

STATE OF THE WAR

A LOOK AT THE CURRENT STATE OF THE WARHAMMER 40K COMMUNITY

IN THE GRIM DARK PRESENT – SPRING 2016 – WE CONDUCTED A SURVEY
TO LEARN ABOUT THE CURRENT 40K COMMUNITY.
IT SPREAD OVER SOCIAL MEDIA AND OVER A THOUSAND PLAYERS RESPONDED.

1027 total responses in 4 days

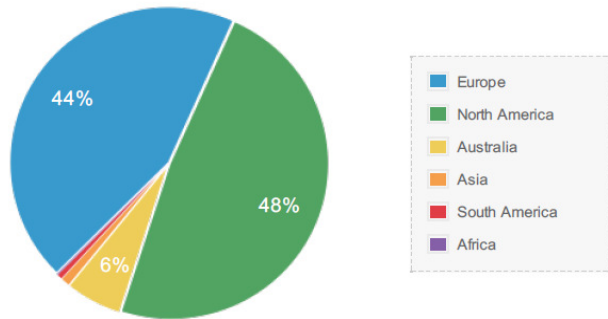
Re-posts via Facebook and Twitter

Thank you to everyone that participated

Special thanks to everyone who reposted!

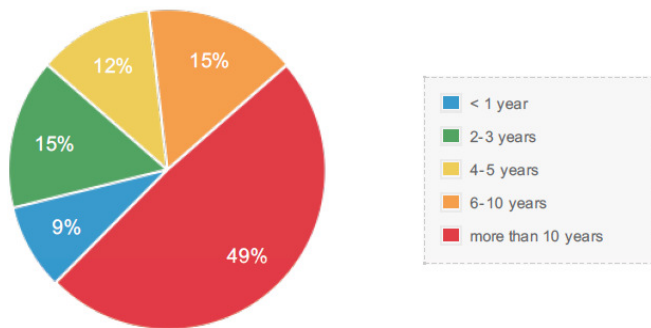
Where are you located?

Answered: 1027 Skipped: 0



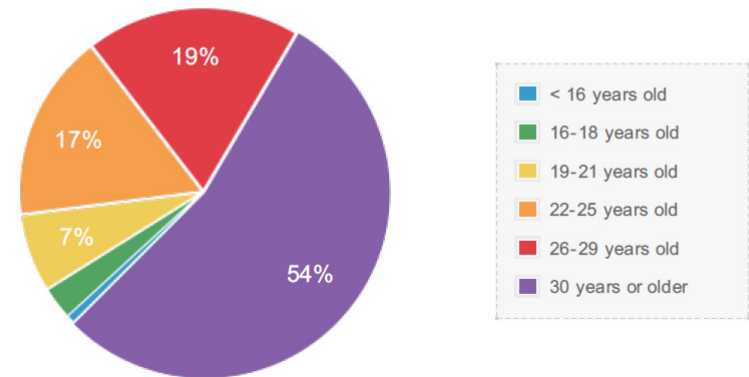
Approximately how long have you been playing Warhammer 40k?

Answered: 1027 Skipped: 0

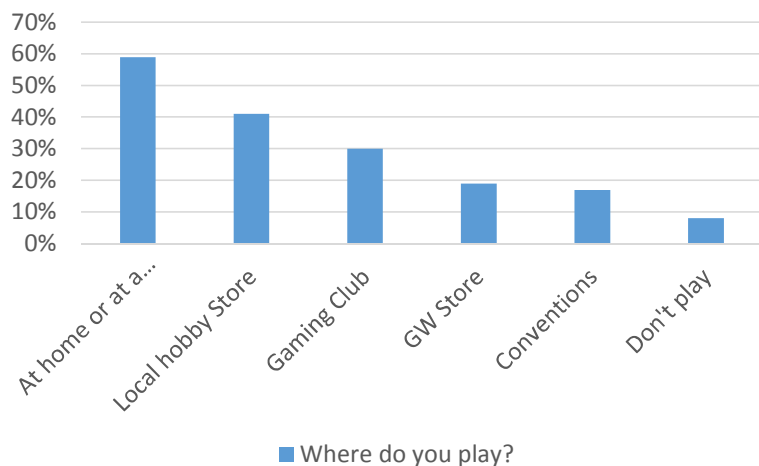


Approx how old are you?

Answered: 1027 Skipped: 0



Where do you play?



What introduced you to the game?

Half of players were introduced to the game through Friends or Family

Local hobby stores was in 2nd place

- Mostly players that have been playing for 5 years or more

Games-workshop stores were in 3rd place

- Has been slowly growing at about 1% per age group

40k video games was in 4th place

- Mostly players that have been playing 5 years or less

The rate at which Local hobby stores have been getting players into the game has declined at a rate of 5% per age group, videogames have been increasing at the same rate. 😞

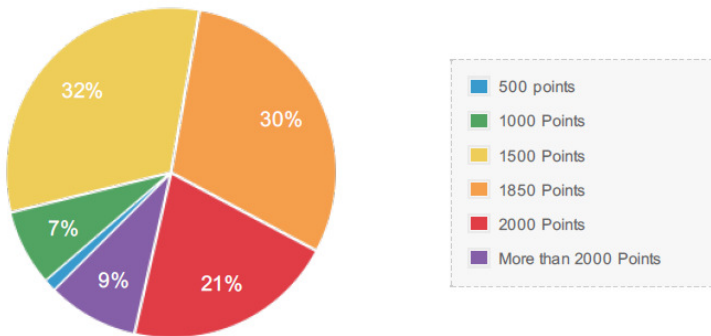
How often do you play?

Advertising was responsible for 5% of players getting into the game, but ZERO players with less than 5 years experience.

	Response Percent	Response Count
Very Frequently (more than once per month)	35.83%	368
Frequently (once per month)	24.34%	250
Infrequently (Several times per year)	22.88%	235
Very Infrequently (once per year or less)	6.23%	64
I used to play but no longer	7.98%	82
Have never played, I'm only interested in modelling and painting	2.73%	28

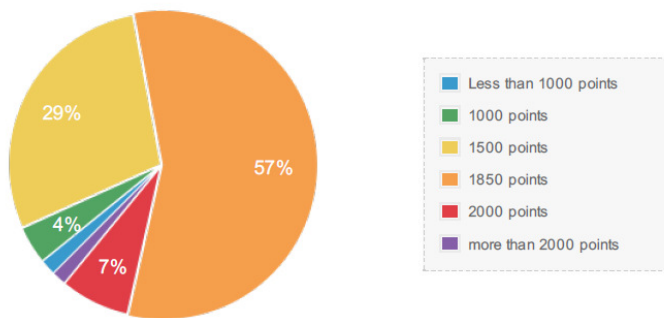
What is your preferred point value for games? (as close as possible)

Answered: 951 Skipped: 76



What is the standard point value for tournaments in your area? (Pick the closest)

Answered: 715 Skipped: 312



Using comparative stats:

1850 is the preferred tournament point value

1500 is the preferred casual point value

1500 is much more popular in Europe

1850 is much more popular in North America

1500 points is preferred by older players with 10+ years experience

1850 is preferred by players with 5-10 years experience

1000 points is by far preferred by players < 1 year experience (likely because they don't have a big army yet!)

97% responded to keep the points system in 40k and not follow the example of Age of Sigmar.

Spending Habits

How much do you expect to spend in a calendar year?

The average is between \$250 and \$500 in a year

The older you are the more money you spend on 40k in a year average spending over 30 is \$500-\$1000 in a year.

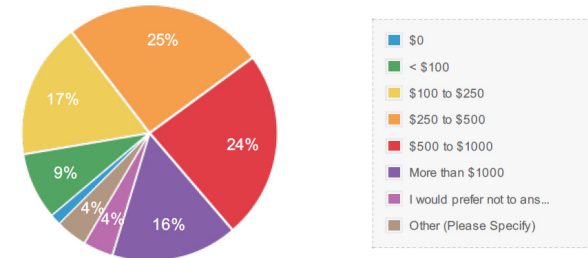
The youngest players spend the least by far

There is an interesting dip between age 26-30 in spending. Players in that age range spend much less than before or after. Likely because this is the age where players start careers and start raising families so they have less disposable income. But they come back with a vengeance after 30.

Spending habits are evenly split between occasional single kits, frequent smaller purchases and occasional binges. Making this question almost statistically irrelevant.

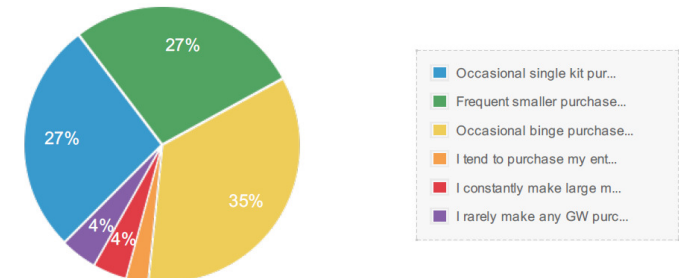
Approximately how much money do you expect to spend on GW related products within a calendar year? (local currency)

Answered: 976 Skipped: 51



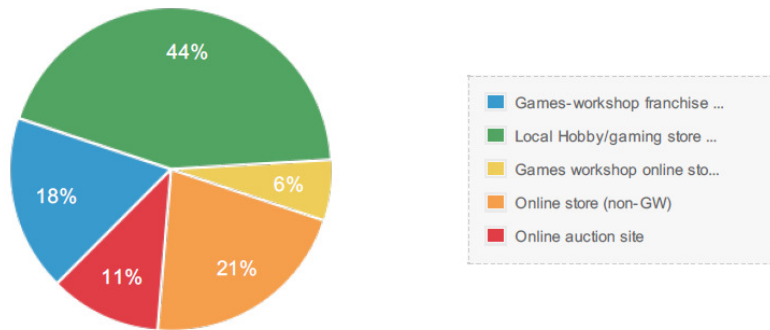
How would you best describe your GW spending habits?

Answered: 976 Skipped: 51



Where are you most likely to purchase a GW product?

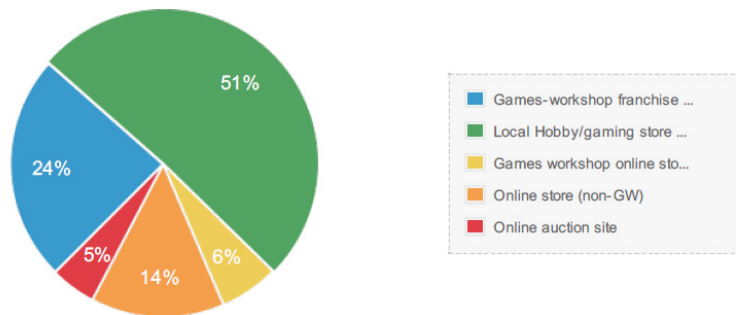
Answered: 976 Skipped: 51



Local Hobby stores are by far the preferred place to get your 40k fix. But interestingly almost half of players that regularly purchase online from auction sites, online stores and other online methods admit they would prefer to purchase from their local stores.

Where would you prefer to make the majority of GW related purchases?

Answered: 976 Skipped: 51



The likely explanation is cost savings from buying individual bitz, used models, recasts and bulk purchasing discounts have pushed players to the online market, because if the issue was that local stores can't keep product in stock, players would be purchasing from the GW online store instead of 3rd parties.

	Response Percent	Response Count
Space Marines (Codex chapters and variants)	51.21%	487
Eldar	21.14%	201
Imperial Guard	34.91%	332
Chaos Space Marines	32.91%	313
Chaos Daemons	21.35%	203
Dark Eldar	15.25%	145
Orks	24.5%	233
Tau	24.29%	231
Tyranids	21.66%	206
Necrons	18.82%	179
Sister of Battle	9.15%	87

	Response Percent	Response Count
Cult Mechanicus + Skitarii	17.35%	165
Harlequins	9.88%	94
Imperial Knights	18.4%	175
Inquisition	15.67%	149
Grey Knights	17.35%	165
Khorne Daemonkin	10.3%	98
Dark Angels	17.46%	166
Blood Angels	15.77%	150
Space Wolves	17.03%	162

Armies

If we were to divide the armies into tiers of popularity

Tier 1 (> 50%): Space Marines

Tier 2 (24-49%): Imperial Guard, Chaos Space Marines, Orks, Tau

Tier 3 (10-23%): Eldar, Tyranids, Chaos Daemons, Dark Eldar, Necrons, Sister of Battle, Ad Mech, Khorne Daemonkin, Blood Angels, Dark Angels, Space Wolves, Grey Knights

Tier 4 (< 10%): Harlequins, Imperial Knights, Inquisition

50% of players state they have a Space Marine army, not including Blood Angels, Dark Angels, Grey Knights, and Space Wolves.

Added together the percentage is > 100%, but this doesn't account for players having multiple Space Marine armies...

If you include Blood Angels, Space Wolves and Dark Angels with Space Marines 33% of players stated that Space Marines is their primary army.

General Stats + 3rd party rules

91% state that they have played a 40k related video game

There is a 50/50 split on players who use 3rd party parts in armies.

By far most of the players who use 3rd party parts have more than 10 years' experience in the game.

The most popular answers for non-GW hobby tools was glue, hobby knives and clippers.

64% of players admitted to using non-GW paint, but that doesn't necessarily mean that they use non-GW paint exclusively.

Brushes and Green stuff were the most popular write ins

Which phrase more closely matches your opinion about 3rd party model companies making products compatible with Warhammer 40k?

	Response Percent	Response Count
Warhammer 40k is a complete game, there is no need for 3rd party miniatures	6.87%	64
3rd party miniature companies generally make lower quality, but cheaper alternatives to GW miniatures	10.74%	100
They make an interesting niche product that can add a variety of parts to existing GW kits	66.38%	618
3rd party model companies make a superior product to GW	3.44%	32
I have no opinion, would prefer not to say	6.77%	63

Forgeworld

91% of players stated that their gaming groups allow Forgeworld rules

Other GW Games

Warhammer Fantasy was the most popular non-40k GW game among 40k players at 50%.

Mordheim, Bloodbowl, Necromunda and Battlefleet Gothic are all within 27-32%

Interestingly *every single one of these games is out of print.*

Age of Sigmar has 21%, and is by far played by players with < 5 years experience in 40k.

LOTR and related games are several magnitudes more popular in Europe than in North America.

Space Hulk was by far the most popular write in game (it was excluded from the list by accident!)

Non-GW games

62% of players stated that they regularly play non-GW tabletop games

56% of those players stated "GW makes superior models but has inferior rules" and 26% responded "they are about the same"

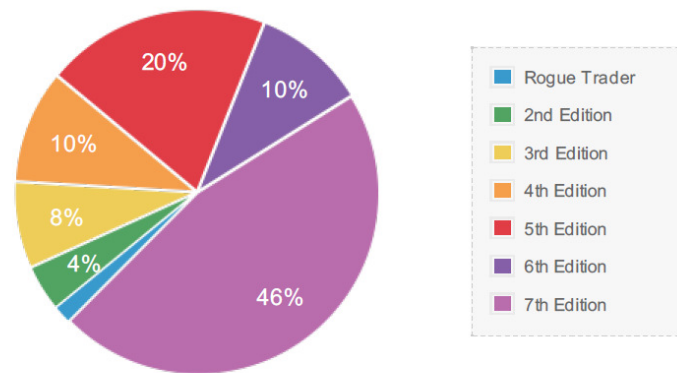
There is about a 50/50 split between players who started playing 40k first or another tabletop game

42% learned about non-GW games from friends or members of the community (Almost the same percentage that stated that friends got them into 40k in the first place)

About 30% learned about non-GW tabletop games from a local hobby store.

What do you consider to have been the best rules system for Warhammer 40k?

Answered: 871 Skipped: 156



Best Rule System

7th edition is very well regarded by all age groups and experience levels!

5th edition is in second place. A very close second in fact, when you exclude the votes of players with less 4 years' experience (Most of those players wouldn't have played in 5th edition!)

3rd and 4th are well regarded by the older players, more so than Rogue trader or 2nd edition.

6th edition got very little love comparatively...

Fortifications are well regarded by players overall. Allies and Unbound are generally well accepted as being a good addition to the game but prone to abuse. Players were most vocal about banning unbound at 32%

Word Games

The most popular words used to describe 40k were:

Expensive (59%)
Fun (59%)
Entertaining (58%)

followed by

Creative (39%)
Overpriced (37%)
Quality (34%)

The least used words were

Cheap (.22%)
Unoriginal (.44%)
Old (1.09%)
Dull (1.2%)

The most popular words used to describe GW were:

Expensive (53%)
Frustrating (47%)
Profit (43%)

Followed by

Secretive (36%)
Quality (36%)
Ignorant (33%)

The least used words were

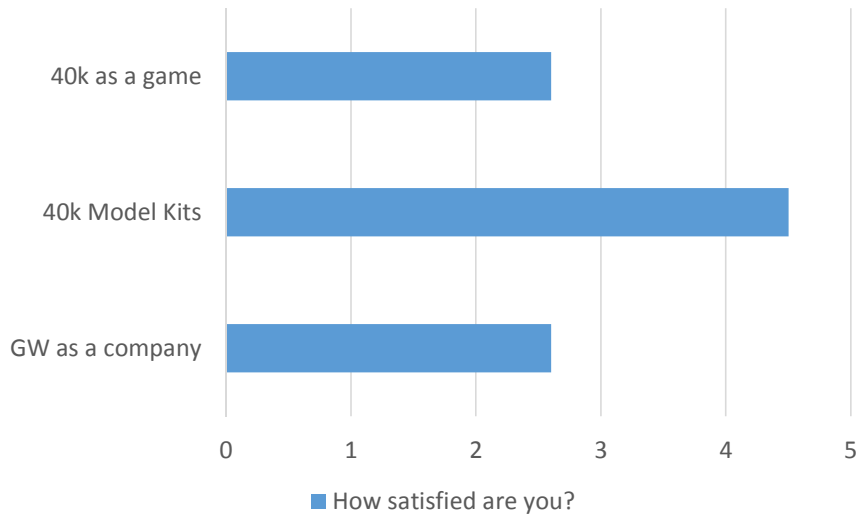
Boring (1%)
Listens (1.6%)
Cooperative (3%)
Unoriginal (3%)

This is a test designed to test player's subconscious feelings about a certain subject.

Generally speaking players consider 40k to be a Fun, Creative, High Quality and entertaining game but quite expensive.

Players consider GW to be a company that produces a quality product but doesn't communicate adequately with its customers and is seen as being more interested in making a profit than anything else.

How satisfied are you with?



Players felt the current pace of releases is just right, leaning towards slightly too fast.

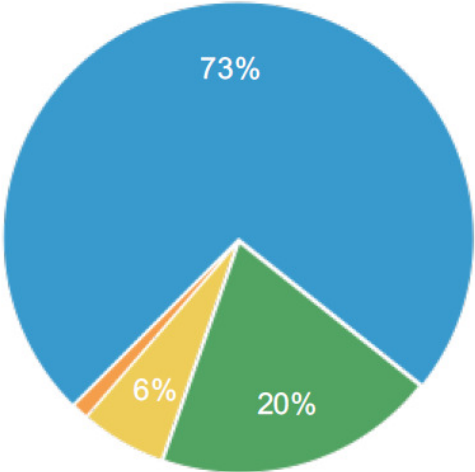
How would you rate Games Workshop's web books?

	Response Percent	Response Count
Fantastic product, excellent value. I only purchase my GW books online	2.0%	18
Fantastic product I typically purchase both the online version and paper copy.	4.45%	40
Good product for good value, it's a valued alternative to the paper versions	17.58%	158
I only buy certain products online because they are web exclusive	16.91%	152
I do not see a need for web based books and media related to Warhammer 40k	11.12%	100
I refuse to purchase online products from GW due to poor value	20.24%	182
I have no opinion	27.7%	249

How would you describe Games Workshop's presence on the web?

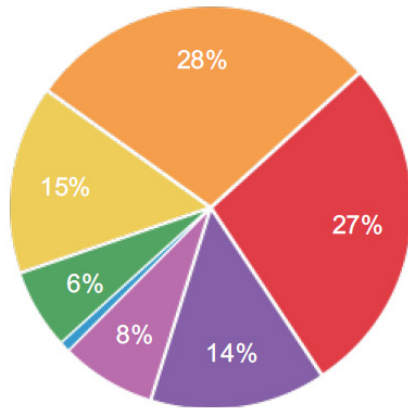
	Response Percent	Response Count
GW has a rich full featured website, extensive social media presence and delivers a great deal of value and content online.	8.01%	72
GW has a moderate web presence which a great deal of content on social media and websites but they could do more.	16.91%	152
GW has an adequate web presence. A strong home page with minimal social media presence.	45.49%	409
GW maintains only the absolute minimum online presence	29.59%	266

How would you describe the 40k community online?



	Response Percent	Response Count
The 40k community has a rich and extensive presence online on websites, and in social media.	73.18%	655
The 40k community has a moderate web presence with a great deal of content on social media and websites but I wish there was more.	19.66%	176
The 40k Community has an adequate web presence, a handful of websites and limited social media.	6.03%	54
The 40k community online is practically non-existent	1.12%	10

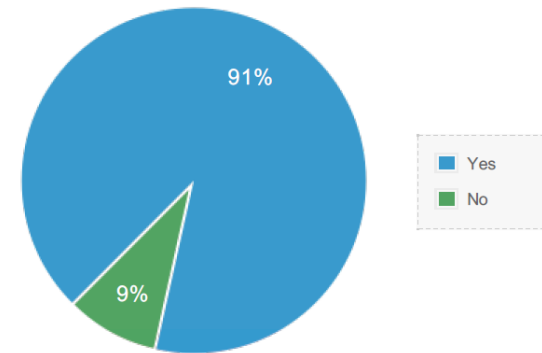
How would you describe your perception of Games-Workshop's involvement in the 40k community online?



	Response Percent	Response Count
Games Workshop strongly supports 3rd party websites and social media, contributes and works with the community to help grow the hobby	0.78%	7
Games Workshop supports 3rd party websites and social media, provides no assistance, but generally allows 3rd parties to create the content as they see fit.	6.46%	58
Games workshop supports 3rd party websites and social media but actively defends its Intellectual property.	15.14%	136
Games Workshop supports 3rd party websites and social media but is notoriously overly protective of its intellectual property	28.4%	255
Games Workshop tyrannically works to shut down websites and frequently submits takedown notices to ensure its control over its web presence.	27.39%	246
I have no opinion on this subject	14.14%	127
Other (Please Specify)	7.68%	69

Should GW be more involved in the online community?

Answered: 899 Skipped: 128



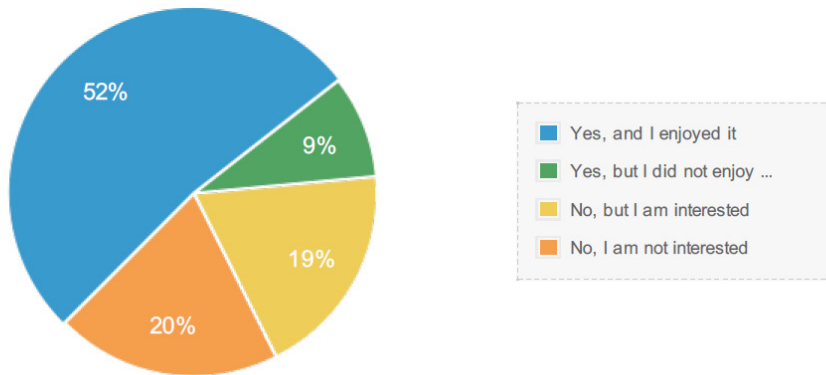
In general players are quite dissatisfied with not only the lack of GW generated content online, but also the perception that GW actively targets 3rd party websites to prevent them from using their copyrighted content.

A significant number of the 'other' comments were vulgar and not repeatable.

The overwhelming majority of players say that GW needs to be more involved with the community online.

Have you ever played in a competitive 40k event?

Answered: 893 Skipped: 134



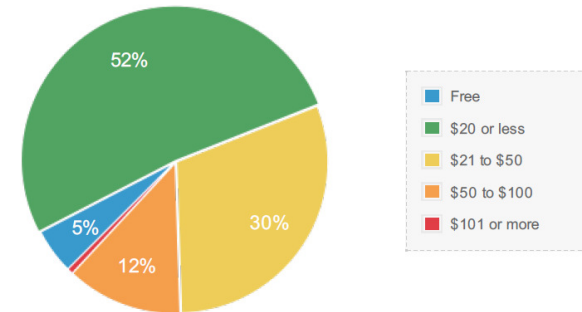
The chances of playing in a tournament and enjoying it increase dramatically as players become more experienced.

How competitive are 40k tournaments in your area?

3.5/5

Answered: 715 Skipped: 312

How much would you expect to spend on entry fee?



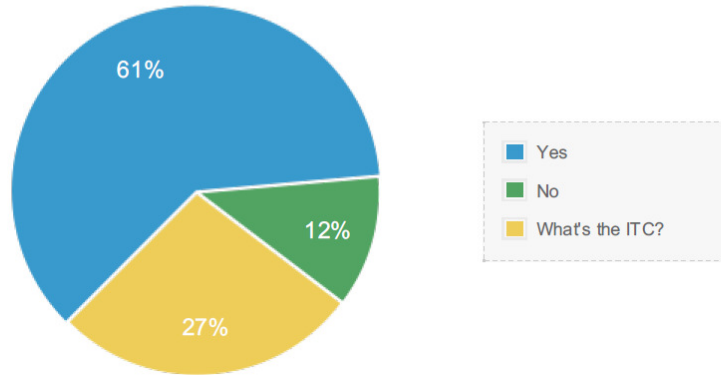
82% of players expected to pay < \$50 to play in a competitive event. (2/3 of those said < \$20)

75% of players are willing to travel to play in structured events

The average tournament or event is 10-20 people with a typical entry fee of < \$20. (29% of events are free)

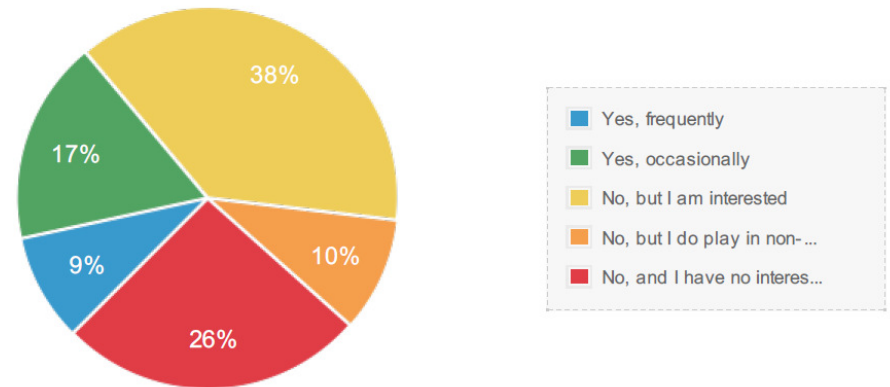
Do you believe that the ITC (Independent Tournament Circuit) and organizations like it add value to the 40k community?

Answered: 890 Skipped: 137



Do you play in ITC sanctioned events?

Answered: 648 Skipped: 379



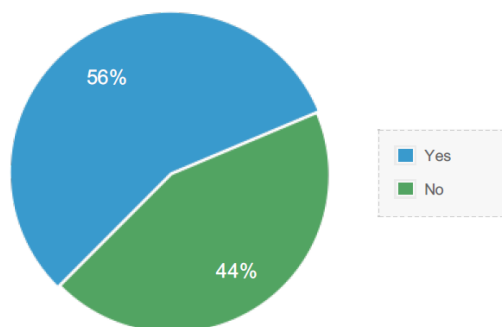
26% play in ITC events and a further 38% are interested!



<http://www.frontlinegaming.org/community/frontline-gamings-independent-tournament-circuit/>

Does your local gaming group generally accept the guidelines in the ITC FAQ?

Answered: 648 Skipped: 379



56% state that their gaming group generally accepts the ITC FAQ

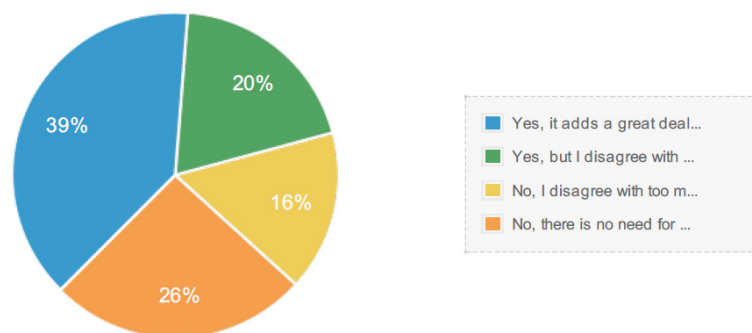
39% Use the ITC FAQ and agree with the rulings

36% disagree with the ITC rulings (50/50 split between those that use it anyway and those that don't)

26% feel there is no need for the ITC FAQ

Do 'you' specifically prefer to use the ITC FAQ?

Answered: 648 Skipped: 379



Interestingly, those that disagree with the ITC rulings are spread across all regions and age groups. The only statistically relevant comparison is that those who disagree with the ITC rulings but use it anyway preferred 4-7th editions, while those that refused to use it preferred Rogue Trader, 2nd and 3rd edition.

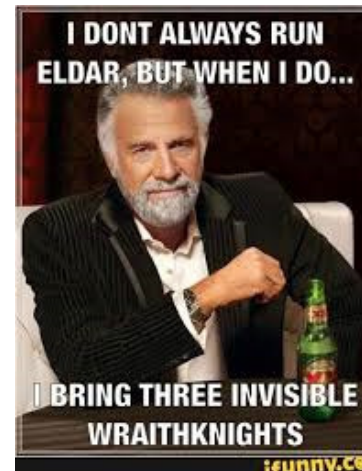
	Response Percent	Response Count
Yes, it adds a great deal of value to my games of 40k	38.73%	251
Yes, but I disagree with a lot of their rulings	19.6%	127
No, I disagree with too many of their rulings	15.9%	103
No, there is no need for such a document	25.77%	167

Based on player opinions:

The most powerful army is: *drum roll* Eldar!

With over 50% of the vote...

Eldar	54%
Tau	16%
Codex Space Marines	9%
Necrons	7%

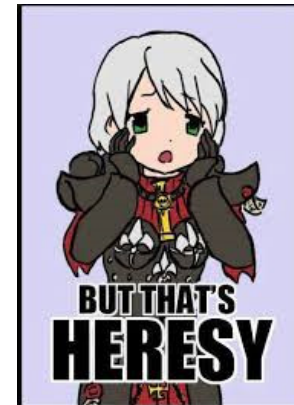


- Interestingly, the majority of the players that voted Necrons as the best army almost all have < 5 years' experience.
- The most experienced players were not nearly as likely to list Tau as the most powerful, and did not vote Necrons statistically higher than other armies.
- It appears the secret to beating Necrons and Tau is experience!
- Eldar on the other hand are universally *loathed*, even Eldar players said their stuff is too good.

Based on player opinions:

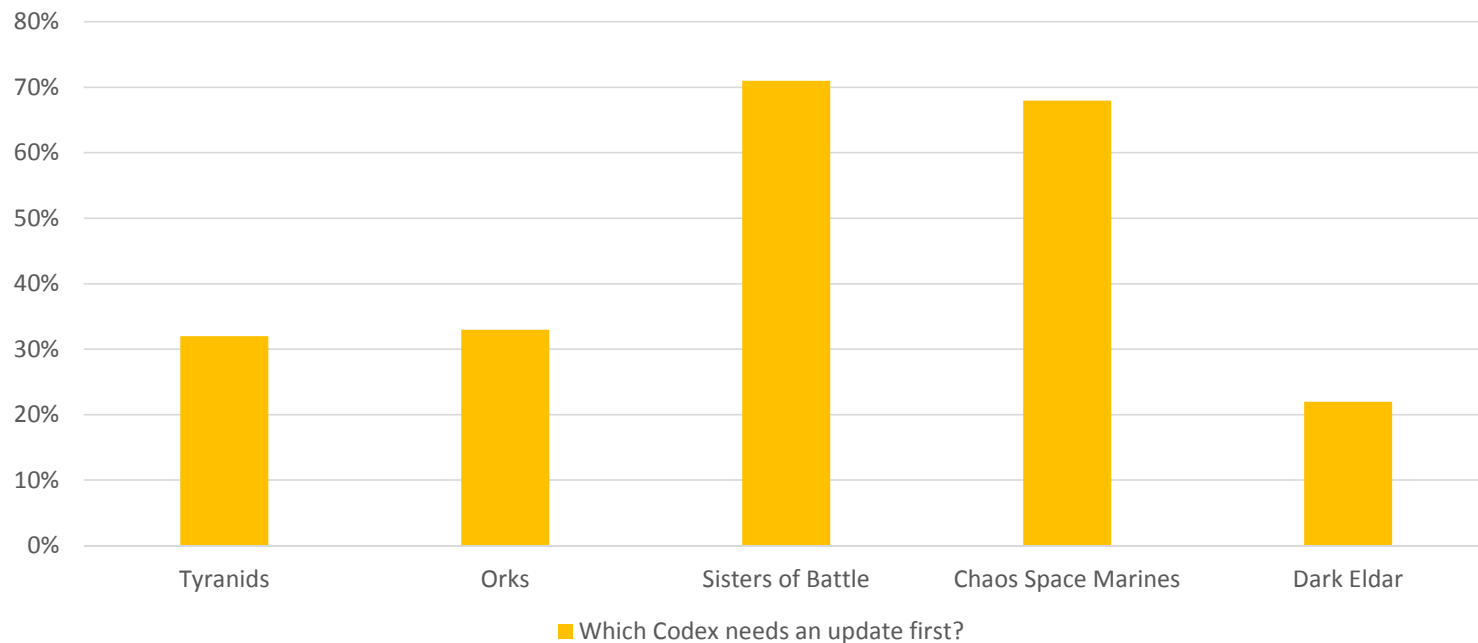
The least powerful army is: Sisters of Battle

Sisters of Battle	26%
Chaos Space Marines	22%
Orks	15%
Tyranids	9%



- Sisters are widely regarded as being the least powerful army, with many sympathetic votes. (Votes from players who listed a different primary faction)
- > 50% of people who answered Chaos Space Marines were Chaos players and aligned armies (Chaos Daemons and Khorne Daemonkin). This is by far the highest '*self loathing*' vote. Given that Chaos are a very common army this skewed the vote a fair bit, but attracted a fair number of sympathetic votes
- Orks attracted a large number of sympathetic votes, but tended not to vote for themselves. "Weeza not great, but Sistas and Chaos boyz need help mor!"
- Tyranid players on the hand voted themselves quite frequently as the worst army but attracted very few sympathetic votes by comparison. It would appear that the Tyranid army may not be as bad as its players think it is!

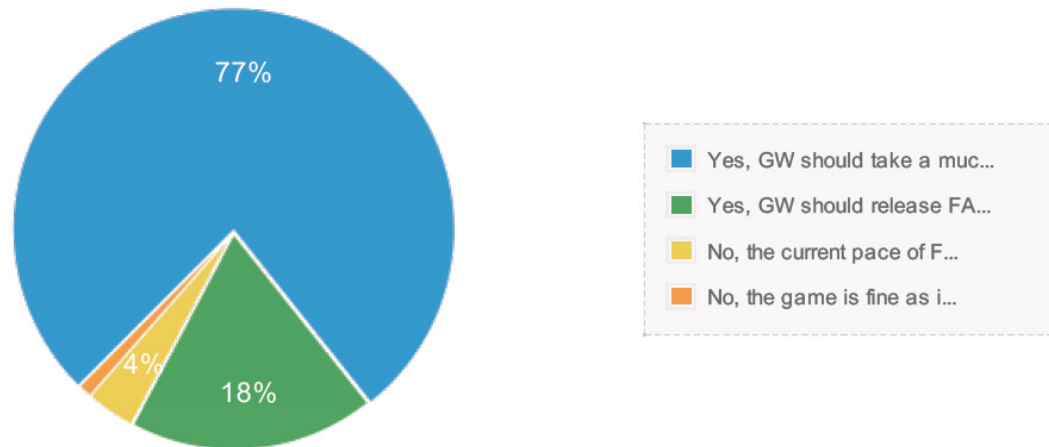
In your opinion which 3 Codexes are in most dire need of an update?



- Sisters of Battle received the most votes overall for a new Codex
- Again Chaos players skewed the vote in their favor but received a fair number of sympathetic votes
- Having reviewed the data it's interesting to note that the theory of Codex Creep (The idea that each new Codex is likely to be more powerful than the last) is so engrained in 40k players thinking that hardly anyone posted to give the most powerful armies newer codexes. As players tend to automatically assume that a newer codex will generally be more powerful, but there is nothing saying that a new codex can't tone down an existing army.

Do you feel the game would benefit from more frequently released FAQ and Errata from GW?

Answered: 884 Skipped: 143

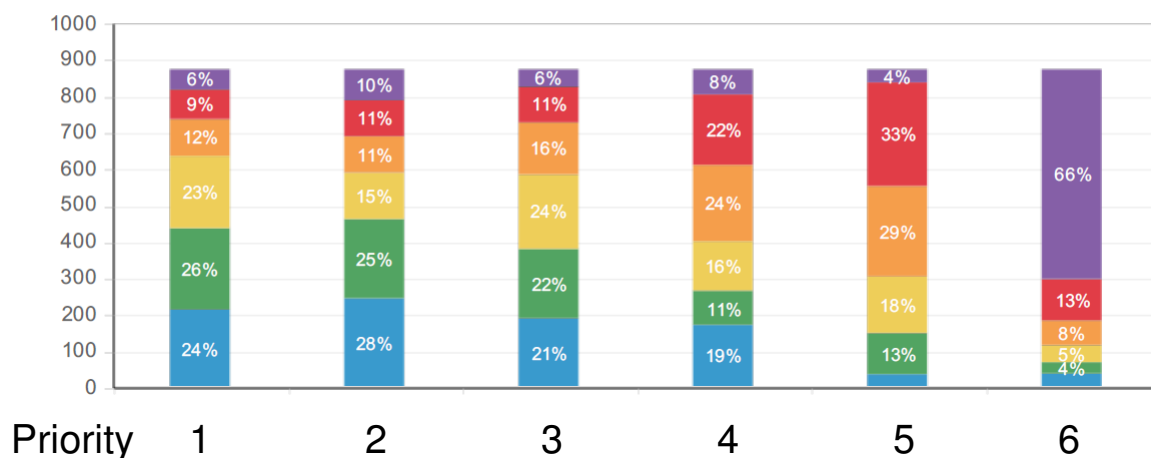


Greater than 95% of players agreed that GW needs to release FAQs and errata more frequently. GW has already made steps to fix this making an official request for FAQ questions on their official facebook page just days after a preview of the survey results was posted. (Go survey team?)

But 60% of players don't trust GW to fix their own game, stating that GW should appoint a 3rd party to be in charge of this process.

What aspects of the game do you feel that Games Designers should concentrate on the most?
Place the following in order of priority

Answered: 871 Skipped: 156



1. Updating obsolete rule books and Codexes
2. Game Balance within the metagame (how the game is played in real life)
3. Making the rules easy to understand and Interpret
4. Making cool new Models
5. Making new units and options for existing Armies
6. Designing entirely new armies and factions

Game balance was the most popular choice for #1 at 26% with Updating obsolete rules the most popular choice in the top 3.

Designing entirely new armies is a resounding **DEAD LAST**.

The vast majority of the player base appear to be in agreement that the games designers should stop working on new products and work on fixing the problems in the game.

Players agree the game has serious game balance issues, and GW would be better served by encouraging their Game Design Team to concentrate less on releasing new stuff and instead concentrate on fixing issues in the metagame.