

A grayscale photograph of two children sitting on a couch and playing video games. The child on the left is wearing a white t-shirt and holding a controller. The child on the right is wearing a dark jacket and also holding a controller. The image is semi-transparent, serving as a background for the text.

POLISH^{'78}

GAMERS RESEARCH



KRAKOW
TECHNOLOGY
PARK

Ministry of
Culture
and National
Heritage of
the Republic
of Poland.

General information

ABOUT OUR STUDY



GENERAL INFORMATION ABOUT OUR STUDY

OBJECTIVES OF THE STUDY

Objective of the study was to provide detailed information about gamers who are Internet users age 15–55 y.o. and play games on one of the following platforms:

- games installed on computer
- games in web browser
- games on video gaming consoles
- games on mobile devices – smartphones and tablets
- social networking websites gamers

Additionally the objective was to present the habits of parents (both players & non players) related to their children playing games.

REPRESENTATIVENESS

Sample structure was corrected with the analytic weight to fit the structure of population of Internet users aged 15–55 regarding key characteristics corresponding with the objective of research. When calculating the weight, social–demographic variables were taken, i.e. gender, age, level of education, size of locality.

Results presented in the report are based on weighted data.



GENERAL INFORMATION ABOUT OUR STUDY

FIELDWORK PERIOD

The study was conducted 16 - 22 of April 2018 using the panel method (online survey with recruitment on websites).

METHOD OF THE STUDY

Invitations to take part in the survey were sent by e-mail to members of panel Opinie.pl belonging to IQS. The sample was chosen with a random-quota sampling method.

TARGET GROUPS AND SAMPLE SIZE

Two Target groups are presented in the report:

Gamers: Data reports the results among the group of 1000 Internet users aged 15–55 who played games on at least one of the following platforms: games installed on PC/laptop, online games in the web browser, games on video game console, games on tablets PC or smartphones and games on social networking websites. Detailed questions about each of these five platforms were asked to 400 respondents.

Parents: Data reports the results among the group of N=620 Internet users aged 15–55 who have children below 18 y.o. In order to analyse both gamer and non-gamer booster N=100 of non-gaming parents. were collected. Total sample for parents was corrected by data weighting for the natural proportion of gamers among parents.



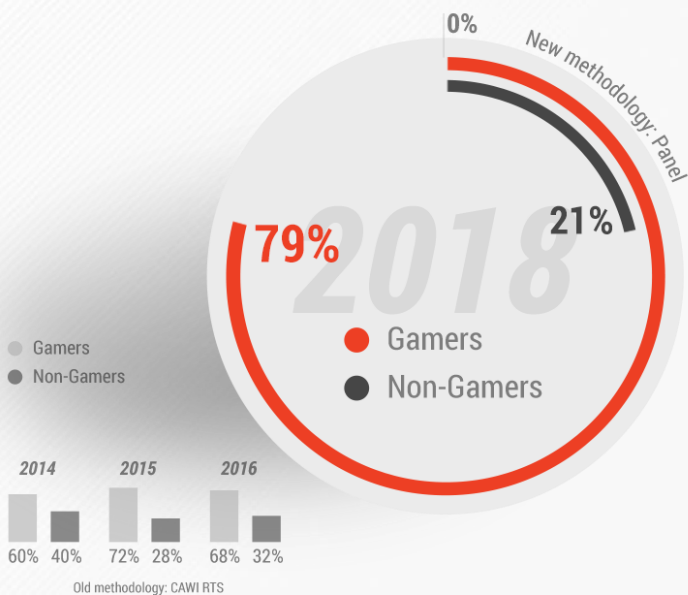
How many gamers

ARE THERE AMONG POLISH INTERNET USERS?

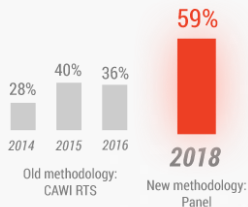


HOW MANY GAMERS

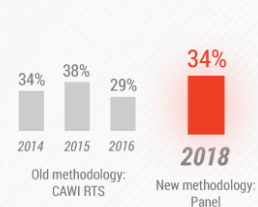
ARE THERE AMONG POLISH INTERNET USERS?



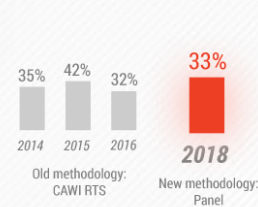
I played games on smartphone or tablet



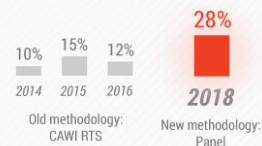
I played games in web browser (Firefox, Chrome, IE) on computer



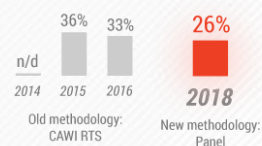
I played games installed on computer (laptop or PC)



I played games on video game console

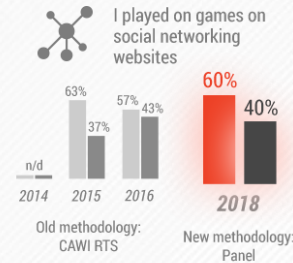
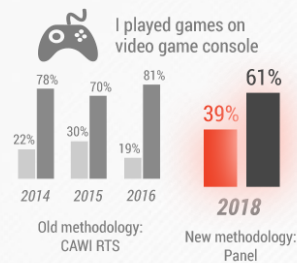
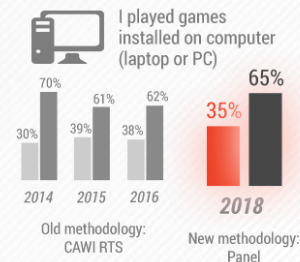
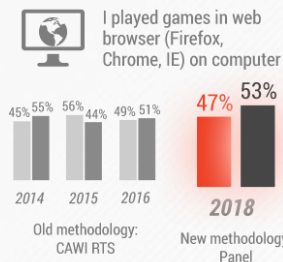
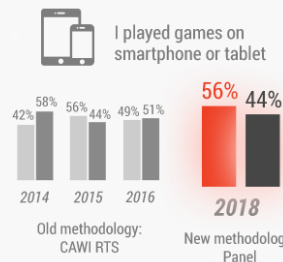
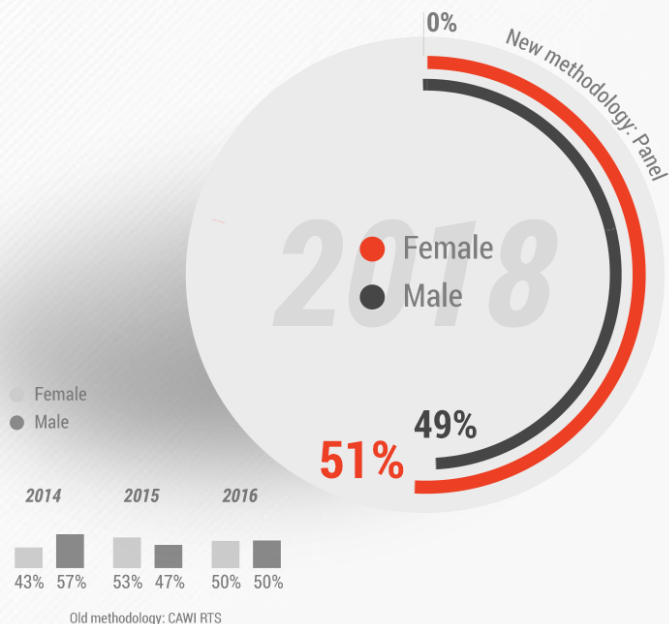


I played on games on social networking websites

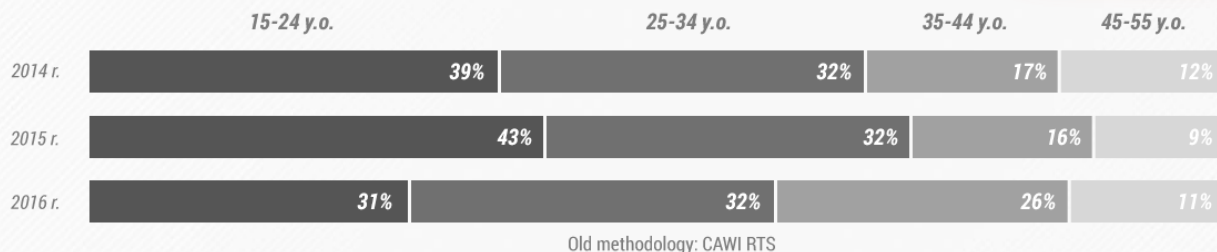
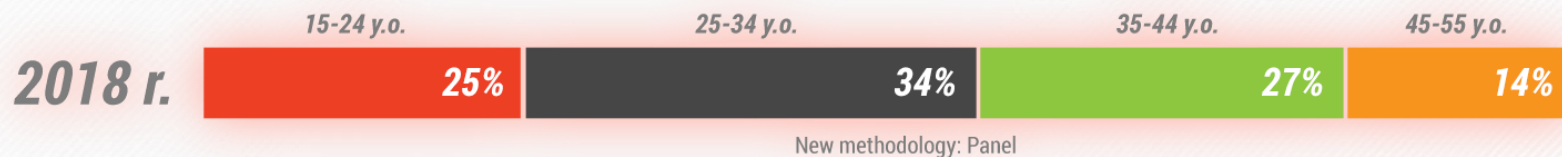


Profile of POLISH GAMERS

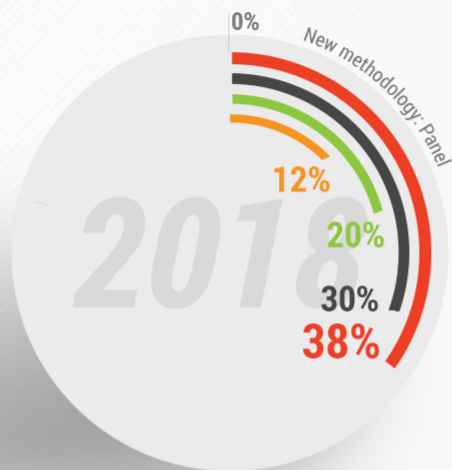
PROFILE OF POLISH GAMERS / BY GENDER



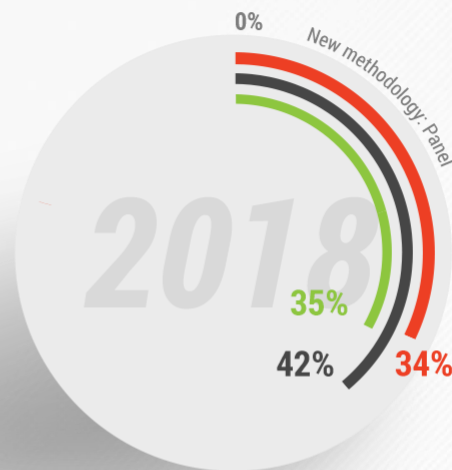
PROFILE OF POLISH GAMERS / BY AGE



PROFILE OF POLISH GAMERS / BY HOME & FINANCIAL SITUATION

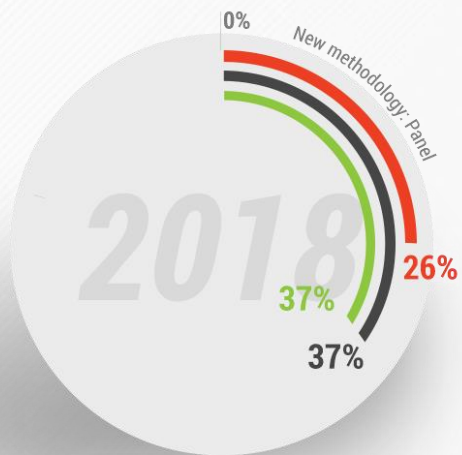


- Village
- < 100 000 residents
- 100 000 - 500 000 residents
- > 500 000 residents

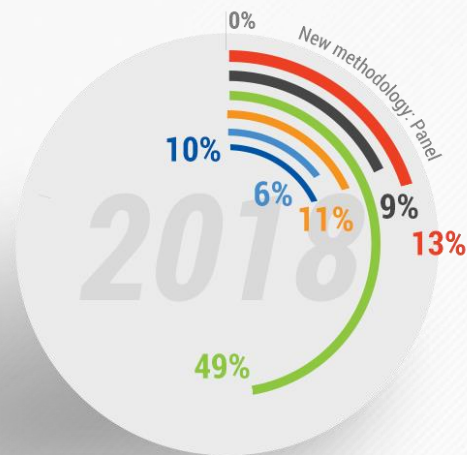


- poor household financial situation
- average household financial situation
- good household financial situation

PROFILE OF POLISH GAMERS / BY EDUCATION & PROFESSION



- primary
- secondary
- higher



- pupils, junior students
- academic student
- permanently employed
- part-time job
- unemployed
- not working, home-maker

PROFILE OF POLISH GAMERS / MOTIVATIONS TO PLAY ON EACH PLATFORM



2018

● significant difference in comparison to other platforms

REST AND RELAX, WAY OF DEALING WITH STRESS

KILLING TIME, BOREDOM

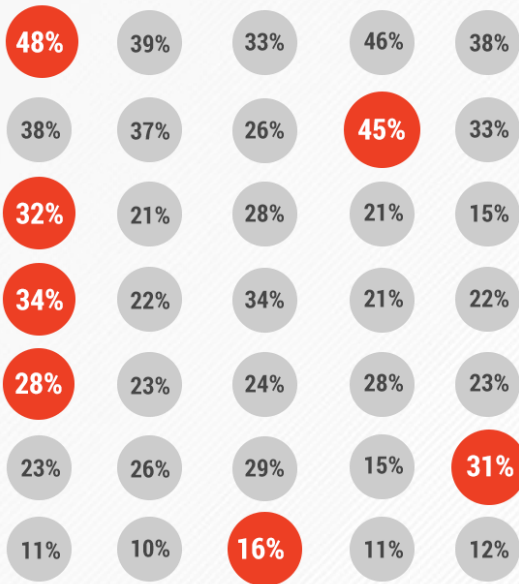
ABILITY TO IMPERSONATE IN NEW ROLES CHARACTERS

FEELING EMOTIONS, ADRENALINE, RIVALRY

TO LEARN SOMETHING, DEVELOP NEW SKILLS

FOR COMPANY, MEETING OTHER GAMERS

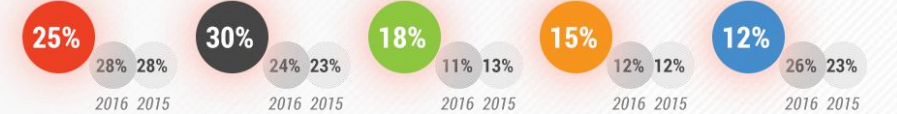
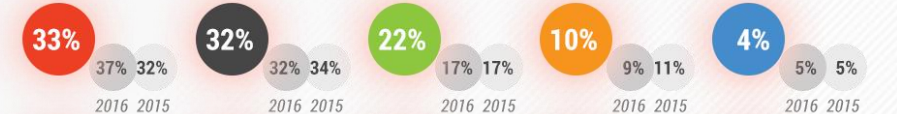
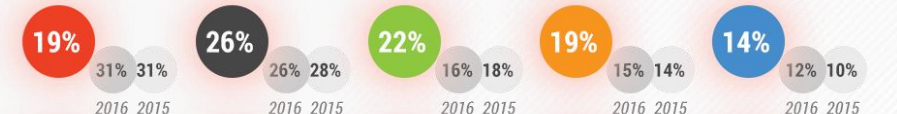
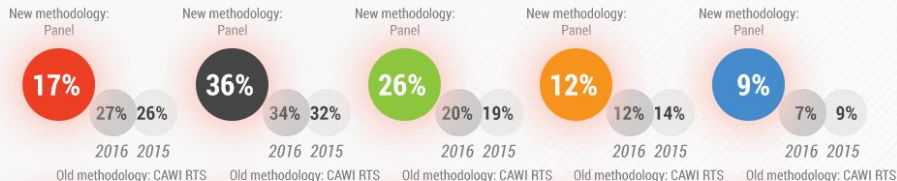
NEITHER OF THOSE REASONS



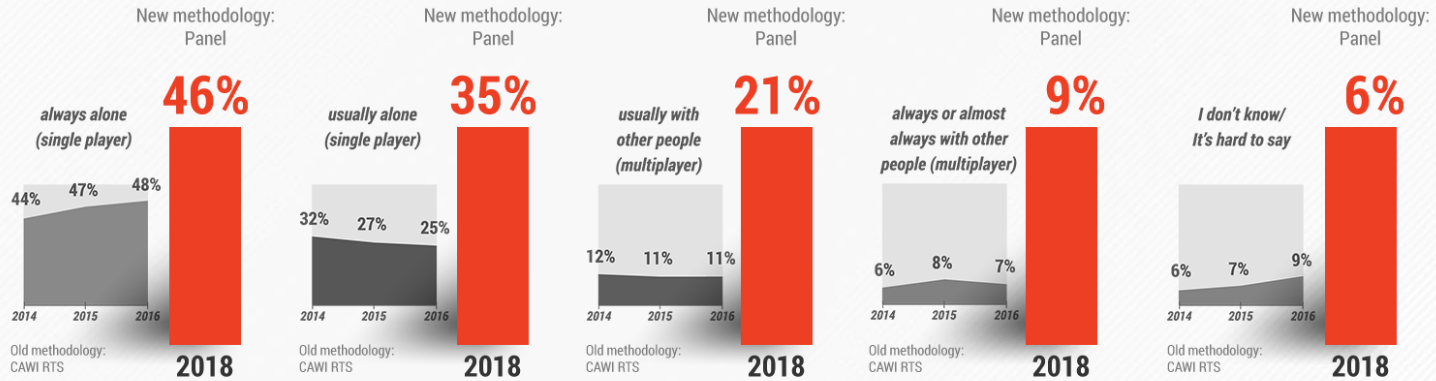
PROFILE OF POLISH GAMERS / FREQUENCY OF GAMING ON EACH PLATFORM

2018

- every day
- few times a week
- more or less once a week
- once or twice a month
- less than once a month



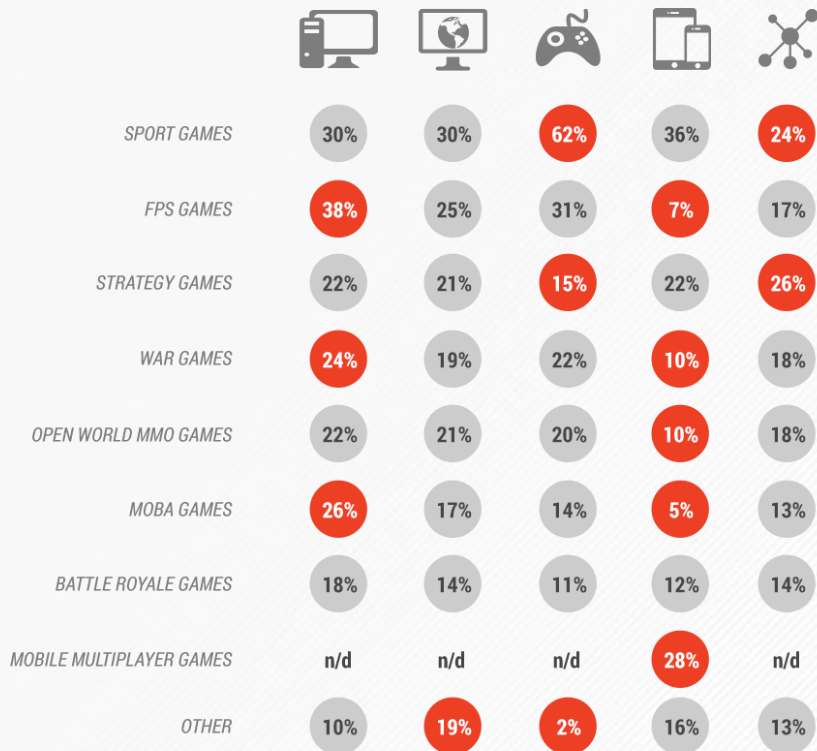
PROFILE OF POLISH GAMERS / GAMING STYLES AMONG DIFFERENT PLATFORMS



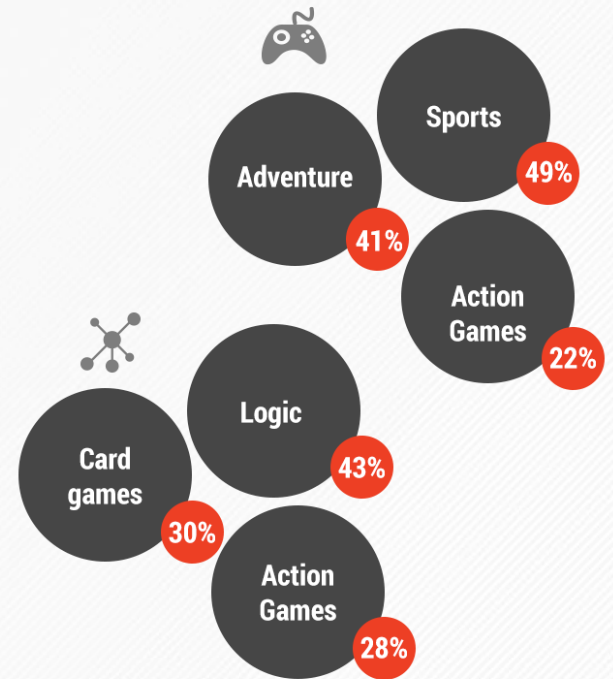
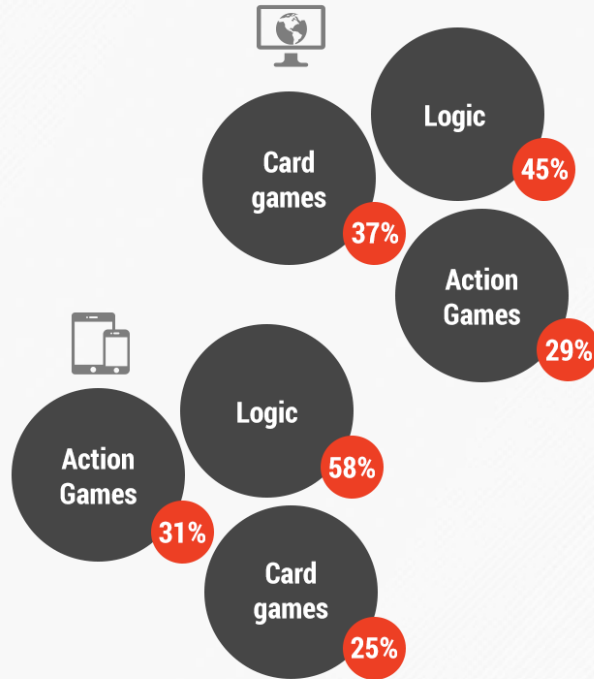
PROFILE OF POLISH GAMERS / GAMES PLAYED WITH OTHER GAMERS

2018

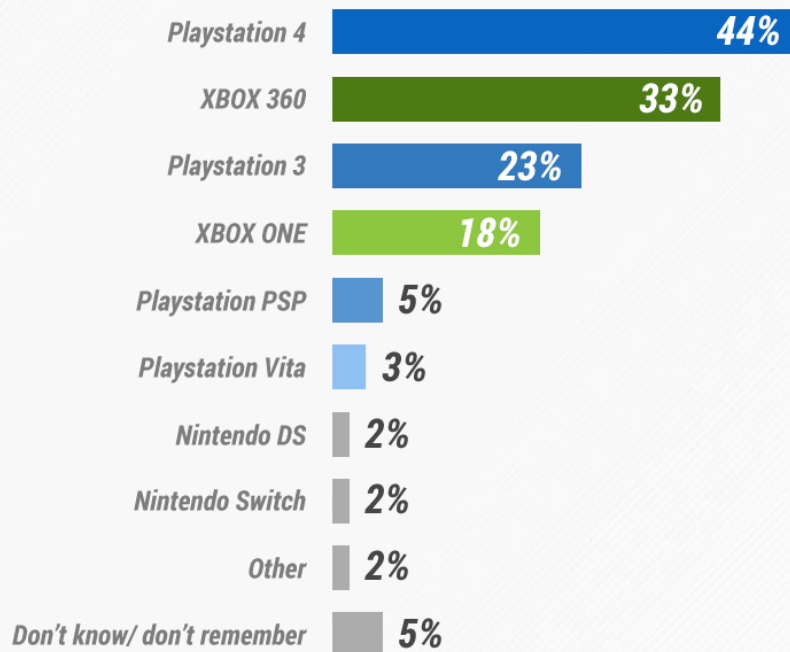
● significant difference in comparison to other platforms



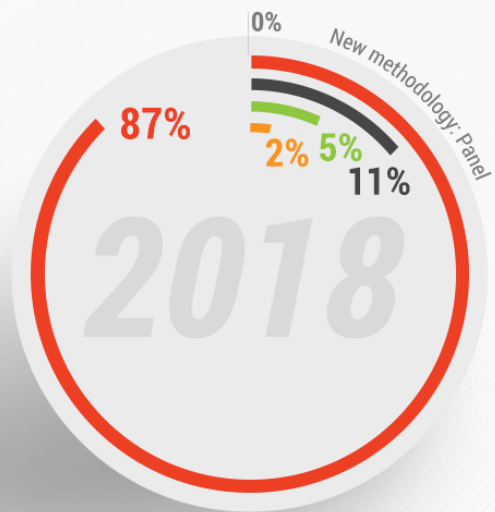
PROFILE OF POLISH GAMERS / POPULARITY OF DIFFERENT TYPES OF GAMES



PROFILE OF POLISH GAMERS / POPULARITY OF CONSOLES



PROFILE OF POLISH GAMERS / POPULARITY OF MOBILE OPERATING SYSTEMS



- Android
- Windows Phone
- iOS
- I don't know

PROFILE OF POLISH GAMERS / FREQUENCY AND TIME OF PLAYING OF EACH TYPE OF GAMES ON DIFFERENT PLATFORMS



Regardless of the platform we play most often on virtual farms

30%

declare to play this type of games every day



the longest

(ABOUT 30% OF RESPONDENTS MARKED THEIR ANSWER "LONGER THAN 120 MINUTES")

we play RPGs and MMOs on PCs and Consoles



On mobile devices we play much shorter, but there is no shortage of virtual farm fans

6%

who also spend no more than 2 hours on it



We have the longest history of being involved in casino games on social networking platforms

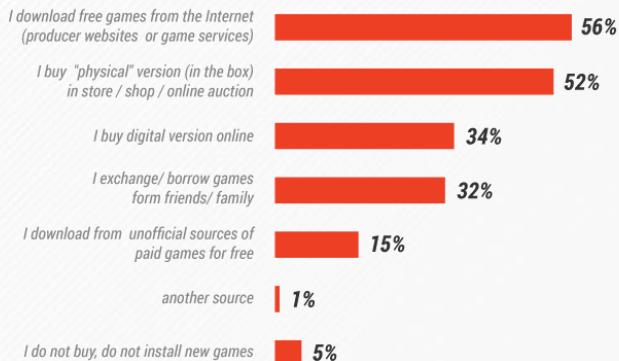
11%

Sources OF GAMES

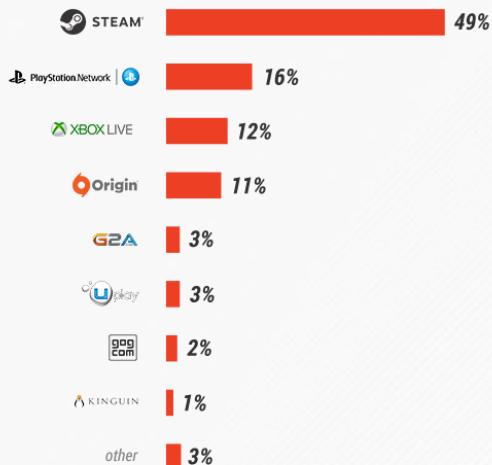
SOURCES OF NEW GAMES



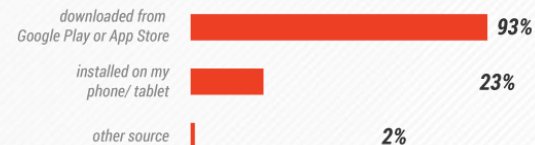
Sources of new games PC & Consoles



Sources of digital version of new games PC & Consoles



Sources of new games Smartphone/tablet



Purchasing

AND PAYMENT METHODS

PURCHASING / POPULARITY OF GAME PURCHASE

GAME/GAME ACCESS PURCHASE IN 2018

New methodology: Panel



41%



42%



11%

2016
Old methodology: CAWI RTS



PURCHASE OF GAMES ADD-ONS IN 2018

New methodology: Panel



25%



22%



31%



18%

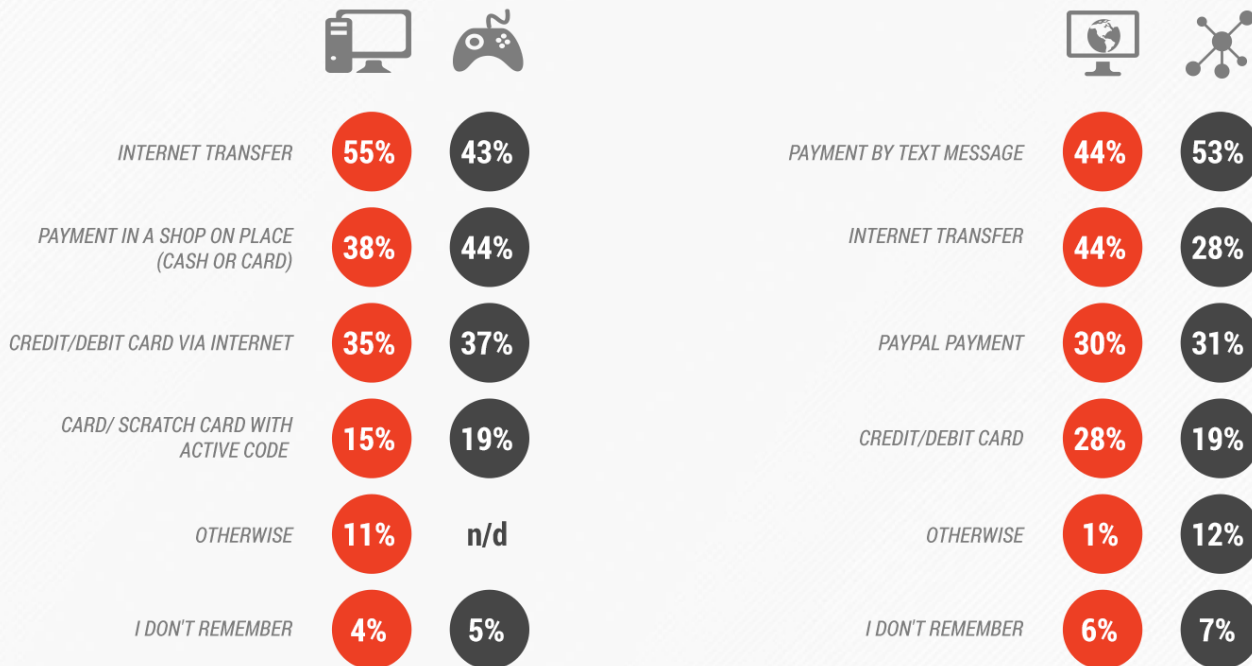


17%

2016
Old methodology: CAWI RTS



PURCHASING / METHOD OF PAYMENT



PURCHASING / REASONS OF RESIGNING FROM MAKING A PAYMENT IN GAME ON SOCIAL NETWORKING WEBSITE



Average

EXPENSES ON GAMES

PROFILE OF POLISH GAMERS / AVERAGE EXPENSES ON GAMES



PC Gamers are still price sensitive

Only

19%

**declare to spend more than
100 PLN on new game**



Console owners spend more...

58%

**declare to spend more than
100 PLN on new game**



*On mobile devices and on browser
games we spend money only for
game extensions*

10 -19 PLN

**this expenditure bracket
was the most frequently
chosen**



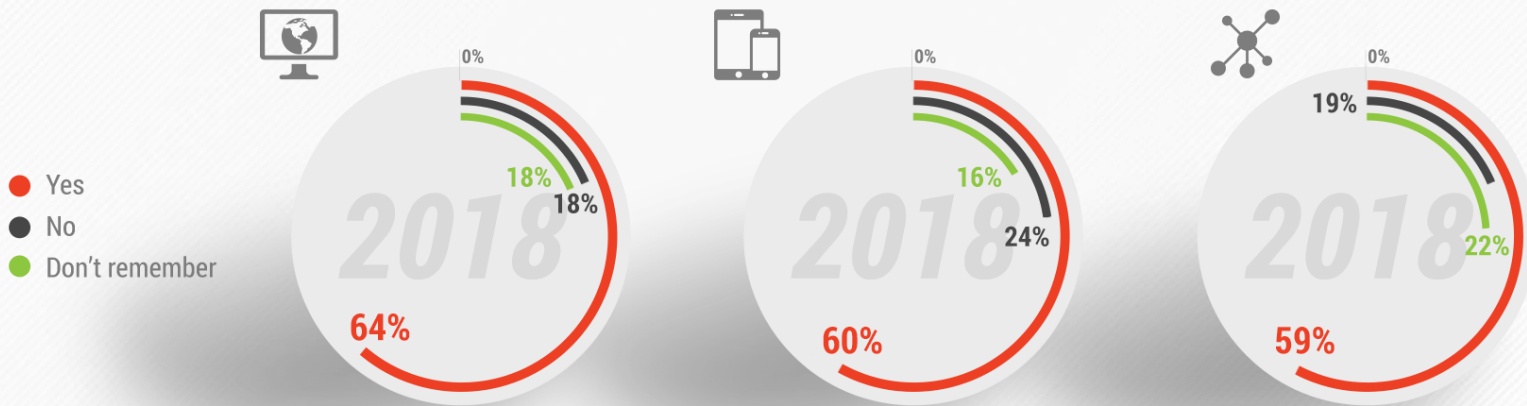
*On Mobile devices gamers declare
to spend usually less than 5 PLN
for a new game (31%). However,*

75%

**declare to spend more than
5 PLN for games
extensions**

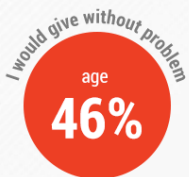
Registration

REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

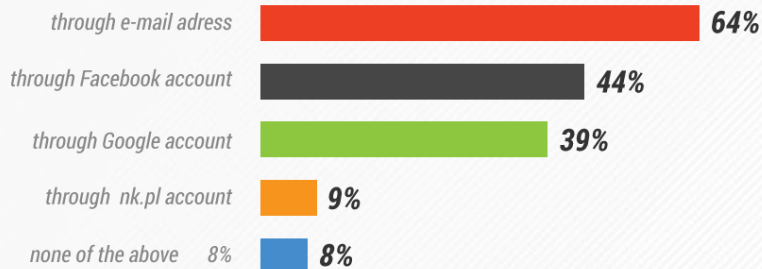


REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

PROVIDING PERSONAL INFORMATION WHILE REGISTRATION GAMES ONLINE



CONSIDERED REGISTRATION METHODS TO ONLINE GAMES

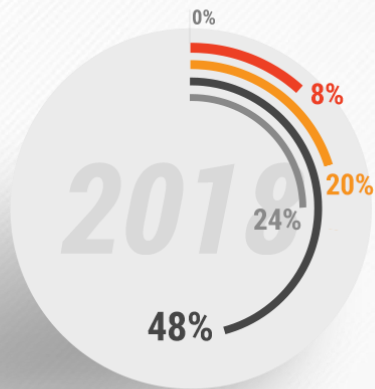


E-sport



E-SPORT

INTEREST IN E-SPORT

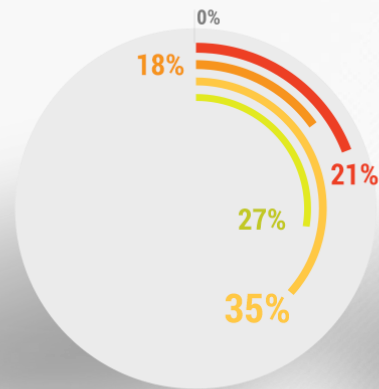


- Definitely yes
- Rather yes
- Rather no
- Definitely no

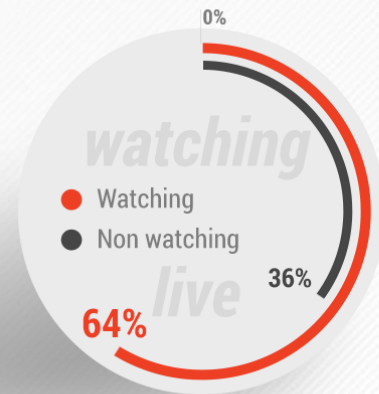
ABOUT 28% DECLARED TO BE DEFINITELY OR RATHER INTERESTED



FREQUENCY OF WATCHING/ FOLLOWING TOURNAMENTS



- sporadically
- on the occasion of the most important eSports events (eg IEM) (several times a year)
- from time to time (once a month)
- quite often (at least once a week)



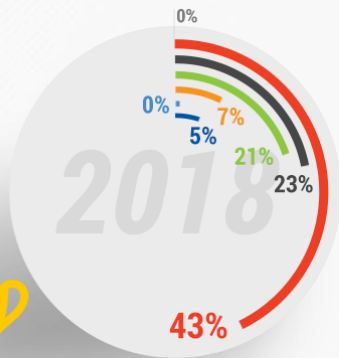
- Watching
- Non watching

E-SPORT

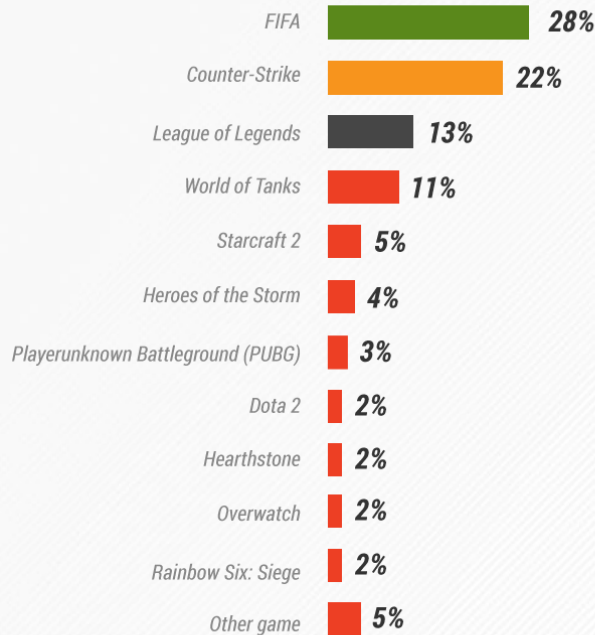
USED PLATFORM

- Youtube streaming
- Facebook
- Twitch
- Traditional TV
- Other place
- I do not watch at all

 YouTube



MOST POPULAR GAMES

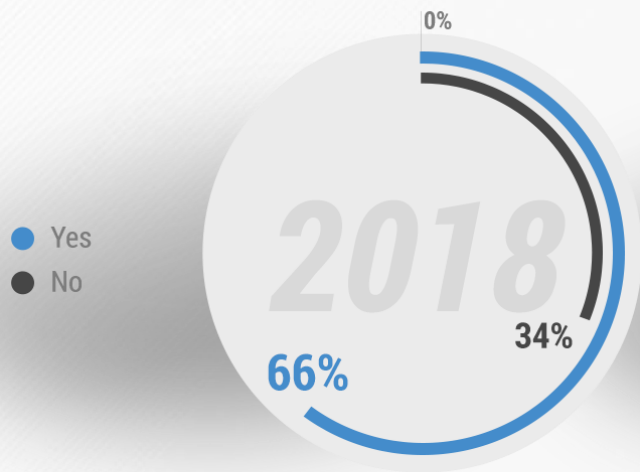




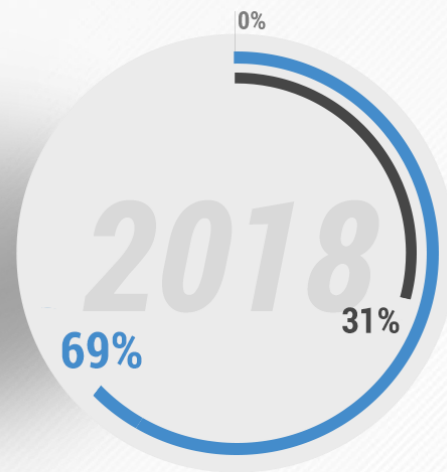
Parents & children

PARENTS & CHILDREN / PLAYING GAMES OF CHILDREN OF INTERNET USERS

HOW MANY PARENTS - INTERNET USERS,
HAVE GAMING CHILDREN

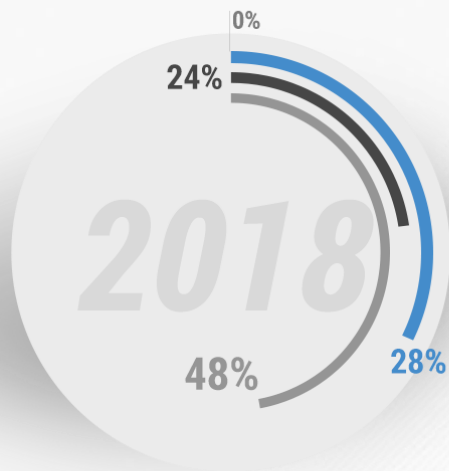


HOW MANY GAMING PARENTS
PLAY WITH THEIR CHILDREN



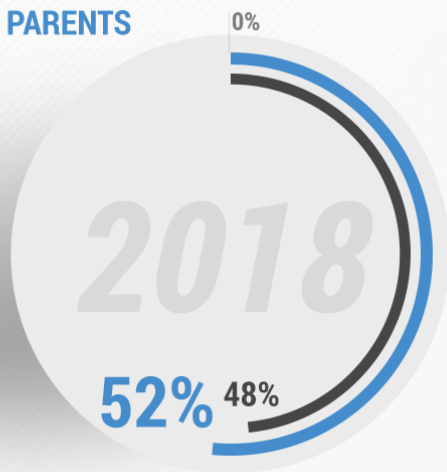
PARENTS & CHILDREN / USING PEGI SYSTEM BY PARENTS

- Yes
- No, but I know what it is
- No and I don't know what it is

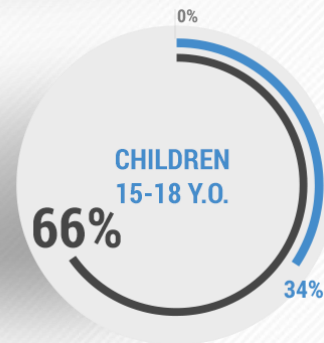
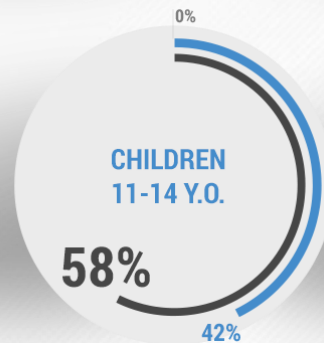
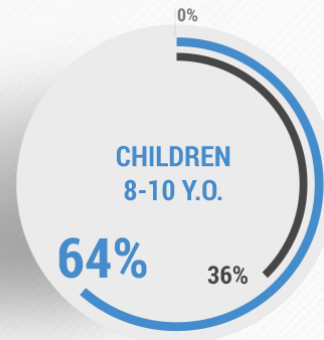
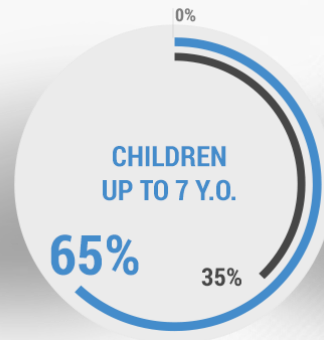


PARENTS & CHILDREN / USING PARENTAL CONTROL

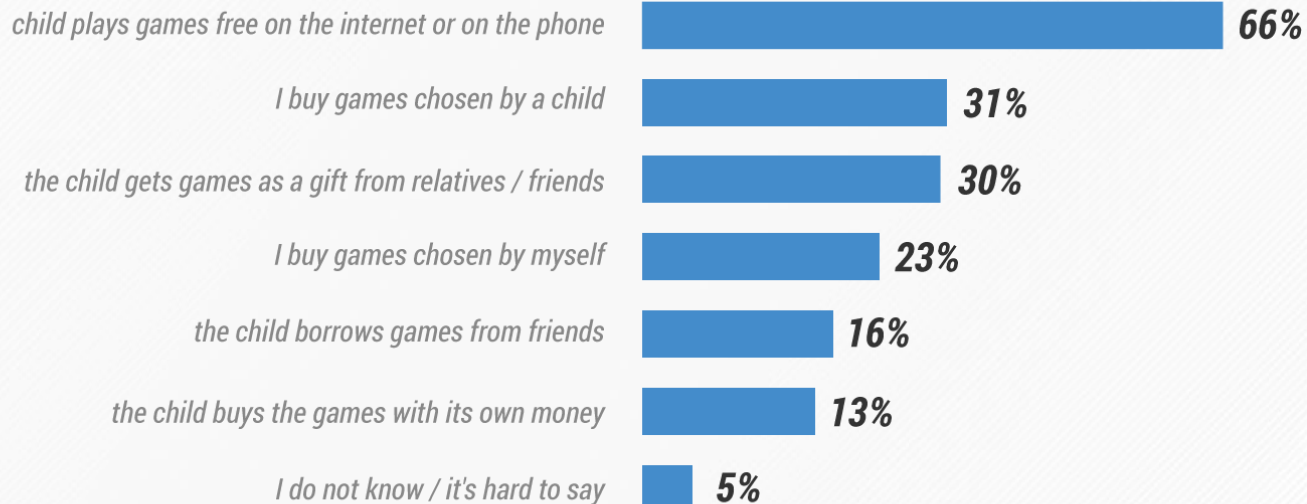
ALL PARENTS



- Yes
- No

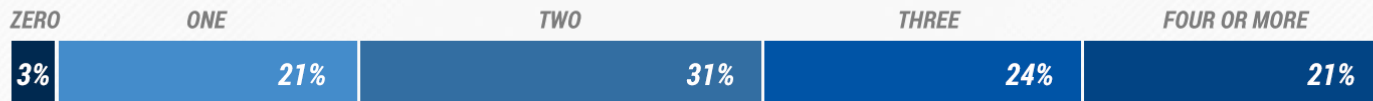


PARENTS & CHILDREN / SOURCES OF NEW GAMES

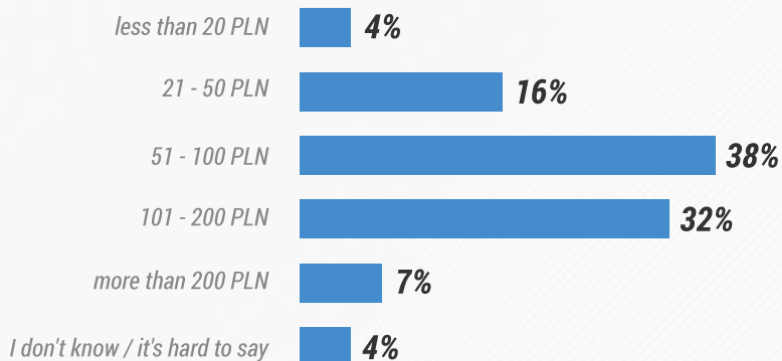


PARENTS & CHILDREN / GAMES BOUGHT LAST YEAR

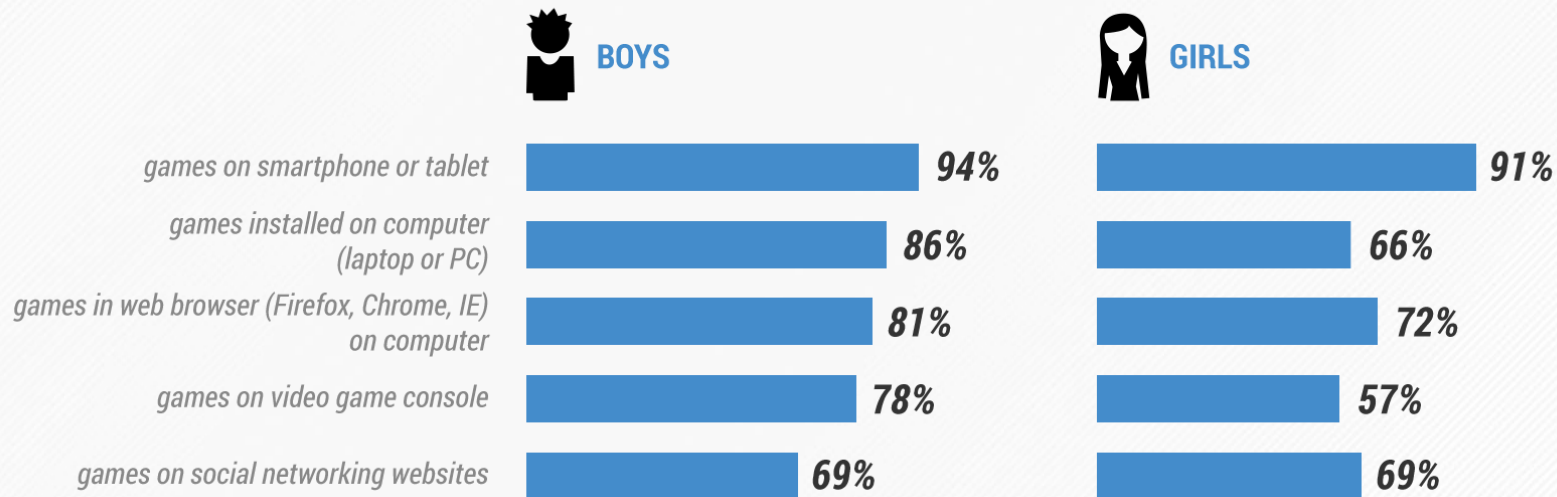
NUMBER OF GAMES BOUGHT LAST YEAR



PRICE OF LAST BOUGHT GAME

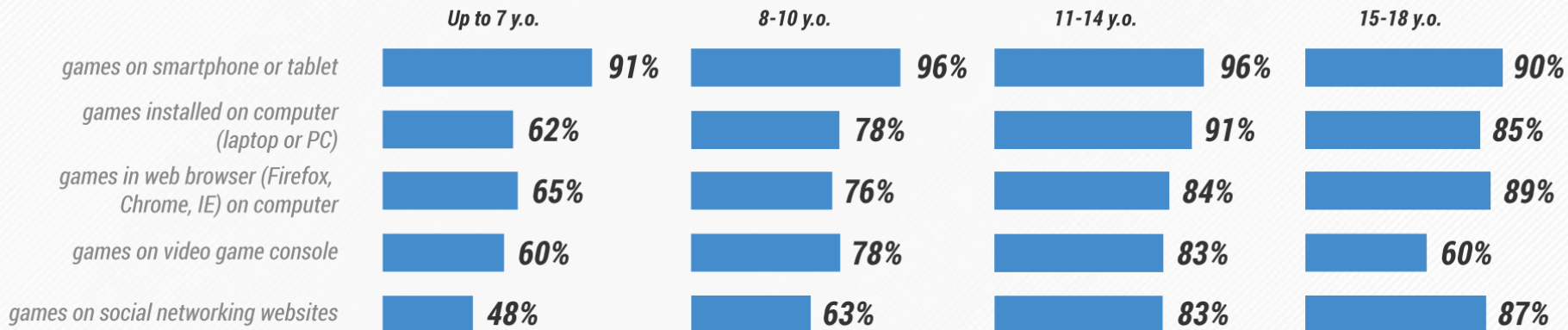


PARENTS & CHILDREN / CHOSEN PLATFORMS AMONG GAMERS



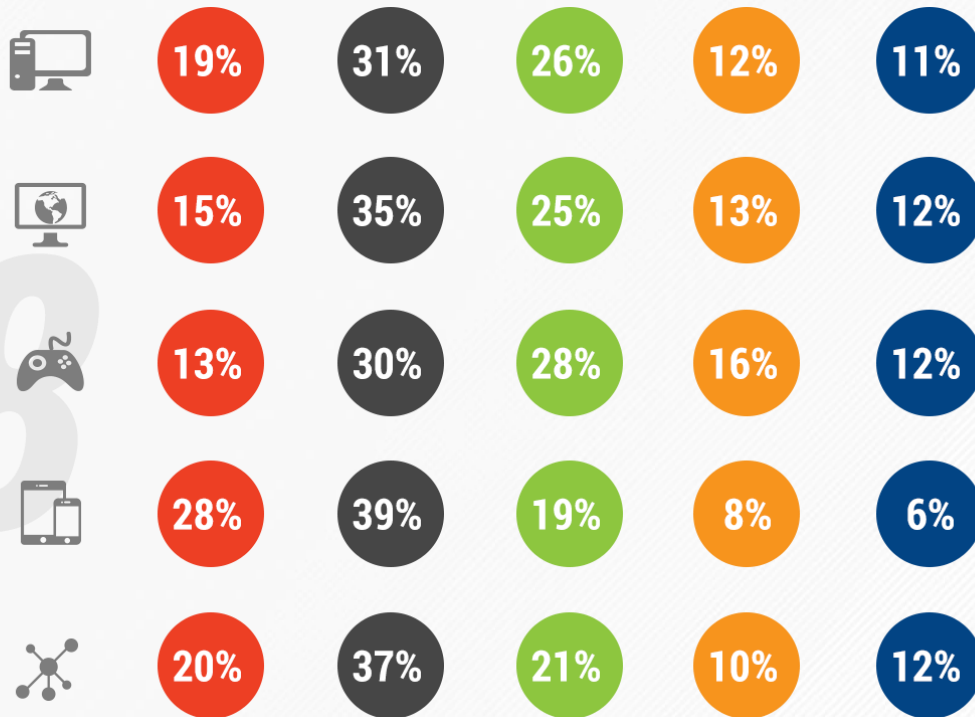
PARENTS & CHILDREN / CHOSEN PLATFORMS AMONG GAMERS

CHILDREN OF POLISH INTERNET USERS

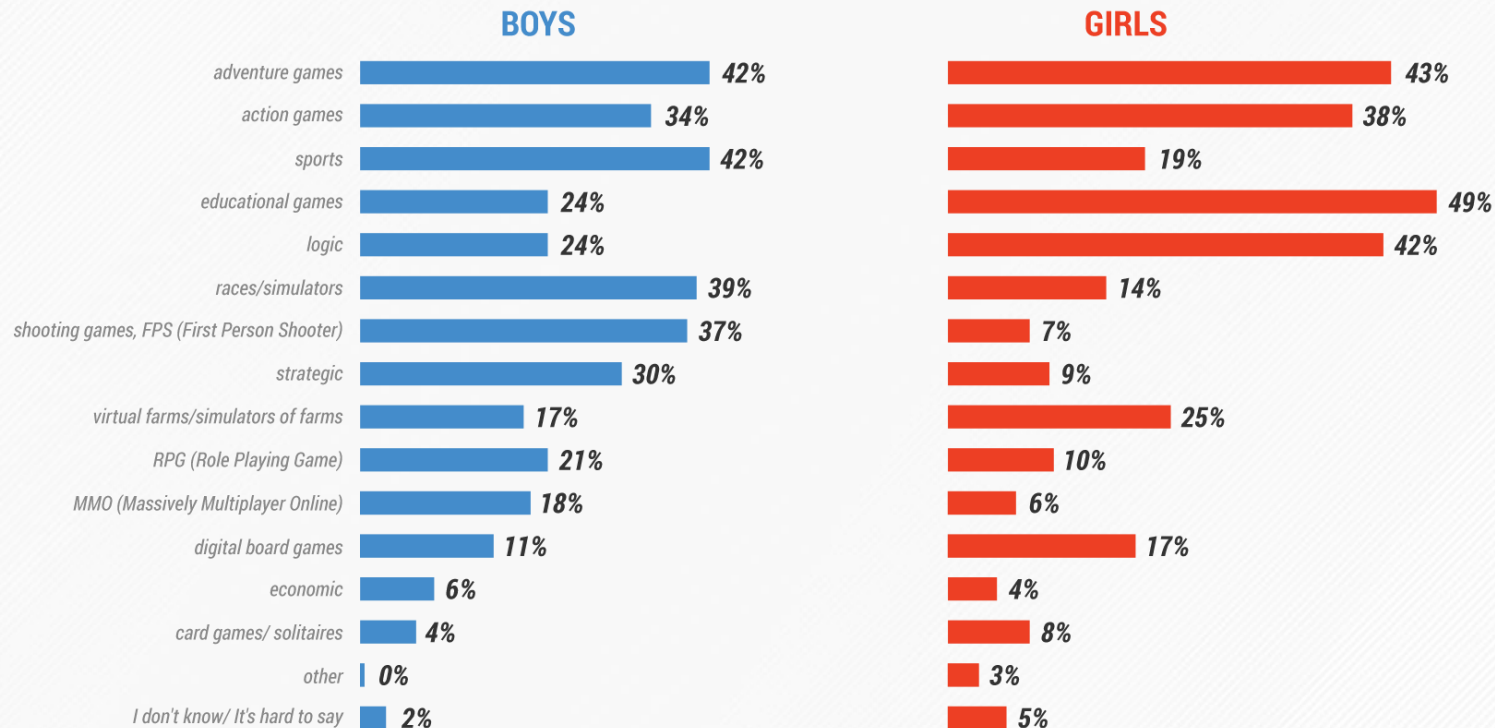


PARENTS & CHILDREN / FREQUENCY OF GAMING ON EACH PLATFORM

- every day
● few times a week
● more or less once a week
● once or twice a month
● less than once a month



PARENTS & CHILDREN / POPULARITY OF DIFFERENT TYPES OF GAMES



PARENTS & CHILDREN / FREQUENCY AND TIME OF PLAYING OF EACH TYPE OF GAMES ON DIFFERENT PLATFORMS



Among children age 8-10 can be observed the most significant growth of time spent on playing social, PC installed, browser, mobile and console games

More than 10% children age 8-10 play games for more than 120 minutes



ABOUT **40%**

OF ALL CHILDREN SPEND
av. 31-60 MINUTES
PLAYING ON EACH OF 5
PLATFORMS



In comparison to girls, boys spend more time playing game on each of 5 platforms

13%

boys spend more than 120 minutes on playing PC installed games



14% children up to 7 y.o. play mobile games every day while 31% do that few times a week

55%

Children up to 7 y.o. play games every day or few times a week





THANK
YOU



KRAKOW
TECHNOLOGY
PARK



Ministry of
Culture
and National
Heritage of
the Republic
of Poland.