



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.

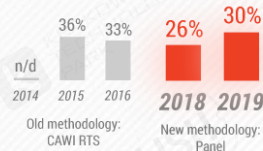
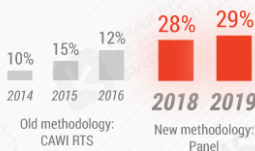
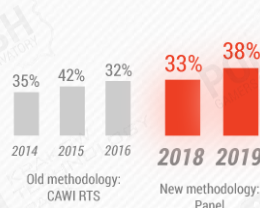
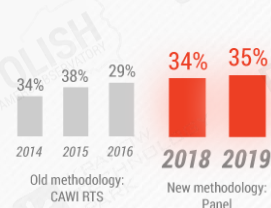
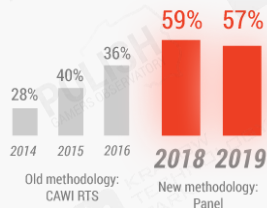
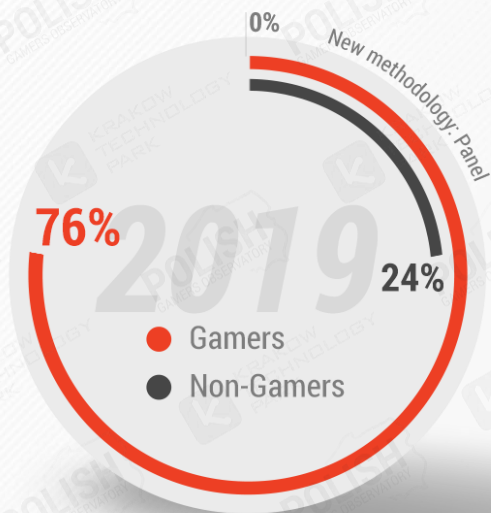
The background of the slide features a grayscale photograph of two men, likely gamers, looking intently at a screen. They are holding video game controllers. The image is overlaid with a repeating, semi-transparent watermark pattern. The watermark consists of a stylized 'K' logo followed by the text 'KRAKOW TECHNOLOGY PARK' and 'POLISH GAMERS OBSERVATORY'.

How many gamers

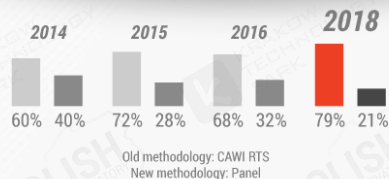
ARE THERE AMONG POLISH INTERNET USERS?

HOW MANY GAMERS

ARE THERE AMONG POLISH INTERNET USERS?



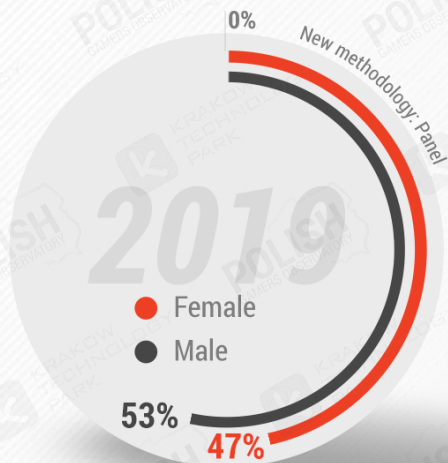
● Gamers
● Non-Gamers



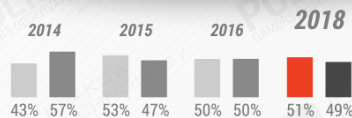


Profile of POLISH GAMERS

PROFILE OF POLISH GAMERS / BY GENDER



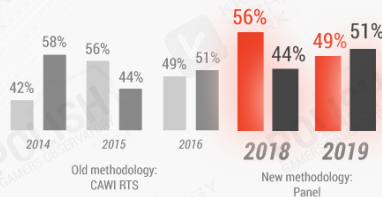
● Female
● Male



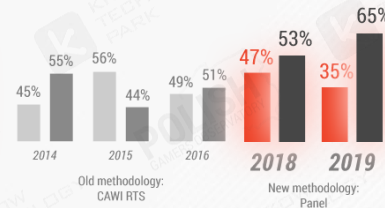
Old methodology: CAWI RTS
New methodology: Panel



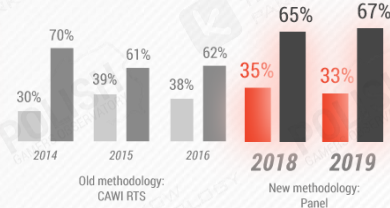
I played games on
smartphone or tablet



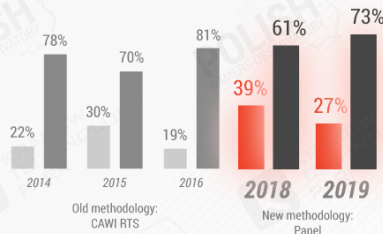
I played games in web
browser (Firefox,
Chrome, IE) on computer



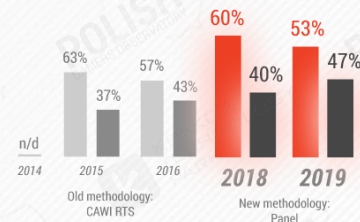
I played games
installed on computer
(laptop or PC)



I played games on
video game console



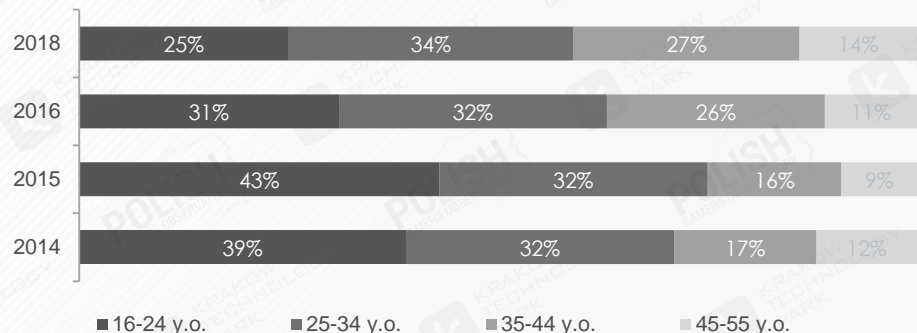
I played games on
social networking
websites



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.



25% 33% 32% 10%



26% 32% 29% 14%



29% 32% 27% 13%



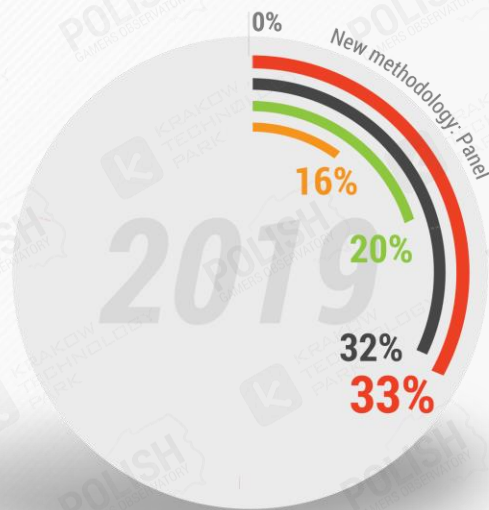
28% 32% 28% 13%



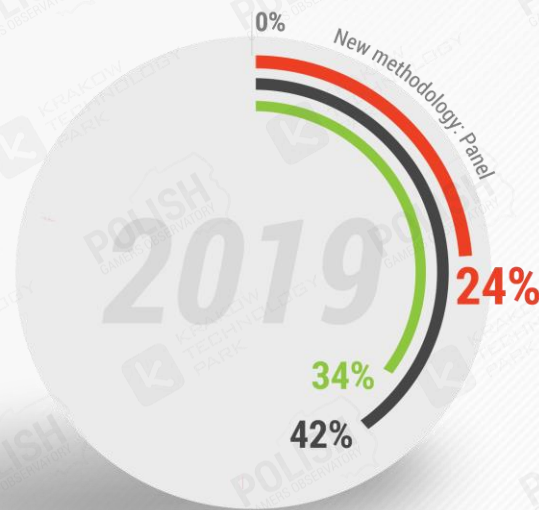
27% 32% 25% 15%

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

PROFILE OF POLISH GAMERS / BY HOME & FINANCIAL SITUATION

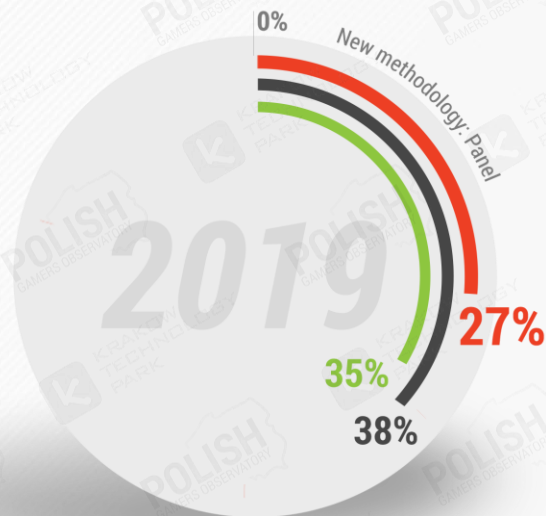


- village
- < 100 000 residents
- 100 000 - 500 000 residents
- > 500 000 residents

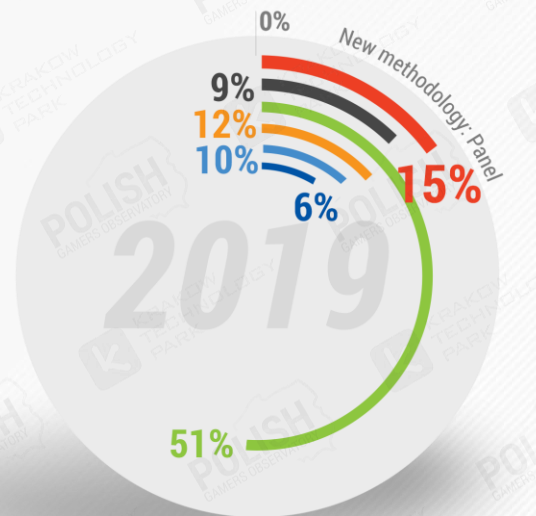


- poor household financial situation
- average household financial situation
- good household financial situation

PROFILE OF POLISH GAMERS / BY EDUCATION & PROFESSION



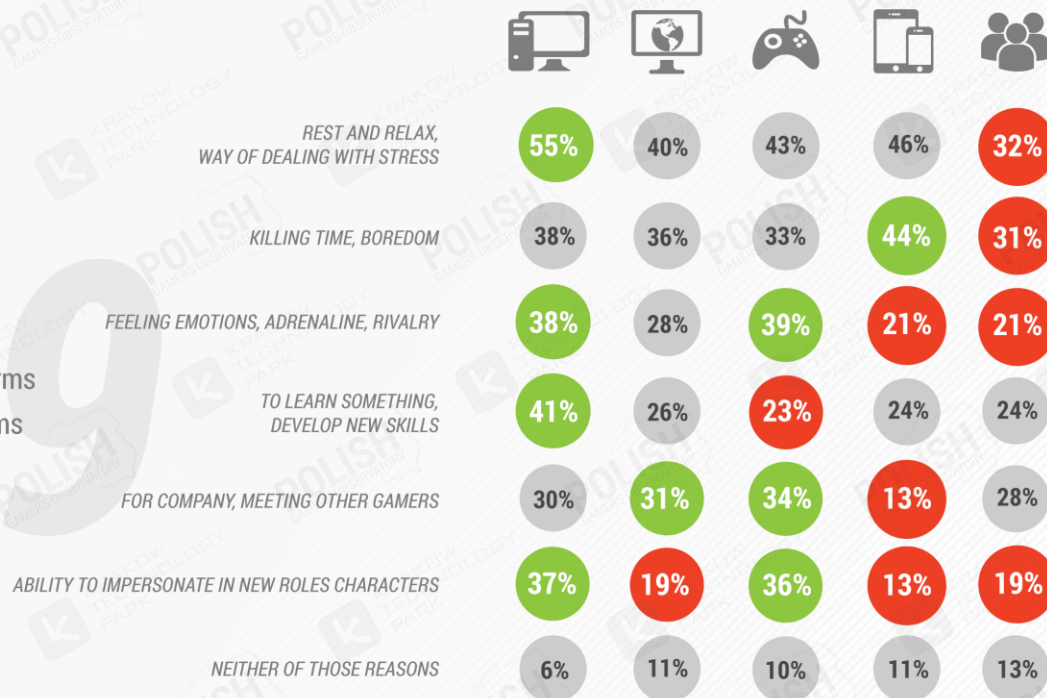
- primary
- secondary
- higher



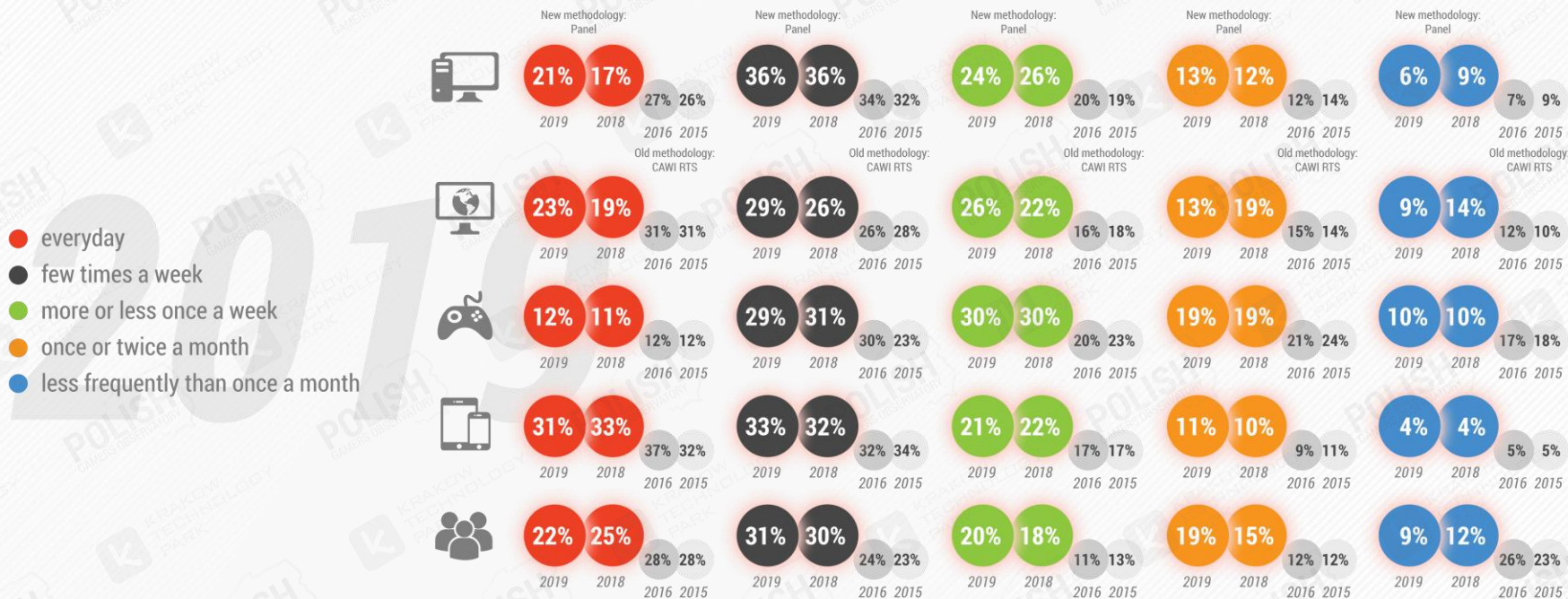
- pupils, junior students
- part-time job
- unemployed
- not working, home-maker
- permanently employed

PROFILE OF POLISH GAMERS / MOTIVATIONS TO PLAY ON EACH PLATFORM

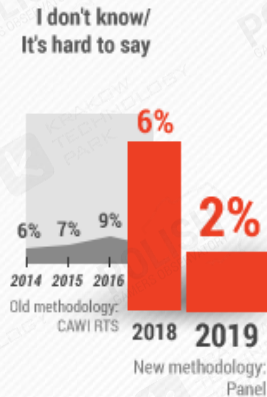
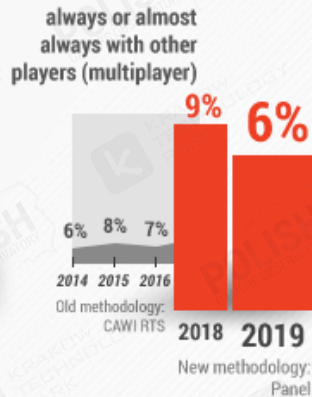
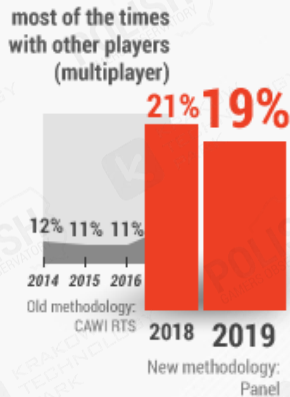
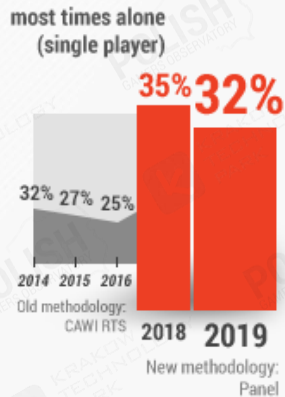
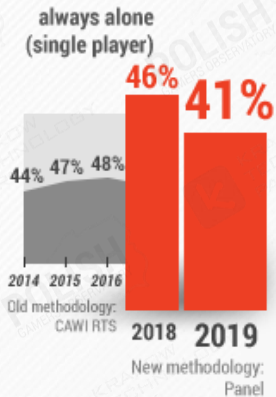
- significantly more in comparison to other platforms
- significantly less in comparison to other platforms



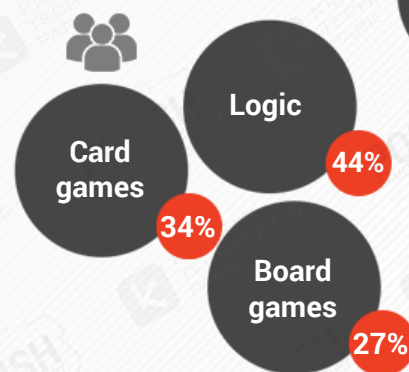
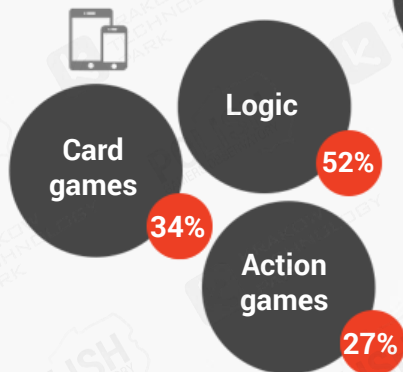
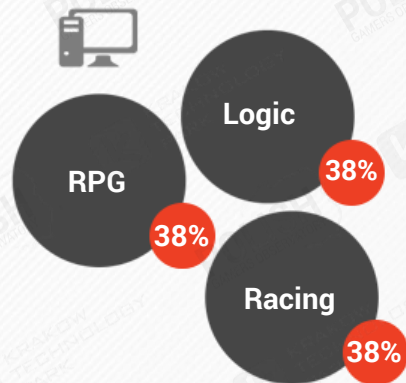
PROFILE OF POLISH GAMERS / FREQUENCY OF PLAYING ON EACH PLATFORM



PROFILE OF POLISH GAMERS / GAMING STYLES AMONG DIFFERENT PLATFORMS

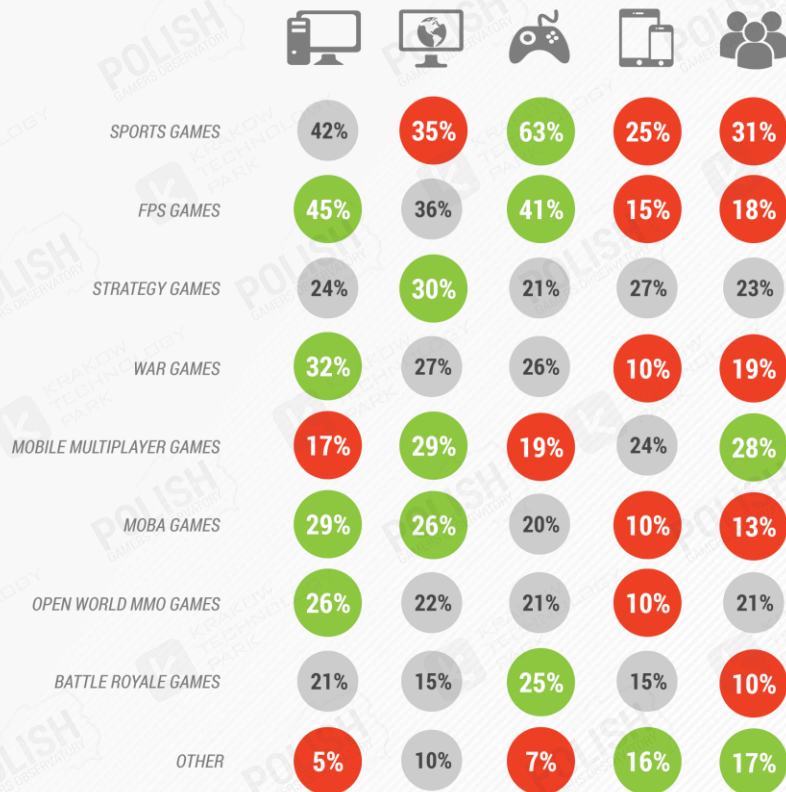


PROFILE OF POLISH GAMERS / POPULARITY OF DIFFERENT GENRES OF GAMES



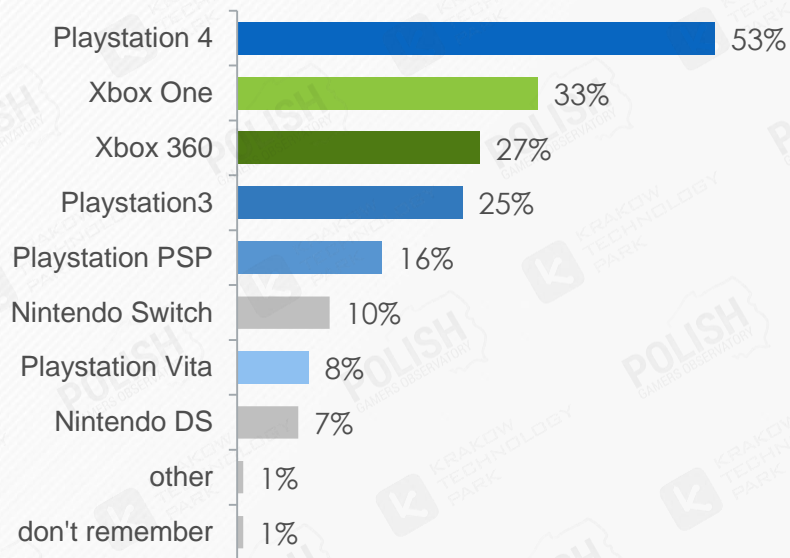
PROFILE OF POLISH GAMERS / GAMES PLAYED WITH OTHER GAMERS

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

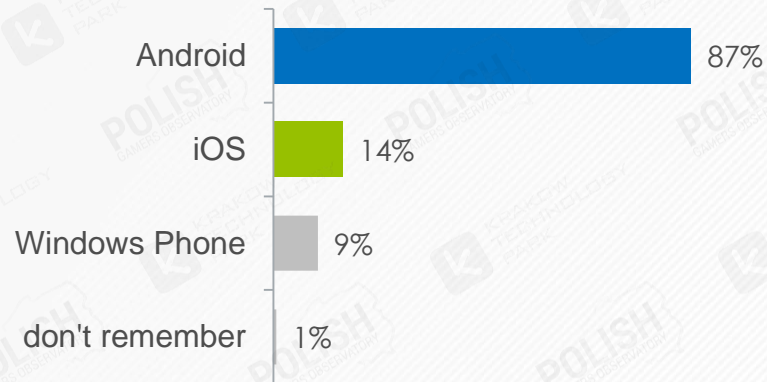


PROFILE OF POLISH GAMERS

POPULARITY OF CONSOLES



POPULARITY OF MOBILE OPERATING SYSTEMS



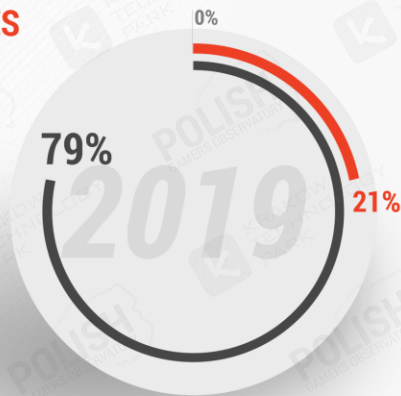
A grayscale photograph of a person wearing a VR headset, holding the sides of the device with both hands. The person is looking into the headset. The background is a light gray with a repeating pattern of logos for 'KRAKOW TECHNOLOGY PARK' and 'POLISH GAMERS OBSERVATORY'.

VR - VIRTUAL REALITY

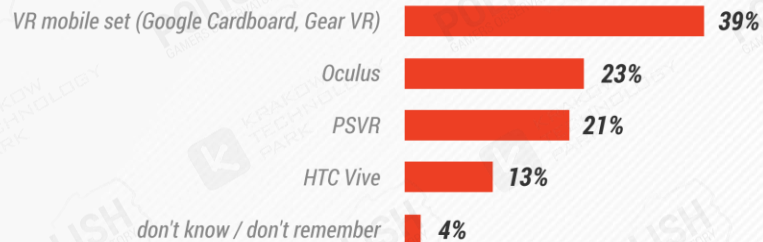
VIRTUAL REALITY

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

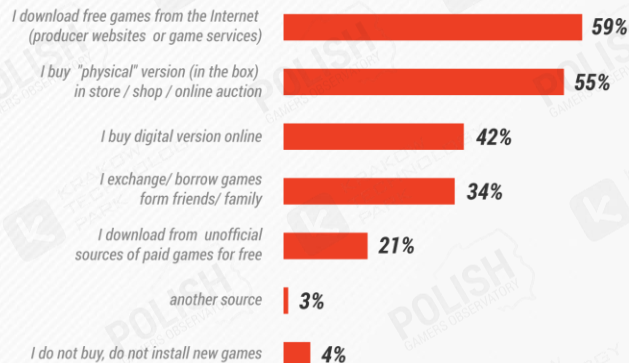
A grayscale photograph of four young adults sitting together and playing video games. From left to right: a woman with curly hair pointing forward, a man holding a controller, a woman laughing while holding a controller, and a man smiling. The background is a light gray with a repeating pattern of logos for 'KRAKOW TECHNOLOGY PARK' and 'POLISH GAMING OBSERVATORY'.

Sources FOR OBTAINING GAMES

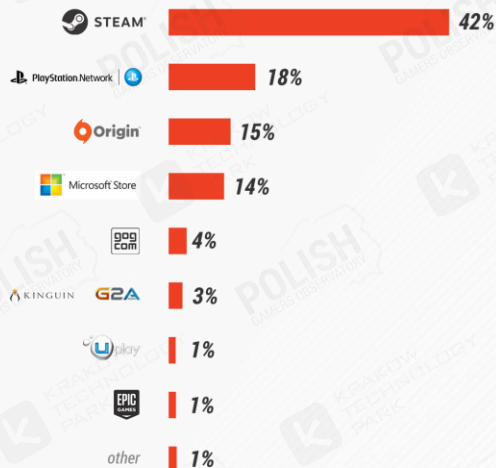
SOURCES OF NEW GAMES



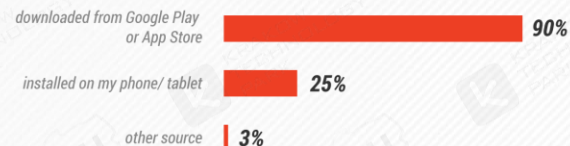
SOURCES OF NEW GAMES PC & CONSOLES



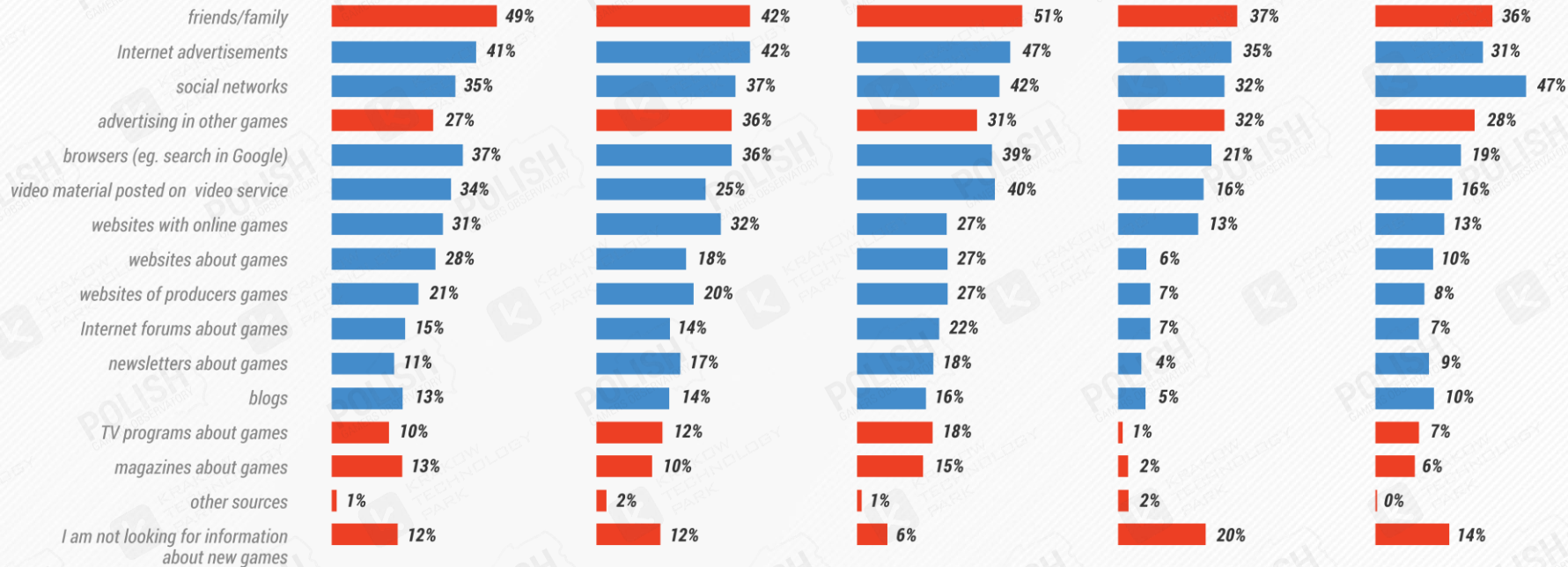
SOURCES OF DIGITAL VERSIONS OF NEW GAMES PC & CONSOLES



SOURCES OF NEW GAMES SMARTPHONE & TABLET



SOURCES OF INFORMATION ABOUT NEW GAMES



■ Online sources



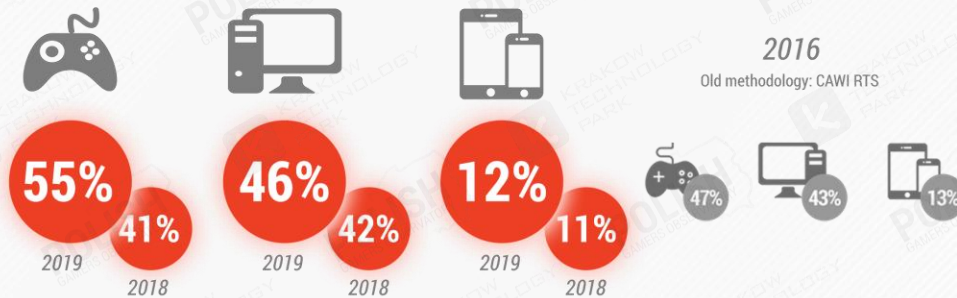


Purchasing AND PAYMENT METHODS

PURCHASING / POPULARITY OF GAME PURCHASE

PURCHASE OF GAME/ ACCES TO GAME

New methodology: Panel

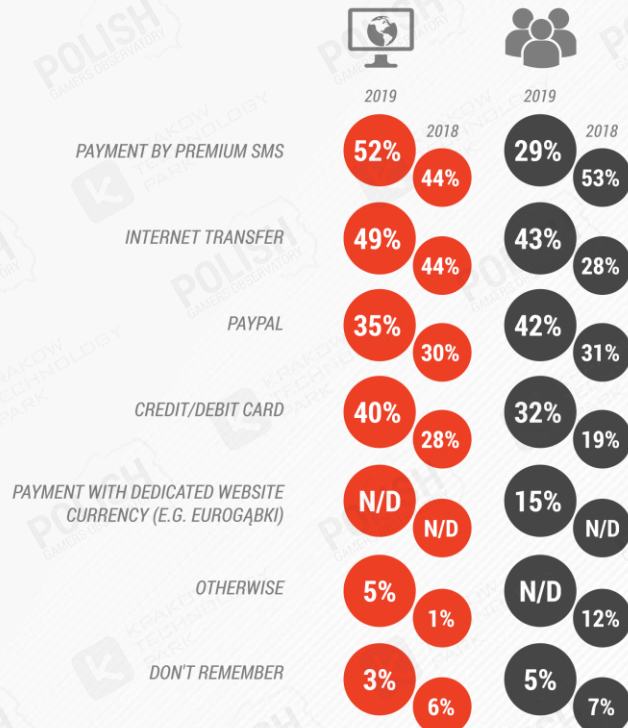
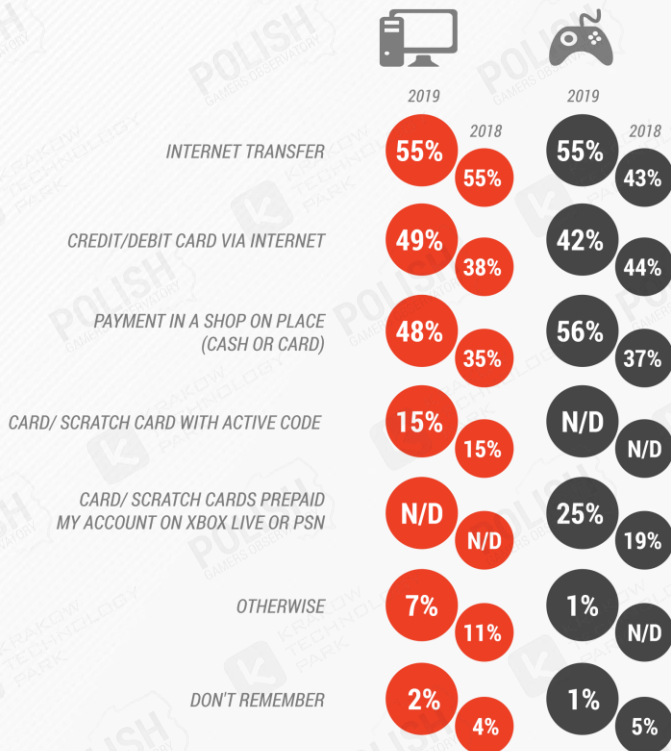


PURCHASE OF GAMES ADD-ONS

New methodology: Panel



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 pattern that reads "POLISH GAMERS OBSERVATORY" and "KRAKOW TECHNOLOGY PARK".

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,*

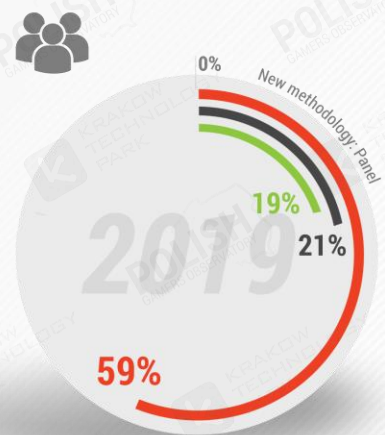
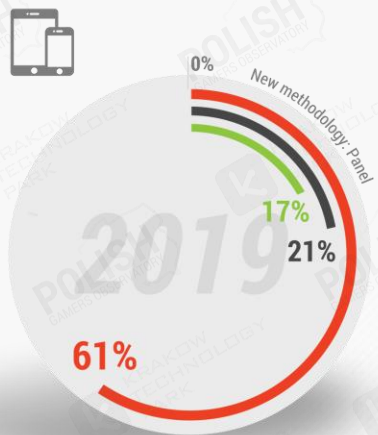
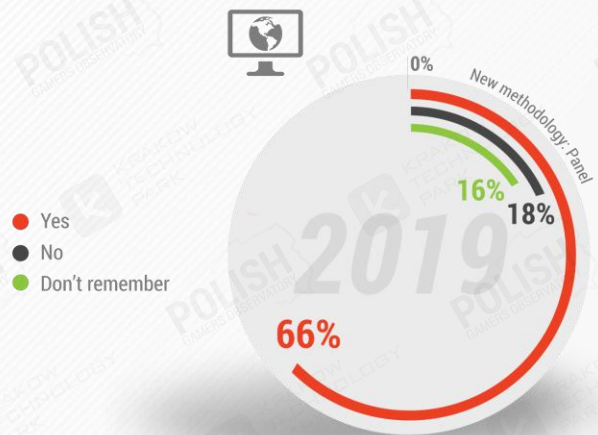
60%

declare to spend more than 10
PLN for game extensions



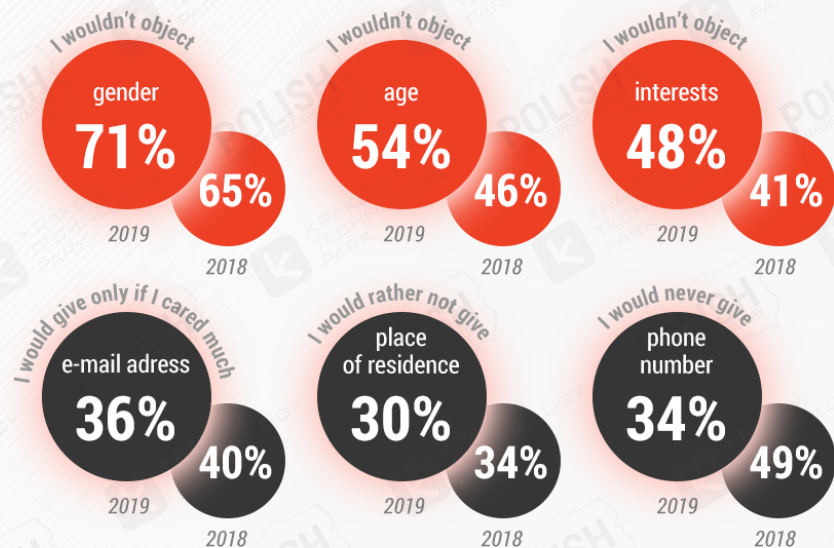
Registration

REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

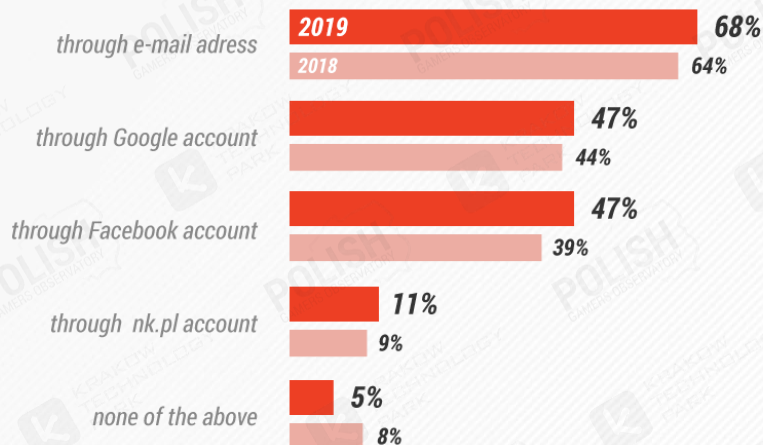


REGISTRATION / RESIGNATION FROM REGISTRATION/INSTALLATION

PROVIDING PERSONAL INFORMATION WHILE REGISTERING GAMES ONLINE



CONSIDERED REGISTRATION METHODS TO ONLINE GAMES

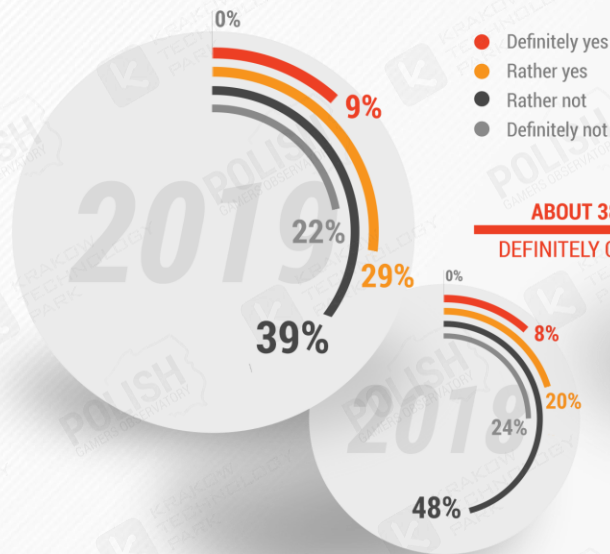




E-sport

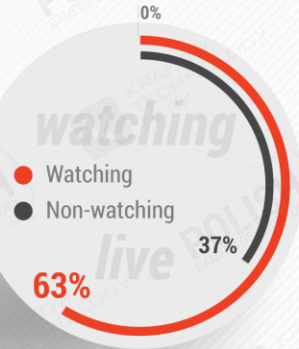
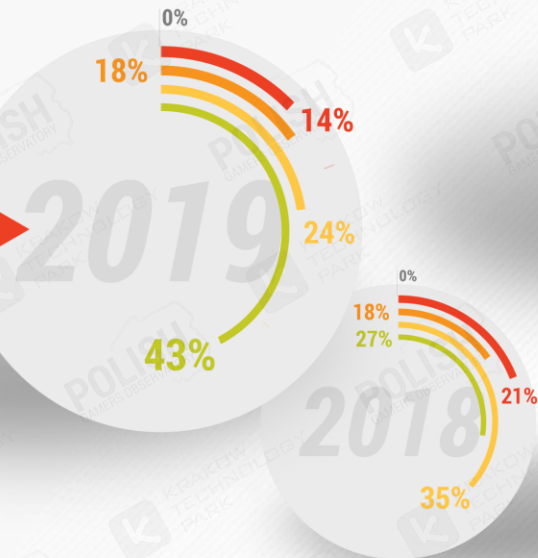
E-SPORT

INTEREST IN E-SPORT



ABOUT 38% DECLARED TO BE
DEFINITELY OR RATHER INTERESTED

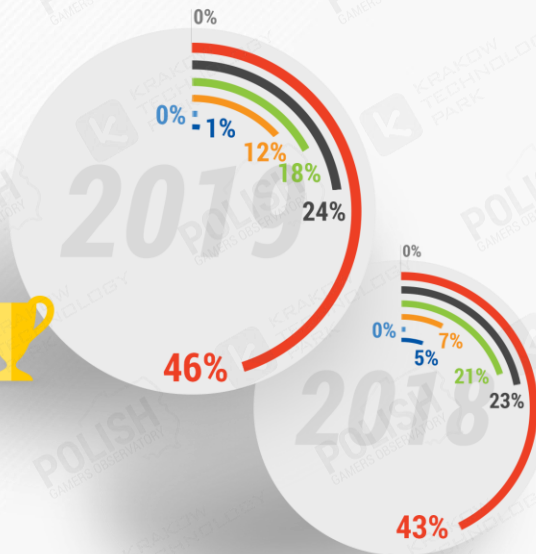
FREQUENCY OF WATCHING/ FOLLOWING TOURNAMENTS



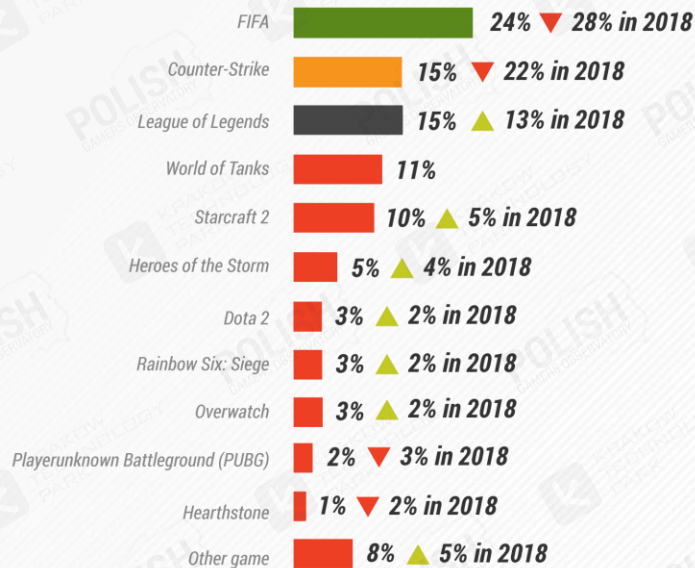
E-SPORT

USED PLATFORM

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



MOST POPULAR GAMES

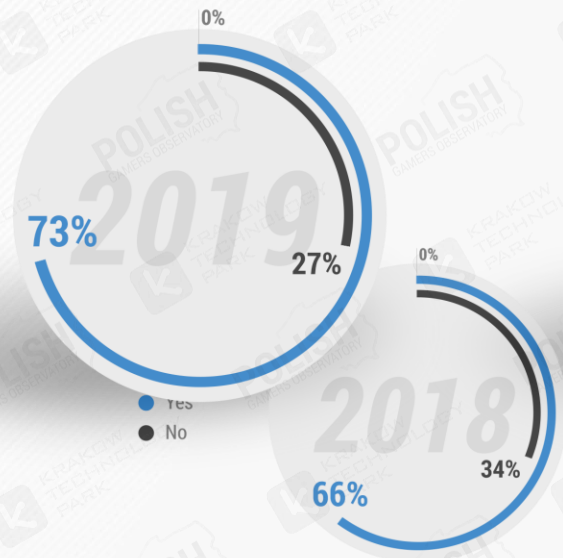




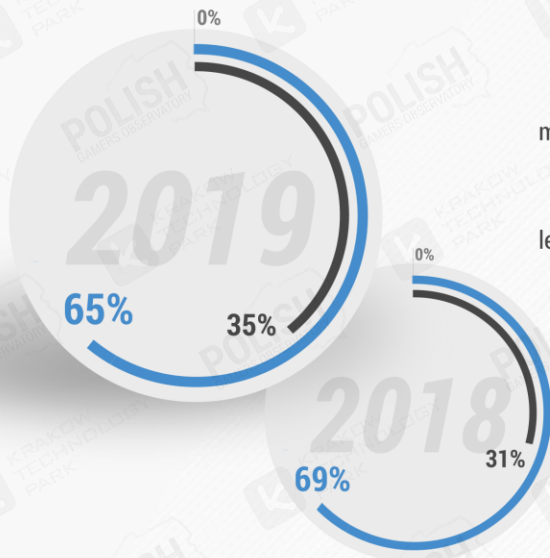
Parents & Children

PARENTS & CHILDREN / GAMING HABITS OF RESPONDENTS' CHILDREN

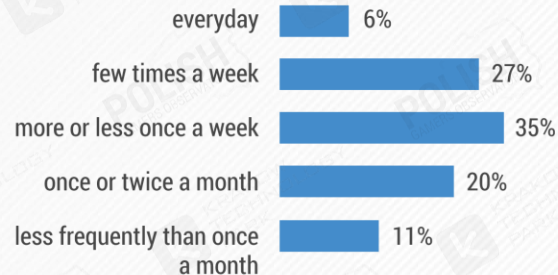
HOW MANY PARENTS - INTERNET USERS, HAVE GAMING CHILDREN



HOW MANY GAMING PARENTS PLAY WITH THEIR CHILDREN

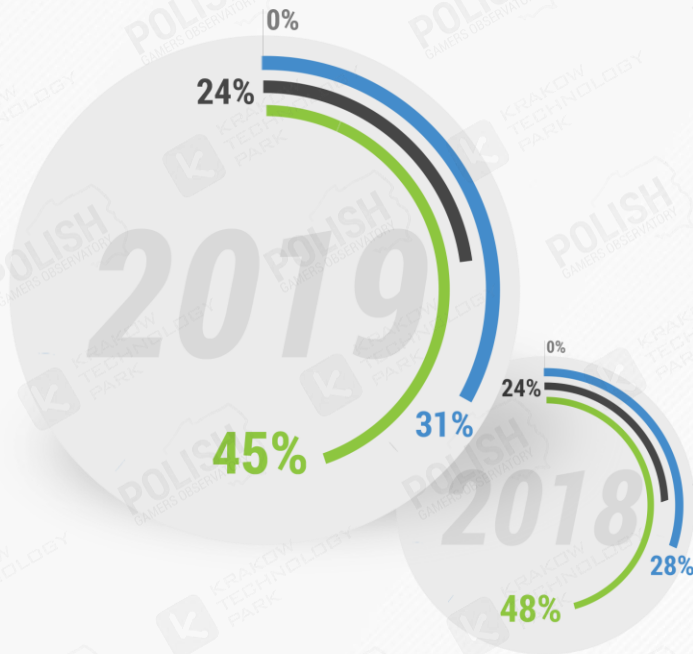


FREQUENCY OF PLAYING WITH CHILDREN



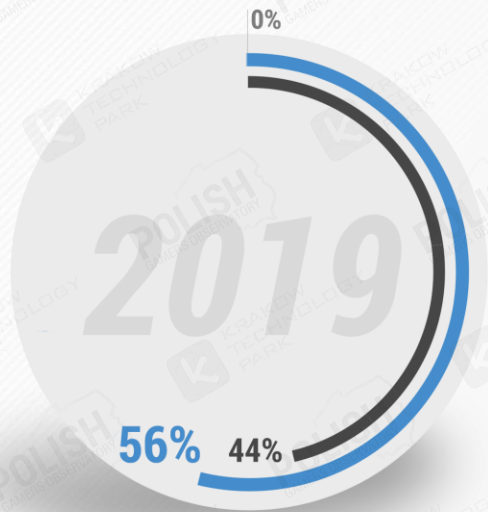
PARENTS & CHILDREN / USING PEGI SYSTEM BY PARENTS

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



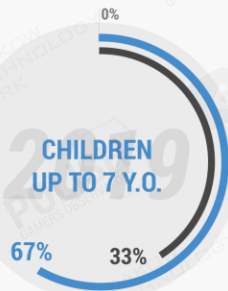
PARENTS & CHILDREN / USING PARENTAL CONTROL

ALL PARENTS

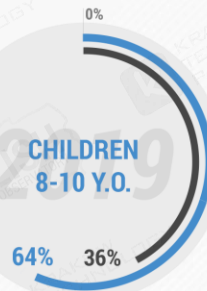


● Yes
● No

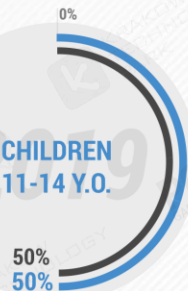
CHILDREN UP TO 7 Y.O.



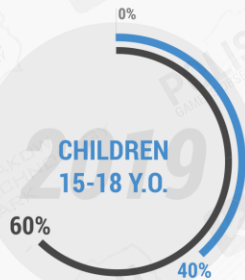
CHILDREN 8-10 Y.O.



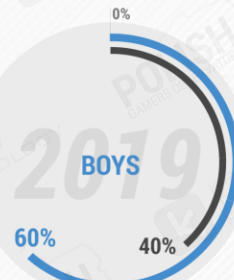
CHILDREN 11-14 Y.O.



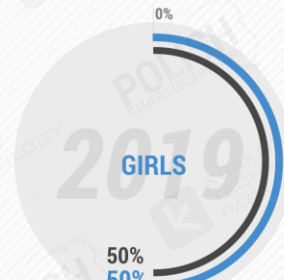
CHILDREN 15-18 Y.O.



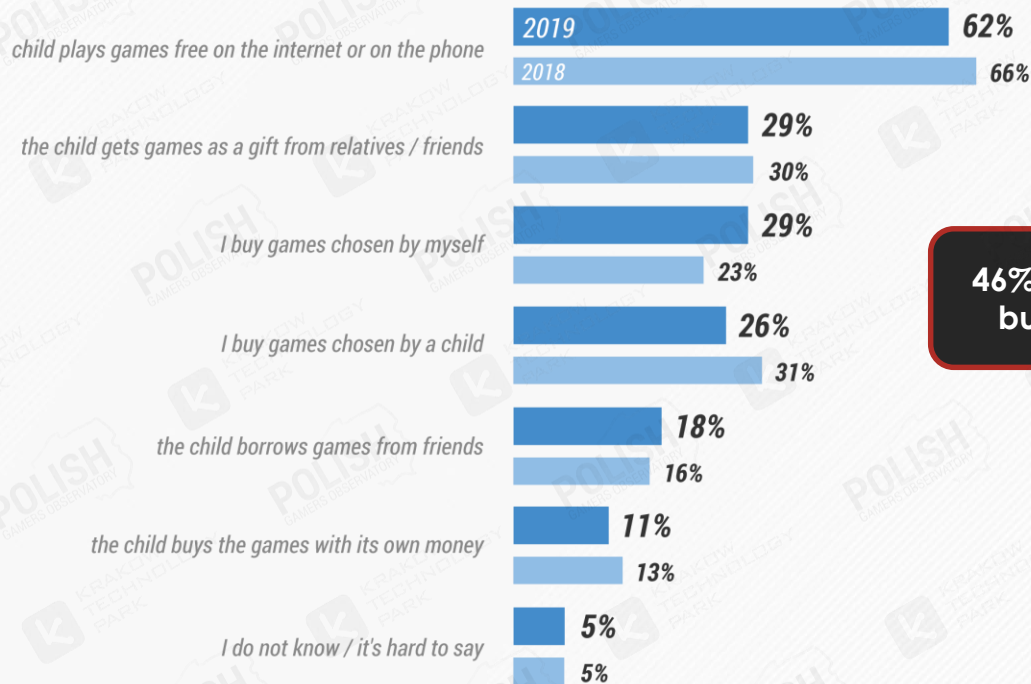
BOYS



GIRLS



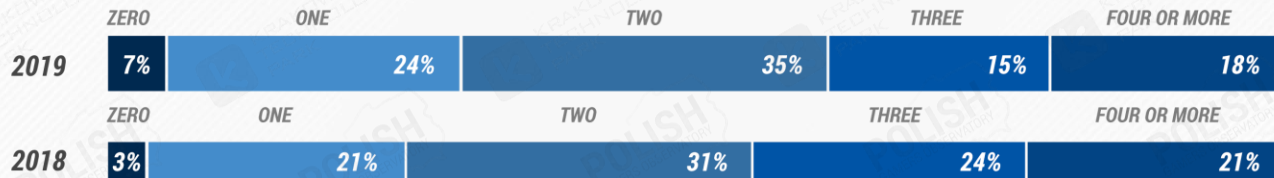
PARENTS & CHILDREN / SOURCES OF NEW GAMES



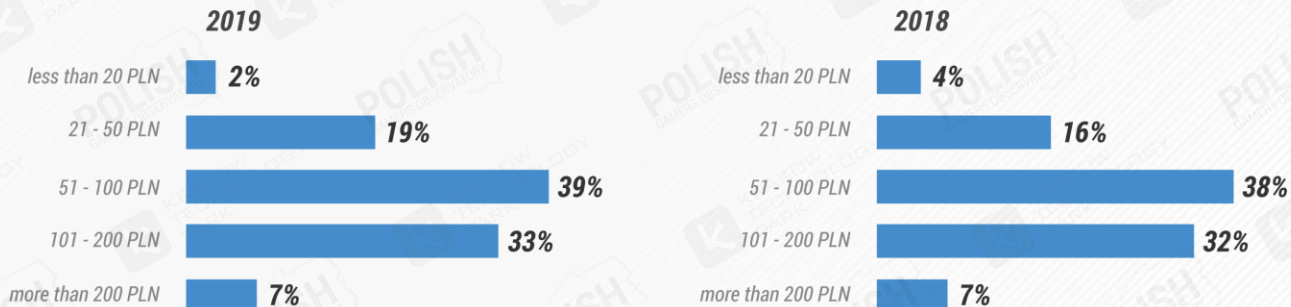
**46% of parents
buy games**

PARENTS & CHILDREN / GAMES BOUGHT LAST YEAR

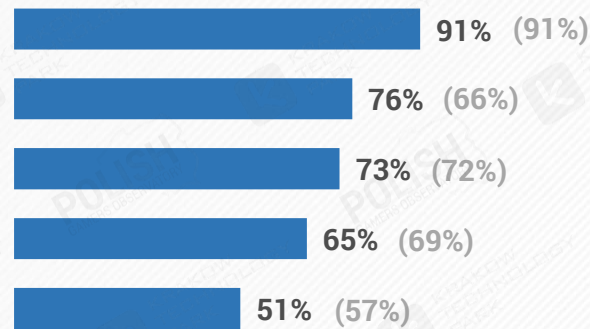
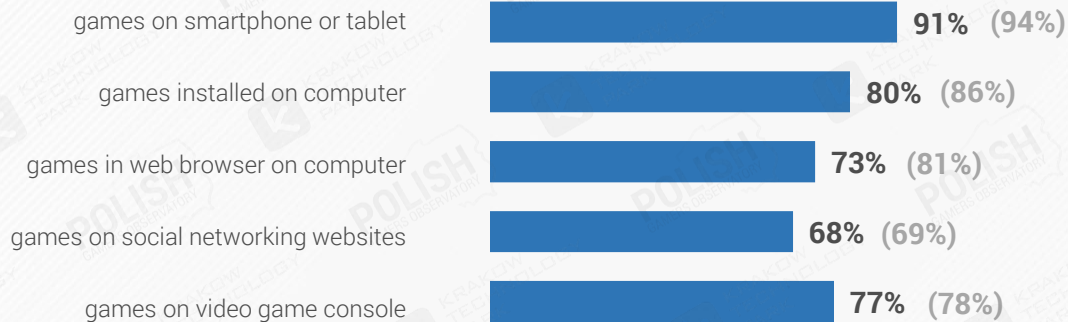
NUMBER OF GAMES BOUGHT LAST YEAR



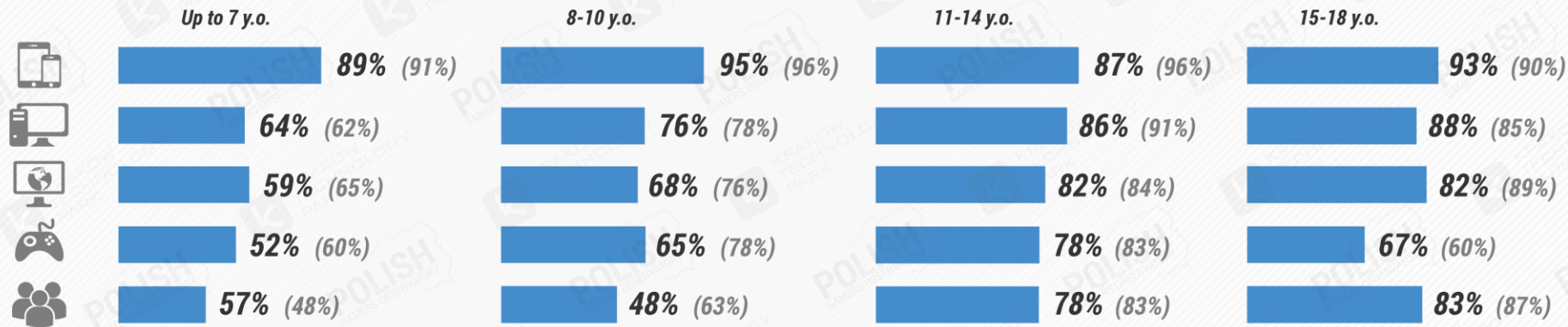
PRICE OF LAST BOUGHT GAME



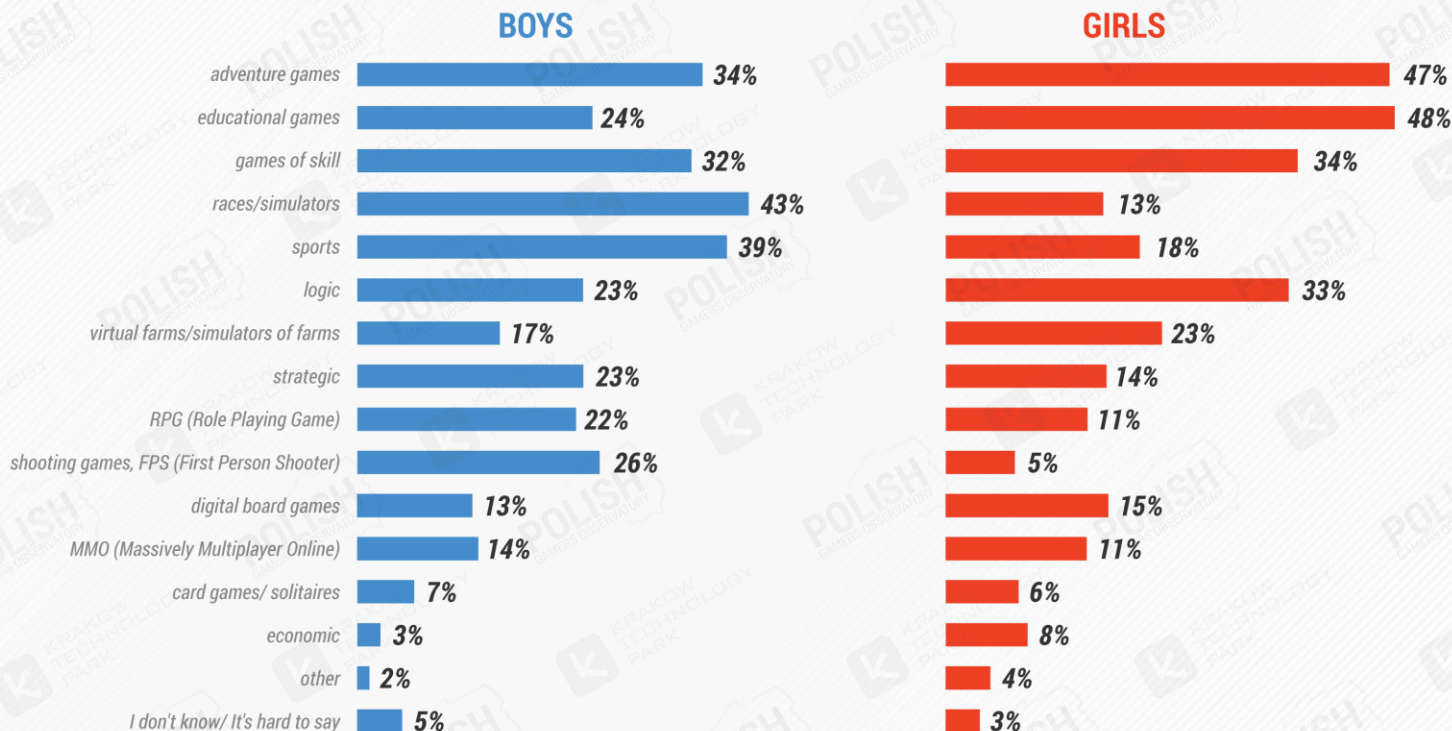
PARENTS & CHILDREN / CHOSEN PLATFORMS AMONG GAMERS



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

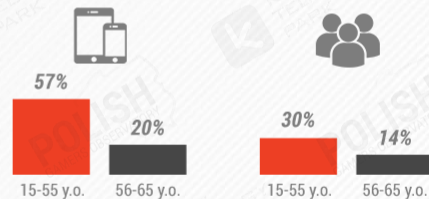
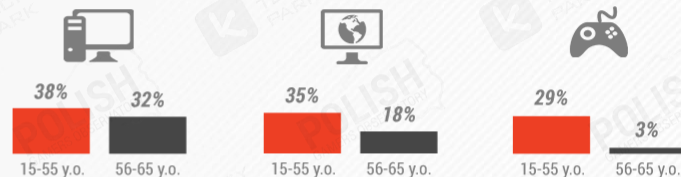
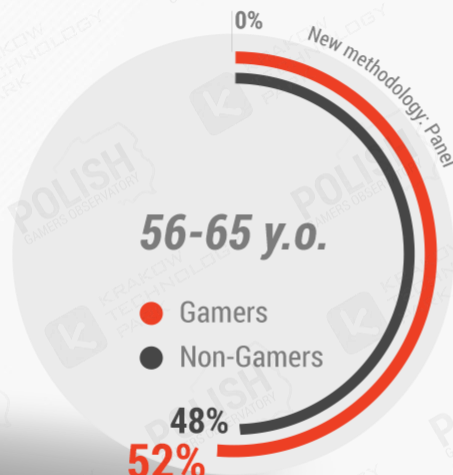
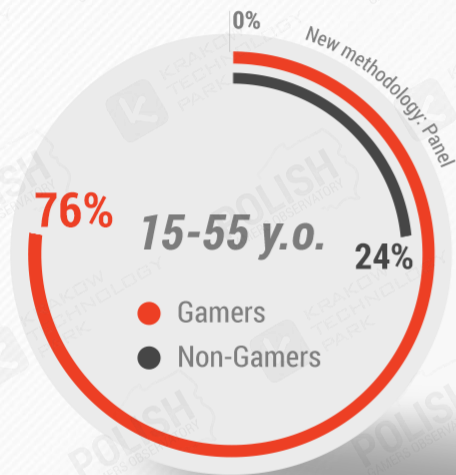


15-55 vs 56-65 y.o.

COMPARISON

56-65 Y.O.

GAMERS AND USED PLATFORMS

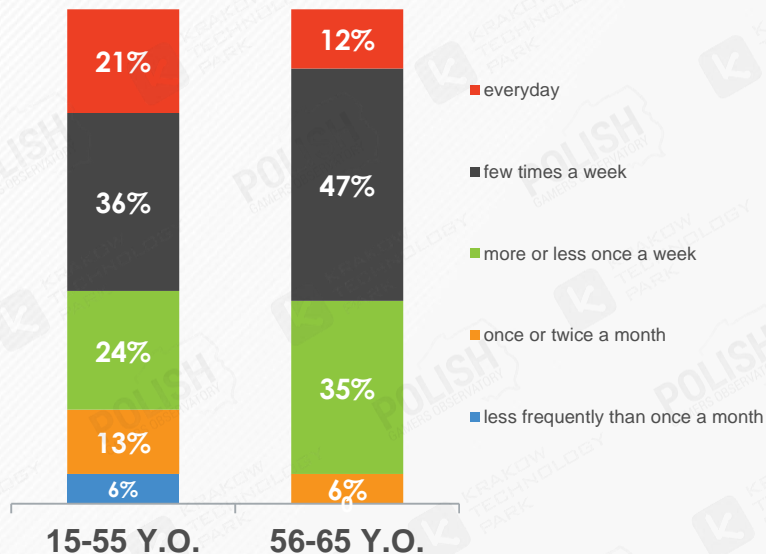


56-65 Y.O.

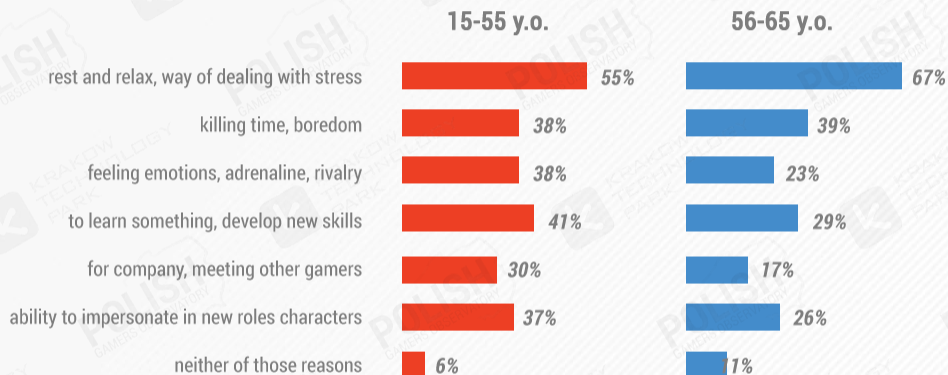
GAMES INSTALLED ON COMPUTER

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



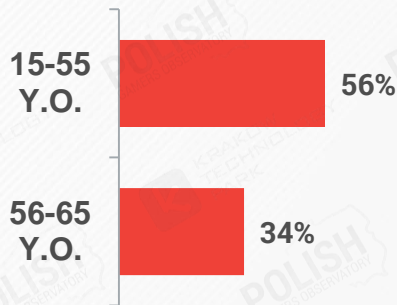
MOTIVATIONS TO PLAY



56-65 Y.O.

GAMES INSTALLED ON COMPUTER

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



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



SOURCES OF NEW GAMES
PC & CONSOLES

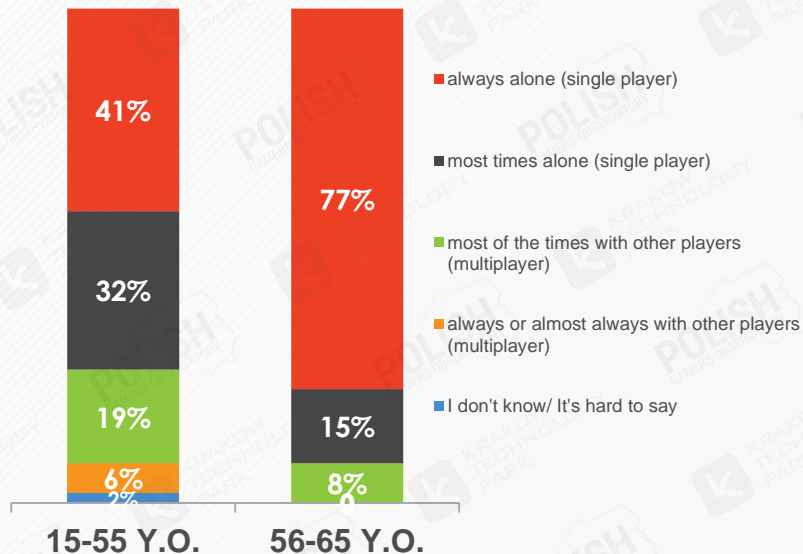


56-65 Y.O.

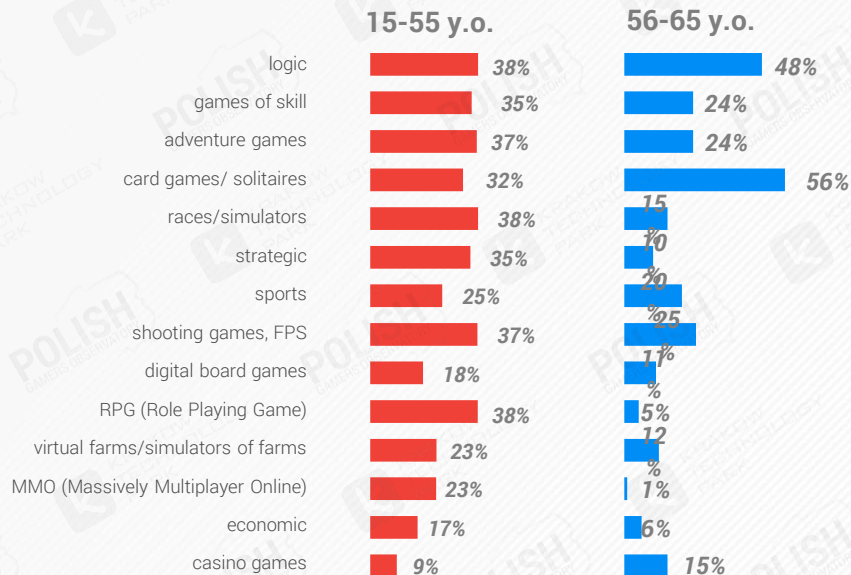
GAMES INSTALLED ON COMPUTER

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

PLAYING ALONE VS PLAYING WITH OTHERS



POPULARITY OF DIFFERENT TYPES OF GAMES





**THANK
YOU**

FOR WATCHING AND
LISTENING