do. This could perhaps set Jolly Dutch apart when highlighting their passion for board games instead of focussing on being the best like the bigger companies do. Nowadays, it is more popular to support smaller businesses due to social media (Jones et al., 2015). Customer loyalty and word of mouth advertisement are also more unique in smaller businesses (Gilboa et al., 2019), like Jolly Dutch. Communicating can give small businesses a competitive advantage and has been seen as a driver for success (Gilboa et al., 2019). Jolly Dutch communicating their passion for board games and gathering loyalty from customers can prove to be successful within their vision.

## Conclusion

To conclude, from the vision, it becomes clear that the focus of Jolly Dutch lies within creating board games with high quality to show their love for the industry. Other competitors such as 999 Games and WGG focus on making the best board games. This difference is something that can set Jolly Dutch apart from the others. Improvements on the vision for Jolly Dutch is communication. Currently, communication is lacking. If Jolly Dutch manages to improve this, they could also profit from smaller companies being more supported on social media.

## 2.4 Philosophy

Next to the company's mission and vision, companies also create a philosophy. A company philosophy brings three advantages (Ledford et al., 1995):

1. guides the company's behaviour and decisions.
2. expresses organizational culture.
3. increases organizational performance.

A company philosophy can also have a negative impact if not executed properly. If a philosophy is too ambitious, employees get demoralized instead of gaining the inspiration it should provide (Ledford et al., 1995). A philosophy could also be too rigid, and it may become a justification for not exploring new challenges. An example of a company that was not able to adapt is IBM. The philosophy of IBM was focused on individuality, and therefore, it did not adapt well to the importance of the role that teams play in a technological firm (Ledford et al., 1995).

So how do you know if a company philosophy is good, too ambitious or even too rigid? A company philosophy should cover three aspects, according to Mintz (2016):

1. Company expectations from employees
2. Company beliefs
3. Employee performance

Again, the chosen competitors will be compared to Jolly Dutch, now looking at the philosophies based on the theory of Mintz (2016) (Figure 17, Table 3). The current company philosophy of Jolly Dutch is:

*“Making beautiful games while keeping it fun to do.”*

This philosophy was again established with discussions with Kneepkens and Van Binsbergen since it was not clear in their company yet. Jolly Dutch has a philosophy that includes:

- the expectations from the company (1): beautiful games
- the expected employee performance (2): keeping it fun to do

However, it is missing the fundamental beliefs (3) of the company.



Figure 17 The philosophies of 999 Games, WGG, and The Gamefantry.

Figure 17 and Table 3 show the philosophies of Jolly Dutch and their competitors. From Table 3, it can be seen that all competitors only have their company beliefs in their philosophy. Interesting here is that the beliefs of 999 Games and the Gamefantry are similar; they both focus on making board games more available. WGG is focusing more on bringing happiness, while Jolly Dutch is concentrating on the quality of the games. Interestingly Jolly Dutch is focusing on the games while the competitors focus on the people playing the games. Besides the company beliefs, it is interesting to see that Jolly Dutch is the only company that mentions the employees in their philosophy. This shows that Jolly Dutch is ahead with thinking what they want from their employees, or at least are willing to show this more.

## Conclusion

Jolly Dutch their belief is to make beautiful games. This sets Jolly Dutch apart from their competitors, focusing more on inclusive games such as 999 Games and the Gamefantry.

**Table 3** Analysis of the philosophies of Jolly Dutch, 999 Games, WGG, and The Gamefantry based on Mintz's theory (2016)

	<b>JOLLY DUTCH</b>	<b>999 GAMES</b>	<b>WGG</b>	<b>THE GAMEFANTRY</b>
Company expectations from employees	Keep it fun to do	-	-	-
Company beliefs	Making beautiful games	Making board games that are playable by anyone	Make board games that bring happiness	Make board games accessible
Employee performance	-	-	-	-

## 2.5 Organizational structure

An organization is a group of people, two or more, working together to a common objective or multiple objectives (Snow & Hrebiniak, 1980). According to Williams (2020), there are seven organizational structures; however, only two structures are of interest: the horizontal and the hierarchical structure. These are the two structures that are currently the most similar to the system of Jolly Dutch.

- Horizontal structures are structures within a company that do not have many levels between upper and lower management. Horizontal structures are often seen in start-ups that do not have many employees (Williams, 2020). Advantages of this structure are that it gives employees more responsibility and improves the speed of implementing new ideas.
- Hierarchical structures are pyramid-shaped. With a leader or a few leaders on top and the lower you go, the less influence people have, and the more people there are (Williams, 2020). Advantages of this structure are: better defining the levels of authority, showing who is responsible for what, and giving each employee a specialty.

It is interesting to look at the past, current, and possible future organizational structure of Jolly Dutch to create a better understanding of who is in charge and who has the final responsibility. Especially in small companies, it is important to know who stands where to avoid conflicts (Ingram, 2019). Besides Jolly Dutch's organisational structure, the organizational structure of the competitors will also be discussed.

### Jolly Dutch

Jolly Dutch has been operating with a horizontal structure since 2017 (Figure 18), where they only had two employees, the owners, Kneepkens and Van Binsbergen, who are at the same level. Jolly Dutch did not have many employees in the beginning, and there were no levels between upper and lower management.

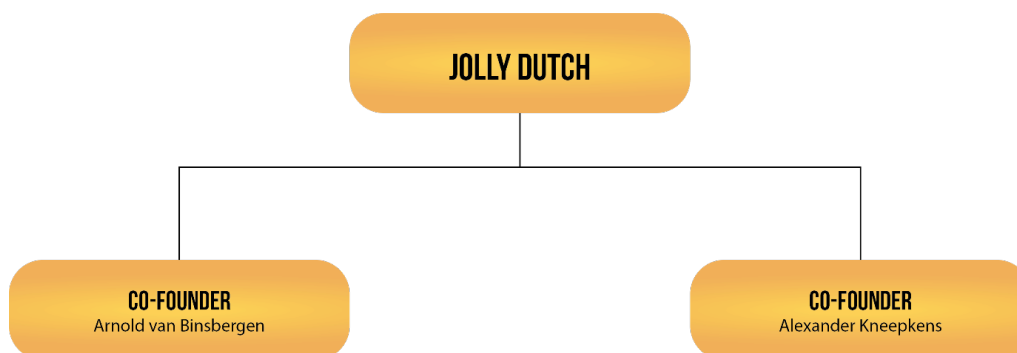


Figure 18 The horizontal structure in Jolly Dutch.

Jolly Dutch has now shifted to a hierarchal structure with their new employees (Figure 19). This structure is fitting since they now have two leaders on top, Kneepkens and Van Binsbergen, and more people working for them. Jolly Dutch's business is looking more like the typical pyramid-shaped hierarchical structure. Knowing how your organization is structured can help guide employees. It also makes it easier to add new positions in the company as well. This makes it easier for the company to grow (Ingram, 2019). It also makes it clearer for the employees to know who is in charge and responsible for what with this structure, as opposed to the horizontal structure.

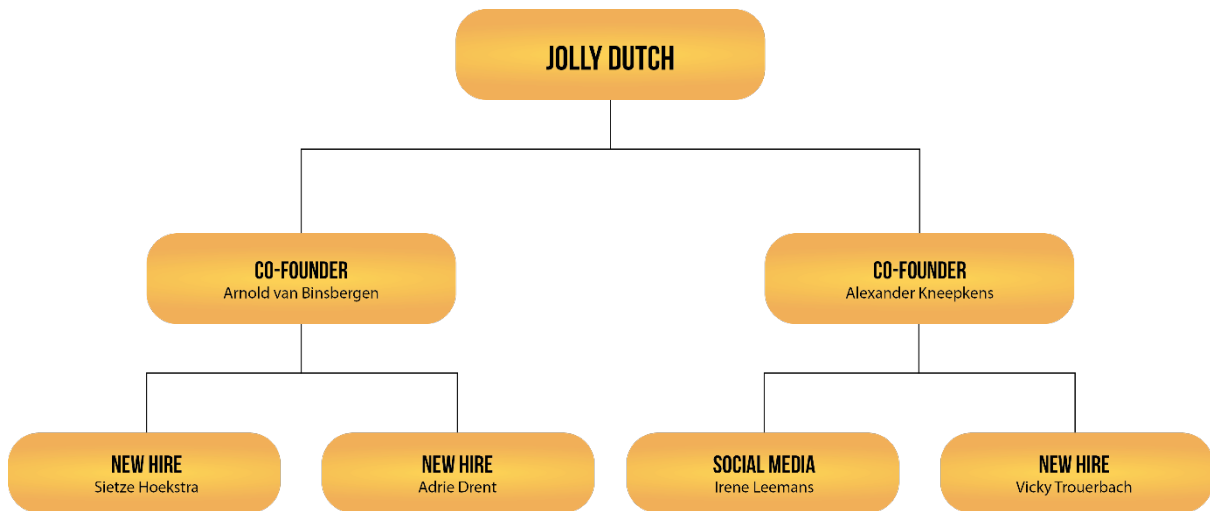


Figure 19 A hierarchal structure with Jolly Dutch's new employees.

### 999 Games

The organizational structure of 999 Games is similar to the future structure of Jolly Dutch. They both fall under the hierarchical structure, with the difference being that 999 Games has more employees. The structure that 999 Games has in place consists of managers that have employees below them. These managers oversee these workers and report to the director and finally the CEO (Appendix I).

### White Goblin Games

The organizational structure of WGG is unfortunately not available online. When contacted, they were not able to provide any information regarding their company structure.

The Gamefantry's company structure consists of three founders. The Gamefantry is the brand and sells the games, and they work together with two other companies: the Spelmakerij and the Spellenmaakgilde. The Spelmakerij is a partner who designs and works with people with autism, and the Spellenmaakgilde brings board game designers in the Netherlands together. The Spellenmaakgilde is an opportunity for The Gamefantry to test and discuss their games.

The organizational structure of The Gamefantry is currently a horizontal structure with the three founders on the same level (Appendix II).

### Conclusion

The growth that Jolly Dutch saw in their company reduced their speed of implementing ideas as they went from a horizontal structure, which speeds up this process, to a hierarchical structure. However, taking a look at the competitors, who also have a hierarchical structure, there is still a difference in size and amount of layers within the company. This should still mean that Jolly Dutch, even with their growth, has an advantage in the speed of decision making.

## 2.6 Resources

There are four types of resources in a company: physical, human, intellectual, and financial. Resources are used to create value for the customer and create a competitive advantage for the company (Bhasin, 2011)., The resources of Jolly Dutch and their competitors will be discussed (Table 4) to find the strengths and weaknesses as something only becomes a strength or weakness if it can be weighted to something else.

### **Intellectual resources**

Jolly Dutch has the Jolly Dutch brand but also the ideas and mechanics of their board games. Jolly Dutch also has a significant amount of emails for potential customers, around 2500, that they acquired through their Kickstarter campaign. Jolly Dutch has a great reputation with their contacts. Interviews with partners of Jolly Dutch confirmed this: *“Jolly Dutch is doing a great job with their communication to journalists.”* According to Erwin Broens. *“They have a professional attitude and do not push their games as some other publishers do.”* According to Kim Hoetjes-Mulder owner of WirWar.

### **Human resources**

Alexander has played a significant role in the design of all the games of Jolly Dutch. Jolly Dutch also have the expertise from Arnold, which lies in marketing. Arnold has been responsible for all the marketing of Jolly Dutch games.

### **Financial resources**

Jolly Dutch currently has no financial resources except their capital.

### **Physical resources**



Jolly Dutch’s physical resources are their location in Zeist, the physical games they have ready for sale, and the prototypes of their games.

As seen from Table 4, there is a difference between the resources of Jolly Dutch and the competitors. First of all, the size of the resources becomes apparent. Compared to 999 Games and WGG, Jolly Dutch has fewer resources. Jolly Dutch is a smaller company, and this shows best in the human resources, where Jolly Dutch has significantly lesser people. Compared to the Gamefantry, Jolly Dutch is a bit bigger. With Jolly Dutch’s smaller number of resources, they cannot do the same things as the bigger companies. This is, at the moment, one of their weaknesses. For example, it would be difficult to compete with 999 Games on the number of board games produced. However, Jolly Dutch could try to compete on the quality of the board games, which is one of their strengths.

### **Conclusion**

Jolly Dutch currently has fewer resources than its bigger competitors. This means that it will be harder for Jolly Dutch to compete on certain aspects, such as the number of games produced. Compared to the smaller competitors, Jolly Dutch has one interesting resource, namely unique Kickstarter emails. These emails could help Jolly Dutch in future advertisements and could be a great asset.

Table 4 Resources of Jolly Dutch compared to their competitors.

	JOLLY DUTCH	999 GAMES	WGG	THE GAMEFANTRY
Physical resources 	<ol style="list-style-type: none"> <li>1. Location in Veenendaal</li> <li>2. Physical games and their prototypes</li> </ol>	<ol style="list-style-type: none"> <li>1. Location in Almere</li> <li>2. Warehouse with board games</li> </ol>	<ol style="list-style-type: none"> <li>1. Location in Tweede Exloermond</li> <li>2. Warehouse with Board games</li> </ol>	<ol style="list-style-type: none"> <li>1. Physical games and their prototypes</li> </ol>
Human resources 	<ol style="list-style-type: none"> <li>1. Alexander Kneepkens</li> <li>2. Arnold van binsbergen</li> </ol>	<ol style="list-style-type: none"> <li>1. Their employees</li> </ol>	<ol style="list-style-type: none"> <li>1. their employees</li> </ol>	<ol style="list-style-type: none"> <li>1. their employees</li> </ol>
Intellectual resources 	<ol style="list-style-type: none"> <li>1. 2500 unique Kickstarter email addresses</li> <li>2. Brand reputation</li> </ol>	<ol style="list-style-type: none"> <li>1. Brand reputation</li> <li>2. Fanbase</li> <li>3. International contacts</li> <li>4. Copyright</li> </ol>	<ol style="list-style-type: none"> <li>1. Brand reputation</li> <li>2. Fanbase</li> <li>3. Copyrights</li> <li>4. International contacts</li> </ol>	<ol style="list-style-type: none"> <li>1. Contacts with the Spellenmaakgilde</li> <li>2. Brand reputation</li> </ol>

## 2.7 Growth strategy

The following section will cover the growth strategy of Jolly Dutch and its competitors.

### **Jolly Dutch**

Jolly Dutch is a small and medium enterprise (SME). A disadvantage of being an SME is that SMEs generally experience significantly higher growth constraints in the business environment than larger enterprises. These growth constraints are caused mainly by size (Beck & Demirguc-Kunt, 2006). Through international expansion, SMEs can develop technologies and products by taking global opportunities that will help them produce at a lower cost or differentiate in other ways from their competitors (Schwens et al., 2018). Jolly Dutch is looking into these opportunities. Jolly Dutch is exploring markets in Vietnam, Spain, and also Russia. Selling board games in other countries is currently done by selling the idea to a company in a country. If needed, they will make it suitable for that specific country, and Jolly Dutch will receive a percentage per game sold. This model has its pros and cons. The advantage is that this model is of little effort to Jolly Dutch. They sell the idea, and that is it. However, because of this, the profit for Jolly Dutch will also be lower, which is a disadvantage. But as mentioned, Jolly Dutch is still exploring these opportunities. Interesting to note here is that this expansion to foreign markets contradicts the mission of Jolly Dutch (2.2 The mission) where they focus on the Dutch market only. When focusing on the Dutch market only, there is a limit to their growth, which is the size of the Dutch board game market. However, Jolly Dutch is currently still a very small player compared to other bigger competitors such as 999 Games, as seen in the difference in resources (2.6 Resources). This means that even though there is a limit to the growth in the Dutch board game market, this limit will not be reached soon.

To summarize, Jolly Dutch's growth strategy currently consists of two parts:

1. To grow in the Dutch market.
2. Explore options to expand through other markets in other countries.

However, these two strategies do not align with their mission. This is interesting as it shows that Jolly Dutch wants to expand on other markets, but on the other hand, wants to focus on the Dutch consumer.

### **999 Games**

999 Games' original growth strategy was to find successful games in different countries and bring these to the Dutch market, according to boardgame reporter Broens with whom an interview was held. This concept has proven to be a very successful strategy. 999 Games brought in multiple successes such as Pokemon, Settlers of Catan, and Magic the Gathering (999Games, n.d.). Recently, however, 999 Games started to shift more into in-house designs, according to an interview with employee de Haan. After the interview with de Haan, it became clear why 999 Games is making this shift. There is a significant increase in online sales (Matalucci, 2021). Just as in many other markets, people are exploring the possibilities of online shopping (Ouellette, 2021). 999 Games' principle was to get good selling games from foreign countries and sell them in the Netherlands. However, when more people start to buy games online, they will find out that the games are available on the site of the original maker. This causes a problem for 999 Games. They are now competing with the people they bought the game's rights from (Haan, 2021).

### **White Goblin Games**

The growth strategy of White Goblin Games is to publish a lot to increase their chance of success. WGG publishes over sixty games per year (WGG, n.d.). This means that they publish more than one game per week. With such a massive amount of games, WGG tries to grow and become the biggest board game publisher in the Dutch market. WGG also imports games from other countries with the same principle as



999 Games. In an interview with Kneepkens, he mentions that when games succeed in other countries, WGG will look into them for possible production in the Netherlands.

### The Gamefantry

As mentioned before, the Gamefantry is a company that started in 2020 and is relatively new to the board game industry. This means that the chances are high that people do not know their brand. It is a similar situation that Jolly Dutch is in right now. The Gamefantry's strategy is to create a brand with a clear USP, namely designers with autism. Putting the focus on this clear USP and making more games with it, The Gamefantry wants to create growth for itself.

### Conclusion

Jolly Dutch currently has two ways to grow: through the Dutch market or through exploration of foreign markets. Only growth through the Dutch market is, however, reasoned with their mission. The competitors, 999 Games and WGG, mainly buy games from other companies to sell in the Netherlands. This means that Jolly Dutch has an advantage over them since Jolly Dutch speaks with the designers and can partner with exclusive Dutch designers to strengthen their mission and vision. The other side of working with designers is that it is harder to predict if a game will be successful, while 999 Games and WGG can already see if the games have potential in other markets.

## 2.8 Competitive strategy

The following section will cover the competitive strategy of Jolly Dutch and its competitors.

### Jolly Dutch

The competitive strategy of Jolly Dutch currently focuses on being a Dutch board game company. This means that they want to have Dutch designers, artists, and producers. In reality, this is easier said than done, especially when looking at the production as there is only one board game factory in the Netherlands, the Nederlandse Spellen Fabriek (NSF).

Besides focusing on being a Dutch publisher, Jolly Dutch is also looking into being more sustainable, another one of their USPs. One of the games, Kobito, is 100% CO<sub>2</sub> neutral (Figure 20). This is something that Jolly Dutch is trying to push more into their games and their image. Even though they are trying to create this sustainable image, the advertisement can be improved, and this will be further elaborated in chapter 2.9 Marketing Mix.

The two advantages that Jolly Dutch has will be further analyzed in the next chapter (Chapter 3 Market analyses).

### 999 Games

999 Games is currently publishing a large number of board games. They publish around sixty games each year (Klein, 2020). With this amount of games produced, 999 games are flooding the market. Their strategy is currently cost leadership. 999 Games is one of the biggest board game companies in the Netherlands, with its collection of over 400 hundred board games, only matched by WGG (999Games, n.d.) (WGG, n.d.). Their size allows them to be cost-effective and create more profit than other smaller board game companies.



Figure 20 Kobito, Jolly Dutch's first carbon-neutral game where you need to create rainbows to win pots of gold at the end of those rainbows while being helped by 'Kobito' figures (JollyDutch.e, n.d.). Image: jollydutch.com

## White Goblin Games

The competitive strategy of WGG is very similar to the strategy of 999 Games. WGG produces around a new game every week (WGG, n.d.). This allows WGG to use the same cost leadership strategy as 999 Games.

## The Gamefantry

The most important part of the competitive strategy of the Gamefantry is its story. They are different from other companies because of their designers with autism. This strategy focuses on differentiating itself from the other board game companies in the market.

## Conclusion

Jolly Dutch has two focus points in their competitive strategy, namely sustainability and a Dutch image. However, this Dutch image is hard to fully complete as the NSF is not available for Jolly Dutch yet. Looking at the competitors, it becomes clear that they have a different strategy. Rather than focusing on specific aspects that could set them apart, they focus on creating many games. Looking at these competitors, Jolly Dutch could use the two focus points they have to create an advantage over the competitors. With the right advertisement, they could show customers why Jolly Dutch games are better and why price matters less when it comes to good games.

## 2.9 Marketing Mix

The marketing mix is an excellent tool to find out more about the four p's (4Ps): product, price, promotion, and place. These 4Ps can be used to develop both long-term strategies and short-term programs (Thabit & Manaf, 2018). The 4Ps, however, can vary in proportions and can be altered and differ from product to product (Pandey, 2016). The marketing mix is a powerful concept since it makes marketing seem easy to handle, allows the separation of marketing from other company activities, and the components of the marketing mix can change a firm's competitive position (Pandey, 2016).

The marketing mix will be used for Jolly Dutch to discuss their products, prices, promotions, and place.

### Product

Board games are diverse and come in different sizes and themes. Because of this diversity, it is helpful to have a division between different types of games. This helps to understand better what kind of genre a game is and the difficulty level, amongst other aspects. Board games are divided into fourteen categories (Moe, 2021):

1. Area control
2. Legacy
3. Card games
4. Co-op games
5. Deckbuilder
6. Dexterity
7. Eurogame
8. Roll and walk
9. Escape room
10. Party games
11. Push your luck
12. Roll and write
13. Social deduction
14. War games

Each category is elaborated on below, with for each category two examples. Each example game will also be rated with a difficulty level (Table 5). This difficulty level will be based on BoardGameGeek (BGG), an online board game community platform (BGG, n.d.). On BGG, board games are rated with a complexity rating. This rating goes from 1-5, with five being the most difficult. A game will be considered for 'hardcore' players with a rating above three and for 'casual' players with a rating below three.

Table 5 Different games with their difficulty ratings based on BoardGameGeek.

Category	Game	Difficulty rating
1 – Area control	Twilight Imperium	4.23
	Diplomacy	3.36
2 - Legacy	Gloomhaven	3.86
	Stellaris	3.74
3 – Card games	Tichu	2.34
	Dalmuti	1.29
4 – Co-op games	Too Many Bones	3.85
	Spirit Island	4.01
5 - Deckbuilder	Dominion	2.36
	El Dorado	1.92
6 - Dexterity	Twister	1.09
	Jenga	1.12
7 - Eurogame	Ticket To Ride	1.85
	Terraforming Mars	3.24
8 – Roll and walk	Monopoly	1.64
	Snakes and Ladders	1.00
9 – Escape room	Exit	2.56
	Escape Room The Game	2.26
10 – Party games	Picture Party	1.00
	Don't Get Got	1.08
11 – Push your luck	Monopoly	1.64
	Quacks of Quedlinburg	1.95
12 – Roll and write	Qwixx	1.12
	Clever	1.90
13 – Social deduction	Werewolves	1.32
	The Resistance	1.61
14 – War game	Root	3.68
	Warhammer 40,000	3.04

1. **Area control board games** are games where players contest each other for land (Shamma, 2017). Usually, players use tokens or other pieces to show which land they own. This control often comes with fighting for land. Games such as Twilight Imperium (Figure 21) or Diplomacy fit this category. This is a typical hardcore game genre as the games usually take pretty long, almost always over an hour, because the win conditions typically require a lengthy setup.



Figure 21 Twilight Imperium. Image: imgur.com

2. With **legacy games**, the actual board game gets changed permanently after each time you play (Elsam, 2019). This can be done through stickers or tearing up cards. Games that fit into this category are Gloomhaven and Stellaris. These games are played mainly by hardcore gamers because of their usability and amount of choices. They require a lot of difficult decisions, which are usually in the same theme as the style of the game, which gives it more character.

3. **Card Games** are games where cards play the most significant role (Roya, 2018). Card games can be all kinds of games, from simple games in which you play out your hand of cards to more difficult games in which cards help discover certain things. The card game genre is relatively big; however, most card games look similar. You start with a hand of cards, and the main objective is to win other players' cards or lose all your cards. Games within this category are Tichu (Figure 22) and The Great Dalmuti. Card Games are well suited for casual gamers as they are usually relatively short and not too tricky.



Figure 22 Tichu. Image: bol.com

4. **Co-op games** are games in which people cooperate to win the game (Abbot, 2020). Players usually try to beat a set score or try to reach a set goal. Games within this category are Too Many Bones and Spirit Island. This genre is also mainly for hardcore gamers as the games tend to be quite lengthy. The difficulty can vary a lot between different games.

5. **Deck Building games** are games where players create their own deck (Meehan, 2021). This can be a deck of cards or even a deck of tokens. The objectives of these games differ a lot but always play around creating or improving your deck. Games within this category are Dominion and El Dorado (Figure 23). Both hardcore gamers and casual gamers play these games. However,



Figure 23 El dorado. Image: shutupandsitdown.com

most of these games fit into the casual gamer category because of the time it takes to play.

6. **Dexterity games** are games that involve physical skills (Mastrangeli, 2021). This can mean using your whole body with games such as Twister or just your fingers in games such as Jenga. These games are usually fun party games and easy to play. They also do not take much time and are therefore an excellent category for casual gamers.
7. **Eurogames** are strategy games with a low amount of luck (Luke, 2018; Pulsipher, 2006). The name originated from Europe as these games were initially designed and successful in Europe. These games are usually passive and focused on gathering resources, and players cannot be eliminated from the game. Games within this category are Ticket To Ride and Terraforming Mars. Eurogames tend to be quite lengthy and complicated as players will have many choices during their turn, like Terraforming Mars. However, this is not the case for all Eurogames. Some Eurogames are easier to play and more for beginners, like Ticket To Ride. Because of this, Eurogames are a category suitable for both casual and hardcore players.
8. **Roll and walk** are games in which a player rolls a dice and moves its character accordingly. Games that fall under this category are Monopoly and Snakes and Ladders. These games are typically easy to play and great games for casual players.

9. **Escape room games** are games with the theme of an escape room (Spencer, 2020). The games usually have a time constraint and are meant to play with a team of people. The players try to solve riddles within the given time to reach the goal. Games within this category are Exit and Escape Room The Game. Escape room games are usually party games that are fun to play with a group. They fit perfectly into games for casual players, even though the games can take up to an hour.

10. **Party games** are games that do well in big groups (BGG, n.d.). This category is a bit overarching with some other groups, such as dexterity and social deduction. However, it is essential to distinguish party games as a different category as many party games do not fit in these other genres, such as Picture Party and Don't Get Got (Figure 24). Party games are typical games for casual players as the games are usually short and centred around creating a fun atmosphere for a group.



Figure 24 Don't Get Got! A party game where players have secret assignments during the day of doing other activities. Whoever successfully achieves the most assignments wins. Image: amazon.com

11. **Push your luck games** are board games where you will be tempted to take increasingly large amounts of risk to get more significant rewards (Seikaly, 2019). The games in this category can take some time to play but are usually not that difficult. Games within this category are Monopoly and Quacks of Quedlinburg. This category can be outstanding for casual players because of their low difficulty rating and game length.

12. **Roll and write games** are games in which you roll dice and write some form of result (Avtalion, 2016). Yahtzee is one of the very first roll and write games. After the success of Yahtzee, the roll and write games did not seem to appeal to a bigger audience. This was until the game Decathlon was made in the early 2000s. This game used scoring patterns in a very thematic way and added player agency with the option to stop your turn early. After this attention, it snowballed until now, where roll and write games are a huge success and a big trend in the board game industry (Signor, 2020). These games are straightforward to understand and take a short amount of time to play. Games within this category are Qwix and Clever, with quite a low difficulty rating. This category is, therefore, an excellent category for casual players.

13. **Social deduction games** are games played in big groups (Beggs, 2021). Usually, the players get assigned a role in secret. Some of the players have a secret role that others need to find out. This will force people to lie and make difficult decisions. Games within this category are Werewolves and The Resistance. These games are typical party games that are very easy to understand. For these reasons, they are a good fit for casual gamers.

14. And last but not least, the genre of **War games**. War games are games where people fight each other, usually on a giant board (Dunnigan, 1992). The objective is to defeat each other or to control a certain amount of land. Games within this category are Root or Warhammer 40,000. These games can be very similar to the area control games and are better for hardcore gamers than casual gamers because of their length.



## Jolly Dutch's products

With this information, we can now look at the games of Jolly Dutch. According to the mission of Jolly Dutch, *“To give Dutch people an enjoyable evening with their families through well-designed board games.”* Kneepkens and Van Binsbergen want to make well-designed games that give people an enjoyable evening after a long day. Jolly Dutch's games should voice this message and fit in this kind of category.

Jolly Dutch currently has four products available: Chartered, Herrlof, Boogie Beasts, and Hot Potato! (Figure 25).

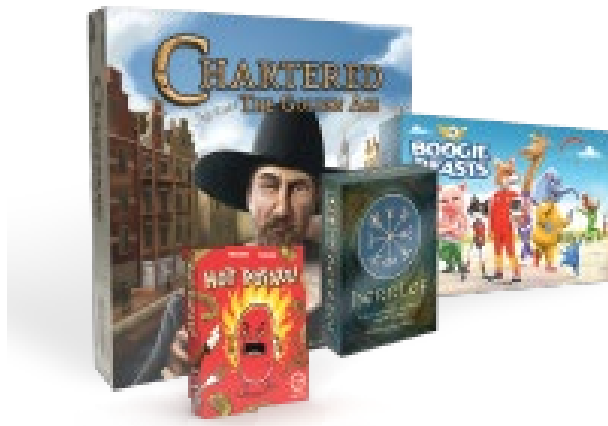


Figure 25 Jolly Dutch's published games as of 2021, April.

1. Chartered is a Eurostyle game (category 7) where players try to become the wealthiest person in Amsterdam during the golden age. With intelligent decision-making and a small amount of luck, this game is easy to play but hard to master (Jolly Dutch, n.d.). A fun game to play with your family, just as Jolly Dutch intended. Eurogames, however, are a tricky category because of their wide range of difficulties. Chartered scores a difficulty of 2.00 on BGG, which is on the lower side. This means that even though the category allows for challenging games, Jolly Dutch chooses to make a lighter Eurogame that fits more into the games they are trying to create.
2. The second game of Jolly Dutch is Herrlof, with a difficulty rating of 1.30. Herrlof is a trick/card game (category 3) with a Viking theme. After receiving cards, you have to write down the number of tricks you think you will get. At the end of the round, you will compare the actual amount of tricks you got versus the tricks you predicted. This will give you a number of points. The first to X points will win (Jolly Dutch, n.d.). Kneepkens and his wife developed this game as they played similar games and felt that a few essential game aspects were missing, such as breaking tricks. The games on which this game is based are Wizards and The Fox In The Wood (Figure 26).



Figure 26 The Fox In The Wood and Wizards. Games which inspired Herrlof.

- Thus, Herrlof is a typical card game. It is centred around playing cards and fits within the target group of casual players.
3. The third game is Boogie Beasts (no rating). Boogie Beasts is a 3-8 player game about bungee jumping. It is a social card game (category 3) in which it is allowed to bluff and lie. With a time constraint, this can make things hard. You are meant to take risks and get the most points in four rounds of bungee jumping (Jolly Dutch, n.d.). Boogie Beasts fits probably best in the party game genre (category 10). It is a game in which you need to guess if your friend is fooling you or not. It is also playable with a small number of people. However, Jolly Dutch told me that it is way more fun with a bigger group. This game is also a good fit for the target group of casual gamers.
  4. The fourth game from Jolly Dutch is Hot Potato! (no rating). Hot Potato! is a simple and fun card game (category 3) in which you have to face encounters with your potatoes. Each round, you play a card, and an encounter is revealed. It will then show which potato is best suited for the job, and that player will gain points. The first player that can get ten points will win the game (Jolly Dutch, n.d.). It is a card game that can also be seen as a party game (category 10). It is a game where you have to try and fool your friends with simple card game mechanics.

Besides these existing games, Jolly Dutch is also working on new games. They have four new games that they want to release next year; Kobito, If it fits, Telos, and Polders. With all these new games, it is important that Jolly Dutch starts to think about which message they want to convey to the consumer as having your product recognizable and consistent is essential for brand awareness. Engaged customers will contribute to sales more, enhance positive word-of-mouth, and improve organizational performance (Kaur et al., 2020), showing the strategic significance of brand awareness. However, looking at the new games, we can see some inconsistencies in the appearance of the details (Figure 27):

- The logo of Jolly Dutch is not consistently placed in the same place. On three of the games, the logo is placed in the bottom right corner, but on the game “If it fits”, it is placed at the top middle.
- Three of the four games have a short explanation in squares (not in the same order), while Polders has it beneath each other. The authors of the games are also in different places in different styles.
- Kobito is not recognizable as a carbon-neutral game, while Jolly Dutch wants to advertise their sustainability as it is their strength. The cover of the game is an excellent opportunity to show this.



Figure 27 New games of Jolly Dutch: Têlos, If It Fits, Kobito, and Polders. Images: jollydutch.com

The way these games play is hard to discuss as they are not available yet. The games that are available from Jolly Dutch, however, do not have that many similar features. Herrlof is a trick game that is primarily tactic with a bit chance, Chartered is an economic game in which you use luck combined with predicting the future choices of your opponents and Boogie beasts is a game about guessing what other players will do. These games are not very similar in their concepts or playstyle; however, they do all fall under easy to play games.

Looking at the competitors in comparison with Jolly Dutch, it becomes clear that 999 Games and WGG are bigger, with both having over 400 games available on their webshops. The consistency of 999 Games and WGG is also visible on their sites, with all games having the logo in the bottom left corner for 999 Games and the bottom right corner for WGG. This makes their games easy to recognize. This consistency makes it easy for customers to recognize their products quickly. What should be noted is that these inconsistencies are minor, and it cannot be said with certainty that such minor differences will make a difference to the consumer. What is highlighted here is that decisions in a company should be consistent, and currently, this is not the case. A solution to this problem would be a manual on how decisions could be made for both the art and the game design to create games that are in line with what Jolly Dutch wants to achieve.

### Price

Price is an important factor for customers when they are searching for games. Two quotes were mentioned while interviewing board game store owners: “*Cheap games under ten euros sell incredibly well.*” and “*Games that cost around ten euros sell way easier than the expensive games.*”. These quotes from Hoetjes and Beusen, store owners who were interviewed, show that the price of your game influences consumer behaviour.

For Jolly Dutch, price is something that they have to keep close to their competitors while still making a profit. An example of this price difference is visible in Jolly Dutch's new game Kobito, which costs €12,95, while similar games from 999 Games and WGG only cost €9,99. This is a problem that comes from higher production costs for Jolly Dutch as they order smaller batches of their products. Kneepkens mentions that they sometimes settle for 4-5 euros on a 10 euro game as production costs, while their bigger competitors will not go over 3 euros for production costs on a 20 euro game. These differences in price make it hard for Jolly Dutch to sell their games for the same prices, and they still make less profit than the bigger competitors.

## **Promotion**

Promotion is essential for any company. If your existence is not known, how will consumers find your company and buy your products? It is also crucial to set yourself aside from your competitors (Whaley, 2015). Promoting your company can be done in multiple ways, such as through social media, which is an excellent tool to reach a big crowd. However, it would be best if you targeted the right people to make it worth your time. Social media has become significant in the last few years and is almost necessary for promoting your company (Bhasin, 2011). Jolly Dutch also has its fair share of experience with social media. Kneepkens used to be in charge of most social media, but now they hired an employee to be responsible. Jolly Dutch also post on Bordspelmania.nl, a board game site for the Benelux on which people can discuss several board game-related topics.

Another great way to promote your company is the use of television, radio and news reports. According to two shop owners I talked to, getting an article in the news reports will significantly influence sales: "*News articles can boost your sales significantly.*". Jolly Dutch also has experience with being on the news. Their first game, Chartered, got some coverage on NOS (NOS, 2018).

Covid-19 also had a significant impact on the current promotion of Jolly Dutch. Promotion for Jolly Dutch has been slow during Covid-19. They decided to stop advertising after the Christmas season of 2020. No matter how much you advertise, many new games cannot profit like classic games in Covid-19 (Matalucci, 2021). Before Covid-19, Jolly Dutch used to have influencers whom they would ask to play the game. They also had advertisements through Facebook and magazine ads. Jolly Dutch stopped advertising as they felt that it was not helping enough to justify the costs.

With the end of Covid-19, Jolly Dutch is starting to advertise more. Hiring a new employee to be responsible for social media posts is an excellent way to promote yourself and let people know what you have to offer. However, improvements still can be made by, for example, focusing more on their sustainable image in social media posts.

## **Place**

The places where you sell your product will determine the number of customers and the kind of customers. Board Games are sold online and offline. Jolly Dutch is already widely available on the online services, being available on Bol and Amazon. However, they can still improve their online presence in online board game sites such as Spellenrijk, Spellenvariant, and Spellenhuis. Online selling also comes with a significant amount of benefits. You will significantly increase your revenue when you are selling from your online store as you do not need to pay a physical store anymore to shelve your product. Also, you are no longer limited by the number of customers that can fit and go to the physical stores (Hartley, 2016).

One of the advantages of physical stores, however, is their personnel. In a physical store, personnel can explain what you are buying. This can be useful if you as a consumer are unsure which game you want to purchase or have questions about how the game works. The store employees can explain the games and increase or decrease your sales (Clark, 2020). This is also why it is essential to let the stores play your board game before selling it. Availability for physical stores could still be improved for Jolly Dutch as they are not available everywhere.



## 2.10 Discussion and conclusion

Jolly Dutch is currently trying to find a way to set itself apart. They are looking into multiple advantages such as sustainability and a Dutch image. However, to set themselves apart and make this an advantage, they still could improve.

From the comparison of the mission, vision, and philosophy (MVP), it becomes clear that a perfect MVP is not required for success. We can see that even though the bigger and successful companies like 999 Games and WGG do not have an ideal MVP, they are still successful. Even though this MVP is not required, it could still help Jolly Dutch create a clear goal that will help them with consistency. Another thing that could have influenced the result is that the MVPs were not clearly stated on the competitors' websites, which made it harder to pinpoint their MVPs exactly. The lack of a clear vision will be considered a weakness for Jolly Dutch.

Besides the MVPs, this analysis also shows the sheer difference in size between the companies. This size plays a role in the number of resources and the structure of the company. With resources, this is a disadvantage as Jolly Dutch has fewer resources to spend on improving. However, a smaller company structure gives Jolly Dutch the opportunity to be faster in decision making than the bigger companies.

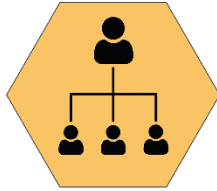
In the growth and competitive strategy, the first sub-research question: **What is the current strategy of Jolly Dutch?** is answered. Jolly Dutch is focussing on two unique selling points: being entirely Dutch and being sustainable. The issue with being Dutch is that other Dutch board game companies are also Dutch, and even though they are not producing and designing all their games in the Netherlands, Jolly Dutch is not doing that yet either. The second USP is sustainability, which could significantly differ from other Dutch board game companies as they currently are not showing any signs of sustainable improvement. However, Jolly Dutch is not yet communicating this to the consumers clearly. Besides these USPs, Jolly Dutch is currently using trial and error to see if things work for them. This can be a good strategy; however, it can also cost a lot of resources to find the right paths that work. With Jolly Dutch being relatively small and lacking resources, this strategy seems not optimal for Jolly Dutch.

These two aspects, sustainability and Dutch image, are considered strengths because Jolly Dutch is working on them, while their competitors are not. With this project focussing on the future of Jolly Dutch, these strengths should be taken into account.

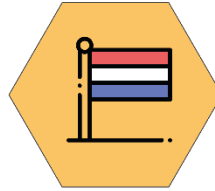
With the analysis of the MVP and the resources, we can immediately look at the second sub-questions: **How do competitors pose a threat for Jolly Dutch?** When looking at the resources, especially the bigger competitors pose a more significant threat. But as mentioned, since Jolly Dutch is a small company, they can run by ideas quicker and make quicker decisions. Besides resources, competitors can also pose a threat if they compete with Jolly Dutch on the same parts of the board game industry (Dutch image, sustainability). Suppose the bigger competitors choose to go in the same direction as Jolly Dutch. In that case, it will be hard for Jolly Dutch to stay different and exciting for the consumers as the bigger companies have more resources to overwhelm Jolly Dutch.

In conclusion, this chapter shows that Jolly Dutch has three strengths and two weaknesses (Figure 28). The goal for Jolly Dutch would be to use their strengths and improve their weaknesses, which will be elaborated on further in Chapter 4.

**STRENGTHS**



Quick decision making



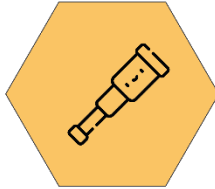
Creating games with a Dutch feeling



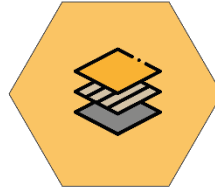
Sustainable board games

**JOLLY DUTCH**

**WEAKNESSES**



No clear vision



Small amount of resources

Figure 28 Strengths and weaknesses of Jolly Dutch.

## CHAPTER 3 MARKET ANALYSES

This chapter will consist of three analyses:

1. Trend analysis
2. Target group analysis
3. Foreign market analysis

Together, these three analyses will create the external analysis in the second part of the DIM. These will result in opportunities and threats for Jolly Dutch. In this chapter, three sub-research questions will be answered: **What are influential trends for Jolly Dutch?, Which target group should Jolly Dutch focus on?, and Which foreign markets hold potential for Jolly Dutch?**

### 3.1 Trend analysis

A trend analysis will answer the sub-question: What are influential trends for Jolly Dutch? This analysis explores which trends might influence Jolly Dutch (Osseweijer et al., 2017). This trend analysis will look at the current trends that are present in the board game industry, which will be done using the theory of the DEPEST method.

#### 3.1.1 SUBSCRIPTION MODELS

Nowadays, there are many different things you can be subscribed to, from Netflix to a newspaper or even monthly underwear deliveries. Many companies currently see opportunities in this subscription business model, such as the Dollar Shave Club and Blue Apron (Rainy, 2021). There are even board game examples of subscriptions such as Awesome pack, Game box monthly, and Escape the Crate (Bryan, 2020). This trend can mean new possibilities for Jolly Dutch. This model could attract more customers and give a steady and predictable income instead of the normal unpredictable income with selling games. This makes the subscription trend a high-impact trend.

#### 3.1.2 ROLL AND WRITE GAMES

Roll and write games are a huge success and a big trend in the board game industry (Signor, 2020). Consumers love these easy to play and fun games. This could be because it is just fun to roll the dice or because it is a short and fun experience. This trend has opportunities for Jolly Dutch as it can help Jolly Dutch into an easy way to sell more games when following this trend.

#### 3.1.3 SUSTAINABILITY

##### **Awareness of global warming is increasing**

People are becoming more aware of the impact of global warming (Fagan & Huang, 2019). For the board game industry, this is both positive and negative. The initial making of a board game and the shipping have a significant environmental impact. However, board games can be used repeatedly, lowering their carbon footprint (Sargeantson, 2005). Jolly Dutch is already actively involved in this with their game Kobito. This trend will give possibilities for Jolly Dutch, as they can continue to focus on making more sustainable games and create an even more significant advantage over their competitors.

##### **Companies use more recyclable materials**

With the circular economy being pushed by the European government and companies seeking business opportunities in recycling material (Thompson, 2019), recycling has become trendy. People like to recycle and feel like they are helping the earth. You can already notice a shift in your own home with the increase of different waste materials you can separate. Recycling components and games could make Jolly Dutch even more sustainable to build a better image of sustainability for themselves.

### Consumers want to reduce their plastic use

Consumers want to reduce their plastic use as the oceans turn into plastic soup (Abbing, 2019). This behavioural change is visible in their buying behaviour. Thirty-five per cent of consumers are more likely to purchase products without plastic than products with plastic (GlobalData, 2019). Again, this trend can be a good possibility for Jolly Dutch to decrease their environmental impact by using less plastic.

#### 3.1.4 COVID-19

Covid-19 has dramatically influenced our lifestyle by limiting contact with people and making daily tasks harder than usual. One of the decisions of the Dutch government during Covid-19 was to close physical stores that were non-essential (Retailtrends, 2020). Boardgame stores are non-essential stores and closed during some parts of the Covid-19 crisis. For Jolly Dutch, this has a significant impact. Their games are not well known yet, and can thus not profit from the recommendation of the store owners because of the closing stores.

Covid-19 will not have that much of an impact on the future of Jolly Dutch as a lot of people are already vaccinated, which reduces Covid-19's impact, as can be seen with the regulations becoming freer. However, future pandemics could mean possible problems for Jolly Dutch if they are not ready. This is why Covid is a high-impact trend; it is currently affecting Jolly Dutch and may cause problems in the future.

#### 3.1.5 TRANSPORTATION COSTS

Because of an increase in shipping out of Asia, there is a shortage of containers in Asia, leading to increased prices of shipping goods. It has never been more expensive to transport a container from Asia to another part of the world (Larsen, 2021). The increase in prices causes problems for companies as they bring unexpected costs.

This trend has, during this project, influenced Jolly Dutch as it reduced the amount of profit Jolly Dutch could make on a shipment from China. In the future, this problem will still affect Jolly Dutch as they still have some products that they import from China which makes this trend a high-impact trend.

#### 3.1.6 CONCLUSION

Five trends are related to the board game industry that could help Jolly Dutch develop their company. These five trends are the answer to the third sub-question: **What are influential trends for Jolly Dutch?** and can either be opportunities or threats for Jolly Dutch (Figure 29). The five trends are as follows:

**An increase in interest in subscription services** shows that a board game subscription can be viable. A subscription model could help Jolly Dutch set itself apart from the competitors in an interesting way. Having the first working board game subscription brings advantages. And with no other Dutch companies currently in this business, this could lead to opportunities for Jolly Dutch.

**Sustainability is increasing in popularity under consumers.** These environmental trends play a significant role for Jolly Dutch, as they are currently a big part of their USPs. It is important for Jolly Dutch to keep developing more ways to be sustainable and set themselves apart from the competitors. With the increase in popularity, these trends show that this can be a great opportunity that deserves more time and resources.

**Increased popularity in roll and write games** create another opportunity for Jolly Dutch. This trend can be interesting for Jolly Dutch as it can guide the company. They can use this trend to decide to create roll and write games. This could mean growth for Jolly Dutch as these trending genres attract more attention than the non-trending genres.

**Covid19 closing shops and conventions** is a threat for Jolly Dutch. Even though Covid-19 looks like it is burning out, other pandemics could create the same possibilities and problems. With a plan to act on these situations, Jolly Dutch could be ahead of their competitors.

**Unexpected transportation costs** show a similar problem as Covid-19. It shows that external sources can negatively affect Jolly Dutch without Jolly Dutch being able to do anything. With Jolly Dutch being a smaller company, these problems pose a more significant threat as they have fewer resources. But even when Jolly Dutch grows, they still want to avoid unnecessary costs.

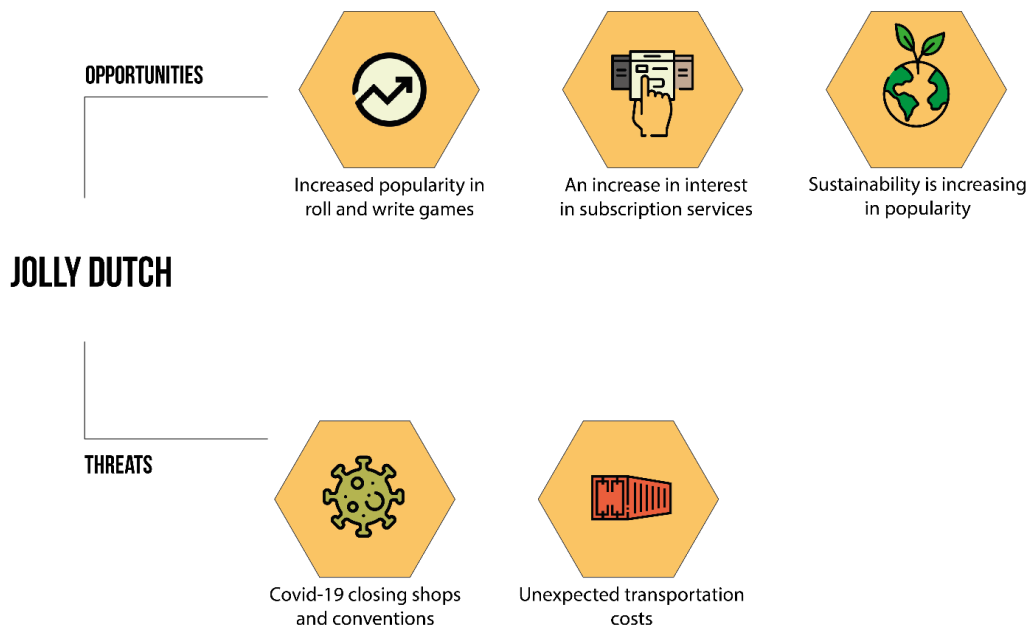


Figure 29 The opportunities and threats for Jolly Dutch.

To decide which trends to follow, the strengths and weaknesses should be linked. This will be discussed in Chapter 4.

## 3.2 Target group analysis

A target group analysis is done to answer the fourth sub-question: **Which target group should Jolly Dutch focus on?** In this target group analysis, users from Bordspelmania were asked to fill in a questionnaire with different questions about their behaviour regarding buying and playing board games. With these results, a target group was found which holds potential for Jolly Dutch.

### 3.2.1 QUESTIONNAIRE

Boardgamemania is a Dutch version of BoardGameGeek where people can discuss board game releases and other board game-related topics. Naturally, many people who play board games and are knowledgeable about them or have a considerable interest are present on this website. Because of Covid-19, this website seemed like a perfect place to gather as much information from people as possible without seeing them face-to-face. The questions asked in this research are as follows:

1. What is your gender?
2. What is your age?
3. What is your nationality?
4. How often do you play board games?
5. Do you intend to play more board games?
6. Who do you play board games with?
7. What kind of games do you play?
8. How much money do you spend on board games?
9. Do you intend to buy more games?
10. Do you know Jolly Dutch?

Sixty-one people filled in the questionnaire (N=61) and the results were analyzed in SPSS.

### 3.2.2 GENERAL RESULTS

The first result that will be discussed is about whom people play board games with (Figure 30). People most often play with their friends (85%). Playing with your partner comes second (68%), family third (59%), solo fourth (27%), and the board game club comes in last place (27%). A high percentage of people are playing with their friends. This could be interesting if they also play different games with friends than with family or their partner. A small percentage of people play solo games or plays at the game club. This could mean that people enjoy playing with a bigger group, preferably people they know very well, such as family, friends, or your partner.

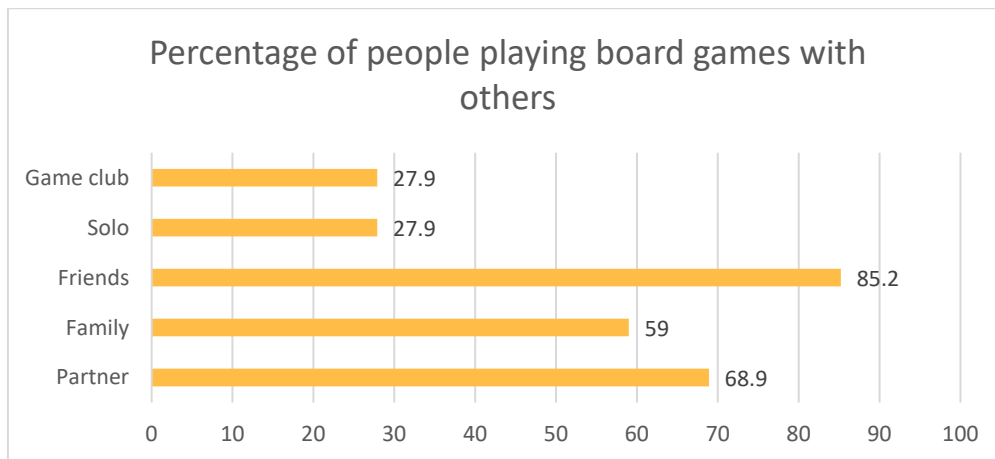


Figure 30 Overview of whom people play board games. People play the most games with friends.

The second result discussed is which board game genres are played the most (Figure 31). From the fourteen board game categories, almost everyone played Eurogames (86%). The second and third most played genres are deck building (68%) and card games (63%). This high number of people playing Eurogames could be explained by the fact that this category is widespread. It is playable for beginners and experts while also having a lot of variability in difficulty, as mentioned before in section 2.9 Marketing Mix.

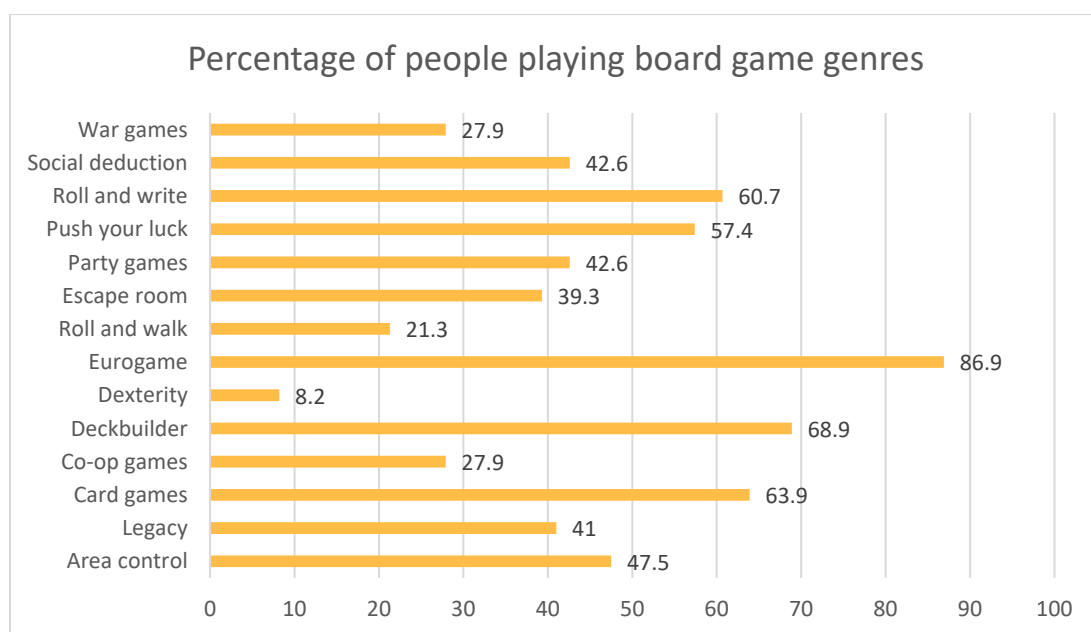


Figure 31 Overview of which game genres people play the most.

### 3.2.3 DIVING DEEPER INTO THE DATA

One-way ANOVA tests are used to see if there are statistical relationships between different groups of people and the games they play. Here, we will look at the relationships between age vs game genre and money spend vs game genre. This information could provide insights into which age groups play certain games more, resulting in a specific age group being a better target group for Jolly Dutch. The money spend vs game genre can also result in information about what type of games people play who also spend the most money. This could be interesting as it could lead to game genres that can make more money for Jolly Dutch. In the questionnaire, four age groups are separated (below 16, 16-25, 26-40 and over 40). However, from the participants who filled in the questionnaire, no one was below 16. This is why this group will be omitted from the results.

#### **Age vs game genre**

There is a significant difference in the age groups for Eurogames, roll and walk games, and social deduction games (Appendix III). Their p-values are 0.002, 0.0004, and 0.014 respectively ( $\alpha=0.05$ ).

- Roll and walk games are played mainly by the age group of 16-25. The age group of 16-25 plays roll and walk games 75 percent versus 8 percent for the age group of 26-40 and 21 percent from the age group above 40.
- Social deduction games are also most played by the age group of 16-25, with 88 percent versus 32 percent for the age group of 26-40 and 36 percent from the age group above 40.
- For Eurogames, this is reversed and is played mainly by the age group above 40, with 93 percent. The age group of 26-40 has 80 percent, and the age group of 16-25 only has 38 percent of the people playing this genre.

#### **Money spend vs game genre**

The amount of money people spend versus which game genres they play is also compared (Appendix IV). There is a statistical difference in money spent compared with games genres played. There are three game categories where significantly more or less money is being spent on. Those categories are Eurogames, roll and walk, and luck-based games with their p-value of 0.009, 0.004, and 0.003, respectively ( $\alpha=0.05$ ).

The amount of money spent per year in euros is divided into four categories: below €100, between €100 and €200, between €200 and €500, and above €500.

- People who play Eurogames showed to be bigger spenders. 93 percent of the people who spend €500 or more all play Eurogames, while only 45 percent of the people who spend less than €100 play Eurogames. This could be interesting for Jolly Dutch as the people who play euro games have the most economic power.
- For roll and walk games, this is the other way around. Only 13 percent of the people who spend more than €500 play roll and walks while this is 64 percent for the less than €100 group.
- Finally, we have luck-based games. People who spend less than €100 also play luck-based games with a percentage of 73. People who spend more than €500 play luck-based games with a percentage of 79. The other two groups have a significantly lower amount of percentage.

### 3.2.4 CONCLUSION TARGET GROUP ANALYSIS

From the results, it becomes clear that many people play Eurogames, namely almost 87 percent. The people who play Eurogames are primarily above the age of 26, and with higher age, this group becomes even more prominent, with 93 percent of the people above 40 playing Eurogames. People who play Eurogames also tend to be the biggest spenders, with 93 percent of the people who spend more than €500 per year being people who play Eurogames.



This chapter answers the sub-question: **What would be an interesting target group for Jolly Dutch?** The data shows that people who play Eurogames would be the most interesting target group for Jolly Dutch because of their economic power and size. For Jolly Dutch, this means that Eurogames could be an interesting opportunity for them to look into. To whether this opportunity has potential, it will be combined with the strengths and weaknesses of Jolly Dutch in the next chapter, Chapter 4 Search areas, to find possible search areas.

### 3.3 Foreign market analysis

A foreign market analysis is done to see if there are potential new markets in which Jolly Dutch can seize opportunities. This subchapter will answer the sub-question: **Which foreign markets hold potential for Jolly Dutch?**

Jolly Dutch has expressed their interest in foreign markets even though it does not fit their mission: *Give Dutch people an enjoyable evening with their family through well-designed board games*. This mission focuses on the Dutch people as consumers. Even though their mission is Dutch-focused, Jolly Dutch wants to explore other markets to create more opportunities.

The foreign market analysis will examine the North American and Asian markets as Jolly Dutch expressed interest in expanding to these markets. Besides the interest of Jolly Dutch, together with Europe, these are also the biggest board game markets in the world, with an estimated size of 4.4 Billion in the USA (Seetharaman, 2020), 3.1 Billion in Europe (Seetharaman, 2020), and 0.5 billion for China alone (Sable & Deshmukh, 2019). The goal for Jolly Dutch is to enter these markets without their brand. Instead, they want to sell their products on these markets through partnerships with other companies, as previously discussed in chapter 2.7 Growth strategy. Jolly Dutch intends to expand to these markets with the same concept they are now planning to use in Spain, which is selling their game to a publisher. The company in Spain will then make and sell the game, giving Jolly Dutch a percentage per game sold. This is what Jolly Dutch wants to do in North America and Asia as well.

The model of Johansson's model is used to select an international market (Johansson, 1997). Johansson's model is significant because it permits observation of variables like the geographic distance that introduces the effects of the psychic/cultural distance in the decision-making process (Musso, Francioni, 2012).

This project will focus on finding specific markets which hold potential for Jolly Dutch. Jolly Dutch then can focus on that particular market instead of spreading the few resources they have. This is why the model of Johansson is chosen as it is more precise in these matters. The model of Johansson consists of five steps: country identification, preliminary screening, in-depth screening, final selection, and choosing the market.

#### 3.3.1 COUNTRY IDENTIFICATION

The first step of analyzing is country identification. There are three major countries in North America: the United States of America (USA), Canada, and Mexico. Between these countries, the differences in the size of their board game markets are significant.

The board game market of the USA is worth an estimated 3.5 billion US dollars (Statista, 2020). There is no information available about Mexico and Canada since the board game industry is too small in these two countries. For these reasons, Mexico and Canada are omitted from the foreign market analysis.

When looking at the Asian market, there are some noteworthy developments. First of all, the Asian board game market is growing (GrandViewResearch, 2019). In Asia, there are two major countries: China and India. Between these countries, there is a big difference in the size of the board game market, with China having a board game market with an estimated value of 538 million US dollars (Wood, 2019), while India 'only' has a market of 45 million US dollars (Lakshmanan & Aggarwal, 2021). Hence, for the Asian market, India will be excluded, and the analysis will be done for China.

### 3.3.2 PRELIMINARY AND IN-DEPTH SCREENING

The second and third steps are the preliminary and in-depth screening. These steps will consist of screening companies that, on paper, would have an excellent connection to Jolly Dutch for collaborations. For the screening, the focus will be on the following two aspects:

1. Revenue:  
The amount of money the company makes a year. When this cannot be found, the number of games made will be used.
2. Types of games being sold:  
The games they sell will show their fit with Jolly Dutch, which will be decided on after looking at their collection of games. The criteria for fit with Jolly Dutch is complexity. The current games of Jolly Dutch are all low in complexity, and this should also fit with the partners.

BGG will be used as a medium to find board game companies in the USA and China. From the top five games currently at BGG, the publishers will be checked and see which games also have American and Chinese publishers that release the game. The board game companies which are selected can be seen from Table 6.

Table 6 USA companies and Chinese companies together with their size and fit to Jolly Dutch.

	Companies	Revenue	Fit with Jolly Dutch
American Companies	Cephalofair Games	40.000 USD	Low
	LederGames	131.000 USD	Medium
	Zman Games	19 Million USD	Low
	North star Games	5 Million USD	High
	Roxley Games	517.000 USD	Low
Chinese Companies	MYBG Co., LTD.	30 Games	Low
	Yoka Games	25.000 USD	High
	Asmodee China	111 Games	low
	Boradway Toys	242 Games	High

### 3.3.3 FINAL SELECTION AND CHOOSING THE MARKET

This final subchapter will also discuss the sub-question: Which foreign markets hold potential for Jolly Dutch? The North-American and Chinese markets show to hold potential for Jolly Dutch. Consequently, after screening the North-American and Chinese companies, two companies stood out from the others, namely North star Games and Boradway Toys (Table 6). These companies could be potential partners for Jolly Dutch and could create opportunities for Jolly Dutch. However, it should be taken into account that the main focus of Jolly Dutch will stay on the Dutch market.

### 3.4 Conclusion

In this chapter, three sub-questions were answered: **What are influential trends for Jolly Dutch?, Which target group should Jolly Dutch focus on?, and Which foreign markets hold potential for Jolly Dutch?** These questions were answered with the help of three analyses.

The trend analysis provided six trends that could hold potential opportunities and threats for Jolly Dutch. The target group analysis pointed into the direction of a target group that can have potential for Jolly Dutch. The foreign market analysis provided two companies that could be possible future partners. These analyses revealed different threats and opportunities for Jolly Dutch (Figure 32).



Figure 32 Opportunities and threats of Jolly Dutch.

## CHAPTER 4 SEARCH AREAS

This chapter will use the information found in chapters two and three, the strengths, weaknesses, opportunities, and threats (SWOT), to construct search areas for Jolly Dutch. According to DIM (2012), these search areas will be used as inspiration to create new product ideas and, eventually, a new future vision. The new future vision will be discussed in chapter 5, which will answer the sub-question: **Which future vision would suit the current identity of Jolly Dutch?**

### 4.1 Potential for Jolly Dutch

The strengths, weaknesses, opportunities, and threats became clear from previous chapters. These four aspects will be combined to find new potential chances in the board game industry for Jolly Dutch (Figure 33).

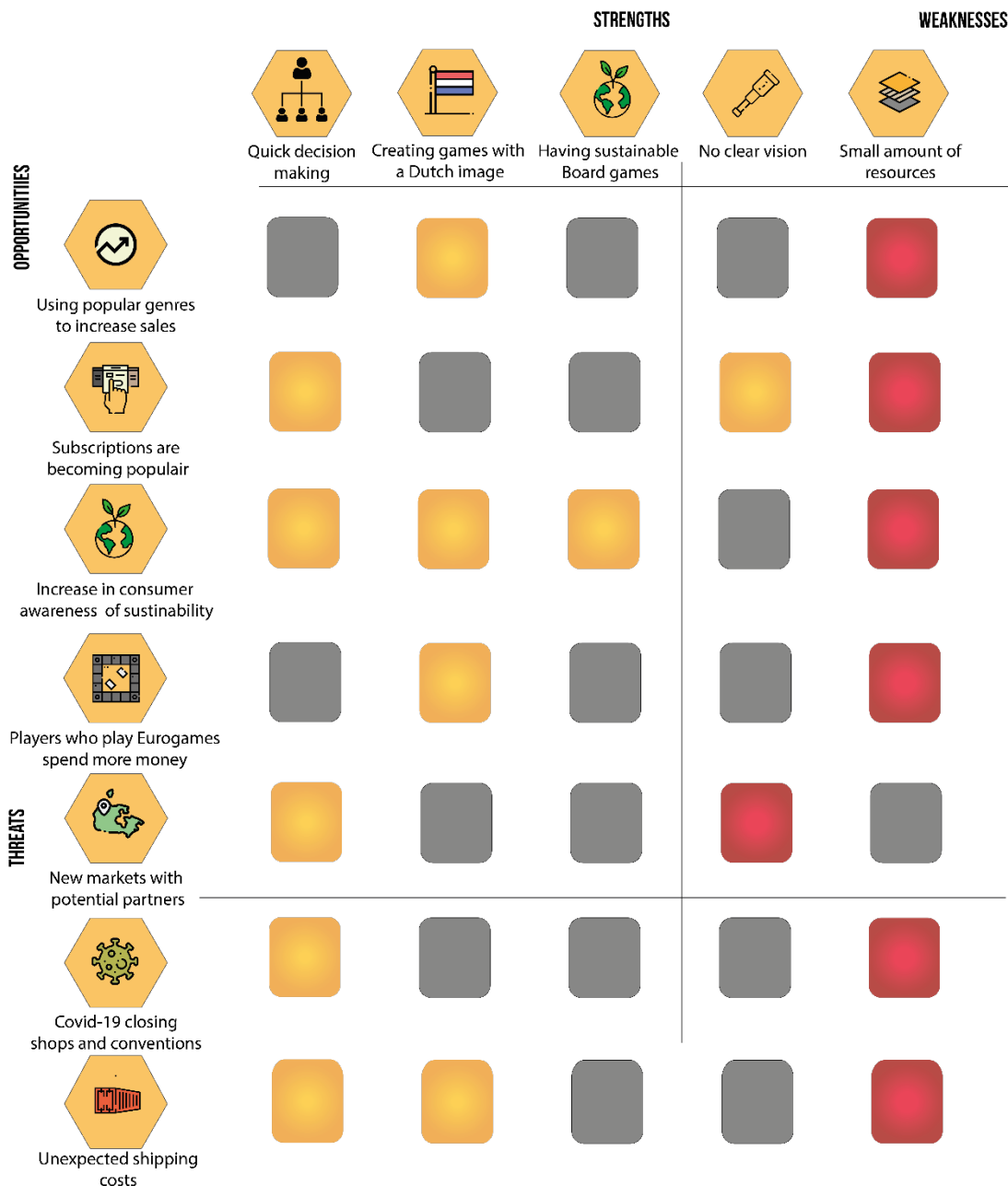


Figure 33 Strengths and weaknesses versus opportunities versus threats. Orange represents positive chances, red represents possible problems. Grey represents areas without chances or problems.

Figure 33 shows two colours: the orange representing positive chances and the red representing possible problems. Each possible chance and problem will be discussed following the different strengths and weaknesses in order:

### **Quick decision-making**

The opportunity, using popular genres to increase sales, does not represent any extra opportunities regarding the strength of quick decision making. This is because these games genres have already been established, making them less likely to undergo changes. Without these changes, Jolly Dutch cannot gain any competitive advantage over their competitors with quick decision-making.

Subscriptions are becoming more popular. These subscriptions are a new way of selling games. Because it is new in the board game industry, it is hard to predict which steps can make or break the concept. Quick decision-making can play an important role here to ensure Jolly Dutch can adjust their decisions when needed. This can already be seen by their quick decision to release their initial subscription plan sooner than planned because a competitor announced their own board game subscription service.

An increase in consumer awareness of sustainability also matches with quick decision making. Sustainability is slowly making its entry into the board game industry, where Jolly Dutch is one of the front runners. With sustainability becoming more important, it can create opportunities for Jolly Dutch to focus on their sustainable start and create an image that sets them apart. For Jolly Dutch to make their products more sustainable and keep innovating, quick decision-making definitely helps.

Players who play Eurogames spend more money. Similar to the popular genres opportunity, Eurogames do not change that much; it is an established genre. This means that it is not about reacting fast but more about who can make the best and well thought out Eurogames.

New markets with potential new partners can bring chances for Jolly Dutch because of their quick decision-making. These chances can occur from making quick decisions about which growing companies they should partner with or which partnerships should end because of bad results. Being able to predict and react fast to changing markets can bring new opportunities in other markets for Jolly Dutch.

The threats, Covid-19 closing shops and conventions and Unexpected transportation costs, also play a role in the strength of quick decision-making. The threats are both similar. They both represent an external source that negatively influences Jolly Dutch. However, with quick decision-making, Jolly Dutch will be able to adapt quickly and reduce the impact of these threats. An example here is the container shortage. After this incident, Jolly Dutch found new partners in Poland who could make their board games. With these new partners, they will be less dependent on the containers and thus have a smaller chance of losing money in the future from similar situations.

### **Creating games with a Dutch image**

Jolly Dutch has already shown with Polders and Chartered that they can make good games from Dutch themes. Using popular genres to increase sales could combine well with their agenda of pushing Dutch games. Jolly Dutch could make Dutch themed games from these popular genres and increase the consumers' awareness of its existence. The opportunity of players who play Eurogames spend more money could be connected to Jolly Dutch making Dutch games in the same way. If Jolly Dutch can make unique Dutch themed Eurogames, this could draw in the people who play them and increase the number of customers that spend the most on board games.

The second opportunity is the increase of consumer awareness of sustainability. Jolly Dutch wants to create a Dutch image, meaning they want to create all parts of their board games in the Netherlands. This means products do not have to be produced and transported anymore from China to the Netherlands. This avoids the higher emissions generated through transportation, one of the most significant contributors to climate

change and global warming (Nagurney et al., 2010). Because of the lower transportation distance and thus lower emission, this makes the combination of sustainability and a Dutch image a great match.

A threat also plays into this strength of creating a Dutch image: unexpected shipping costs. When Jolly Dutch reaches the goal of making their games in the Netherlands, it will be harder to get influenced by external shipping issues.

Besides the opportunities and threats that fit these strengths, other opportunities and threats do not bring extra chances for Jolly Dutch. Subscription becoming more popular, for example, does not convey any increased chances because of Jolly Dutch their Dutch image. This is because the subscription model is not related to being Dutch. The subscription model can be done in all countries and can have multiple themes. Another example is the foreign markets. As mentioned earlier, it is uncertain if other countries would see Dutch games as something beneficial or as something that would make their games sell quicker. And on the other hand, it will cost Jolly Dutch time and resources to establish these partnerships, which could have also been invested in the Dutch market.

### **Having Sustainable boardgames**

The third and final strength of Jolly Dutch is their ability to create sustainable games. Jolly Dutch already embraced sustainability as an essential part of the company. Jolly Dutch's sustainability matches well with the sustainability trends for apparent reasons. There is an increase in customer awareness for sustainability, and this fits Jolly Dutch's strength.

The other trends can also be argued to have a connection to sustainability: the games can be made in sustainable themes, the subscription model can be more sustainable than normal subscription services if focused on, and Jolly Dutch could partner up with sustainable partners. However, adding sustainability to these opportunities is forcing it. All the opportunities can benefit from making it more sustainable, but Jolly Dutch can not benefit from these trends with their strength of making sustainable games.

### **No clear vision**

As mentioned before, the lack of a clear vision is a weakness of Jolly Dutch. However, within this weakness also lie some chances for Jolly Dutch. Because of the lack of clear vision, Jolly Dutch is able to go in multiple directions without losing their customer base. An opportunity here is subscriptions becoming more popular. Because Jolly Dutch is free to change direction, they can change their direction to have a subscription service. With this threat, it is important to realise that when Jolly Dutch chooses a direction, they should try and follow this direction to create a clear vision for the company in the future.

The lack of a clear vision could also be beneficial for other directions such as the popular game genres, sustainability, and Eurogames. However, these opportunities are not seen as such a big chance as the subscription model. This is mostly because these changes are all minor and could have also been pursued if Jolly Dutch had a clear vision. While the subscription model is such a different business model, it would be hard to fit into a regular vision of a company.

The lack of a clear vision currently makes it more difficult to create connections to other companies and thus also foreign partners. It is hard for other companies to see the direction Jolly Dutch is going in and, therefore, may decide not to work together.

### **Small amount of resources**

The other weakness of Jolly Dutch is their small amount of resources. This lack of resources has some potential dangers for Jolly Dutch. First, it makes it hard for Jolly Dutch to invest in board game trends, like Eurogames and roll and write games, as they do not have many designers. Secondly, it also makes it more challenging to change the company's direction into a subscription model as this requires time and new resources. This is also the case for more sustainable products. Finally, it makes it harder to overcome

sudden problems such as Covid-19 and the unexpected transportation costs. These sudden problems are less impactful for companies that have big reserves. For smaller companies with little resources like Jolly Dutch, these problems can become fatal as they don't have the money to come back from big losses.

The small amount of resources is not a problem in regards to foreign markets because of the model of just selling the game through foreign companies. This requires little resources, which Jolly Dutch can spare.

## 4.2 Search areas

From the SWOT analyses, some interesting chances for Jolly Dutch were found. Each opportunity found in the analyses was combined with strengths that Jolly Dutch currently has. These combinations can give promising search areas. Three search areas can be seen in Figure 34.

The first promising search area is the quick decision making of Jolly Dutch. As mentioned before, Jolly Dutch can make quick decisions because of their small company structure. This quick decision making can play into three opportunities and both threats. This fit exists because quick decision making makes it possible to change faster and adapt better. Because of this great fit with almost all opportunities and threats, this will be the first search area.

The second promising search area is the subscription model opportunity combined with Jolly Dutch's strength to make quick decisions and their weakness of missing a clear vision. Because Jolly Dutch is missing a clear vision, this service could become their new focus and vision. With Jolly Dutch being the first Dutch board game company coming with a subscription, they also need to adapt fast to the coming changes and discoveries on their way. The quick decision strength helps Jolly Dutch with these possible problems. This strength and weakness of Jolly Dutch make the subscription service the second search area.

The third promising search area is sustainability. This opportunity matches with three strengths of Jolly Dutch. It matches the start that Jolly Dutch has made with sustainability already, and it also fits the Dutch theme as making everything in the Netherlands would mean less transportation. Sustainability can also profit from the quick decision-making from Jolly Dutch that can keep them ahead of the competitors. Jolly Dutch has made a great start of sustainability, and this search area shows that there is even more potential for Jolly Dutch to make this their priority.

## 4.3 Summary of search areas

In this chapter, the strengths, weaknesses, opportunities and threats of Jolly Dutch were explored to find new search areas. These search areas represent promising combinations of the strengths, weaknesses, opportunities and threats.

Three search areas are defined: Quick decision making, subscriptions and sustainability. These search areas indicate combinations of the SWOT, which look the most promising. In the next chapter, these search areas will be used to create a new vision for Jolly Dutch.



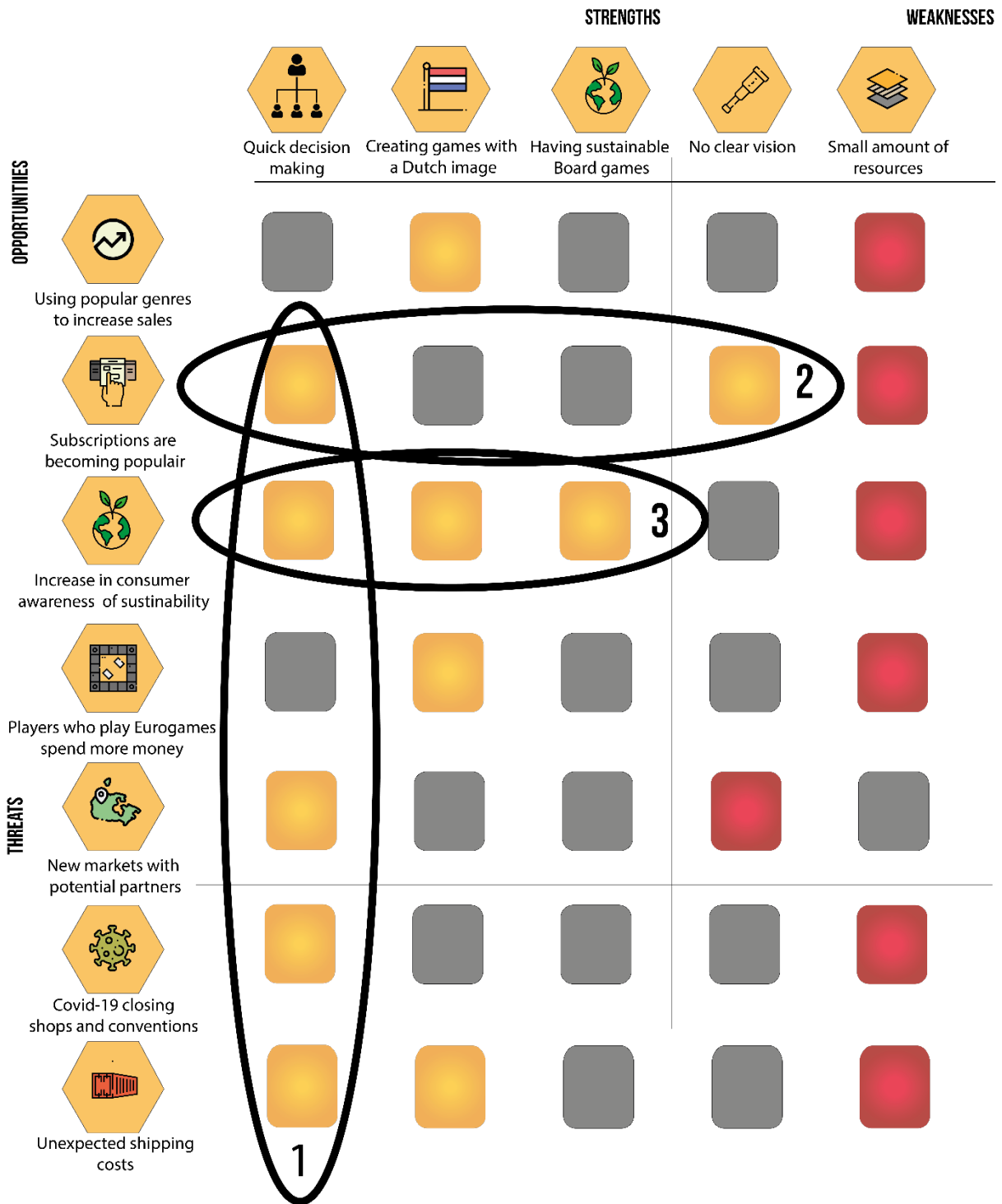


Figure 34 the SWOT analysis with the three search areas.

## CHAPTER 5 NEW FUTURE VISION

This chapter will discuss the possible future visions of Jolly Dutch, where one will lead to a new strategy. Chapter 4 will answer the sub-question: **Which future vision would suit the current image of Jolly Dutch?**

The future visions will be derived from the directions of the search areas found in Chapter 4 Search areas. In this chapter, the search areas will be converted into future visions after a session with Jolly Dutch to see if this is in line with how they see their company. These future visions will then be the start of the roadmap, see Chapter 6 Roadmap, following the DIM (2012) (Figure 35). The future vision will be selected with the use of a Harris profile which will be further explained in this chapter.

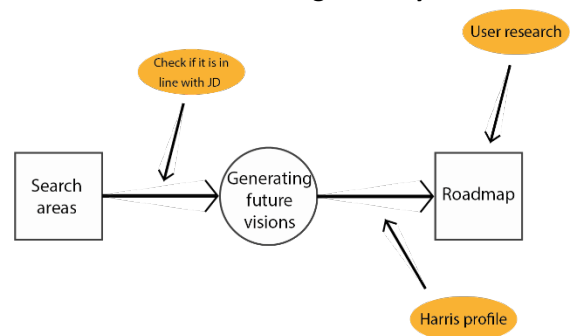


Figure 35 The fourth step of the DIM.

### 5.1 New company direction

With the SWOT's conclusions, three search areas for Jolly Dutch are found:

- Profiting from Jolly Dutch their quick decision making.
- Introducing a subscription model.
- Using sustainability to stand apart.

Three different future visions are created from the three search areas. All the future visions consist of three horizons. These horizons are one year, three years, and five years in the future. This time pacing is based on the current situation of Jolly Dutch because the time pacing of roadmaps can differ a lot and should be based on the specific situation (ProductPlan, n.d.). Jolly Dutch is a small and relatively new company, which means that they are still changing, and predicting the far future would not be achievable. Hence, five years as the final step in the roadmap is selected to keep it more realistically useful for Jolly Dutch.

#### 5.1.1 NEW MISSION, VISION, AND PHILOSOPHY

Before creating the visions and horizons, on my initiative, a session was held with Jolly Dutch, where Jolly Dutch was able to explore what they see as a possible future for the company. This session was conducted to bring the results from this report closer to what Jolly Dutch feels would be within their reach. The session focused on finding the reasoning behind the decisions of Jolly Dutch and creating a clear vision for Jolly Dutch. Within this session, the owners of Jolly Dutch, Kneepkens, and Van Binsbergen, were asked to create a new mission, vision, and philosophy (MVP) for Jolly Dutch. The creation of these new MVPs started by looking at the MVPs of current popular companies, then looking at which components a successful MVP should have and concluded with both owners making their separate MVPs before combining those through a discussion.

Thus, from the discussed session above, a new mission, vision, and philosophy are created by Jolly Dutch. These new MVPs lie closer to what Jolly Dutch is currently trying to be.

The new mission for Jolly Dutch is:

*“Create accessible, sustainable Dutch-designed board games for the Dutch market that will give Dutch people a fun family night.”*

This new mission makes it apparent that Jolly Dutch values their Dutch image. Compare this to the old mission: *“To give Dutch people an enjoyable evening with their families through well-designed board games”*. The difference between the old and new mission is the focus on creating the games rather than the result of giving people an enjoyable evening. It also puts the attention on the sustainable aspect of their company.

The new vision of Jolly Dutch is:

*“Jolly Dutch wants to become the best sustainable boardgame publisher in the Netherlands to show the passion that originates from this evolved hobby.”*

This passion radiates to the players of Jolly Dutch games, who love to play a Jolly Dutch game to relax and show others how good these games are. This vision also mentions the importance of their Dutch image. It also shows that they find it essential that their passion for games comes back into their products. The difference with the old vision: *“Creating a strong Dutch board game brand that works with Dutch designers to create board games that represent their love for the board game industry”*. The new vision focuses more on becoming the best and adds sustainability instead of creating a strong brand.

The new philosophy of Jolly Dutch consists out of four core values:

- **Inspired:** We work from passion because we want to create jolly products.
- **Transparent:** No secret agenda; you know exactly what you get when working with Jolly Dutch.
- **Sustainability:** We strive to have a small environmental impact on our products.
- **Positivity:** We think of solutions, not problems.

These four core values explain what Jolly Dutch expects from their employees and what they try to show to the outside world. Interestingly enough, one of the points here is sustainability. Which means Jolly Dutch does value its presence but is has not found its place within their mission and vision yet.

Compared with the old philosophy, these core values cover a wider variety of aspects. The old philosophy: *“Making beautiful games while keeping it fun to do.”* was rather short and only focused on making the games and keeping it fun. The new philosophy focuses on the four different aspects that Jolly Dutch find important.

## **Conclusion**

With these new MVPs for Jolly Dutch, we can better understand which direction Jolly Dutch wants to go in and what they are not willing to compromise on. They want to focus on creating Dutch board games for Dutch people while showing their expertise on sustainability.

From this MVP, it is clear that being Dutch is important and should always be part of Jolly Dutch, as it is mentioned in both the mission and the vision multiple times. Besides being Dutch, having fun and showing expertise is also an important part of what Jolly Dutch is. This can be found in the philosophy with and in the vision and mission through words such as passion and fun.

What should be noted here is that Jolly Dutch values their Dutch image, but being Dutch is not chosen as one of the search areas in Chapter 4 Search areas. Jolly Dutch wants the Dutch image to be a core part of their company where it can be combined with something else. The search areas now chosen represent the visions they can combine with their Dutch image. For example, for the sustainability vision, producing their products in the Netherlands, making their products more ‘Dutch’, also benefits the sustainability aspect in terms of transportation emission. Jolly Dutch will also be one of the first to implement a working subscription model in the Netherlands, which will be unique in the Dutch market.

## 5.1.2 FIRST FUTURE VISION

### **Using sustainability to stand apart from the rest**

Sustainability is a good tool to set Jolly Dutch apart from competitors. Jolly Dutch’s first step in creating more sustainable games, combined with increased attention towards sustainability from the public, makes sustainability a perfect direction for a future vision.

In the first horizon (one year), Jolly Dutch will improve their new games to be less wasteful:

Jolly Dutch will reduce waste by cutting elements of their games and replacing them with new designs that do not need physical components or more sustainable materials. This horizon will also be the start of social media campaigns and labels on their product, showing the consumer that Jolly Dutch's games are more sustainable than other board games.

The second horizon (three years) will focus on publishing fully sustainable games with possibly sustainable themes:

These sustainable games should follow the intentions of the first horizon where the games can have fewer components. Any components needed for the game should be made from sustainable materials, such as replacing plastic with degradable options like wood (Chapter 7.3 Focus on sustainability). Jolly Dutch could also focus on cutting as much plastic packaging as possible. The themes of the games could also focus on being more sustainable, which allows raising awareness about current issues. These themes, however, should not make the game focus on being educative over being fun.

The third horizon (five years) will focus on creating more alternatives besides board games:

For example, these alternatives could go in the direction of 3D printed board games that consumers can print themselves. Besides these alternatives, Jolly Dutch will still create physical board games. However, these board games will focus on having as few components as possible, and the components they do have are all made from recyclable material. The games of Jolly Dutch could offer a new experience with design focused on the absence of game parts. Jolly Dutch could also accept old games and repair them to sell them second hand, ensuring that their games are even more sustainable.

### 5.1.3 SECOND FUTURE VISION

#### **Subscription model**

The second future vision focuses on the subscription model. From the SWOT analysis came that a subscription model could be interesting for Jolly Dutch. With this vision, we will be looking into subscription models for Jolly Dutch to adopt a new business model.

The first horizon is about creating the first steps of the subscription model:

In this first step, Jolly Dutch will launch their subscription model and advertise this extensively as people might be cautious about subscribing because Jolly Dutch will be the first Dutch board game subscription. Besides focusing on the number of subscribers, this is also the phase where Jolly Dutch can still change things in their subscription. In this first phase, Jolly Dutch should regularly ask for feedback from the consumers to improve the system. Besides asking their consumer, they could also invest in a consumer panel.

In the second horizon, Jolly Dutch will further develop the subscription model:

Jolly Dutch has a good idea of how the subscription model will look on the second horizon, and the most significant changes should already be made. In this phase, the model will be optimized by again asking for user feedback. Jolly Dutch wants to set themselves apart from the competitors as well by showing why their model is superior. This difference should come from interviews that are done in the first part of this horizon.

The third horizon builds further upon the subscription model. In this improved model, customers can 'patch' their games:

This system consists of two parts. First, you have the subscription model. The second part of the model is 'patching' (improving or correcting a routine or program) games. Customers can send

Jolly Dutch games back to Jolly Dutch when they have played enough and feel like new interactions. They will then send their game back to Jolly Dutch, where new parts will replace old parts. This means that the game will have a fresh feel to it while still being the same game. Jolly Dutch would then be able to recycle the parts that are in good shape for other games, making it more sustainable for Jolly Dutch.

#### 5.1.4 THIRD FUTURE VISION

##### **Quick decision making**

The third future vision is about quick decision making in game trends and actuality. In this vision, Jolly Dutch will use quick decision making to create actuality in their games.

In the first horizon, the focus will lie in creating Dutch contacts:

In the first horizon, the focus of Jolly Dutch will mainly be to create a solid Dutch network where they have enough Dutch designers to consistently create board games and have a producer in the Netherlands. In this horizon, Jolly Dutch will make new games that follow the current board game trends.

In the second horizon, Jolly Dutch will focus on trends outside the board game industry:

In the second horizon, the games Jolly Dutch will create will shift more from game trends to actuality trends. Here the strength of Jolly Dutch will be of great importance, as actuality trends come and go, and quick decisions are needed to stay on topic. Jolly Dutch could simultaneously make games with the same design methods to keep making the games as fast as possible. This process could be perfected over multiple games to speed up the process.

The third horizon focuses on creating a system that will create new games fast to keep up with trends:

In the third horizon, Jolly Dutch will try to create games based on popular trends. If there is a trend, a Jolly Dutch game will be produced within a short timeframe. Producing these games as fast as possible is critical here as trends can be over fast. To make the process faster, Jolly Dutch will use their local network and prepare general games without a theme that can be filled in later. With being on point with the trends, Jolly Dutch will stand out from other board game companies. Their games will be made in limited editions as trends come and go. The big advantage here is that Jolly Dutch can profit from fast trends, which normal board game companies cannot capitalize from. However, a risk of this future vision is that it could happen that in the middle of the process of making the game, the trend will disappear, and Jolly Dutch will be stuck with a game. This is also why the games will be limited editions, and the number of games will be small. This is to minimize the losses should this happen.

## 5.2 Choosing the future vision

All three future visions focus on a specific point that makes Jolly Dutch set themselves apart: sustainability, subscription model, and quick decision making. However, which vision suits Jolly Dutch best, and is reasonable to implement? A Harris profile will be used to decide which future vision has the most potential. The Harris profile is chosen as it is a great tool to evaluate design concepts (van Boeijen et al., n.d.). This Harris profile will judge the future visions on three requirements. These requirements will be in the order of importance, meaning that the first requirement has more weight than the last requirement in making the decision. However, important to note with Harris profiles is that they do not represent the 'true' performance of the concepts (van Boeijen et al., n.d.). The results of the Harris profile should be seen more as a prediction. The three requirements are as follows:

- The first requirement is the fit with Jolly Dutch:  
For a future vision to fit with Jolly Dutch, it should be in line with their recent actions and their new MVPs. Without being in line with Jolly Dutch, the future vision could feel out of place and just a random idea they are trying out.
- The second requirement is reachability:  
Is Jolly Dutch able to do this, or will it take a lot of luck or resources to pull this future off? This requirement has a high value because it will be difficult for Jolly Dutch to carry out this future vision when this is not fulfilled.
- The third requirement is uniqueness:  
Jolly Dutch is a small company and tries to stand out. Being a small company Jolly Dutch needs to differentiate itself from other companies. Because of its size, it is hard for Jolly Dutch to, for example, sell cheaper games. Therefore the uniqueness of the future vision also plays an important role. With a unique future vision, it will become easier for Jolly Dutch to set themselves apart and attract customers. While with a less unique vision, Jolly Dutch could become stuck in the shadow of a bigger company.

Table 7 shows the three criteria with the different future visions. Here the future visions can get a score of -2, -1, 1, or 2 based on the Harris profile. -2 indicates the least fitting with the requirement, while 2 indicates the best fit.

	Sustainability				Subscription model				Quick decision making			
	-2	-1	1	2	-2	-1	1	2	-2	-1	1	2
Fit with Jolly Dutch												
Is it reachable?												
Uniqueness												

Table 7 The Harris profile of the future visions.

### Future vision 1: Sustainability

The sustainability concept scores a '1' on the fit with Jolly Dutch. Jolly Dutch is already making actions towards sustainability and adding it to their products; however, they are not advertising it. The reachability of this vision scores a '2'. This vision focuses mainly on reducing the number of parts of board games and using different materials. This is entirely possible and should be even doable at the moment. Uniqueness will be judged on the number of times something has occurred in the board game industry. Sustainable games are new to the board game industry; almost no completely sustainable games exist. This is why this future vision scores a '2' for uniqueness.

### Future vision 2: Subscription model

The subscription model scores a '1' on the fit with Jolly Dutch. This is because they have already started their subscription. However, this service was only recently introduced, so consumers probably do not associate Jolly Dutch with it. The reachability of this model scores a '2' because subscription models already exist, even in the board game world. Finally, the uniqueness of this future vision scores a '2' since Jolly Dutch is the first in the Dutch board game market to release this service.

### Future vision 3: quick decision making

Quick decision making has a fit of '-1' with Jolly Dutch because this vision is combined with actuality. Jolly Dutch is currently not connected to actuality, making it a bad fit. Concerning reachability, it will be hard to produce games so fast before the trend has passed. Producing games at speed to follow trends would also require more people and resources than Jolly Dutch currently has. This is why reachability gets the lowest

score of '-2'. Additionally, this partly explains the '-1' for fit with Jolly Dutch since focusing on producing a lot of games fast does not suit their image with sustainability. The uniqueness of this vision scores a '2' because the concept has not been done yet.

### 5.3 Conclusion

The sustainability and subscription model vision both score the highest according to the Harris profile (Table 7). They both fit well with Jolly Dutch and are reachable and unique. A great way to use both of these visions is to combine a subscription model that creates a more sustainable service. In this way, both visions can be used to optimize Jolly Dutch's potential, focusing on subscription models and being sustainable. This answers the sub-question: **Which future vision will suit the current image of Jolly Dutch?**

In the next chapter, Chapter 6 Roadmap, this future vision will be elaborated on via a roadmap that shows the possibilities for Jolly Dutch.



## CHAPTER 6 ROADMAP

The chosen future vision from the previous chapter will allow Jolly Dutch to create a new experience for consumers and set themselves apart. Changing the business model cannot be easily done, so a strategy is needed to implement this future vision of Jolly Dutch.

This chapter will describe the short-term actions, up until five years, of Jolly Dutch in which they create a subscription business model and a sustainable image for themselves. This will be illustrated with a roadmap, explaining the future actions that Jolly Dutch will need to take to create the new vision. The roadmap will be tested with the use of interviews with potential customers. These interviews are held to see if the ideas presented in the roadmap have potential. Based on these interviews, the roadmap will be adjusted.

The roadmap in this chapter will answer the seventh sub-question: **How can Jolly Dutch implement a strategy?**

### 6.1 Build-up of the roadmap

The roadmap will consist of three parts (Figure 40). The first horizon covers the strategy until 2022, the second horizon covers the strategy until 2024, and the third horizon covers the strategy until 2026. Each horizon of the roadmap will consist of five parts:

1. The goal of this horizon: Tells for each horizon what the end goal is for Jolly Dutch.
2. The market trends: Show which trends influenced this horizon the most.
3. The focus points of Jolly Dutch: Show the focus of Jolly Dutch.
4. The products: Show what kind of products Jolly Dutch will bring out in these horizons.
5. The resources needed: Show which resources are needed per horizon.

#### 6.1.1 FIRST HORIZON: GREEN LIGHT DISTRICT

As was found in the trend research (Chapter 3.1 Trend analysis), the increase in customer awareness of sustainability is a popular trend; companies are becoming more sustainable, and so is Jolly Dutch. However, a problem for Jolly Dutch with sustainability is their communication to the customer. As mentioned in chapter 2.9 Marketing Mix, the advertisement of Jolly Dutch is focussed more on the function of their products and less focussed on the sustainable aspects. Therefore, the first point of this roadmap is that Jolly Dutch will show its sustainability to the customers through their social media channels in the first horizon.

Besides sustainability, another development has recently occurred for Jolly Dutch; they have launched their subscription model (Figure 36). The subscription service that Jolly Dutch currently has allows customers to subscribe for €4.99 per month, where customers will receive six brand new card games per year. In this first horizon, the focus will lie in perfecting the subscription service to adapt to the customers' needs. As this subscription service is new in the Netherlands, the chances are low that Jolly Dutch will do everything perfectly on the first try. This means that feedback from customers will be important for Jolly Dutch to keep improving. An example here is pricing that was not tested. Customers pay around €10 in two months, while they receive a game worth €12.99, so this should be a good deal on paper. However, will customers actually join the service, or are customers looking for more than just a lower price?



Figure 36 The subscription model in three steps.

To realize these goals, Jolly Dutch will need more resources. Luckily they already have some in place. First of all, active social media accounts are essential. Jolly Dutch recently hired an employee who is responsible for all social media of Jolly Dutch. Another resource they need is a way to generate feedback. This feedback can be gathered by creating an online area on Jolly Dutch's website where customers can talk about their experiences with Jolly Dutch. Additionally, this online platform can be interesting for customers as they will also receive information on new deals and discounts.

A way to address problems and directly help customers is via live chat, which can be implemented on the online platform. Live chats, or 'instant messaging platforms', are a way of offering customer service and online support to answer customer questions instantaneously, on top of being very cost-effective (McLean & Osei-Frimpong, 2017). Besides live chat, Jolly Dutch can also hold surveys, which can be done through the help of social media. Simple surveys could help Jolly Dutch explore the pitfalls of their subscription and improve their service.

### 6.1.2 SECOND HORIZON: SUBSCRIBE AND LIKE

The goal for the second horizon is to create a bigger customer base for Jolly Dutch subscriptions. After setting the foundation for sustainability and the subscription service on the first horizon, Jolly Dutch will continue on this path and develop these aspects of their company.

Games in this horizon should have sustainable themes and reduced plastic components, even more than games made in the first horizon. Jolly Dutch can take a significant step in creating less polluting games. This follows the trend of plastic reduction, an important sustainable trend. An example where Jolly Dutch could reduce plastic is with their game Chartered. Chartered uses plastic as wrapping around the box and within components of the game (Figure 38). Plastic wrapping can be replaced by biodegradable plastic. A good sustainable partner for Jolly Dutch for this would be TIPA (TIPA, n.d.). TIPA is a company that makes sustainable packaging from compostable polymers. In collaboration with TIPA, Jolly Dutch could create sustainable board game packaging. Besides the plastic wrapping, other plastic components can also be reduced by replacing the components for a more expensive but widely used material in board games: wood (Chapter 7.3 Focus on sustainability). However, this would increase the price of the product; therefore, another solution could be to make the components from cardboard. An example of this is the game Photosynthesis (Figure 37), where trees are made from recycled cardboard. With these changes, Jolly Dutch could help themselves to a new level of sustainability in this second horizon.



Figure 38 The board game Chartered with its plastic components. Source: [despelletjesvrienden.nl](https://despelletjesvrienden.nl)



Figure 37 The cardboard trees of the board game Photosynthesis. Source: [theboardgamefamily.com](https://theboardgamefamily.com)

On this horizon, another point is the greater variety of genres. Currently, the amount of genres that Jolly Dutch has is four. With a small number of genres, it is harder to appeal to all kinds of customers. Therefore Jolly Dutch could focus on increasing the number of genres on this horizon.

Finally, to increase customers, Jolly Dutch can focus on advertisement through social media. Their subscription service could attract new customers, and an increased genre of board games could also help.

### 6.1.3 THIRD HORIZON: LEVEL UP

The goal of the final horizon is to create a sustainable subscription system. On this horizon, Jolly Dutch will introduce an updated subscription model. Customers will be able to recycle their games by sending them

back to Jolly Dutch and receiving new upgraded and recycled games or parts for the games. This will take the subscription service to the next level in terms of sustainability. These games should reduce the number of games that customers need, as each game is worth multiple upgrades. Jolly Dutch could also offer discount subscriptions for games made with the used game components. However, a disadvantage of this system is that it has extra transportation, which increases the impact on the environment.

The upgradable games will have to have multiple versions with different components which can be implemented. Jolly Dutch could also make a swapping system for customers to hand in their board games at regular postal package points or at board game stores.

The new subscription model will consist of five steps (Figure 39):

1. The first step is the consumer subscribing to the subscription from Jolly Dutch. Here the customers will get a certain amount of games per month sent to their homes.
2. In the second step, customers play the game a certain amount of times until they move on to other games and do not use the initial game too often.
3. Customers send the product back to Jolly Dutch.
4. Jolly Dutch removes certain parts and adds some new elements to change game mechanics, which will make the game feel fresh and new. These parts can be second hand, returned by other customers.
5. The game is sent back to the customer, and the customer can experience a new board game. The cycle now continues from step two.



Figure 39 The upgrade model explained in five steps.

Eventually, Jolly Dutch will reduce the number of games people will have by offering a subscription service to keep upgrading their games, so they never get boring. This will add to the sustainable aspect of people needing fewer board games.

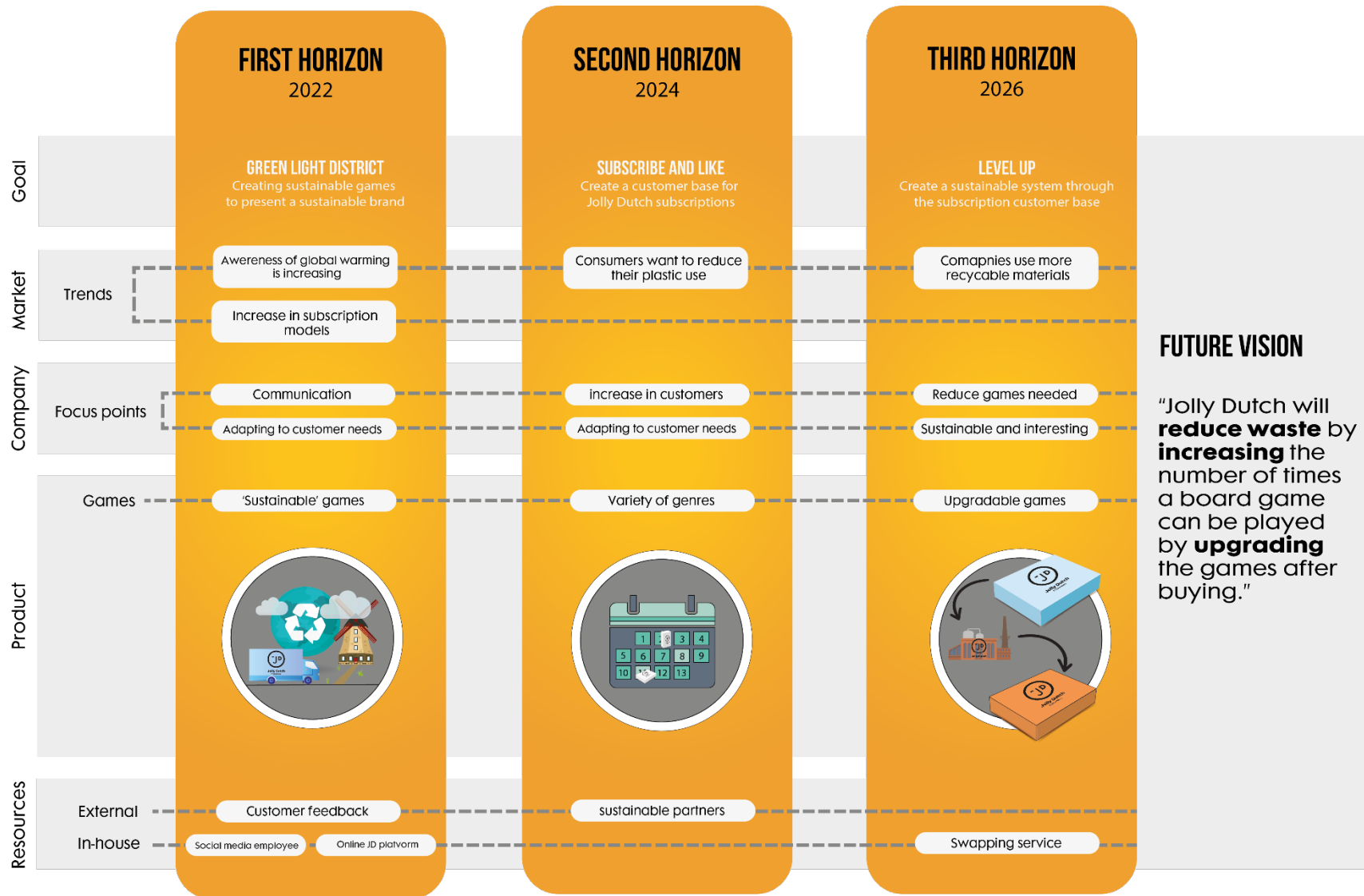


Figure 40 Roadmap for Jolly Dutch including the first horizon (in one year), the second horizon (in three years), and the third horizon (in 5 years). Per horizon, the value, market, user, product, and resources are shown

#### 6.1.4 FUTURE VISION

The future vision of this roadmap for Jolly Dutch is:

*“Jolly Dutch will reduce waste by increasing the number of times a board game can be played by upgrading the games after buying.”*

This vision shows the essential point of the strategy: reduce waste and lower the number of games people need. From the start of this strategy, two main points are mentioned: the subscription model and sustainability. Within the strategy, it becomes clear that these two combine in the final version of the subscription model (upgrade service). This upgrade service will provide people with games that have more possibilities than normal games and reduce the need for other games. With this method, the goal of making a successful subscription model is reached while it is still making the system more sustainable.

### 6.2 Interviews with potential customers

The roadmap made in the previous part of this chapter is based on market research. However, it has not been tested to see if the actual customer sees the benefit of this subscription system. Interviews with potential customers will help establish whether the customer will be interested in using the subscription service, and based on their answers, the roadmap will be optimized. The method that will help establish this will be the product concept evaluation (PCE), an evaluation method from the Dutch Design guide. This method helps to understand how users value your concept, which will help determine which aspects of the roadmap need optimization. The PCE is usually used for a product, as the name suggests; however, here, it will be used for a concept. This affects one step of the method, namely, step three. In this step, normally, a concept representation will be created. In the case of the roadmap, this was not necessary as the roadmap is already a representation. The PCE consists of eight steps (van Boeijen et al., n.d.):

The first step will describe the aim of the product concept evaluation. Answering the following questions will be the aim of this concept evaluation:

- Which target group would be interested in a board game subscription?
- Is there any interest in upgrading board games?
- Do people find this concept more sustainable than regular board games?
- If there is no interest in this concept, how can it be improved to become more interesting?

The second step of the PCE is choosing which method is best suited. Interviews will be chosen as a method as these are easy to set up and give detailed information about the problems of the strategy.

The third step of the PCE is creating the appropriate concept representations. The roadmap was used as a representation.

The fourth step of the PCE is creating a plan. For this plan, the aim and type of evaluation should be clear. These are discussed in steps one and two. Next, the respondents should be described. The respondents will be board game players as they are the target group. Within this group, three different categories of players will be distinguished: players who play almost no games, players who sometimes play games, and players who play a lot of games per month. These three groups are chosen as they all have a different relation to board games. Players who rarely play probably do not buy that many games, and players who play a lot may do. On the other hand, players who play a lot may be a lot pickier as they already have a lot of experience, while less experienced players are not sure what games they want. Additionally, there will also be a focus on having different participants to cover as many board game players as possible regarding age, size of the collection, and gender.

The questions asked to the respondents can be found in Appendix VIII. The first few questions determine what kind of player the interviewee is and what they value from board games. After establishing this, they

will answer a few questions about subscriptions to find the added benefit from subscriptions to this user. A short explanation of the board game subscription model will be given, and they will be questioned about this. Then another short description will be given of the subscription model with upgrades, and again a few questions will be asked about this as well.

Step five, six, seven and eight:

The respondents were found on a Facebook page named Bordspel Radar, which focuses on board games. A message was sent to the page with an open request whether people were interested in participating in the interview. The participants were selected to have a different amount of board games and have a wide range of ages. The test environment was Zoom. The concept evaluation was conducted with the interview, and the results will be discussed below.

## 6.2.1 INTERVIEW FINDINGS

### **Perceived potential**

After explaining the concept, a lot of the participants immediately liked the concept. Five out of six participants saw potential in the idea and felt it was something they would either use themselves or give as a gift. One of the participants said: *"If I have the idea that someone plays a lot of board games, would give them one or two months as a present to let them try it."* The subscription model is liked for multiple reasons. Some of the participants liked the subscription because it could give them board game options to choose from, making it easier to find good games. Other participants found it very convenient if they were able to choose from enough different genres and prices. Only one participant did not like the concept. The reason for this was that she felt it would just be getting more board games for the sake of buying instead of wanting to play something new.

With five out of the six claiming that they would use the subscription service, it seems that it has potential. However, the service should meet their requirements which are primarily about choosing the kind of board games within this service.

### **Possible problems**

One of the big takeaways from the participants is that they wanted a choice. One participant mentioned: *"The ability to choose which game you get, especially in the beginning, would, I think, help a lot of people to join this service."* arguing that giving more choice would increase the number of people that will try out the service.

The participants want to choose which genre they get and in which price range the game is. This is also to avoid getting the same game each month, as one participant said: *"I do not want an underpants service in which I get the same underpants each month but in a different colour"*. Currently, these options are not available in the service of Jolly Dutch. An important takeaway here is that people want to choose but do not want to make all the decisions. They want to control the price range and the genre. However, they do not wish to select the games. That is something that Jolly Dutch can do for them to keep an element of surprise in the service. However, one participant said: *"Some games I need to have, others I am not interested in, so I really want to choose which game I get."* This quote shows one of the participants' concerns with this system who is afraid that they will receive games that they do not enjoy playing. Having a choice in genre and price range could significantly increase the customers' content with the products.

### **Upgrade service**

Besides the normal subscription service, the participants were also asked about the upgrade service from horizon three of the roadmap. The participants found this service difficult, and they did not see the added benefit from this service. They felt sending back the game would be a lot of effort and also not sustainable. They would like it better if they could just keep the game and get all the upgrades as extras.



## Recycle service

During the fourth interview, a new idea came up. Instead of sending the games back for an upgrade, the games could be sent back for a small amount of money back. This way, the customer does not fill their house with games, and Jolly Dutch will get the game back so it can be recycled or sold again in a second-hand service. With this idea, the problem of sending and receiving the same game multiple times is solved, and the games could still be recycled and re used.

This new recycling service was proposed in the fourth, fifth and sixth interviews, and all three participants found the idea great and would use this service. They felt it was fair to get a gift card for their old game if it was in a usable state.

This new service is not perfect as it still raises more questions, such as: Do people want second-hand games? And how can Jolly Dutch assure the games are in a good enough state? But with some testing in the future, Jolly Dutch should be able to answer these questions.

## Conclusion

These interviews with potential customers were held to see whether the roadmap had potential. From the interviews, it became clear that the subscription model piques the interest of many board game players. However, they want specific things within this service. A big point is a choice and how many variables they are able to control. On the one hand, they do not want to choose too much, but on the other hand, they also do not want to give away full control. The upgrade service felt not sustainable, and none of the participants was interested. However, the recycling service which was found within these interviews looks promising. This is something Jolly Dutch should look further into to combine sustainability with the subscription model.

## 6.3 Improvements roadmap

A few aspects of the roadmap seem to miss the mark, according to the interviews. All the participants found the upgrade system too complicated, which led to a further iteration. There are two main changes (Figure 41): increasing consumers' choice in the subscription model and the recycle system that replaces the upgrade system.

All participants claimed to want some influence in the type of subscription. Including this in the roadmap led to focussing more on the choices of the customers. The changes are implemented by adding the focus of 'customer chooses' into the third horizon. For this increased customer choice, more genres of games need to be produced by Jolly Dutch, and these games should cover more price ranges. This is also covered by the 'increase variety' in the game-making part of the roadmap.

The second change is about the system of the third horizon. The upgrading system was found too complicated by the participants. Some also questioned why they did not get all components of the game immediately. A new idea was generated from this feedback: customers will be able to give back used games for a discount. This recycling system will completely replace the upgrade system as it shows more potential.

## 6.4 Conclusion roadmap

In this chapter, one of the sub-questions is answered: **How can Jolly Dutch implement a new strategy?**

The roadmap made in this chapter shows Jolly Dutch how they can implement the new strategy with the first horizon preparing the steps. The second horizon follows this by listening to the feedback of the new subscription service and expanding Jolly Dutch their business through sustainable games. Finally, the subscription model and sustainability are combined in the third horizon to play to the strengths of Jolly Dutch.



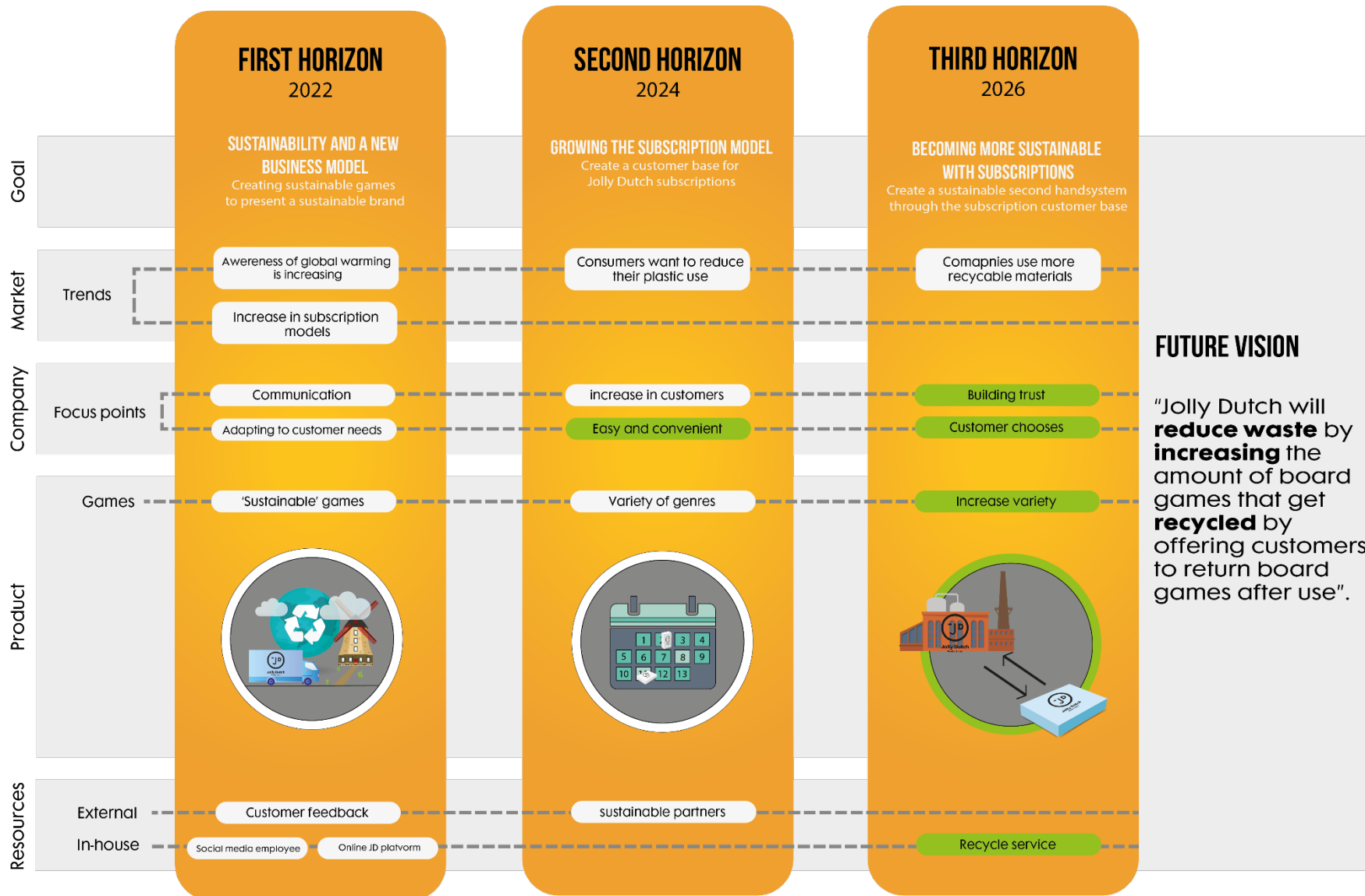


Figure 41 The improved roadmap, with the improvements indicated by green.

## CHAPTER 7 GAME DESIGN

In the final stage of this project, a board game design for Jolly Dutch will be created to fit the roadmap and answer the final sub-question: **What type of board game would fit Jolly Dutch's new strategy?** The game will show Jolly Dutch how the new strategy can be implemented. This chapter will look at game design and, finally, creating a board game for Jolly Dutch.

### 7.1 Design brief

To create the new game, first, a design brief will be created. This design brief will help to give an overview of Jolly Dutch, scope, target audience information, and budget.

A closer look was taken at Jolly Dutch and their current position in the board game industry during this report. For the design brief, it will be assumed that Jolly Dutch is already following the roadmap, specifically the first horizon, to increase the consistency of this game with the changes that Jolly Dutch needs to take according to the roadmap. Jolly Dutch will be a company that focuses on making board games that are sustainable and fit their subscription model. The board game that will follow should also focus on these aspects. It should be suitable for their subscription model and have sustainable elements. The game should have a sustainable theme and have a low environmental impact. The roadmap mentions that Jolly Dutch should also expand the variety of their board games genres to give customers more choice. This is why the board game should be within a genre that Jolly Dutch does not currently have.

The scope of the project will be a complete board game. This means that the board game should have balanced gameplay, user testing, and a physical copy. The target audience for this game will be as big as possible to show more consumers what Jolly Dutch can deliver. The survey in chapter three shows that 85 percent of players play with friends making it the most prominent target group.

The price range for this game from Jolly Dutch is around €25. Jolly Dutch themselves set this price. This means that the game should cost approximately €5 for production, according to Kneepkens, to be sold for €25 in a board game store.

### 7.2 Concept stage

The first step in making a board game is finding a game's theme (Adams, 2014). For this particular board game, the theme direction has already been set, namely a sustainable theme. This can be anything related to nature, but it can also go into an educational approach with a theme about a current environmental problem. With the help of a brainstorming session with three other participants, different themes were proposed. Within this brainstorm, a few rules were set. Criticism was not allowed during the session; the more creative the ideas, the better. It was encouraged to combine ideas, and the quantity should be as high as possible (van Boeijen et al., n.d.).

The participants were board game players, ages 24-26, who play board games at least once a week. The session consisted of two parts. In the first part, the participants had to come up with as many ideas as possible within five minutes. Then in the second part, they had to choose three themes they found had the most potential and work these out. The participants were asked to choose on personal preference and connection to sustainability. Results of this session can be found in Appendix VII. Three board game themes were chosen from all the themes: ice crystals, bees, and plants. These games were chosen because of their relationship with sustainability, as will be explained below.

1. The first theme, **ice crystals**, is connected to sustainability. Currently, a lot of the ice in the world is melting due to global warming. This game could help create awareness about this problem.
2. The second theme is **bees**. Currently, bees are not doing well because of many problems, like lack of nesting sites, hybridization, pathogens, and parasites (Requier et al., 2019). This theme could help highlight the environmental issues that cause a wide arrange of problems concerning the bees.

- The third theme is about **plants** that are related to reducing the amount of CO<sub>2</sub>. This game could be an excellent way to explain the importance of plants in reducing CO<sub>2</sub>.

The second step of making a game is to look at which genre the game would fall into (Adams, 2014).

It is easier to communicate if it is a well-known genre than when you define a new genre. The game genre should also be related to the roadmap. As mentioned before, the genre should create more variety for Jolly Dutch, which should be a genre they do not have yet. Jolly Dutch currently has card games, play and writes, Eurogames, and party games. A genre that Jolly Dutch does not have is roll and writes; hence with the previously stated popularity of **roll and writes**; this will be the genre of the game.

After finding the three themes and deciding on a game genre, the themes were worked out further to see what games they could become. This led to three different roll and write concepts:

- The ice crystal-themed roll and write has a simple concept of filling the ice crystal with your dice (Figure 42). A player would choose two different difficulty levels of crystals to make it as easy or difficult as they like. Then they will need to fill their crystals in a certain amount of turns.
- The bee-themed game would be about filling honeycombs with specific components (Figure 43). The honeycombs are filled with honey, bees, and a queen. Players could have custom dice with different symbols where they score points depending on their combinations in the honeycombs.

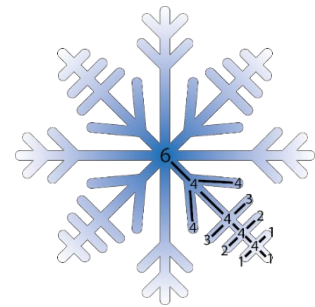


Figure 42 Ice crystal-themed board game idea.

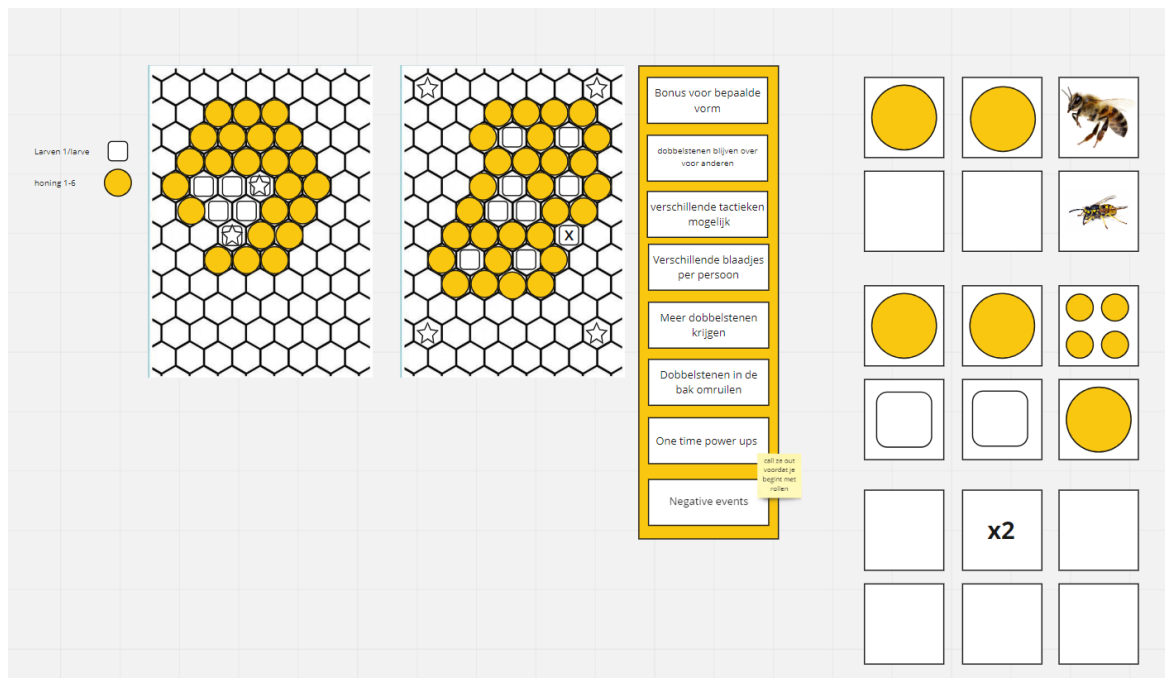


Figure 43 Bee-themed board game idea.

- The plant-themed game is similar to the ice crystal game. It consists of choosing plant pots with different plants. Each plant pot is worth different points and has different difficulty levels (Figure 44). Players would have to fill as many plants as possible to get the most points.



Figure 44 Collecting plants-themed board game idea.

All three game themes can become a roll and write with a sustainable theme for Jolly Dutch. This is why the different themes were proposed to Jolly Dutch. Jolly Dutch expressed that they wanted to create a game of medium complexity as they do not have a game within that complexity yet, and as mentioned before, it should be around twenty euros. Jolly Dutch expressed that the bee theme is their favourite, the reason for this being that it can be given a Dutch feel with Dutch bees and or beekeepers. This could be integrated into the game with flavour text in the rules.

With the genre and theme known, the game has found its basis. Now it is time to design the game elements and how they interact with each other. Creating game components is a complex process that requires a lot of testing (Rollins, 2019). The board game theme can be a good inspiration source for game components (Wirtz, 2021). In this case, the theme is related to bees. Six different elements were found that fit this theme:

- Different kinds of honey
- Different kinds of bees
- Bee queen
- Larvae
- Wax
- Enemies

With these elements, it is time to think more about what will happen in the game. The first step here was to look at what players can do in their turn. The initial idea was to let players have their beehive and control that. However, this soon became too complex. The new concept was that players could place down honey, larvae, and wasps. This looked promising as it looked aesthetically pleasing, and it felt like a roll and write with writing components down and creating a pattern (Figure 45).

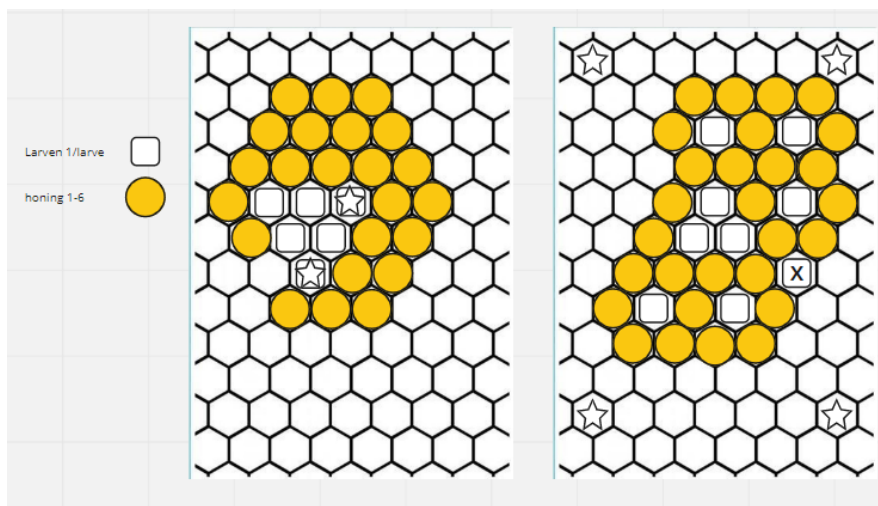


Figure 45 Bee theme first sketches

### 7.2.1 GAMEPLAY

The goal of the game is to surround larvae with honey to protect them from wasps. After a bit of testing, the first version of the game was made (Figure 46). This version also introduced power-ups which allow the player to use special abilities. After this first concept, the game went through multiple versions (Figure 48) and was tested numerous times by different people, where each version was tested at least once. The testing was done by letting four players play the game and observing how they played. After each playing session, the players were asked a few questions about what they thought was good and what could be improved. With this feedback, the new versions were created. For most test rounds, new players were used.

Within these versions, the game changed a lot. The first concept started simply with a few powerups that the players were able to use, as can be seen from Figure 48. This evolved into a whole tree with multiple routes (Figure 48, version 2). These routes made the game more complex and allowed for different strategies. In the final playtesting round of the game (Figure 47), the four players played four different strategies. They ended within a few points of each other, indicating that the game is diverse and balanced.

This bee-themed name is given the name 'Honey wall' because of the way the game works. In the game, you are trying to protect your larvae with a wall of honey, hence the name Honey Wall. The game rules can be found in appendix XI.

### 7.2.2 ITERATIONS

While making the game, the game went through multiple versions after getting feedback from players (Figure 48). The first version was rather simple, and after playtesting, it became clear it was too simple. To improve this, I looked at the upgrade system and how it could be more exciting. I got inspired by video games where you often have skill trees where you can choose to level different skills. In the second version of the game, this skill tree was introduced. With the skill tree, the game became more interesting and allowed players to place more honey. However, this posed the problem that the board was not big enough for all the honey to place. In the third version, this was solved by creating a bigger board. With this bigger board and skill tree, the game became too elaborate, and after tweaking this version, it was decided to reduce the board size again and reduce the number of rewards in the skill tree.

With some more tweaking and changes, such as adding extra dice or more flowers, the game became more and more balanced. This was done in versions four till seven. In the last version, version eight, an extra die was removed to make the game a bit easier. A new win condition was also added to speed up the game.

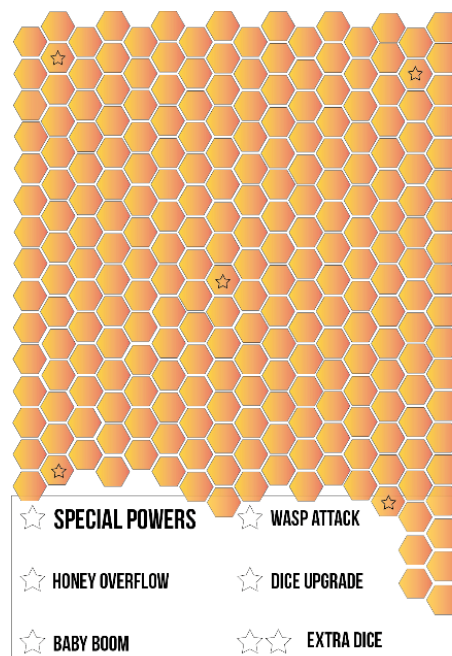


Figure 46 First design of the bee theme board game.



Figure 47 Testing the board game.



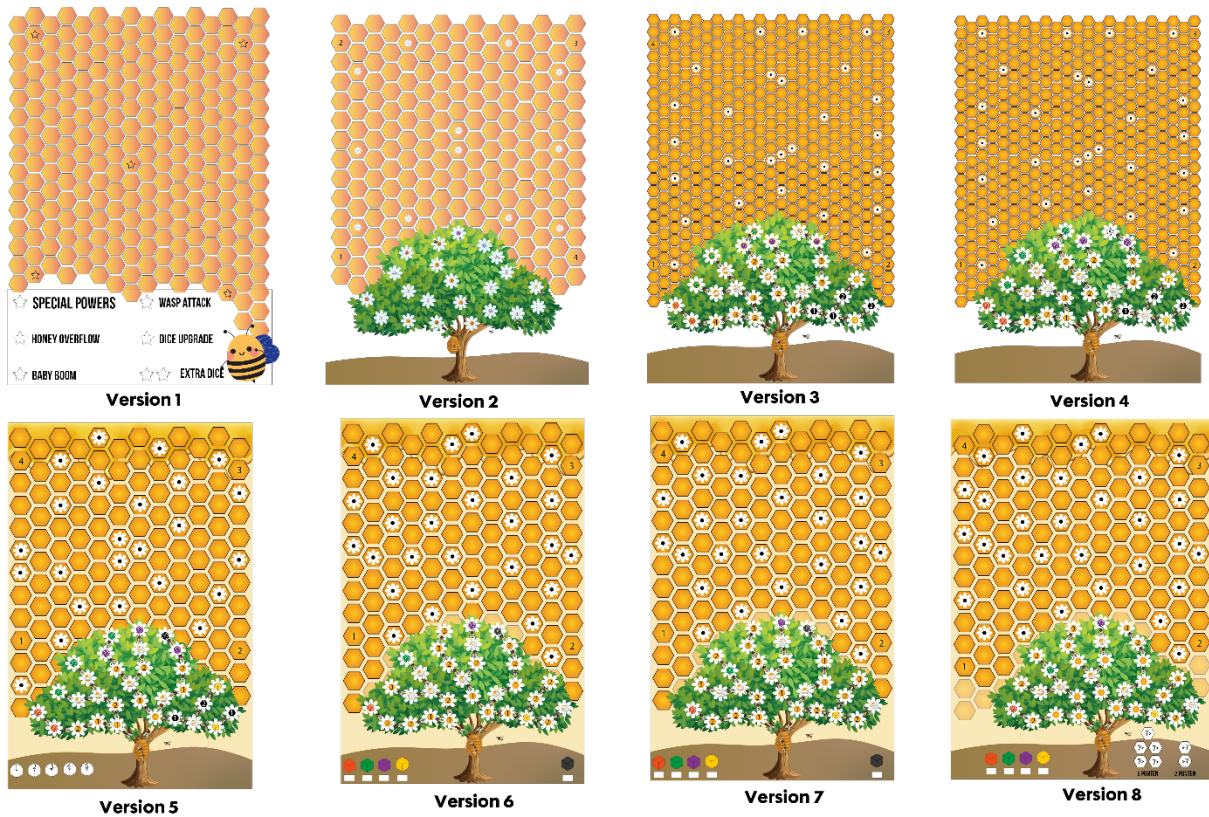


Figure 48 Evolution of the bee-themed roll and write game.

### 7.2.3 PHYSICAL GAME

For the game Honey wall, not only the concept was created but also the physical game itself. The front of the box (Figure 49) shows the game's name together with bees who are building a wall out of honey. The front also displays that the game is made with sustainable components, which is important to add to voice the sustainable message more clearly. The other components on the front are made to match the other games of Jolly Dutch with a logo in the right bottom corner, which is most common on their games. The information of the duration, amount of players and play age are also added on the side.

The backside of the packaging is similar to other Jolly Dutch games: it has the explanation of the game in multiple languages, contents of the game, how many players the game can be played with, the age recommendation, the estimated game time and some information about Jolly Dutch, and, finally, the logo. Besides the regular information on the backside, some information about sustainability is also added. This is to show the consumer that this game is different from other board games and that it pays attention to sustainability.

The dice of the game will be made from wood. The dice used in this prototype are wooden dice from other games which were picked up from a board game store in Delft who collected their leftover dice with no further use. The board is made of plasticized paper to reduce the waste of paper. The sustainable choices in this board game will be explained in chapter 7.3 Focus on sustainability.

The game, as it now is, with seven wooden dice and a plasticized board, will cost Jolly Dutch around €4,50 per game. This is low enough for them to sell the game at the expected price of €24,99. This means that even with all the sustainable components within this board game, the price of the board game can still be reachable.



Figure 49 The artwork of the front and back of the board game box.



## 7.3 Focus on sustainability

Sustainability is one of the main focuses of the roadmap and should be highlighted appropriately in the game. Using the bee theme already highlights this focus, but it can also be implemented by adding text about the current situation of bees to the introduction text of the game, which would lead to more awareness about the current situation surrounding bees.

Besides focussing on the aesthetic and informative properties of the board game, analyzing the materials used to make the board game more sustainable are also necessary. This is done with the help of a life cycle analysis (LCA) which was recommended in an interview with a sustainability expert (appendix IX). The information for the materials in the LCA used came from the programme Idemat 2017. The LCA focuses on four main points: the materials, transport, use of the game and disposal of the materials. Here, a sustainable option will be compared to a non-sustainable option of the game to see whether the sustainable options make a difference. All the results will be in kg CO<sub>2</sub> to understand the impact and make the results comparable.

### 7.3.1 NON-SUSTAINABLE GAME VERSION

The roll and write game Qwixx (Figure 50) will be used as a guideline for the calculations of the LCA to determine which materials could be used in the non-sustainable version of the game. The first part of determining the materials concerns the box, which is most often made from cardboard. Cardboard for board games is FSC approved wood, which is also the case for Qwixx. The paper for the manual is also FSC approved. The dice used in Qwixx are regular coloured dice made from PMMA. The dice are kept in a bag made from PVC. The last part is the player board which will be made of FSC approved paper. The size of the board in the new bee game will be approximately half the size of an A4. Qwixx contains 80 sheets of paper, each representing one 'board'. Following the direction of the roll and write Qwixx for the bee game, 80 sheets will also be chosen.



Figure 50 Qwixx with its components. Source: Bruna.nl

All these parts combined have a carbon footprint of around 1.31 kg CO<sub>2</sub>, with the board being the highest contributor with 0.95 kg CO<sub>2</sub>. The second highest contributor is the PMMA dice with 0.21 kg CO<sub>2</sub> (Figure 51).

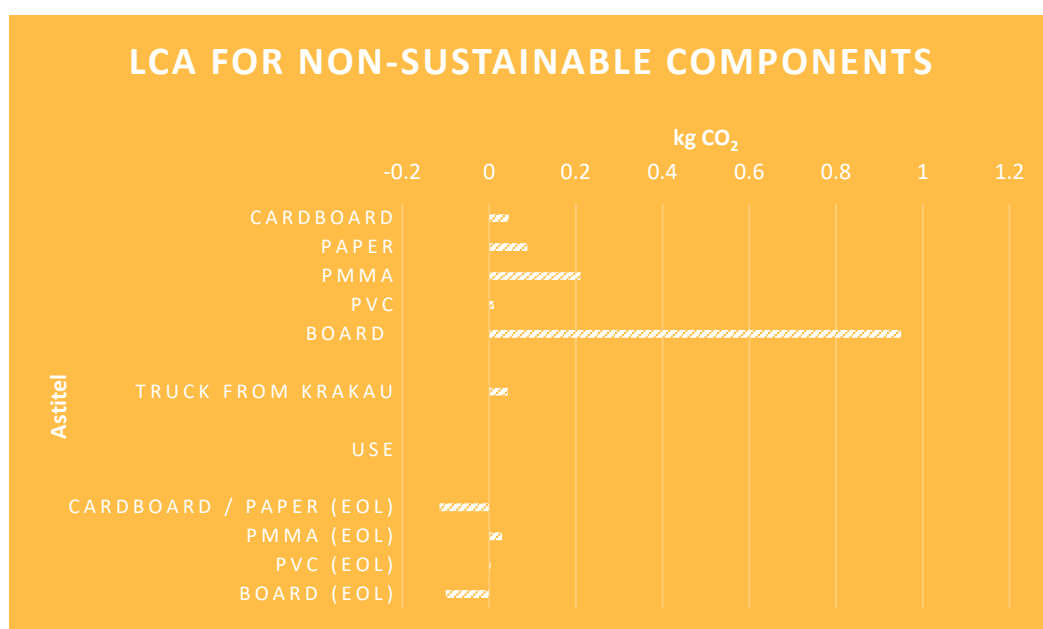


Figure 51 The LCA results for the non-sustainable components.

The second part of the LCA concerns transport. A calculation of the weight of the game and the distance the truck has to travel is made to analyze the transportation impact. For the weight, a similar size board game, Codenames, was chosen and used to determine the weight of the rulebook and the box. The weight of the dice was decided by weighing dice from Qwixx. And finally, the weight of the player board was determined by adding the weight of four Qwixx boards, as they are roughly one-fourth of the size of the Honey wall game. The distance the truck will travel is around 1252 km, from Krakau to Rotterdam. The carbon footprint of the transport is 0.044 Kg CO<sub>2</sub>.

Continuing, the use of the game does not increase the carbon footprint as no additional objects are needed to play this game.

Finally, the end of life gives a positive carbon-neutral footprint because of the amount of paper and cardboard within this product. Paper and cardboard have a positive carbon footprint when disposed of; hence the carbon footprint is -0.18 kg CO<sub>2</sub>.

From this LCA, the materials contribute the most to the higher carbon footprint. From these materials, paper for the game boards and dice contribute the most. The paper is problematic because of the weight, as 80 pieces of paper are the heaviest component within the game. The dice have a high impact because of their material. When looking at other games on the market, it can be seen that there are already solutions for these problems. Some games use wooden dice, which could decrease the amount of carbon produced. Other games use plasticized paper instead of just paper to make the boards reusable and so making up for the fact that it uses plastic. But how big of a difference do these changes make, if any at all?

### 7.3.2 SUSTAINABLE GAME VERSION

Figuring out whether wooden dice lower the carbon footprint compared to PMMA dice, the wood type needs to be known. To find out what type of wood competitors use, WGG was contacted. Their supplier was able to tell that the wooden dice used in WGG games are made of maple wood. Unfortunately, maple wood was not within the Idemat 2017; therefore, wood with the highest carbon impact was chosen, teak wood, to estimate the impact of wood in the 'worst-case scenario' when using wood.

The difference between FSC approved wood and natural forest is also compared. The results are visible in Table 8. The difference between the dice concerning their impact is relatively high. PMMA has the highest impact with 0.21 kg CO<sub>2</sub>, followed by natural forest with 0.055 kg CO<sub>2</sub> and FSC approved wood with 0.0032 kg CO<sub>2</sub>. The difference between these dice show the importance of using wooden dice, more specifically, the FSC approved wooden dice, even when using wood with the highest carbon impact of all the available ones.

**Table 8** The differences between PMMA, FSC approved wood, and natural forest wood concerning eco intensity (impact/kg), mass (kg), uncertainty (%), and calculated impact (kg CO<sub>2</sub>).

	PMMA	Pinewood (FSC)	Pinewood
<b>Eco intensity (Impacts/Kg)</b>	7.53	0.18	3.14
<b>Mass(Kg)</b>	0.028	0.021	0.021
<b>Uncertainty (%)</b>	10	30	30
<b>Calculated impact (Kg co<sub>2</sub>)</b>	0.21084	0.00315	0.05495

The same method is used for the difference in carbon footprint for the different boards, namely paper and plasticized paper (Table 9). However, for this comparison, the fact that plasticized paper can be used multiple times should also be considered. Here, the focus will be on how many paper boards have the same impact as one plasticized board.

Seven paper boards have the same impact as polypropylene (PP) used for one board, meaning that eight paper boards have the same impact as a paper board that is plasticized. This means that if players play the game more than eight times, plasticized boards are more sustainable.

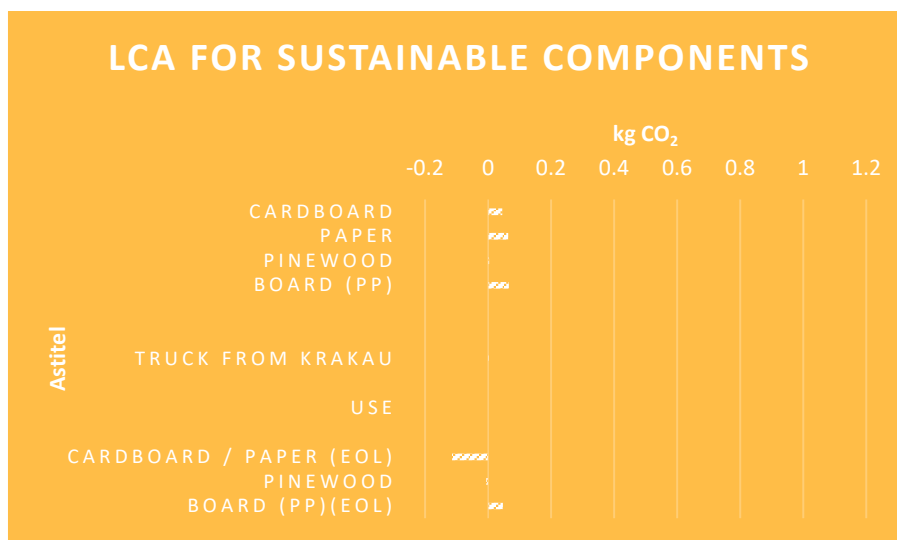
**Table 9** The values of paper and polypropylene (PP) concerning eco intensity (impact/kg), mass (kg), uncertainty (%), and calculated impact (kg CO<sub>2</sub>).

	Paper	PP
<b>Eco intensity (Impacts/Kg)</b>	0.95	1.82
<b>Mass(Kg)</b>	0.003	0.009
<b>Number of items</b>	7	1
<b>Calculated impact (Kg co<sub>2</sub>)</b>	0.016	0.016

The final two improvements for the board game are removing the plastic bag which contains the dice and the second improvement is concerning the transport. Currently, the products are being made in Poland, more specifically, Krakau. Because of this, the products have to travel relatively far and thus have a higher carbon footprint than when the products would come from a place more nearby. Even though this footprint is small compared to the materials, it could still be something for Jolly Dutch to improve on by switching to the Nederlandse Spellens Fabriek when they are able to.

### 7.3.3 COMPARISON

Figure 52 shows how much impact the four changes concerning the dice, paper versus plasticized paper, removing the plastic bag, and the transportation have on the board game. The total impact of the first unimproved, non-sustainable version is 1.17 kg CO<sub>2</sub>, while the impact of the improved, more sustainable version is 0.096 kg CO<sub>2</sub>.



**Figure 52** The LCA results for the sustainable components.

## 7.4 Conclusion

This chapter answers the final sub-question: **What type of board game would fit Jolly Dutch's new strategy?**

The main points of the new strategy are to increase Jolly Dutch's sustainable behaviour and improve the subscription service. Honey wall shows this sustainability by focussing on bees as a theme, which are essential for keeping biodiversity. Besides the sustainable theme, Honey wall will also include more sustainable materials, like wooden dice and a plasticized board. Honey wall also reduces the amount of plastic used by getting rid of plastic packaging and bags. The game also fits nicely into the subscription service since one of the roadmap's goals is to have more genres and let customers have more choices. With the addition of a roll and write game, Jolly Dutch can broaden their game genres and give customers more choice.

With all the sustainable components and the new genre, Honey wall shows how the strategy can be implemented into making new games for Jolly Dutch: by creating a sustainable game within a genre from which Jolly Dutch has no games yet.

## CHAPTER 8 DISCUSSION, CONCLUSION, AND REFLECTION

While almost nearing the end of this report, this chapter will cover the discussion, including the limitations and recommendations, followed by the conclusion and finally, the reflection.

### 8.1 LIMITATIONS

Within this report, some limitations influenced the results. The first limitation concerns the information available from the competitors of Jolly Dutch. As was mentioned in Chapter 2 Company and competitor analysis, the chosen competitors did not have their MVPs clearly available online. This could have caused the MVPs that were created not to be entirely accurate. While an effort was put into trying to contact the competitors for their MVPs, this was not successful. In the future, perhaps contacting an expert in the field of MVPs and preferably the board game industry could help analyse the MVPs better. Preselecting companies based on whether they have clear communications of their MVPs could also help.

Another limitation was the interviews that were done to see the potential of the roadmap. These interviews were only held at the end of the project. It could have been interesting to hear customers' input while creating the new strategy for Jolly Dutch and implementing this in the roadmap. This could have easily been improved by involving the customers early and keeping in touch to see their feedback.

The third limitation was the literature availability of academic sources concerning the board game industry. Different topics, such as the current trends for board games and market research into board game companies, were challenging to back up with academic sources. While more effort was put into contacting experts for information during the last part of this report, like for the sustainability part, it would have been helpful to have a more expert opinion since the start of this report.

The final limitation of this project was the playtesting of the board game Honey wall. Playtesting was done without a structured approach, which made it hard to implement the feedback efficiently. It was not done consistently with four players. There could have been made a difference between letting players read the manual and getting an explanation. This could have been prevented by using a structured approach with small interviews after the games with consistent variables.

Even with these limitations, though, the strategy found for Jolly Dutch looks to be a promising one. Jolly Dutch shows belief in the subscription service and the new game Honey wall, and also their attitude towards sustainability looks promising.

### 8.2 RECOMMENDATIONS

While implementing this new strategy, further research could be beneficial. During the interviews about the roadmap, the willingness to participate in the recycling service was discussed only with the last three participants. Asking further questions could help Jolly Dutch in perfecting the recycling service and thus the third horizon. Questions like: how many people want to hand in their used games for a small price? And how many people are willing to get a second-hand subscription? These questions could be implemented in future interviews with customers. This proposed research could be done the same way as done in this report with interviews. But questionnaires can also be used for this purpose as the answer is more important than its reasoning, looking purely from a business perspective. A questionnaire would also cost considerably fewer resources from Jolly Dutch.

Another recommendation would be to make connections with sustainable partners. Jolly Dutch is currently producing their games in Poland with a supplier that has multiple sustainable options. This partnership, however, still requires the board games to be shipped from Krakua to Jolly Dutch, which has a significant impact. If Jolly Dutch could find a sustainable partner closer to the Netherlands, this could reduce the impact even more. An added benefit from this is that it will make it easier to communicate and inspect the products.

While this report focused on expanding the board game genres of Jolly Dutch by creating a roll and write, this report also made it clear that Eurogames are an interesting genre. Jolly Dutch could try to make another Eurogame as their next new game while also researching other genres that are trending. This could help to expand Jolly Dutch's number of genres usable for their subscription service.

Another recommendation for Jolly Dutch is about keeping the roadmap up to date. Within the report, the roadmap was made as future proof as possible. However, it is not possible to see what will actually happen in the future. This makes it that the roadmap should be updated according to new information. If Jolly Dutch can keep the roadmap up to date, it could help them grow their company.

A final recommendation for Jolly Dutch is to review the board games they have already made and look for opportunities to make those games more sustainable. This report already provided some options for how a roll and write game can be more sustainable, but this could also work for Jolly Dutch's other game genres. It would be an exciting option to see Jolly Dutch make all of their existing games sustainable.

### 8.3 CONCLUSION

Within this report, all eight sub-questions are answered. The current strategy of Jolly Dutch was found in the company analysis. Jolly Dutch's current focus lies predominantly on their Dutch image but also on sustainability. Their current strategy is also where competitors pose a threat as they could compete with Jolly Dutch on the same parts of the board game industry, namely sustainability and Dutch image. This would cause problems for Jolly Dutch as they do not have the resources to compete on the same selling points. After the market research, two future visions came forward that suited the image of Jolly Dutch. These visions were the vision of sustainability and the subscription model. A roadmap was made to find out how to implement these visions into a strategy. The roadmap shows the actions that Jolly Dutch could take and points out the most important focus points. Finally, to help exemplify this strategy, a board game was made. This board game followed a design guide that resulted from the future visions and the previous conclusions in the different chapters.

The beginning of this report proposed the main research question:

#### **How can one create a future proof strategy for Jolly Dutch?**

With the help of the sub-questions, the main question can be answered. To answer the main research question, I will focus on four different aspects of the main question: how to create a strategy, what is this strategy, how does the strategy fit Jolly Dutch's company, and how is the strategy future proof?

- First, the focus will be on how to create a strategy. Research needs to be done about Jolly Dutch and the market to get a complete picture. This will result in a SWOT, which gives search areas. These search areas are transformed into future visions, and eventually, these lead to a new strategy for Jolly Dutch.
- The created strategy consists of two components: the subscription service and sustainability. Jolly Dutch could bring more attention to their sustainable image and promote this more while increasing their efforts to be sustainable. Besides the sustainable image, Jolly Dutch also released a subscription service that can be improved and tested to increase customers and quality. Eventually, Jolly Dutch will be able to offer customers a recycling service for their used board games.
- Jolly Dutch's current focus is on their Dutch image, sustainable image, and, more recently, the subscription model. The strategy made in this report puts the focus on two of these aspects while also keeping in mind the Dutch image. These two aspects are further strengthened by the strengths and even weaknesses of Jolly Dutch.
- Finally, the strategy should be future-proof. This strategy aims to be future-proof by implementing trends such as sustainability which will still be important in the coming five years and implementing

strategies such as the new subscription service, which you can keep upgrading as time goes by according to new trends.

With the newly created strategy focusing on sustainability and the subscription service, Jolly Dutch could significantly change the board game industry. Jolly Dutch could set an example for other board game companies by being one of the first to focus on sustainable games and implement this in a subscription service. Jolly Dutch can also help customers making a sustainable choice while keeping it fun and exciting with their subscription service. The board game Honey wall is an example of how this strategy can be implemented. Honey wall is a new genre board game for Jolly Dutch, which helps in giving customers more choice. Honey wall also shows how a board game can be made sustainable by adjusting just a few game components. This game shows how Jolly Dutch can implement the roadmap into their new games in an accessible way.

## 8.4 REFLECTION

As a final extra chapter, I will look back on this report and analyze the growth I have been through, the problems I encountered, and the improvements.

During this project, multiple reflections were made to reflect on what went wrong and what could have been improved. In this final reflection, the whole project will be reflected on, which will be done using the older reflections and my final thoughts.

Before starting this project, I already knew that a few aspects of the project would be challenging. First of all, I find it hard to work alone on a project. This is because I am alone responsible for keeping myself accountable for all the work. This brings multiple problems, the first being that I usually am too nice to myself when it comes to working a lot. Secondly, I am not good at all the aspects of a project. This is not perse a significant problem since no one is good at everything. However, I try to avoid the tasks I am bad at, so I usually procrastinate. Another challenging part of this project was planning and academic writing. These are two things that I always outsource to other team members and typically do not do well myself. However, I was fully responsible for both in this graduation project, which gave me some stress and problems accordingly. As expected, all these problems came up during my graduation project: I had trouble motivating myself during this project, I procrastinated the more complicated parts, which gave me other problems, I did not follow my planning as I would have liked to, and my academic writing was criticized multiple times. However, I am at the end of the project, and even though I had these problems, I improved and overcame them. I did this as follows:

The first problem that I encountered in the project was my academic writing. During the project brief, my coaches immediately criticized my writing style and encouraged me to improve this. During this project, I feel like my writing skills have improved immensely. This was also great because of Grammarly, which helps me improve my writing and learn from my mistakes. Another problem that occurred relatively early in the project was planning. In the project brief, you have to include the planning of the project. Of course, it is hard to prepare a detailed planner at the start of the project; however, the planner was not followed well by myself. One of the big problems I have with planning is that I always get behind. This is caused by me making daily tasks, and if I give myself to few tasks, I will finish my day when I am done. However, if I give myself too many tasks, I stop when the workday is over. To improve this during the project, I have made more weekly planners in which I do not know if I am finished for a day. This led me to follow my plans better during the later stages of the project.

The third problem I faced was procrastination of the parts I found hard. This procrastination started very early as the research part of a project is usually the part I find the hardest. However, with frequent meetings with my coaches during this project, I helped myself keep the project on track.

Besides the problems I anticipated at the start of the project, there were also some unexpected problems. Two of these problems caused me the most effort to overcome. The first of those is confidence in my work.



I find it very hard to be proud of my work. And even while writing this reflection, I still find it hard to be proud of the final result of this project. During this project, I learned to be more proud of the work that I do. However, I find myself still doubting during the more critical moments, such as the presentations.

Another unexpected problem is about finding the motivation to work, which made me unproductive. To come out of this unproductive working situation, I adopted the Pomodoro method. With this method of working 25 minutes and then taking a five-minute break, I was able to break this unproductive behaviour.

### **Final thoughts**

During this project, multiple problems occurred, which made it more difficult for me to finish my project. However, I learned a lot during this project and could get myself back on track on multiple occasions. Overall, I am impressed by the improvements I made. During this project, I went from handing in mediocre pieces to more well-argued and solid pieces. I found a way to be proud of my work, and I also finally learned to follow my planning better.

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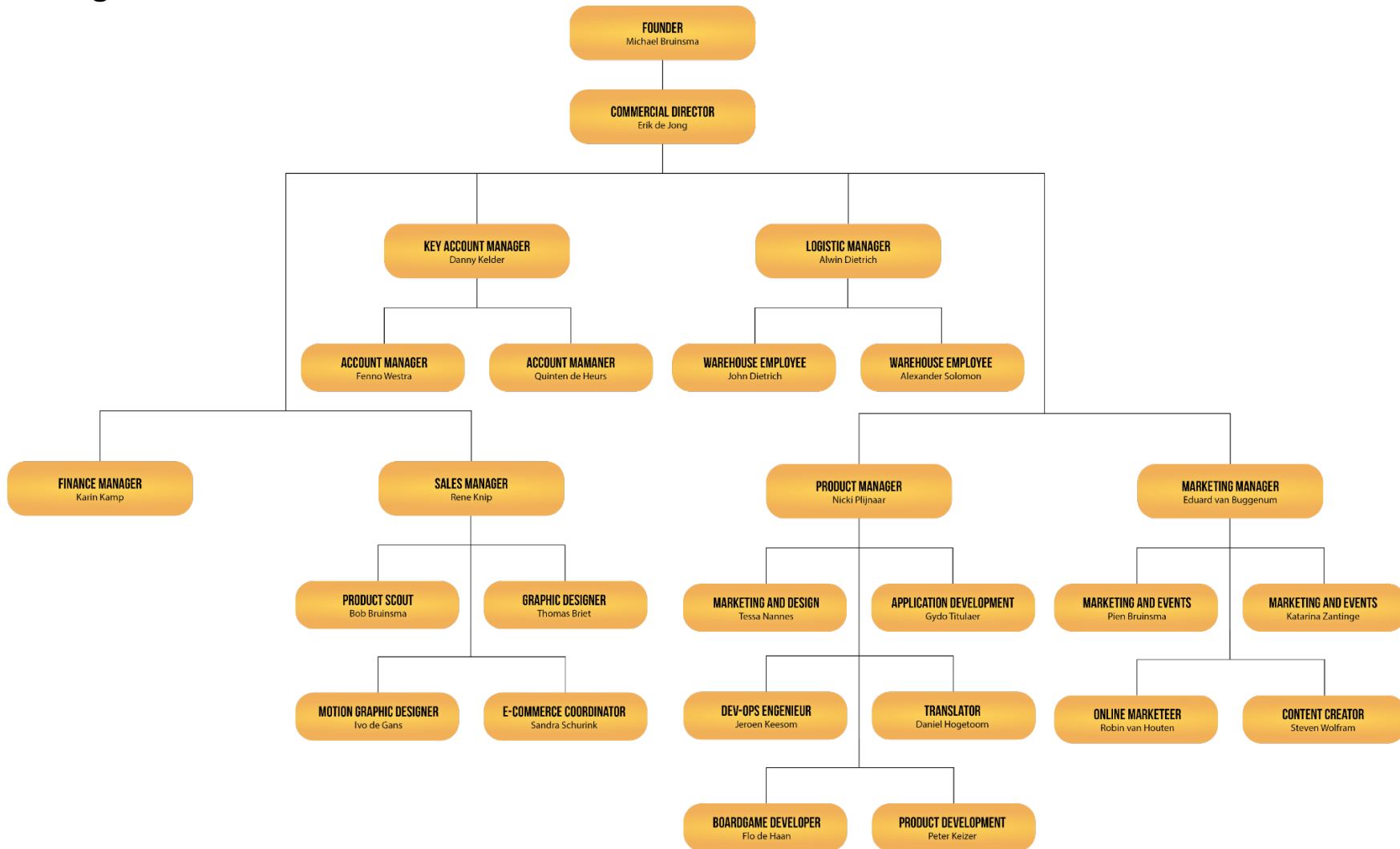
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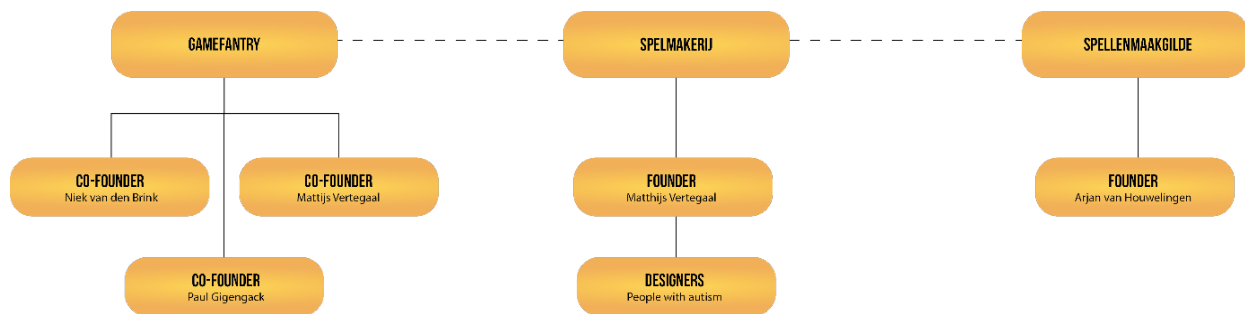


# APPENDIX

## I – Organizational structure of 999 Games



## II – Organizational structure of The Gamefantry



## III – One way ANOVA for age vs game genres

### Descriptives

		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
RollAndWalk	Tussen de 16-25 jaar	8	1.75	.463	.164	1.36	2.14	1	2
	Tussen de 26-40 jaar	25	1.08	.277	.055	.97	1.19	1	2
	Boven de 40 jaar	28	1.21	.418	.079	1.05	1.38	1	2
	Total	61	1.23	.424	.054	1.12	1.34	1	2
SocialDeduction	Tussen de 16-25 jaar	8	1.88	.354	.125	1.58	2.17	1	2
	Tussen de 26-40 jaar	25	1.32	.476	.095	1.12	1.52	1	2
	Boven de 40 jaar	28	1.36	.488	.092	1.17	1.55	1	2
	Total	61	1.41	.496	.063	1.28	1.54	1	2
EuroGames	Tussen de 16-25 jaar	8	1.38	.518	.183	.94	1.81	1	2
	Tussen de 26-40 jaar	25	1.80	.408	.082	1.63	1.97	1	2
	Boven de 40 jaar	28	1.93	.262	.050	1.83	2.03	1	2
	Total	61	1.80	.401	.051	1.70	1.91	1	2
CardGames	Tussen de 16-25 jaar	8	1.88	.354	.125	1.58	2.17	1	2
	Tussen de 26-40 jaar	25	1.56	.507	.101	1.35	1.77	1	2
	Boven de 40 jaar	28	1.54	.508	.096	1.34	1.73	1	2
	Total	61	1.59	.496	.063	1.46	1.72	1	2

### ANOVA

		Sum of Squares	df	Mean Square	F	Sig.
RollAndWalk	Between Groups	2.733	2	1.366	9.839	.000
	Within Groups	8.054	58	.139		
	Total	10.787	60			
SocialDeduction	Between Groups	2.011	2	1.005	4.575	.014
	Within Groups	12.744	58	.220		
	Total	14.754	60			
EuroGames	Between Groups	1.907	2	.954	7.153	.002
	Within Groups	7.732	58	.133		
	Total	9.639	60			
CardGames	Between Groups	.755	2	.377	1.564	.218
	Within Groups	13.999	58	.241		
	Total	14.754	60			



## IV – One-way ANOVA for money spend vs game genres

**Descriptives**

		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
RollAndWalk	Tussen de 100 en 200 euro	20	1.15	.366	.082	.98	1.32	1	2
	Tussen de 200 en 500 euro	16	1.13	.342	.085	.94	1.31	1	2
	Minder dan 100 euro	11	1.64	.505	.152	1.30	1.98	1	2
	Meer dan 500 euro	14	1.14	.363	.097	.93	1.35	1	2
	Total	61	1.23	.424	.054	1.12	1.34	1	2
Luck	Tussen de 100 en 200 euro	20	1.45	.510	.114	1.21	1.69	1	2
	Tussen de 200 en 500 euro	16	1.19	.403	.101	.97	1.40	1	2
	Minder dan 100 euro	11	1.73	.467	.141	1.41	2.04	1	2
	Meer dan 500 euro	14	1.79	.426	.114	1.54	2.03	1	2
	Total	61	1.51	.504	.065	1.38	1.64	1	2
EuroGames	Tussen de 100 en 200 euro	20	1.90	.308	.069	1.76	2.04	1	2
	Tussen de 200 en 500 euro	16	1.81	.403	.101	1.60	2.03	1	2
	Minder dan 100 euro	11	1.45	.522	.157	1.10	1.81	1	2
	Meer dan 500 euro	14	1.93	.267	.071	1.77	2.08	1	2
	Total	61	1.80	.401	.051	1.70	1.91	1	2

**ANOVA**

		Sum of Squares	df	Mean Square	F	Sig.
RollAndWalk	Between Groups	2.227	3	.742	4.944	.004
	Within Groups	8.560	57	.150		
	Total	10.787	60			
Luck	Between Groups	3.319	3	1.106	5.288	.003
	Within Groups	11.926	57	.209		
	Total	15.246	60			
EuroGames	Between Groups	1.746	3	.582	4.203	.009
	Within Groups	7.893	57	.138		
	Total	9.639	60			

## V – Interviews

### Interview Arnold van Binsbergen

#### **What is your most important asset?**

The most important asset is their mission: Give people a fun game night with a good and fun game

#### **Which unique resources do you have access to?**

Creativity from Alexander, Designer from another company and the international network that Alexander has

#### **What is your competitive advantage and is this future proof?**

No layers in the company and no overhead, they have a quick process  
They have a favor factor as a small company that makes family games

#### **What is your USP?**

Mission focussed with a good product

#### **Do you have exclusive contacts with suppliers or distributors?**

No

#### **What are the best qualities of the marketing team?**

Good story about the company, challenge here is to make it practical especially for social media

#### **Are there possibilities to gain extra capital?**

They have a network of investors if necessary

#### **Do you have a strong customer base?**

Yes, they have a big fan base through Kickstarter with 2400 mails. BtoB they have 20-25 stores that take their products

#### **Do you know what customers like about you?**

Down to earth people, they work exclusively with Dutch producers

#### **What expertise do you lack?**

they have too little personnel, marketing and sales are slow because of this

#### **In what areas are our competitors better than you are?**

North American network  
big network and a lot of employees

#### **Is there one customer carrying our entire company?**

There is a big customer for one game(chartered). They take about 25% of the products (van der Garde distributiecentrum)

#### **How much debt does the company have?**

loan on terms to increase cash flow

#### **What complaints do you hear from your customers?**

small errors but mostly stuff like printed wrong

#### **Are you understaffed?**

Yes they want a lot more employees. Preferable one for finances, sales, marketing and game design

#### **Do you have any cash flow problems?**

No

#### **Are our profit margins lower than our competitors'?**

With the older games they have this is the case, but with the newer games it is about the same

#### **What trends might positively affect your industry?**

There is a bigger demand for board games, board game conventions were, before corona, growing a lot.

Old school is becoming cool again  
Of Course the Corona which boosted sales of board games and mostly 2 player games

#### **Is there a need in the industry that you are not meeting, but could?**

They are currently not in North america which could offer chances.

#### **Can you package your products/services differently and set a higher price?**

Workshops on how to make games

Yearly Jolly Dutch day  
Chartered championship

**Do your competitors have any weaknesses that you could take advantage of?**

Fast decisions in the company, being quicker then the competitors

**Is your target market changing in a way that could help?**

There is more attention for board games  
A new economical crisis might be coming and the last one was not bad for board games  
Two player games are still a small segment

**Is there a niche market that you are not currently targeting?**

Business to business  
More versions of the games they now own like Monopoly does.

**Do your customers ever ask for something that you don't offer, but could offer?**

combinations of games all sold together with a little discount

**Could you steal your competitors' customers by offering something they don't?**

Making unique games with business to business games

**Is there anyone who's not currently a direct competitor, but could become one soon?**

Gamefantry  
Jumbo  
Game Brewer

**What happens if a manufacturer or supplier runs out of materials you need?**

They could go to another manufacturer but are not sure

**Are your competitors planning on expanding or offering new products soon?**

Jumbo will be expanding on more adult board games soon  
Quined started a new Kickstarter

**Is your target marketing shrinking?**

No its not shrinking only growing

## Interview with Flo de Haan

### ▲ At which things do you pay extra attention when making board games?

there are two ways to make board games: 1. like an artist with a vision in mind make a specific board game or 2. with a strategy in mind mostly for companies.

Germany likes more plastic in their games and spend a little bit more

America doesn't care if the game is good if it looks good, they like detailed board game pieces and want more luck in their board games

Netherlands like bigger board games, unlike asia we have big tables to play it on

Things to pay attention to when making board games

who are you making the board game for

for which location are you making the board game

for which market are you making the board game

### How does 999 games work with making board games?

The started selling games from other markets they just bought licenses

They started with games such as magic the gathering, pokemon and catan

Now because of the internet people are buying more from the internet and also from other countries this makes it harder for 999 to keep the original system alive by buying licences. This is why 999 games are now designing their own games. Also why they hired Flo

### Which market do you see as promising?

Germany has people that play a lot more board games when they are young. This makes them more eager to play difficult games. Compare this to Netherlands they play a lot more family games in the Netherlands

Germany is ahead on all the other markets by around ten years.

Asia has a lot of themes that can be a mismatch with the european market

Korea however has some big opportunities Males are playing more games, around 90% of conventions is male. This is changing for example Wingspan was made by women

### Which trends do you currently see in the board game world?

More games for women

Roll and writes are popular at the moment escape rooms

cooperative games in which an alfa player cannot dominate the game

legacy games ( games that create their own special rules through the game)

Containers are getting scars in China which is increasing the shipping prices

### What is the difference between the different markets in what kind of board games they play?

Europe: they play bigger games that are easy to step in and made for the family

America: They play more games based on war ( they are proud of their wars) They also want better miniatures for their games ( more detailed) No abstract games and the difficulty matters less of the game looks good

Asia: Smaller games that have more themes related to Asia. the games are more abstract and more with cards

## Interview Erwin Broens

### What is your role in the board game world?

At the moment he provides people with news and reviews about the board game world. Social media however reduces the amount of attention he gets.

How long have you been in the board

### game world and what has been your goal?

He played a big role in Ducosim a board game convention. He saw the rise of 999 Games. At the end of the nineties Ravensburger and Jumbo joined the board game world.

### Are there current changes in the market that influenced it greatly recently?

Covid-19 came around this caused a lot of other forms of entertainment to decrease and thus allowing board games to become more popular.

Even the year that 999 had when pokemon was a big success was this year surpassed because of Covid-19. All 999 products sell incredibly well at the moment.

Puzzles are a huge hit even bigger than board games. This causes the factories to be full with orders. This causes most orders to have a delay.

### Which markets do you focus on?

He started to focus on the German market. He also tried to bring new German games to the Netherlands through Ducosim.

German market is more advanced, people grow up with more board games and can play more complicated games as a result. The culture is also more about expert board games.

Now the focus is predominantly on the Dutch market. It's hard to stand out in the market nowadays because of the amount of games that are being published (thousands).

### Which are the important attributes of the Dutch market?

The Dutch market is very diverse. It has a few big players that make most of the games.

The other players on the market are a combination of smaller publishers.

In the Dutch market there are a lot of titles that come from other markets. Such as the German and the American market.

Dutch board game culture is becoming more like the German culture, a bigger number of expert players.

There are also more and more webshops from publishers. This is a problem for specialty stores.

### How much potential do you see in Jolly Dutch?

A lot of potential. They have a keen eye for other designers. Together with their own ideas this creates possibilities.

Usually small publishers are not so on point with communicating to journalists. Jolly Dutch however is doing a great job with their communication to journalists. Jolly Dutch is very professional in the relationships they have.

### Do you have any tips for the making of new board games?

The Dutch market is quite full. There are a lot of games at the moment compared to demand (before Covid-19).

It is important to start with a passion for board games

It is important to be clear in what you deliver



## Interview Ruud Hermesen

### ▲ What kind of production processes are you able to do?

Everything related to printing and sometimes also small plastic miniatures

### How flexible are you in making specific products?

The more complicated the more fun, They see complicated products as a challenge. Also special requests in China are easier to make because of the low labor costs.

### Do you also make other products besides board games?

Yes puzzles and card games

### Do you plan to expand your production processes?

Because of the culture it is hard to say. However they were trying to buy another factory which also makes plastic miniatures so if they succeed in that they will expand more into miniatures.

What is your margin?

about 15-30 percent of the production costs

### Which developments are there in your discipline?

Legacy games are becoming more popular

legacy games are games in which you add stuff to the board or the rules to make it personalised and for everyone different.

### Are there questions that you are now suddenly getting?

Requests to have some footage for on social media

### Did Corona have a big influence on your business?

Positive: exploding market means more customers

Negative: you cannot visit clients so even though there are more clients it's still really hard to close a deal

### Which markets do you focus on?

NA, Europe. Germany and France are harder markets

### Which market is the most interesting at the moment?

Biggest market is NA with Germany on number two and France on the third place

In NA card games and dice games are very big because of kickstarter Roll and write especially America is six months ahead on the trends

America also has a lot of war games while Europe has more strategic games

In Na the games are becoming less individualistic and there are more eurogames look out brought eurogames to NA

### Do you also give advice to the client?

yes but mostly related to the production

### Are there any cultural differences that influence work?

yes and no, because the HQ is in hong kong its quite western but its still China so impactfuller stuff like Chinese new year still has an influence

### What are the advantages of China?

it's about 20-50% cheaper

A lot of flexibility

### What are the disadvantages of China?

Delivery time is long 5-6 weeks

Delivery costs are high because of the current situation (containers)

Communication can sometimes go wrong

## Interview Kim Hoetjes

### ▲ Which change in buying behaviour do you see in customers with Covid-19?

more two player games are being sold  
Way less party games are being sold  
Trends include: Escape rooms, Roll and write and Legacy games

### Which current trends do you notice?

Well known games are becoming hugely popular  
new games are not being sold  
Companies are switching to production in Europe  
Retailers are selling more  
Games are not available

### Which trends do you expect to see in the future?

She expects the market to take a big hit after Covid-19 is solved

### Which kind of games sell well?

Cheap games under ten euros sell incredibly well

Do you have a big amount of new customers or do you have the same customers as usual?  
Usually a lot of returning customers but because of corona also a lot of new customers

### How do you choose the games that you put in your store?

Dependent on brand. They sell everything from 999 Games and WGG  
Smaller companies games usually depend on if they like to play the games or not and if it adds something new to the assortment.

### Do you have any comments for Jolly Dutch?

Easy going  
They have a professional attitude and do not push their games like some other publishers do.

### Do you have any tips for making board games?

What does not sell is: complex games for a high price  
Good games to look at are el dorado and Quacks of Quedlinburg because they are easy to learn and are not too expensive  
You should not have too many actions a turn

so no eurogame style games. Keep it to 2-3 actions per turn  
Replay value is not that interesting for novice players.  
The holy grail would be a board game around 20 euros easy to learn easy to play and for 2-6 players  
Themes that have no games yet are gift themes such as weddings or graduations



## Interview Sarah Beusen

### **Which change in buying behaviour do you see in customers with Covid-19?**

Physical stores are closing  
More total sales  
Their company is growing faster than normal  
Classical games are doing very well  
Rise in educational games with closing schools

### **Which current trends do you notice?**

Roll and write  
Container shortage  
Brexit makes games from the UK take longer  
publisher are careful with new games  
Puzzles are booming  
Increase in expert games  
More games are being translated  
Not so many Dutch role playing games  
Escape rooms  
Legacy games  
Co-op games  
Living card games  
Everything from HP or LOTR  
Not many legacy familie games

### **Which trends do you expect to see in the future?**

Game quality will increase  
After Covid-19 increase in sales as a lot of people are now not buying as they cannot play with anyone

### **What is the average amount of money people spend?**

On average 25 euros  
Games that cost more than 40 euros are hard to sell  
Games that cost around ten euros sell way easier than the expensive games

### **Do you have a big amount of new customers or do you have the same customers as usual?**

It's about the same  
But compared with normal we have more new customers

### **How do you choose the games that you put in your store?**

They choose games that they expect to do good  
They take all the games from 999 and WGG

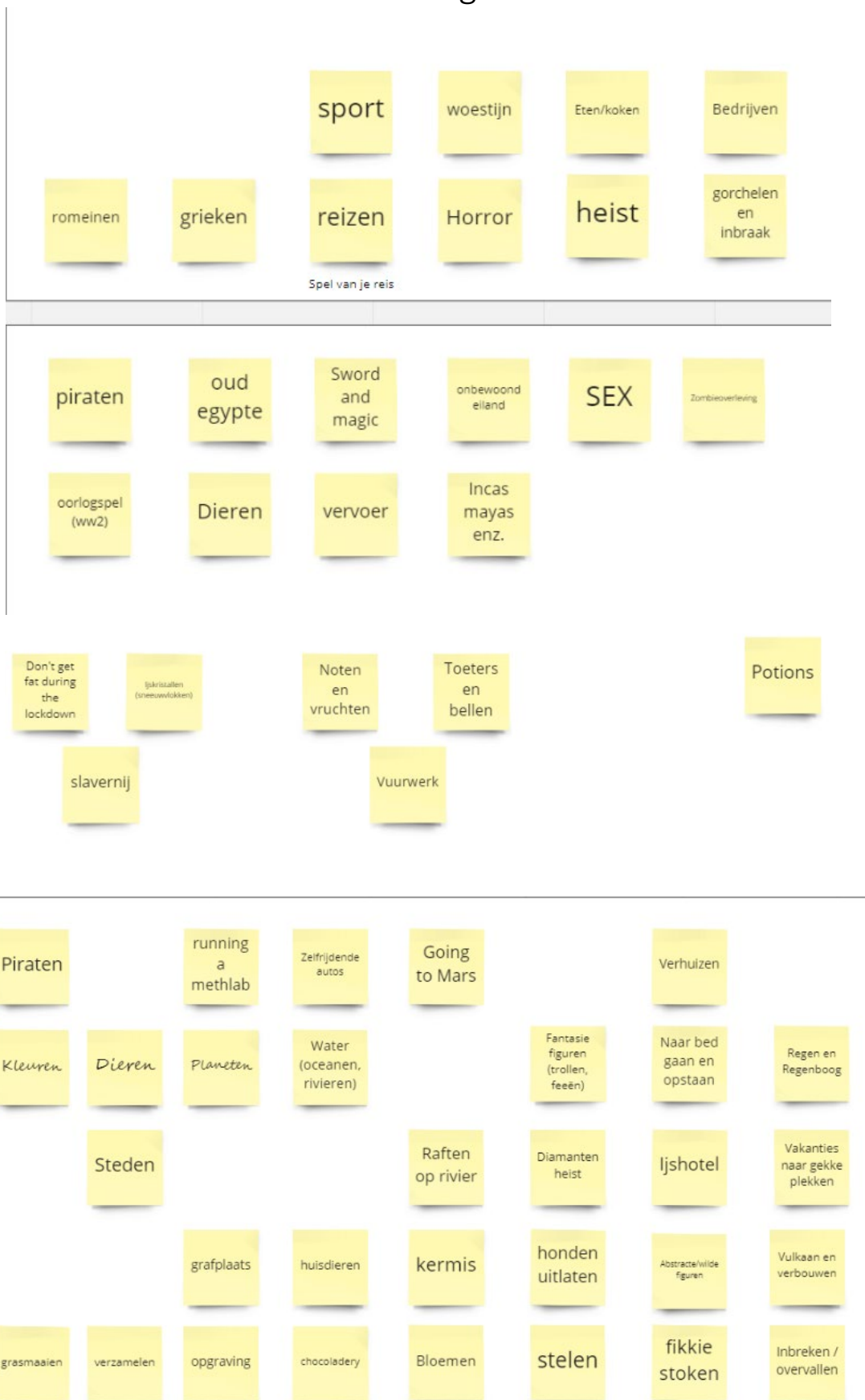
but from smaller publishers they only take what they like

They like games between 25-40 euros that are easy to play and easy to learn. Which are suitable for ages 10 plus and 2-4 people.

### **Do you have any tips for making board games?**

Have shop owners as a test group so they know what the game is and they can give feedback and start to love it  
Be very clear about what the game is on the box  
don't save money on the artwork  
News articles can boost your sales significantly

## VI – Brainstorm session for board game themes



Kinderopvoeding

- Diefstal
- Verhaaltjes verzinnen
- Kleding aantrekken
- Kinder modeshows
- Teenmom drama
- speeltuon ontwerpen
- Klas managen

computers

- Computer zelf in elkaar zetten
- Computer hacken
- Computer opstarten
- Computer virus vrijmaken
- Oudjes computers uitleggen

boeken

- Reisboekenschrijven en dan ervaring opdoen
- Onderzoeker zijn
- bibliotheek bouwen
- Boek samenstellen

Plantenverzameling

- planten verzameling maken
- Amazone herplanten
- speciale plant creeren
- Planten identificeren
- Planten verzorgen

Zelf een plant/ boom ben

Dobbelstenen:	opschrijven	Omgevingfactoren
Takken / bladeren / wortels erbij zon		
Gevaarlijk weer	Levensmeter	
Groeien	'groei'	type boom
Zonlicht/water	punten Besjes/bloemen /vruchten	seizoenen

speeltuon ontwerpen

Dobbelstenen:	opschrijven
Kinderen Bouwelementen	Welk kind komt spelen Welke speeltoestellen je bouwt
Ouders Bouwelementen	Welk kind komt spelen Welke speeltoestellen je bouwt
euros Bouwelementen	Welke speeltoestellen je bouwt
Rollecoaster tycoon achtig met betalen voor attracties en per ronde komen er verschillende aantal mensen	

Gezamenlijke dobbelstenen en individuele dobbelstenen



## VII - Interview questions for potential customers

1. How old are you?
2. How often do you play board games a month?
3. Are you familiar with the games of Jolly Dutch?
4. With whom do you play these board games?
5. Which board game genres do you play/enjoy the most?
6. How big is your board game collection?
7. Do you still play all the board games from the collection regularly? and why?
8. Do you think board games are sustainable?
9. Are you currently subscribed to a service and if yes to which?
10. Why are you subscribed to these services?
11. Are there services that you used to have but canceled? and why?
12. Which requirements need a good subscription service?
13. Do you feel the need to change your current subscription?
14. Are there currently any improvements that you would like with your current subscriptions?
15. If Netflix had the possibility to upgrade to more films and series for a small extra monthly fee, would you be willing to do this?

*Explains the concept of a board game subscription*

16. Would you be interested in a board game subscription service as I mentioned or not?
17. How much influence would you want on the games you would receive?

### *Explains the upgrade system*

18. would you be interested in the upgrading service of the board games?
19. what could be possible improvements on this service?
20. How do you think this service is connected to sustainability?
21. How would you use this service?

Explains the trading system (only with interview 4,5 and 6)

22. would you be interested in this recycling service and why?
23. Would you also be prepared to receive second hand games?

## VIII - Answers of interviews with potential customers

First participant: Ingeborg

1. 46 years old
2. It changes a bit per month but usually around 5-10 times a month.
3. No I don't know the games of Jolly Dutch
4. I usually play board games with my friends or with my family. I have two children ages 14 and 15.
5. I enjoy strategic games the most. Some of my favorite games are Pixie, Creen, Bonfire, Brugge and Hoogspanning
6. My collection contains around 100 games.
7. We try to play all the boardgames in the collection. Old games are being played and she does not have any games that are not being played.
8. Yes because they are very durable. Board games can be used a lot of times and are almost never thrown away.
9. Netflix, Boardgame arena
10. Because its easy to use and fun to use with frineds. Its also a bit of pressure to join the others and easy to keep the kids entertained.
11. No
12. They should constantly try to add new things but keep the things that are already good.
13. No
14. More shows and more choices
15. Depends on the kind of content I would be able to get.
16. Depends on the games they offer, if they only have cardgames and I just get the same games each month but slightly different I am not interested but if they are different it could be interesting.
17. She would like a lot of influence on the choice but still keep it a bit a surprise.
18. Yes she likes the idea of the service, however the sending parts back is too difficult and therefore she would not use this service.
19. Make it so customers don't have to send the games back multiple times.
20. I don think this system is very sustainable as the transportation is not, however the recycling part is something that feels more sustainable
21. For myself together with friends

Second participant: Patricia

1. 42 years
2. At minimum 20 times a month

3. She has one game from Jolly Dutch, Herrlof
4. It changes, sometimes with her children which are 8 and 10 or sometimes with her neighbour.
5. Eurogames, and dice rolling in Eurogames, Deckbuilding
6. Somewhere between 100 and 150 games
7. No, definitely not all games are being played, some games are just not fun or have been played too often already
8. Yes and with new boardgames she feels its getting even better
9. Netflix, Bol, Amazon
10. It makes things easier
11. No
12. Price versus quality should be goo, they should also have good communication when something goes wrong
13. No, I am happy with the current subscriptions
14. No
15. No, there is already more than enough on Netflix for my children to watch
16. No I would be too dependent on Jolly Dutch, and it feel too much like just buying games for the sake of it
17. She would like to have a lot of choice as she is very critical on games
18. No, there is no value, its way too complicated with sending it back multiple times
19. Would like to see more games than only games from Jolly Dutch
20. It feels less sustainable because of the transportation with sending packages back and forth
21. Giving it as a gift but not using it herself

Third participant: Jolanda

1. 27
2. Around four to eight times
3. No
4. With her friend and his friends
5. Co-op games, Storytelling games
6. Around 20-30 games
7. It depends, but new games are usually played way more than the old ones
8. Not really as there is a lot of plastic
9. Netflix, Spotify, Crunchyroll, Book choice
10. Boyfrined chose them
11. Not really
12. It should work, have new content and new seasons of the things she likes
13. Sometimes they take a look at other subscribtions to compare
14. No
15. No most series that I watcxh are on Netflix already
16. Yes, I would be interested in trying it out
17. Ic na have both positive as negativce sides, as more choice makes it more likely to get better games but it also feels less like a surprise. When I strat I would like to have more influence thought
18. I am not sure, I often look forward to expansions but upgrading sounds different
19. Low costs, good communication and flexible with the upgrades
20. Sending games back and fortsh does not feel sustainable, Jolly Dutch could try to collaborate with board game stores to hand in games there but still it would not feel sustainable.
21. I would try it myself but I would also consider it as a gift

Fourth participant: Bert

1. 48
2. Around 10-15 times per month, also 3 times a week at office
3. No, it doesn't sound familiar
4. Partner, children and coworkers
5. A little bit of everything, Roll and writes, Eurogames and legacy games. I do not like Strategy and war games
6. Around 150
7. Around thirty games I have not even played and old games are often pushed to the back of the closet
8. Games with plastic not so much, but games with mostly cardboard feel sustainable
9. Netflix, Apple plus, Apple music, Board game aren
10. I wanted to see multiple shows on Netflix and I am a Apple fan
11. Good price, knowing that what you get is worth the money and stability
12. I used to have Table top mania but I stopped the subscription because it was too expensive
13. I would like to pay less for Netflix to only get shows, Apple is expensive so I would like to pay on basis of use
14. See last question
15. No there are already enough shows
16. I would be interested but it would greatly depend on the kind of games they have.
17. I would like a lot of controle over the choice, I would also like to see multiple brands not only Jolly Dutch. It is important that there is enough choice and that there are games that I like within this choice
18. No would not be interested, If I am done with games I do not want to play them anymore
19. The price is on the low side, I would like to have bigger games. I would also not mind giving the games back for a small amount of money
20. Sending items back is not that sustainable
21. I would use this service for myself and possibly as present if I like it myself.
22. I would be interested in the recycling service if I get a small amount of money back
23. I would also not mind using second hand games

Fifth participant: Derk

1. 25
2. Four times a month
3. No
4. With a friend group of around 8 players and with my partner
5. All kinds of games, but not long games. I mostly like trick games
6. Six games
7. I don't play them all often, it doesn't fit in my day anymore
8. Yes I think so they are very durable
9. Netflix, spotify, discovery plus, twitch, gmail, hellofresh
10. A subscription is easy and nowadays sometimes even a necessity
11. No
12. Better than the other options, a fair price, but I don't often look at comeditors
13. I am currently happy, so I don't feel the need to change
14. No I am currently happy
15. Yes to join the hype
16. Would do it if the games are fun. It feels good if other people make choices for you so you don't have to choose to much yourself.



17. I would like to choose from three genres and price ranges and then see what Jolly Dutch sends me
18. This service is more difficult with sending things back. If I had to choose between a new game and an upgraded one I would choose a new game
19. Just get all the upgrades without sending things back
20. I expect it to be less sustainable
21. I would give it as a present
22. I would use this service if I get some money back. They could even send me some discount for future games
23. I would also be interested in the second hand service, I don't mind getting second hand products if the state is good

Sixth participant: Rebecca

1. 26
2. Three times a month
3. No
4. With friends
5. Card based games, but I have no clear favorite
6. Nine games
7. No I usually don't feel like playing them and computer games have priority
8. No plastic parts don't feel sustainable, however cardboard is not that bad for the environment
9. Netflix, Disney plus, Spotify, Eurosport and Bol
10. For easy use, It started because it was easier for me and because I felt guilty if I pirated it
11. Yes I had a panty subscription, It was great and had good panties, however at a certain point I had enough panties and cancelled the subscription. I also had a lingery subscription but that was too expensive. I also stopped Hello Fresh because the need was not there anymore
12. The products they offer should be what I want, it should be reachable if I need them to be, reliable, easy to use, up to date, easy to cancel and it should have a pause button
13. Yes, when the service becomes obsolete or too expensive
14. I would like to have the breakfast boxes from Hello Fresh with less waste and I would also like to buy them in bulk at the start of the month. I would also like Netflix to be able to request shows on Netflix
15. Yes I would use that for a small amount of money more
16. I would not use this service for myself but would use it as a present
17. I would like to know which games were already in the service previously and an option to return. This kind of influence
18. The service sounds nice but why can I not just get all the upgrades? I don't understand that part
19. An overview where you can easily see which games you can upgrade and which not
20. It can be very sustainable if the parts are well recycled by Jolly Dutch
21. I would be interested as a small amount of money back feels good
22. I would probably also be interested in second hand games, but I would not get the subscription so hard to say

## IX - Interview with sustainability expert

Before the interview, I first explained my project and the reason why this interview was held. To explore more options for Jolly Dutch and find out how calculations can be made on sustainability.

- 1. Jolly Dutch Has a CO<sub>2</sub> neutral game and uses materials such as recycled paper, but how much does this actually influence the impact on the environment? Is this also the right way to approach these problems, or is there another better approach?**

A Fast Track LCA is a great way to find out the difference between certain materials. This LCA is also a good way to see which part of the board game has the most impact. This also includes transport, use and end of life.

- 2. With the new strategy, customers have to send the game back one more time. Is this worth it if you look at it from a sustainable point of view?**

An LCA is again the best option to find answers to these specific questions

- 3. How can I create an accurate LCA for a product from Jolly Dutch? And how can I see the different impacts of different materials?**

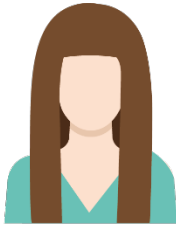
To answer this question, she showed me an Excel sheet that had the tools to easily compare materials and find the impact of different materials as raw materials and at the end of life.

- 4. How do I find out which materials are a good replacement other than just trying materials out?**

You can look at different other competitors and google for specific materials; there are no other methods to find answers to these questions

After these questions and answers, I had a whole explanation on how to use the LCA tool and which tips and tricks could help me get the results I needed

## X – Results interviews with potential customers



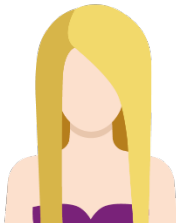
Ingeborg

Ingeborg is 46 years old and plays board games twice a week with her family and neighbor. She likes strategic games and her collection is already over 100 games big. At the moment, she has a subscription on Netflix and Board Game Arena. A subscription for boardgames sounds like something she would be open to, as she like to explore more games and thinks this could be a good way. However she does want different kind of games each time and influence what these games are. **"I dont want an underpants service in which you get the same underpants each month, but in a different color"**. The upgrade service sounds too complex with sending games back. Printing the games or just getting extra components would be better for her.

Patricia is 42 years old and plays board games almost every day. She plays boardgames with her kids, her husband, the neighbors and friends. She loves to play Eurogames and roll and writes. Her boardgame collection has around 125 games and a few of those dont get played anymore. She is currently subscribed to Netflix, Bol and Amazon. She would not be interested in the board game subscription as she already has a big collection, so games are being chosen with care, and she is afraid the games would end up not being played. A quote from Patricia describes this feeling **"the subscription feels to much like buying just to buy"**. Patricia find the upgrade service too complex, with sending things back, renting games or something similar would be more interesting for her. Even though she does not see potential in the subscription for herself, she would be interested in using it as a gift.

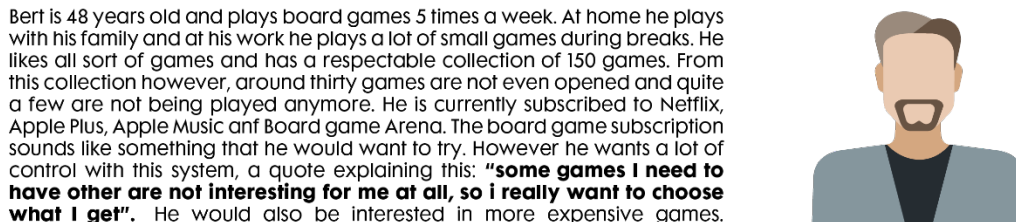


Patricia



Jolanda

Jolanda is 27 year old and plays board games once a week, with her friend and his friends. She likes to play co-op games and has a collection of 25 games. She is currently subscribed to Netflix, Spotify, Crunchyroll and Book choice. She is very interested in the concept of a board game subscription to try and see if she would like it. If she subscribes to a board game subscription she want to have control over what she chooses **"the ability to choose which game you gete, especially in the beginning would I think help a lot of people to join this service"**. The upgrade service sounds less interesting to her as she would rather buy expansions. The subscription service would be interesting for herself but also to give it as a present if she likes it.



Bert

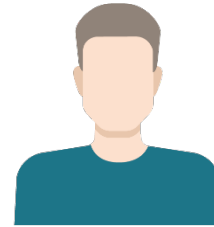
Bert is 48 years old and plays board games 5 times a week. At home he plays with his family and at his work he plays a lot of small games during breaks. He likes all sort of games and has a respectable collection of 150 games. From this collection however, around thirty games are not even opened and quite a few are not being played anymore. He is currently subscribed to Netflix, Apple Plus, Apple Music and Board game Arena. The board game subscription sounds like something that he would want to try. However he wants a lot of control with this system, a quote explaining this: **"some games I need to have other are not interesting for me at all, so i really want to choose what I get"**. He would also be interested in more expensive games. Upgrade system is not something that he is interested in, however he would be interested in sending the games back after use for a portion of the price.



Rebecca

Rebecca is 26 years old and play boardgame around 3 times per month. She plays boardgames mostly with friends and loves card based games the most. Her collection consists of nine board games, however she does not play all the games anymore because of videogames or movies. Rebecca is subscribed to six services including Netflix and Disney plus. One of the major reasons she has subscriptions is for convenience but also for the fear of missing out. Previously, she ended subscriptions because she didn't use the products anymore, other services were stopped because of the price being too high. The board game subscription model is not something she would use for herself but as a present she sees potential **"if I have the idea that someone plays a lot of boardgames I would give them one or two months as a present to let them try it"**. The upgrade mechanic sounds good but she doesn't want to send back items and keep it all. The idea of sending games back for a small price is something she likes as the game will get used even after she is done with it.

Derk is 25 years old and plays boardgames once a week. He usually plays board games with the same group of friends at a friend's house. A lot of games suit him well but he likes trick games the most. His collection is relatively small and consists of only six games. Even though his collection is small, not all games are played anymore. Derk is currently subscribed to six services which include Netflix and Spotify, the reason for these subscriptions is predominantly because it's easy and convenient. He is currently happy with the services and doesn't look at competitors as long as the services are delivering. A board game subscription would interest him and in the interview he explains this with an example of HelloFresh **"There is a limited choice, with always something nice to choose from, which is way easier than having to choose in the supermarket"**. He is not interested in the upgrading model as it's too much effort. He would rather have the option of sending back products that he is not using anymore.



Derk

## XI - Game rules

The Dutch bees need your help! Their living area is becoming smaller and smaller, with pesticides, diseases and now even wasps! They need your help now more than ever. Luckily the bees found a smart and simple way to keep the wasps from stealing their larvae. They can surround them with a wall of honey. This makes sure those sneaky wasps cannot steal the bees larvae.

Do you also want to help the bees in the Netherlands, you can read more on [www.Bijenstichting.nl](http://www.Bijenstichting.nl)

### Material

7 Dice  
4 Playing boards  
1 Rulebook

### Game overview

This dice game is a game in which players try to score points by surrounding their larvae with honey. To gain honey and larvae, players roll dice in their turn. But be careful because your neighbours can steal your larvae with wasps, which makes them score your larvae.

### Preparations

Each player receives a player board and a marker. The first player is the one who most recently planted a flower to help the bees. After deciding the first player, the starting positions are decided. Player one will get spot 1, player two will get spot 2, etc. For playing the game, it is recommended to colour the hexagons fully for honey and draw a circle within the hexagon to represent larvae.

### Playing the game

The turn of a player contains four phases. Throwing dice, placing resources, steal larvae with wasps and resolve flowers.

#### 1. *Throwing the dice*

Each player will start the game with three blue dice. If other colours are unlocked, a player can choose to swap a blue dice for a coloured one. A player will always throw three dice.

Once the dice have been thrown, the player gets one reroll. With this reroll, the player can decide how much dice the reroll. It is not required to reroll.

#### 2. *placing honey and larvae*

After throwing the dice, a player should have a certain amount of honey and larvae. The player is allowed to place this starting at the starting point. All honey and larvae must be placed adjacent to either honey or larvae that are already on the board. The restriction for honey is that it must be placed adjacent to at least one larvae.

#### 3. *Wasps*

The goal of wasps in this game is to steal larvae from your opponents and, in turn, steal their points. Wasps can steal a single larva from an opponent of your choice if that larva is not yet surrounded by honey. This larva will be scored by the player who stole it.

4. *Flowers*

If you find yourself placing a larva or honey on a flower during your turn, you can use this to get an upgrade in the tree. All upgrades can be placed after the dice results have been resolved. With the skills in the tree, you can place more larvae or honey or you can unlock a new colour dice to give you an advantage in the following turns.

**The end of the game**

The game ends in two scenarios:

1. one player has two areas with seven or more larvae surrounded by honey.
2. one player has five or more areas with less than seven larvae surrounded by honey.

**Score**

Surrounded larvae are the way to score points. A bigger group of larvae is worth more points than a smaller group (Table 1). Larvae in groups bigger than seven do not give extra points. Stolen larvae are worth as much as the other larvae in a group so if a player has a group of 5 larvae from which two are stolen. He will get  $3 \times 8 = 24$  points, while the one who stole the larvae will get  $2 \times 8 = 16$  points.

1 larva	4 points per larva
2 larvae	5 point sper larva
3 larvae	6 points per larva
4 larvae	7 points per larva
5 larvae	8 points per larva
6 larvae	9 points per larva
7 larvae	10 points per larva

Tabel 1 points per larva