



# POLISH '19

## GAMERS RESEARCH



KRAKOW  
TECHNOLOGY  
PARK



Speakers:



Michał Bobrowski



Patrycja Rodzińska-Szary



# 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.

## 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.

## REALISATION OF THE STUDY

The study was conducted 26.03 – 08.04 2019

# GENERAL INFORMATION ABOUT OUR STUDY

## SAMPLE

- representative sample of Polish internet users aged 15-65 y.o.: N=1239
- representative sample of gamers 15-55 y.o.: N=775
- representative sample of gamers 56-65 y.o.: N=112
- boosters for each of five analysed platforms: N=450
- representative sample parents of children below 18 y.o.: N=744 (including boost of non-gaming parents, N=100)

## REPRESENTATIVENESS

Sample structure was corrected with the analytic weight to fit the structure of population of Internet users aged 15–65 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.

## NOTICE

Due to the possibility of comparing data with results of previous waves of study, the data in the report is shown on the group of 15-55 y.o. Information about the older respondents (56-65 y.o.) and comparison with main sample are located at the end of the report.



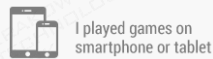
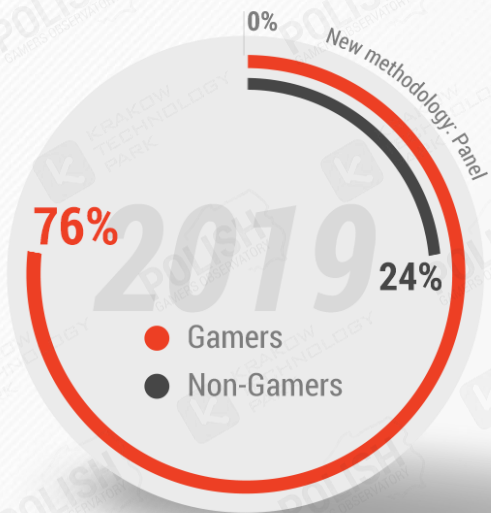
The background image shows two men from the chest up, both holding video game controllers. The man on the left is looking upwards and to the right with a focused expression. The man on the right is looking towards the camera with a slight smile. The entire image is overlaid with a repeating watermark pattern consisting of a stylized 'K' logo, the text 'KRAKOW TECHNOLOGY PARK', and 'POLISH GAMERS OBSERVATORY'.

**How many gamers**

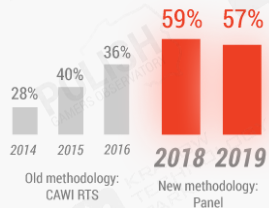
**ARE THERE AMONG POLISH INTERNET USERS?**

# HOW MANY GAMERS

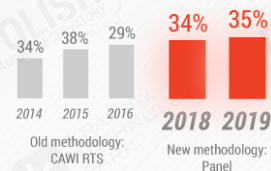
## ARE THERE AMONG POLISH INTERNET USERS?



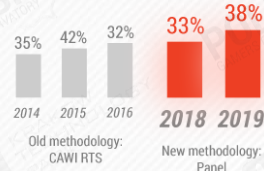
I played games on smartphone or tablet



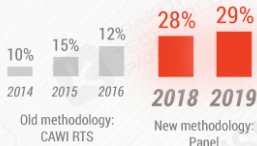
I played games in web browser (Firefox, Chrome, IE) on computer



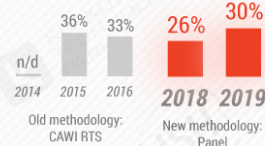
I played games installed on computer (laptop or PC)



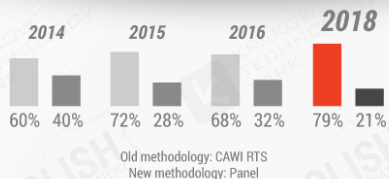
I played games on video game console



I played games on social networking websites



- Gamers
- Non-Gamers

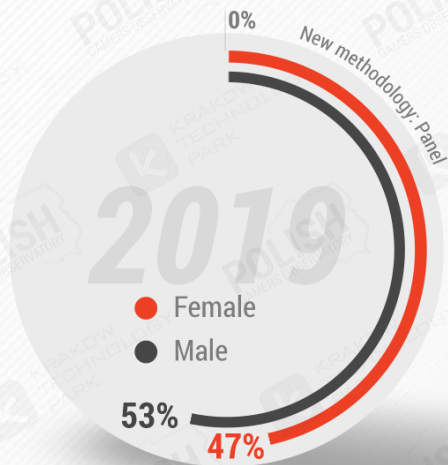




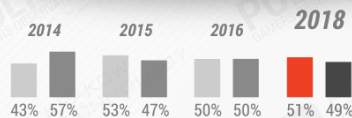
**Profile of**  
**POLISH GAMERS**



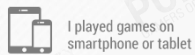
# PROFILE OF POLISH GAMERS / BY GENDER



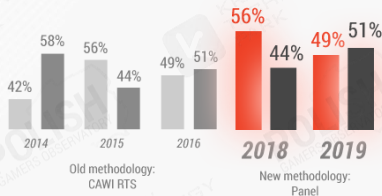
● Female  
● Male



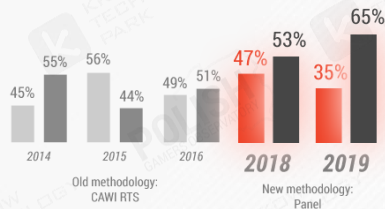
Old methodology: CAWI RTS  
New methodology: Panel



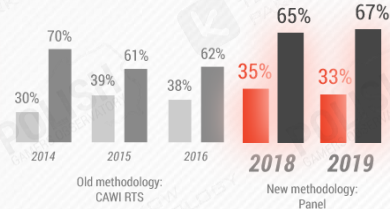
I played games on smartphone or tablet



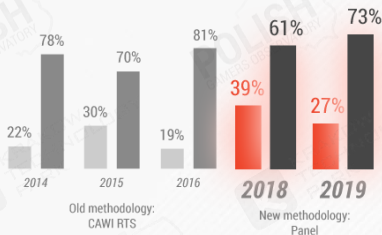
I played games in web browser (Firefox, Chrome, IE) on computer



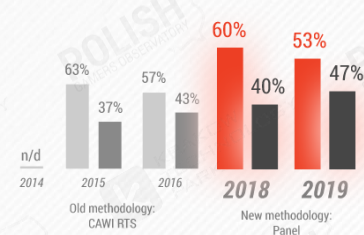
I played games installed on computer (laptop or PC)



I played games on video game console



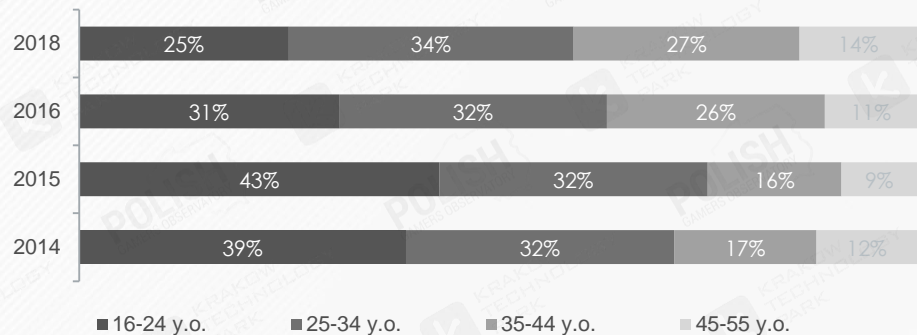
I played games on social networking websites



# PROFILE OF POLISH GAMERS / BY AGE



■ 16-24 y.o.   
 ■ 25-34 y.o.   
 ■ 35-44 y.o.   
 ■ 45-55 y.o.



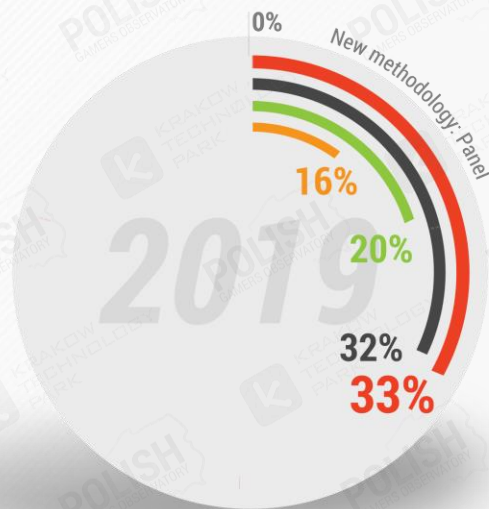
■ 16-24 y.o.   
 ■ 25-34 y.o.   
 ■ 35-44 y.o.   
 ■ 45-55 y.o.



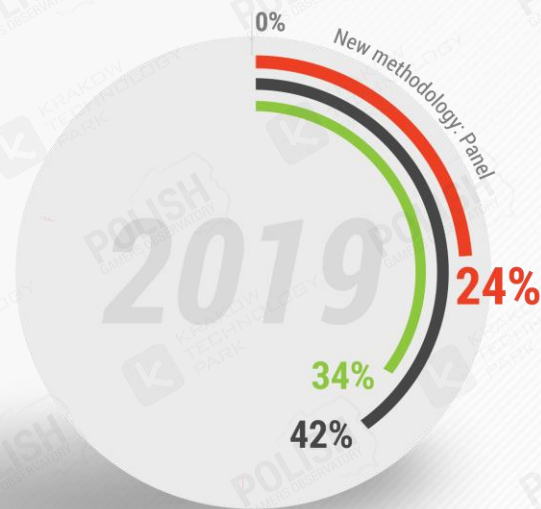
■ 16-24 y.o.   
 ■ 25-34 y.o.   
 ■ 35-44 y.o.   
 ■ 45-55 y.o.



# PROFILE OF POLISH GAMERS / BY HOME & FINANCIAL SITUATION



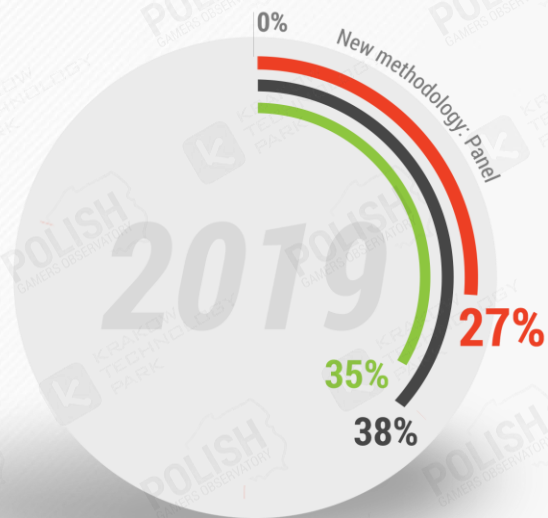
- village
- < 100 000 residents
- 100 000 - 500 000 residents
- > 500 000 residents



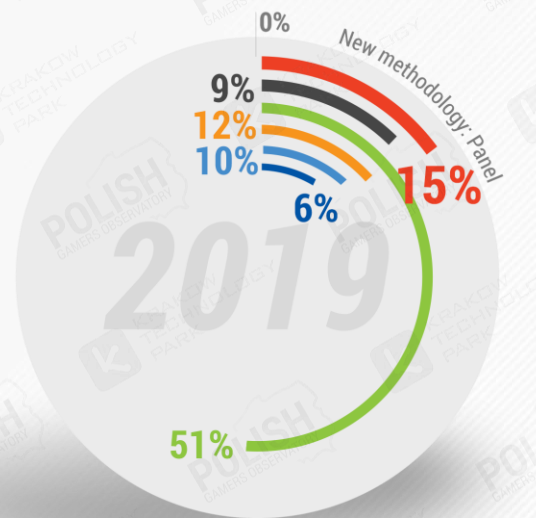
- poor household financial situation
- average household financial situation
- good household financial situation



# PROFILE OF POLISH GAMERS / BY EDUCATION & PROFESSION



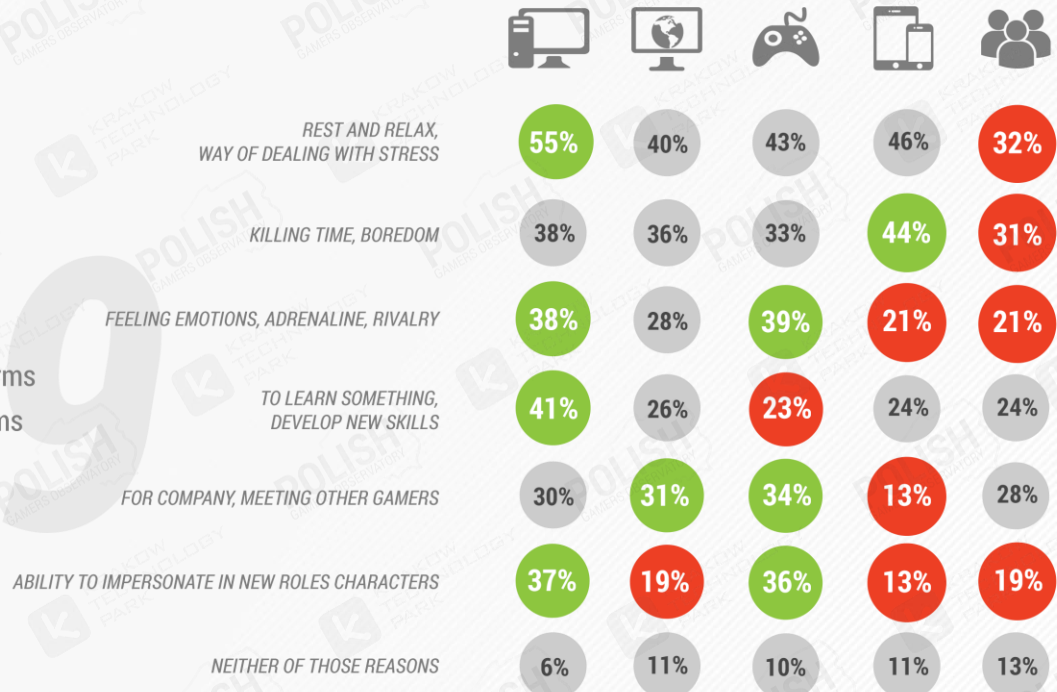
- primary
- secondary
- higher



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

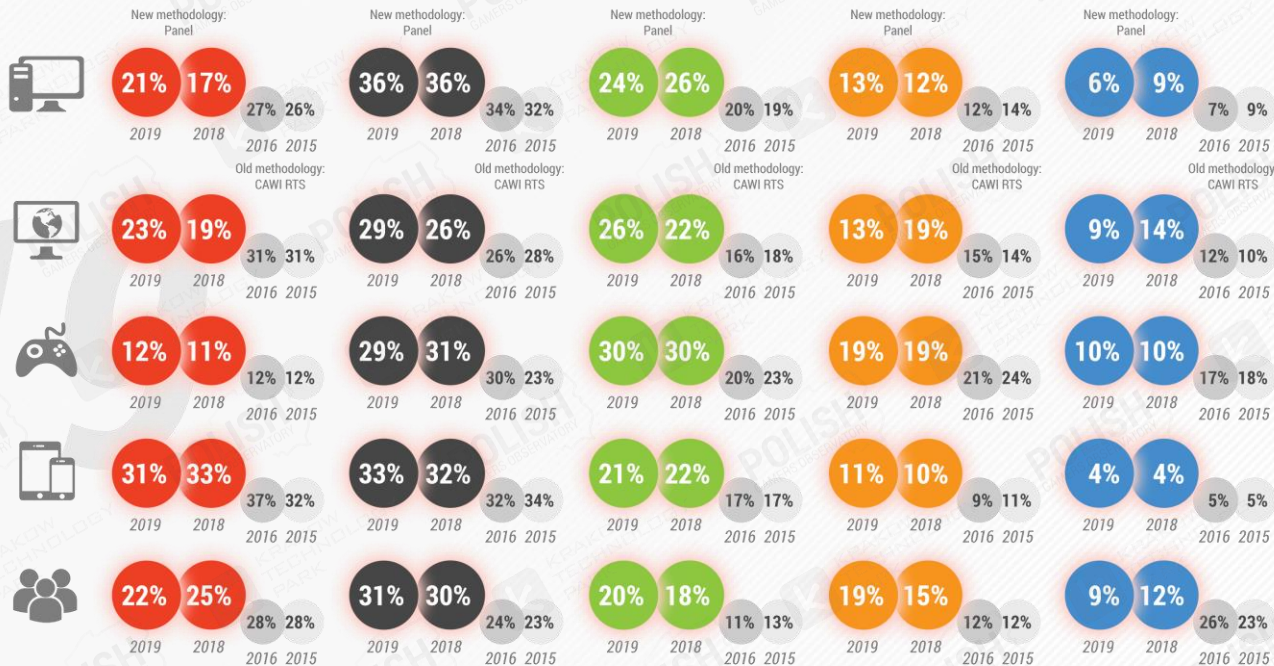
# PROFILE OF POLISH GAMERS / MOTIVATIONS TO PLAY ON EACH PLATFORM

- significantly more in comparison to other platforms
- significantly less in comparison to other platforms



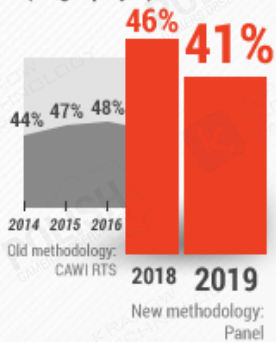
# PROFILE OF POLISH GAMERS / FREQUENCY OF PLAYING ON EACH PLATFORM

- everyday
- few times a week
- more or less once a week
- once or twice a month
- less frequently than once a month

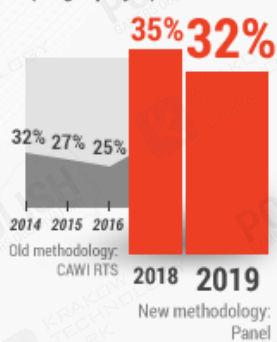


# PROFILE OF POLISH GAMERS / GAMING STYLES AMONG DIFFERENT PLATFORMS

always alone  
(single player)



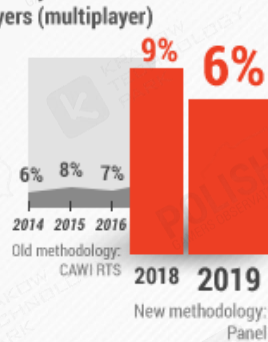
most times alone  
(single player)



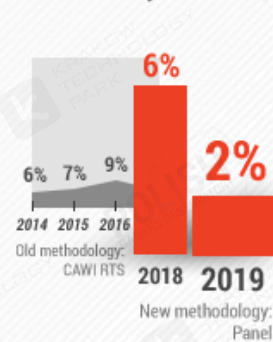
most of the times  
with other players  
(multiplayer)



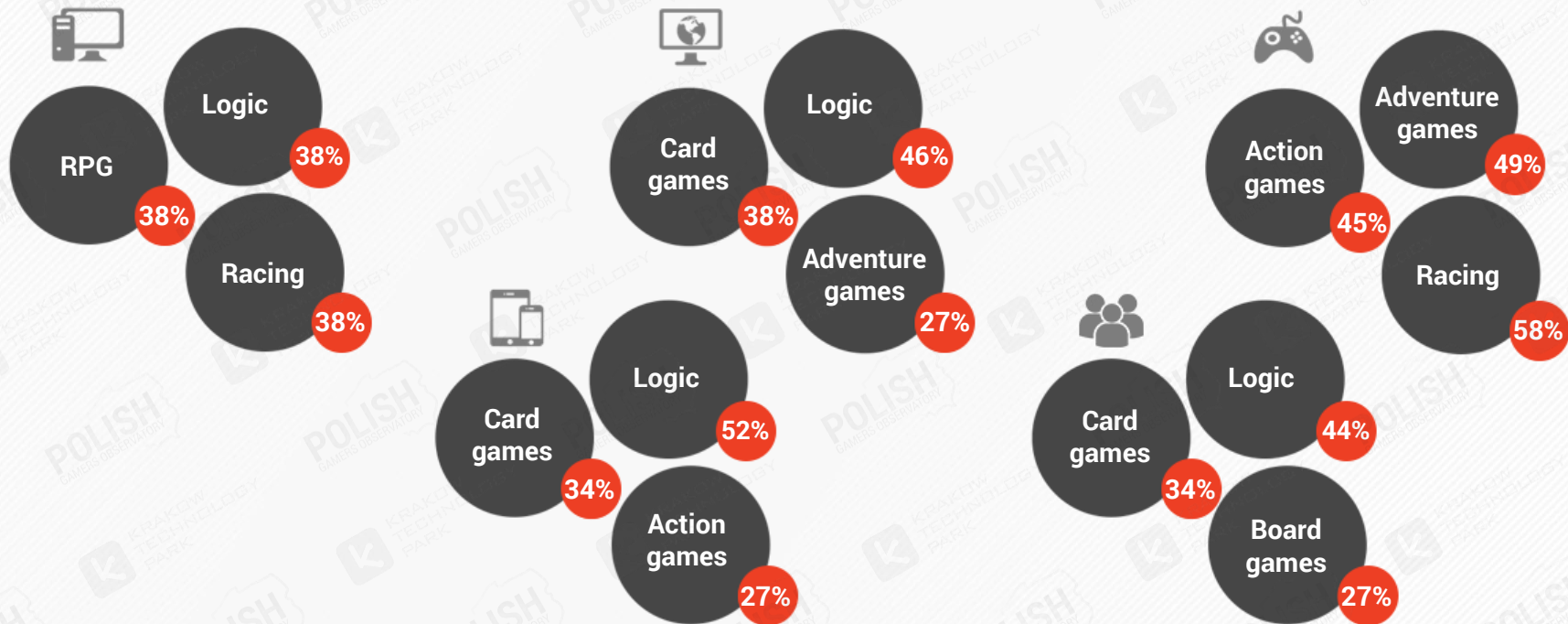
always or almost  
always with other  
players (multiplayer)



I don't know/  
It's hard to say



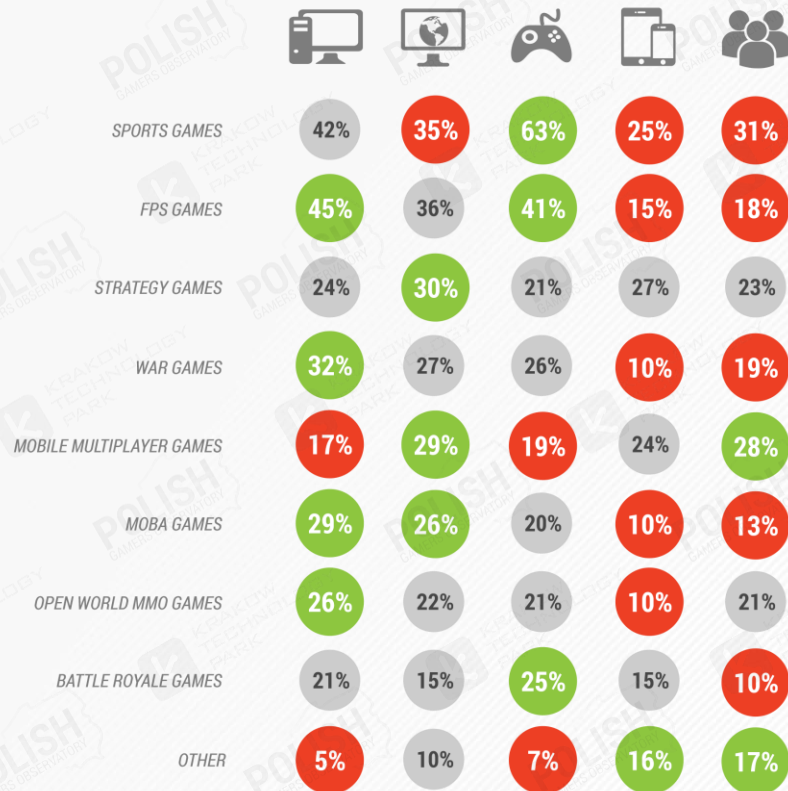
# PROFILE OF POLISH GAMERS / POPULARITY OF DIFFERENT GENRES OF GAMES





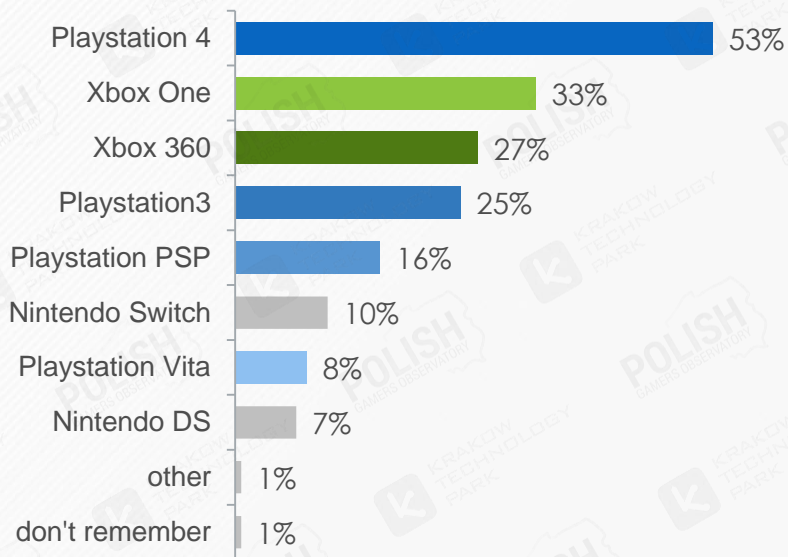
# PROFILE OF POLISH GAMERS / GAMES PLAYED WITH OTHER GAMERS

- significantly more in comparison to other platforms
- significantly less in comparison to other platforms

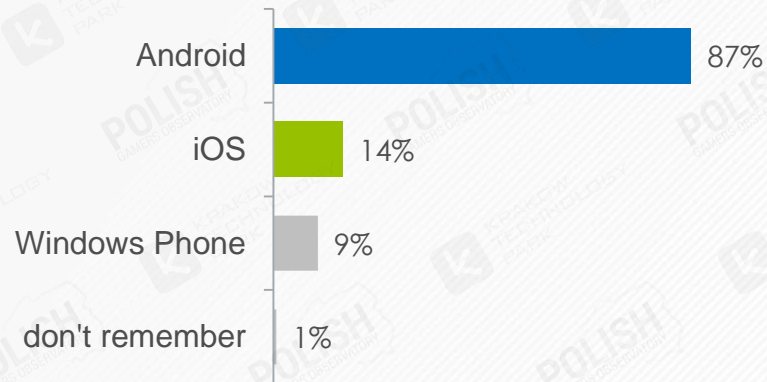


# PROFILE OF POLISH GAMERS

## POPULARITY OF CONSOLES



## POPULARITY OF MOBILE OPERATING SYSTEMS



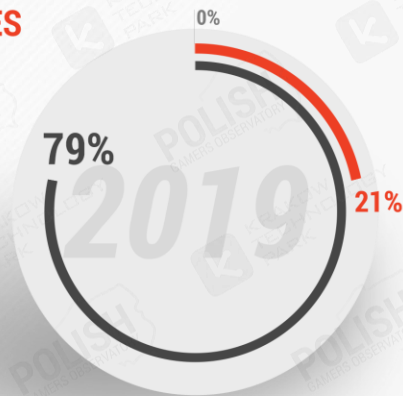


# VR - VIRTUAL REALITY

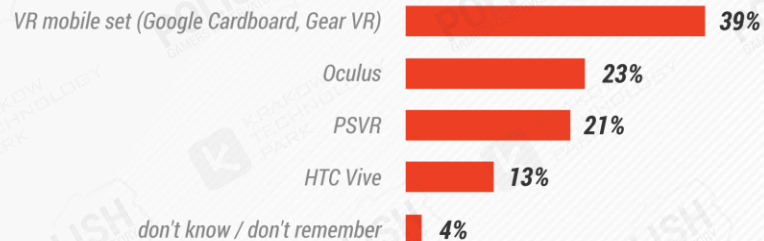
# VIRTUAL REALITY

## USE OF VR DEVICES

- Yes
- No



## USED DEVICES



# PROFILE OF POLISH GAMERS / FREQUENCY AND TIME OF PLAYING BY GENRE AND PLATFORM



22% of social platforms users play casino games during single gameplay for

**2 hours**

30% play casino games every day



Most console gamers play games few times a week or once a week

**>30%**

play MMO and RPG for more than 2 hours



24% PC gamers play solitaires every day

**≥25%**

browser gamers play MMO, RPG, virtual farms and casino games every day



Virtual farms are played every day by 33% of mobile gamers for

**15-60**

minutes during single gameplay





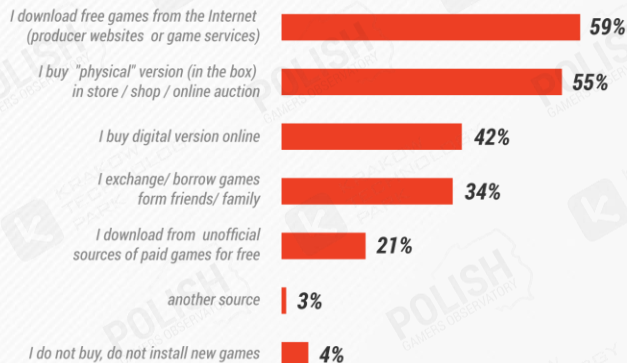
# Sources

**FOR OBTAINING GAMES**

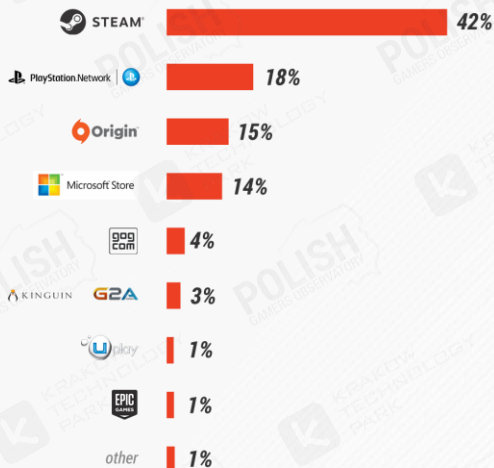
# SOURCES OF NEW GAMES



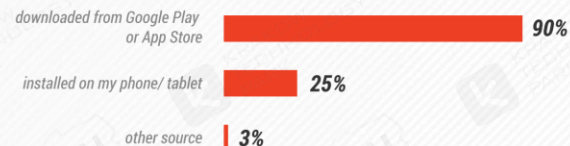
## SOURCES OF NEW GAMES PC & CONSOLES



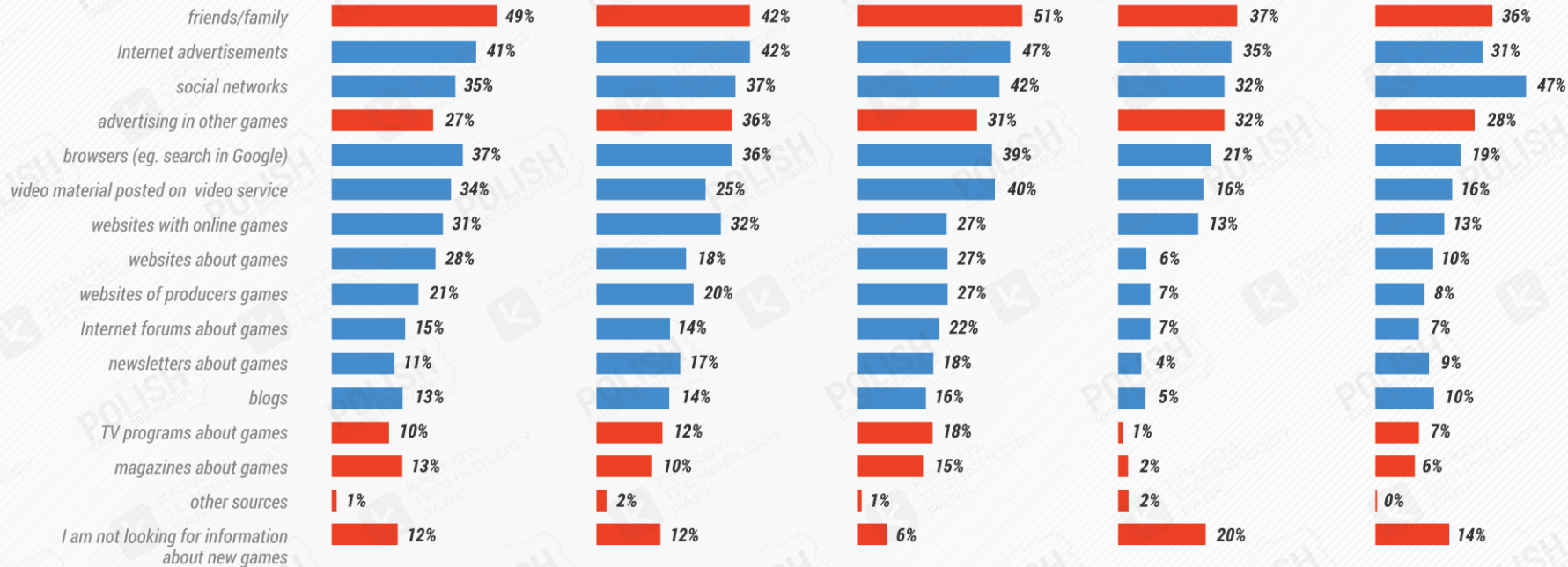
## SOURCES OF DIGITAL VERSIONS OF NEW GAMES PC & CONSOLES



## SOURCES OF NEW GAMES SMARTPHONE & TABLET



# SOURCES OF INFORMATION ABOUT NEW GAMES



■ Online sources







# Purchasing

## AND PAYMENT METHODS

# PURCHASING / POPULARITY OF GAME PURCHASE

## PURCHASE OF GAME/ ACCES TO GAME

New methodology: Panel



55%

2019

41%

2018



46%

2019

42%

2018



12%

2019

11%

2018

2016

Old methodology: CAWI RTS



## PURCHASE OF GAMES ADD-ONS

New methodology: Panel



28%

2019

25%

2018



30%

2019

22%

2018



36%

2019

31%

2018



21%

2019

18%

2018



16%

2019

17%

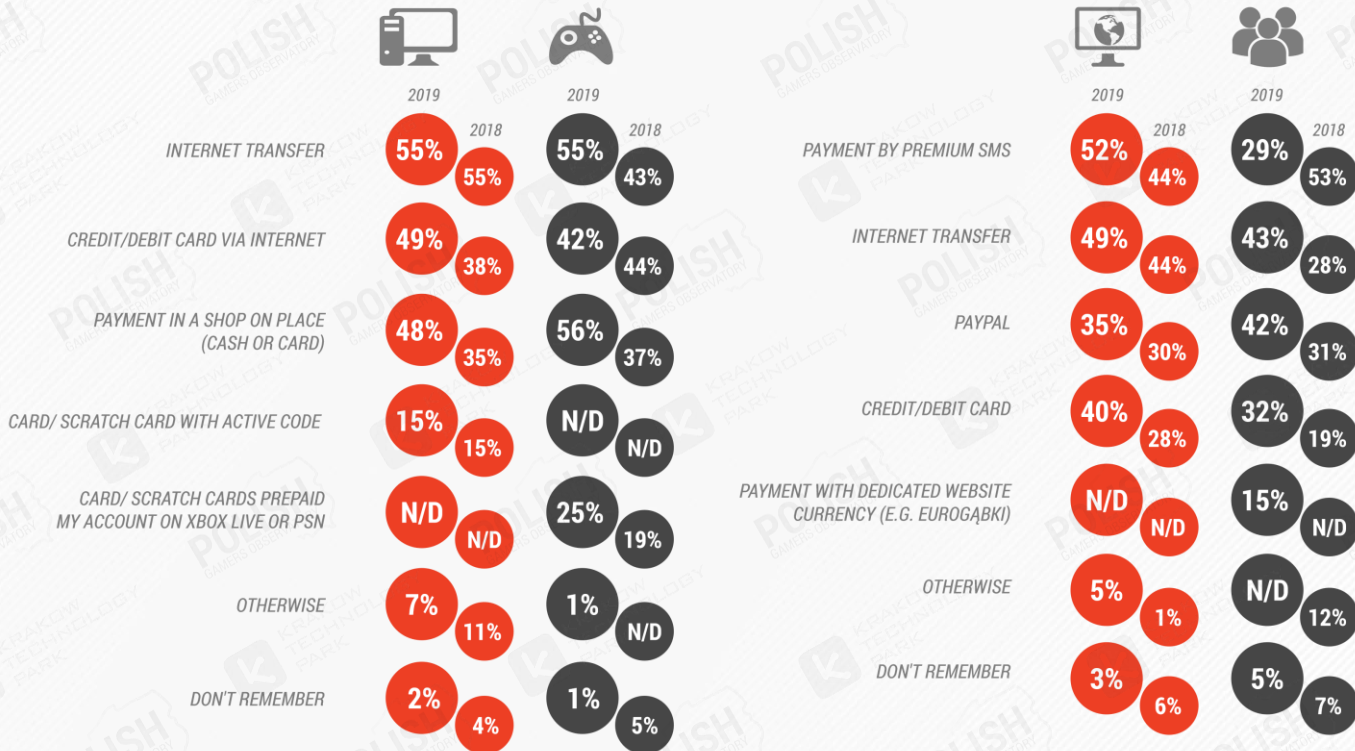
2018

2016

Old methodology: CAWI RTS



# PURCHASING / METHOD OF PAYMENT



A grayscale photograph of a person's hands typing on a laptop keyboard. A white cup of coffee sits on a saucer to the left of the laptop. The image is overlaid with a repeating watermark of a logo consisting of a square with a 'K' and the text 'KRAKOW TECHNOLOGY PARK' and 'POLISH GAMERS OBSERVATORY'.

# **Average** **SPENDINGS ON GAMES**

# PROFILE OF POLISH GAMERS / AVERAGE SPENDINGS ON GAMES



*PC Gamers are still price sensitive*

**28%**

declare to spend more than  
100 PLN on new game



*Console owners spend more...*

**64%**

declare to spend more than  
100 PLN on a 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 10 PLN  
for a new game (49%). However,*

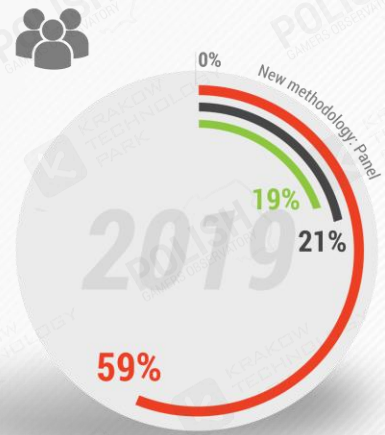
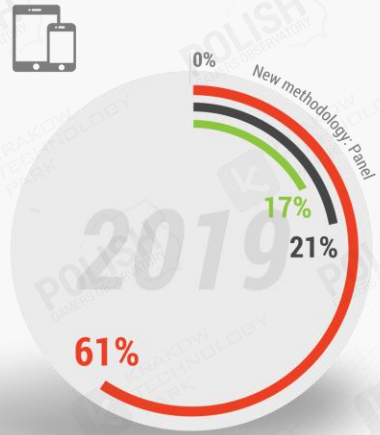
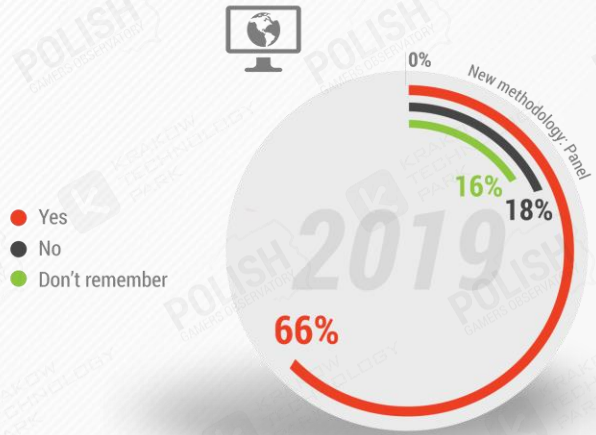
**60%**

declare to spend more than 10  
PLN for game extensions



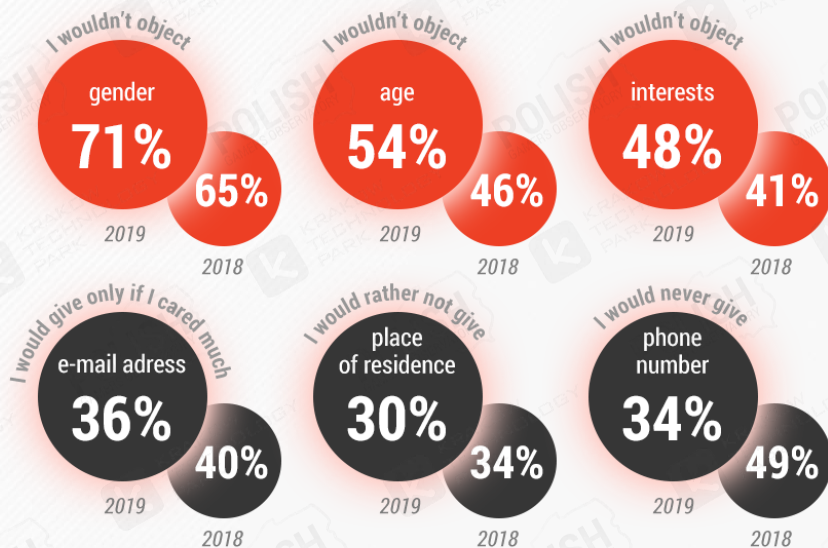


# REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

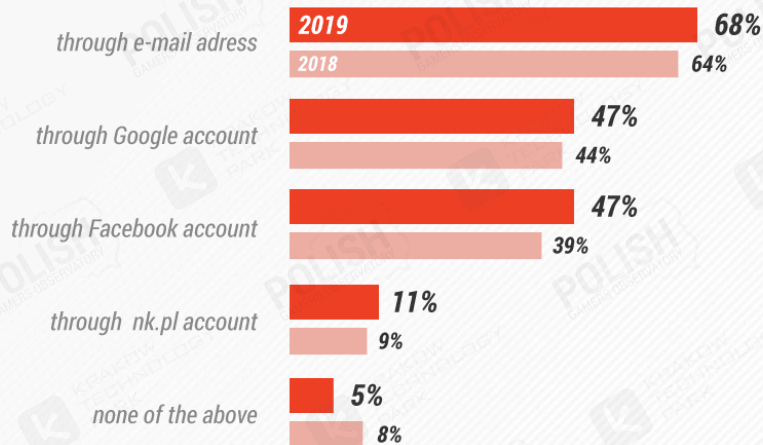


# REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

## PROVIDING PERSONAL INFORMATION WHILE REGISTERING GAMES ONLINE



## CONSIDERED REGISTRATION METHODS TO ONLINE GAMES



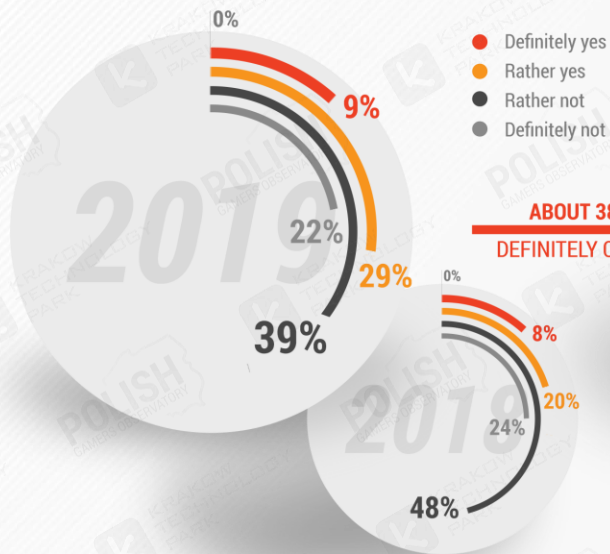




**E-sport**

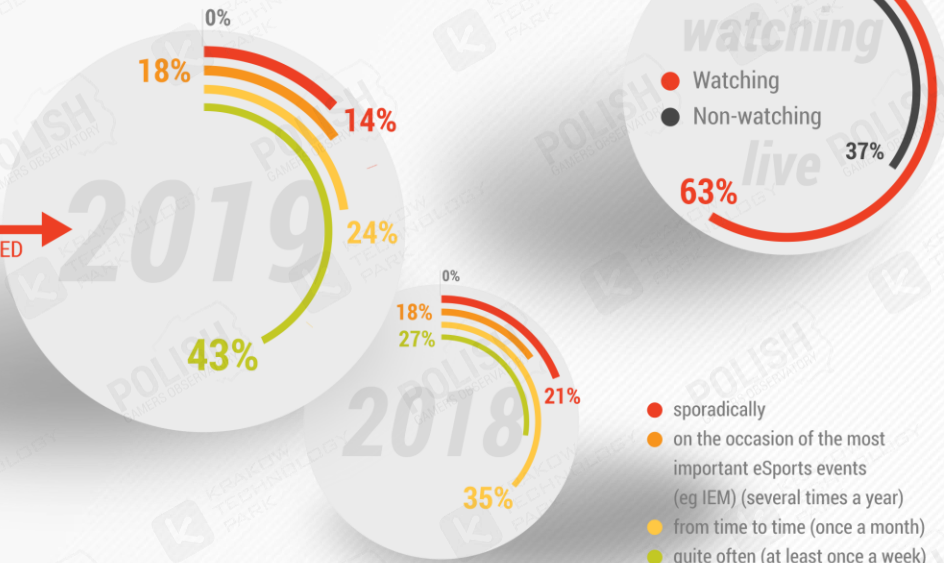
# E-SPORT

## INTEREST IN E-SPORT



ABOUT 38% DECLARED TO BE DEFINITELY OR RATHER INTERESTED

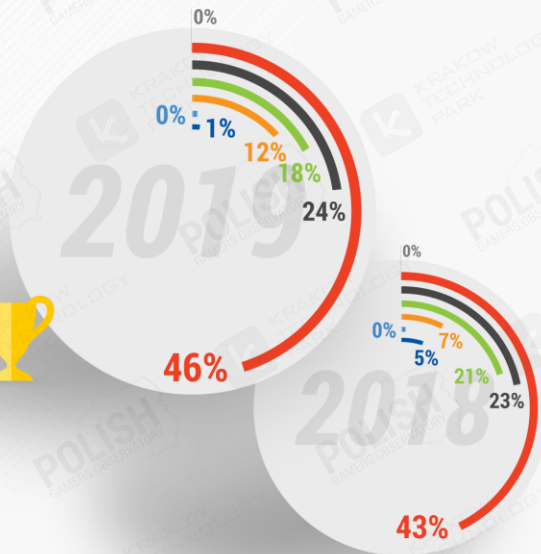
## FREQUENCY OF WATCHING/FOLLOWING TOURNAMENTS



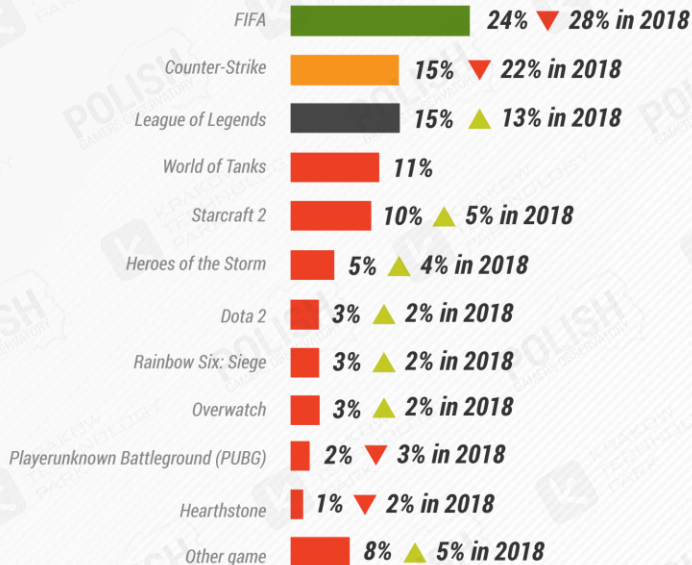
# E-SPORT

## USED PLATFORM

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



## MOST POPULAR GAMES

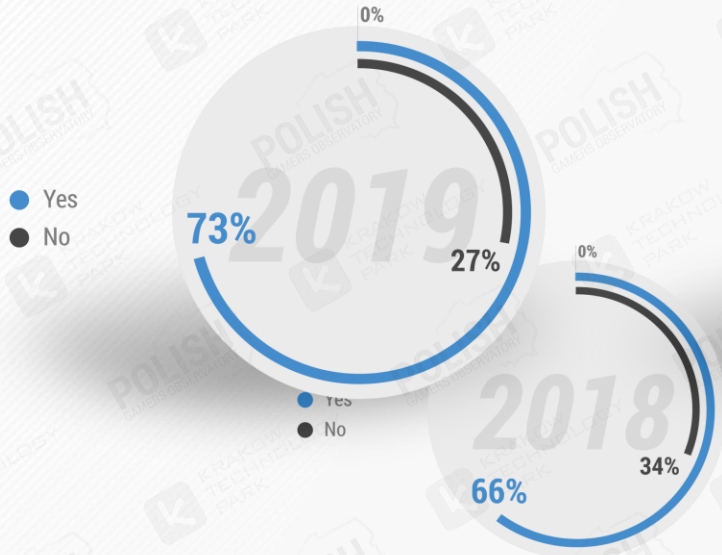




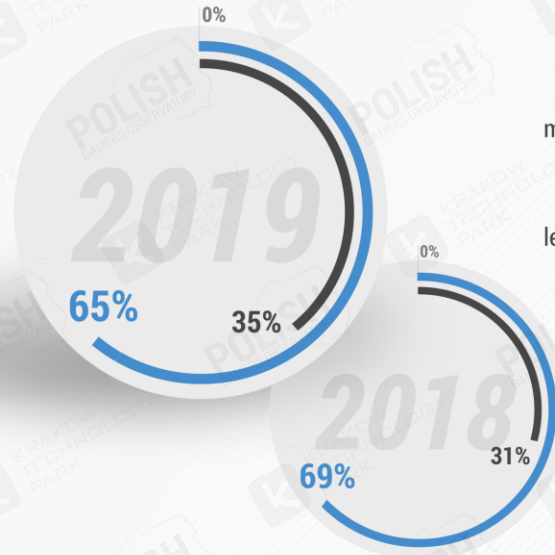
# Parents & Children

# PARENTS & CHILDREN / GAMING HABITS OF RESPONDENTS' CHILDREN

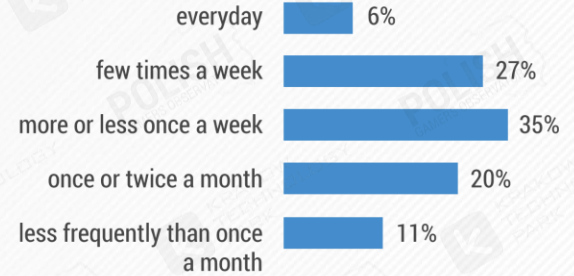
## HOW MANY PARENTS - INTERNET USERS, HAVE GAMING CHILDREN



## HOW MANY GAMING PARENTS PLAY WITH THEIR CHILDREN

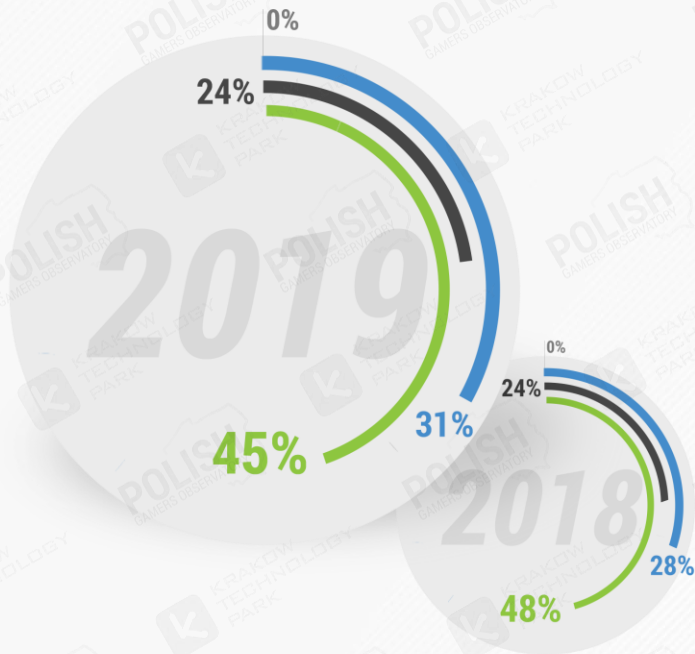


## FREQUENCY OF PLAYING WITH CHILDREN



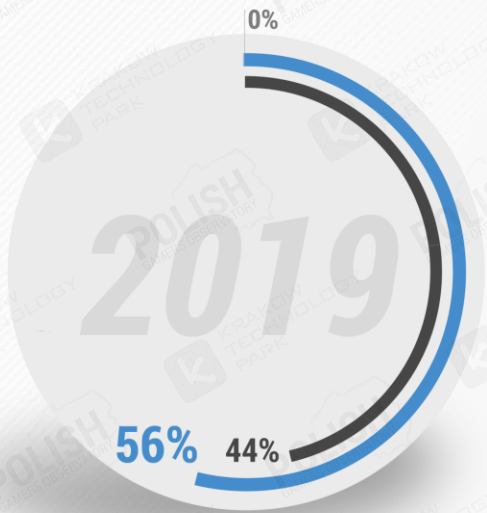
# PARENTS & CHILDREN / USING PEGI SYSTEM BY PARENTS

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

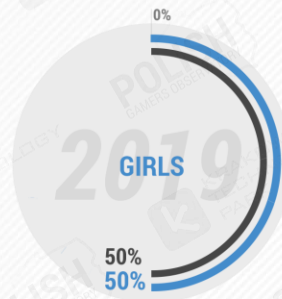
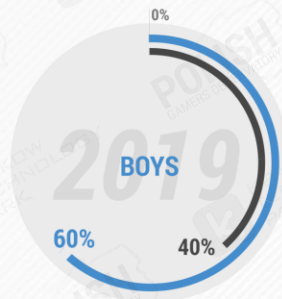
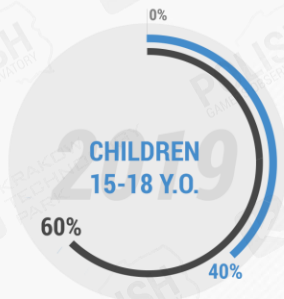
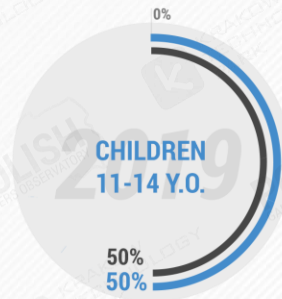
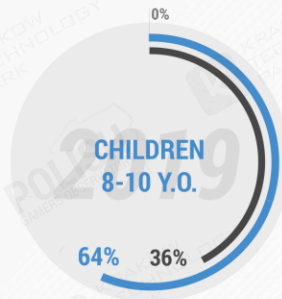
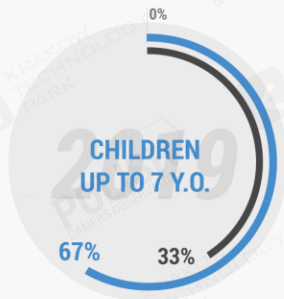


# PARENTS & CHILDREN / USING PARENTAL CONTROL

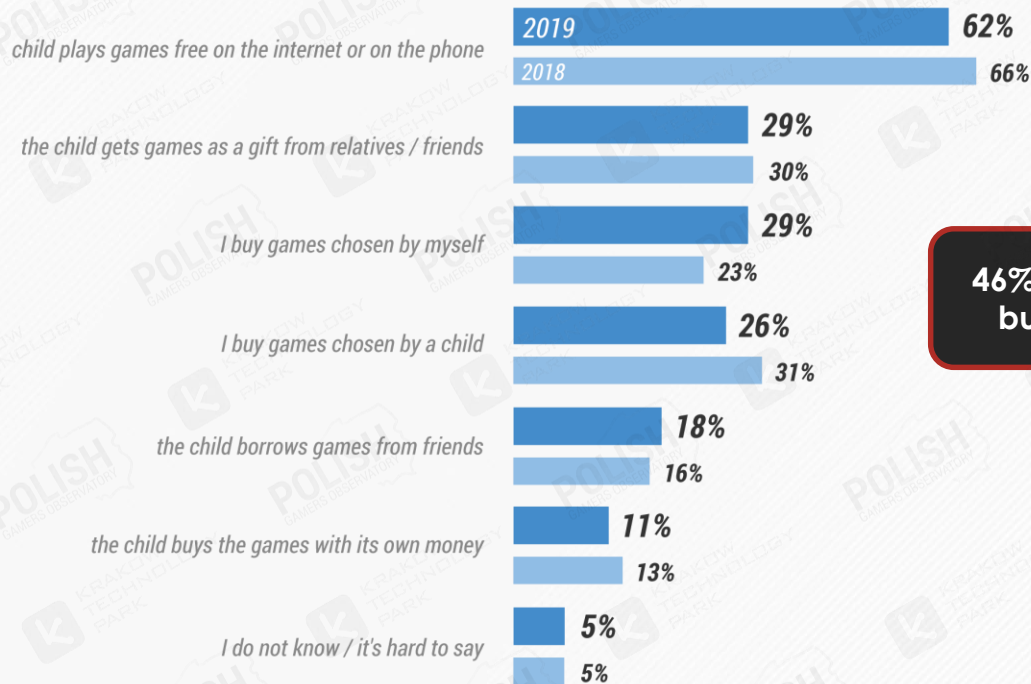
## ALL PARENTS



- Yes
- No



# PARENTS & CHILDREN / SOURCES OF NEW GAMES



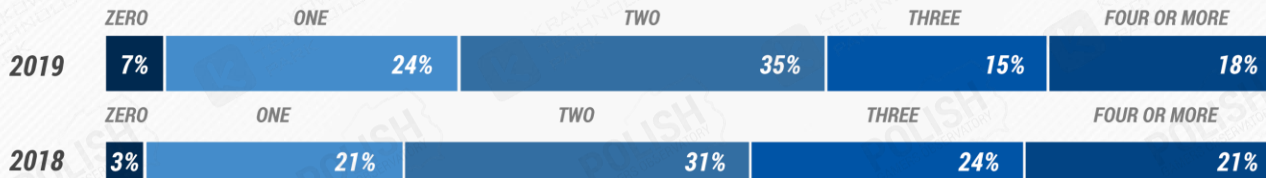
**46% of parents buy games**



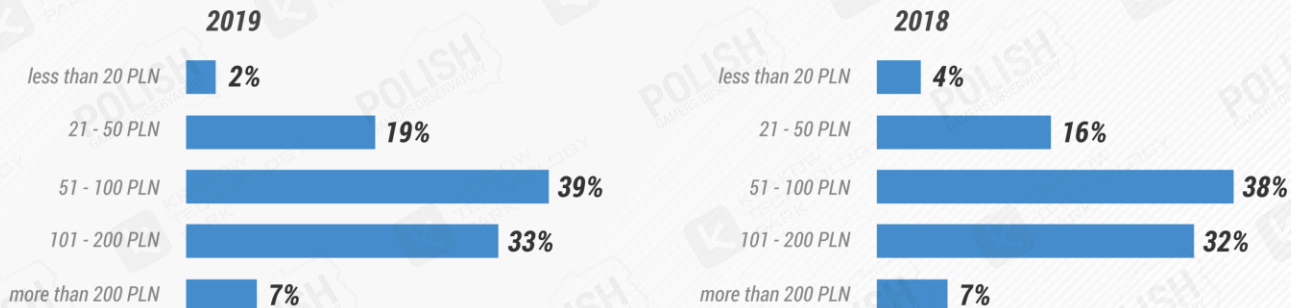


# PARENTS & CHILDREN / GAMES BOUGHT LAST YEAR

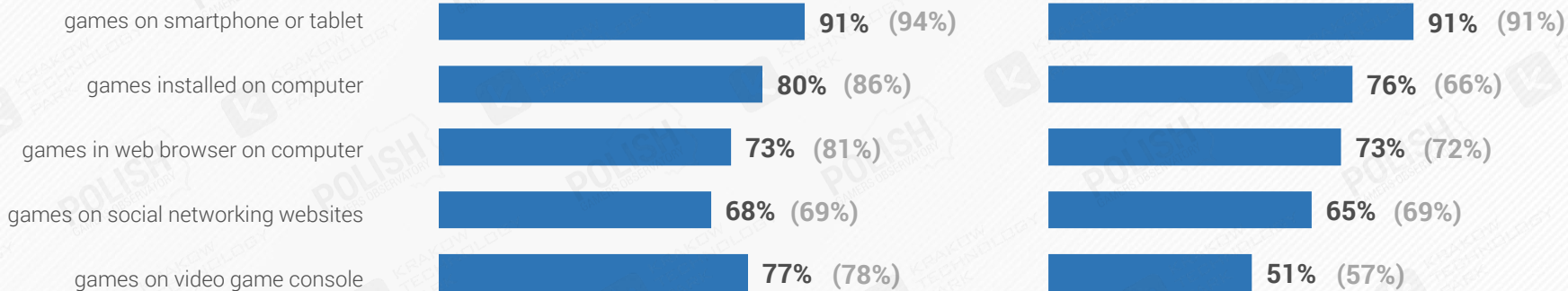
## NUMBER OF GAMES BOUGHT LAST YEAR



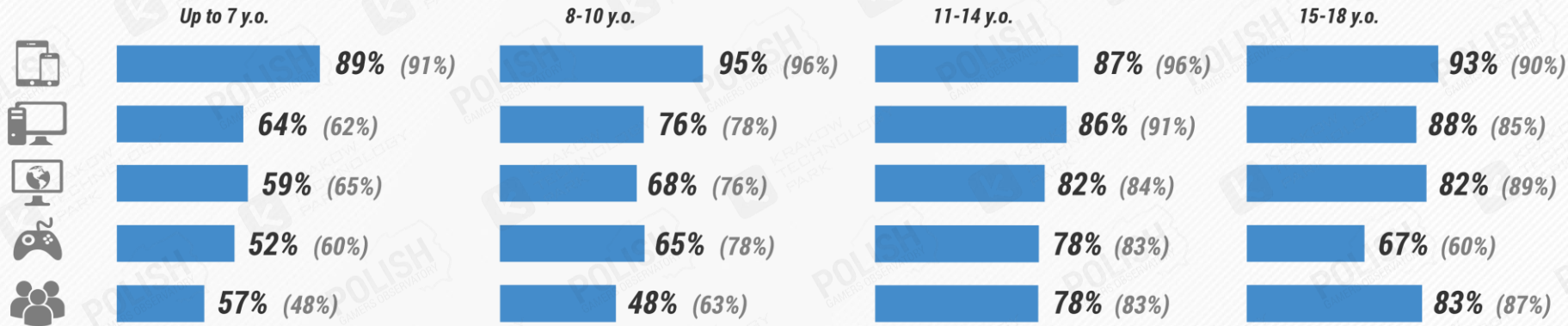
## PRICE OF LAST BOUGHT GAME



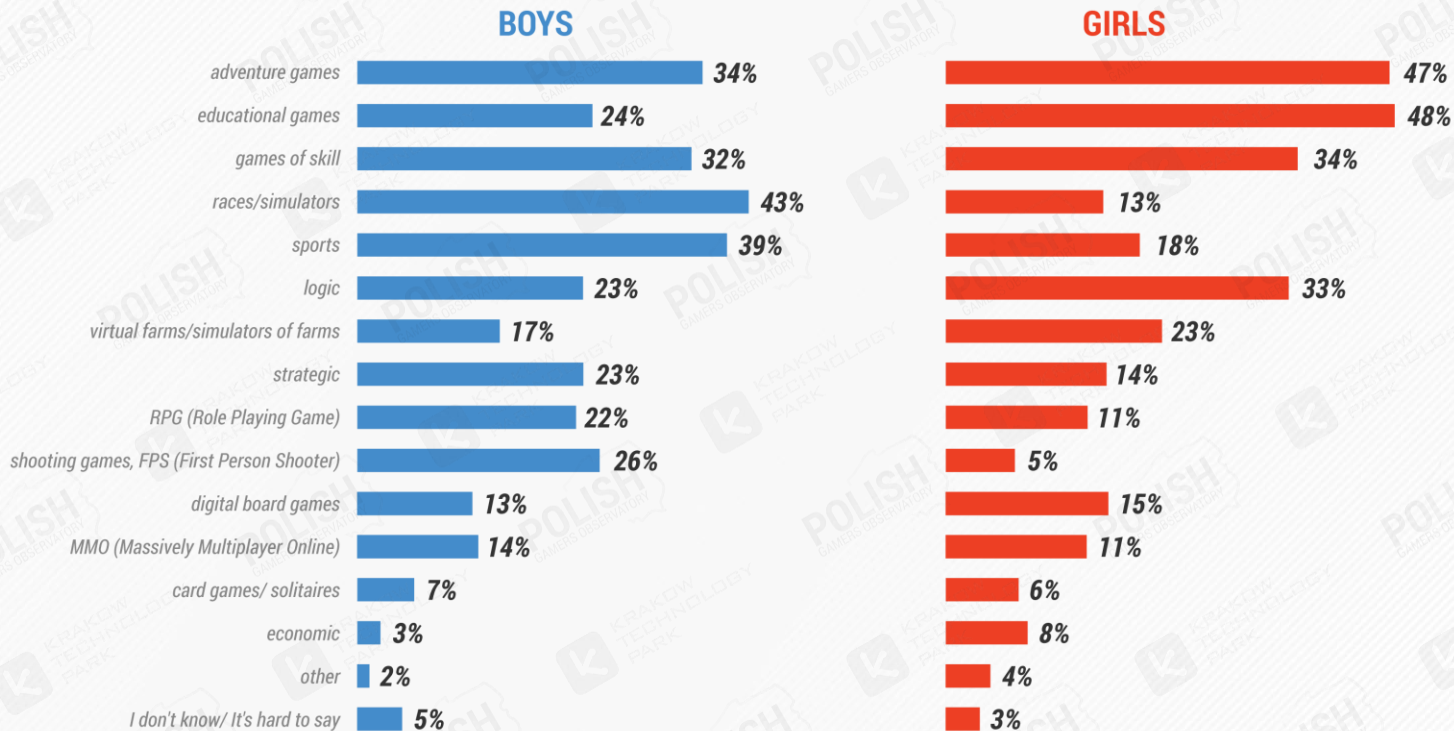
# PARENTS & CHILDREN / CHOSEN PLATFORMS AMONG GAMERS



# PARENTS & CHILDREN / CHOSEN PLATFORMS AMONG GAMERS



# PARENTS & CHILDREN / POPULARITY OF DIFFERENT GENRES OF GAMES



# PARENTS & CHILDREN / FREQUENCY AND TIME OF PLAYING BY GENRE AND PLATFORM



Among children age 11-14 there can be observed the most significant growth of time spent on playing social, PC installed, browser, mobile and console games

More than **30%** children aged 11-14 play games from 60 to more than 120 minutes



ABOUT **30%**

av. 31-60 MINUTES DURING SINGLE GAMEPLAY

**10%** PLAY FOR MORE THAN 2 HOURS ON CONSOLES AND PC



Girls and boys spend time playing game on each of 5 platforms with almost similar frequency

**21% vs. 11%**  
except browser games

>10% boys spend more than 2 hours playing console, browser and PC installed games



19% children up to 7 y.o. play mobile games every day, and 15% play on social networks with similar frequency

**60%**

Children up to 7 y.o. play games between 15-60 minutes during single gameplay



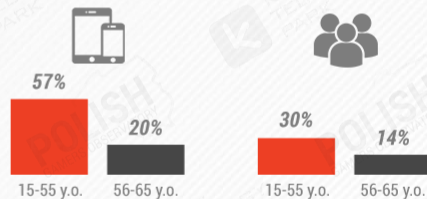
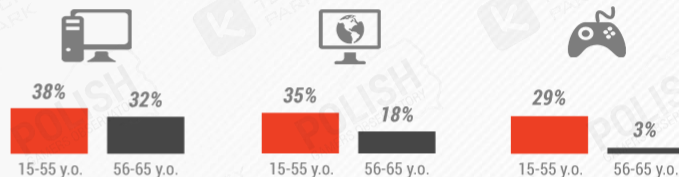
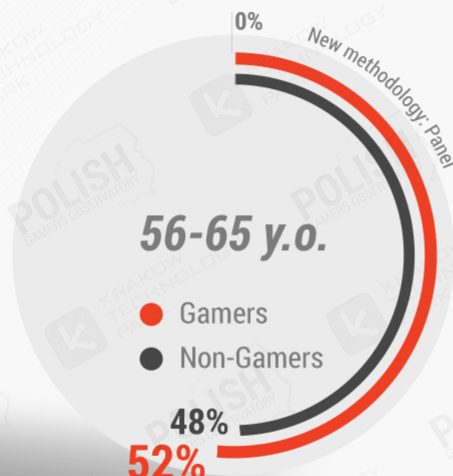
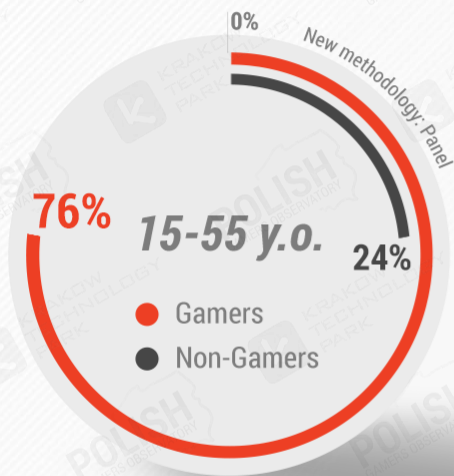


**15-55 vs 56-65 y.o.**

**COMPARISON**

# 56-65 Y.O.

## GAMERS AND USED PLATFORMS

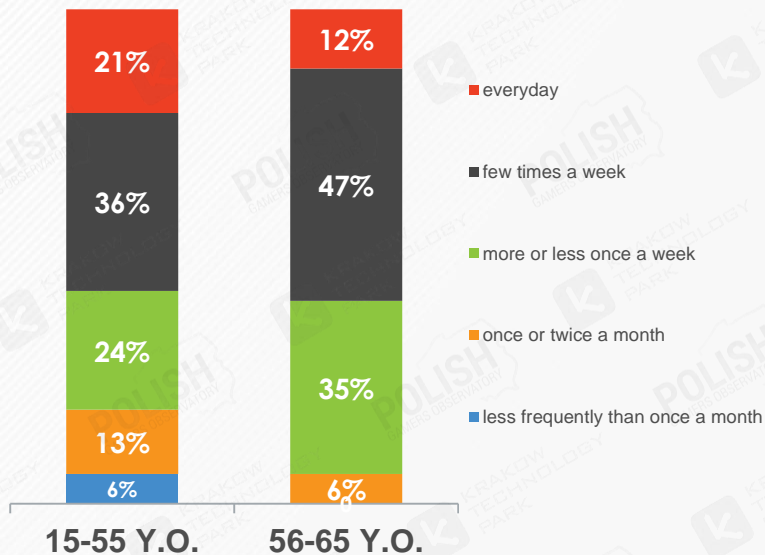


# 56-65 Y.O.

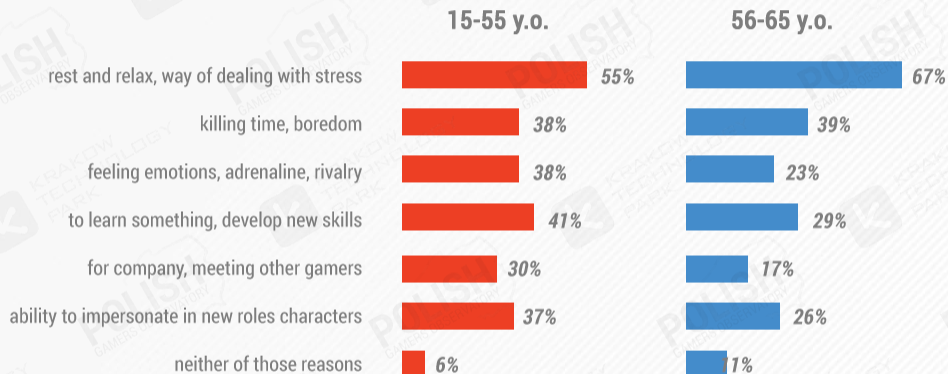
## GAMES INSTALLED ON COMPUTER

GAMES INSTALLED ON COMPUTER IS THE ONLY CATEGORY WITH A SUFFICIENT NUMBER OF RESPONSES IN THE AGE GROUP OF 56-65 Y.O.

### FREQUENCY OF GAMING



### MOTIVATIONS TO PLAY

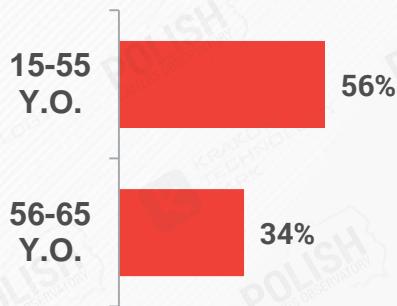




# 56-65 Y.O.

## GAMES INSTALLED ON COMPUTER

PERCENT OF PEOPLE WHO BOUGHT GAME /ACCES TO GAME OR GAMES ADD-ONS



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SOURCES OF NEW GAMES PC & CONSOLES

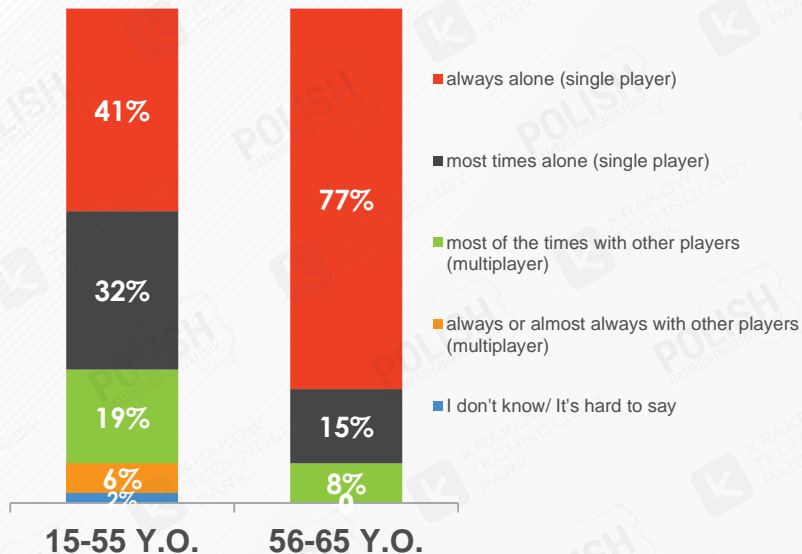


# 56-65 Y.O.

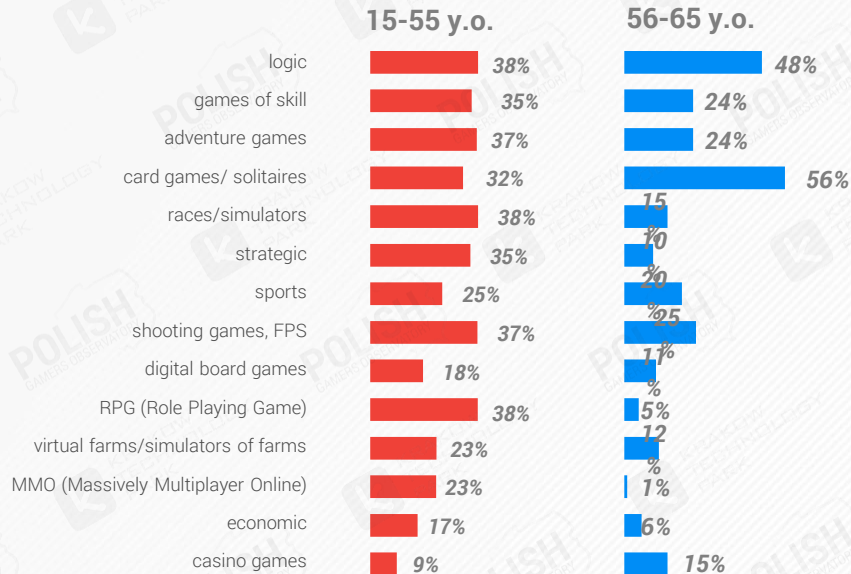
## GAMES INSTALLED ON COMPUTER

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### PLAYING ALONE VS PLAYING WITH OTHERS



### POPULARITY OF DIFFERENT TYPES OF GAMES





**THANK  
YOU**

FOR WATCHING AND  
LISTENING