

POLISH Gamers RESEARCH 2015



OUR PARTNERS:

onet.

GRYOnline.pl



KRAKOWSKI
PARK
TECHNOLOGICZNY



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



Creative
Europe
Desk Polska



Małopolska
KRAKÓW Region



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.



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 as well as variables related to lifestyle.

Results presented in the report are based on weighted data.

GENERAL INFORMATION ABOUT OUR STUDY



FIELDWORK PERIOD

The study was conducted between 21st of April and 4th of May 2015 using the RTS method (online survey with recruitment on websites). Additional online IQS96 Omnibus study was conducted between 30th of April and 6th of May to provide information about Target Group structure. Previous wave of the study was conducted between 10th and 17th of April 2014.



METHOD OF THE STUDY

Invitations to take part in the survey were displayed on websites that are in IQS emission network, Onet Group websites and gry-online.pl website. The sample was chosen with a random-quota sampling method.



TARGET GROUPS AND SAMPLE SIZE

Data reports the results among the group of 3750 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 750 respondents. Although the subsample size for each group is the same their shares in Total sample for all games was corrected by data weighting for the natural proportion. In the previous wave Target Group do not include gamers playing on social networking websites.

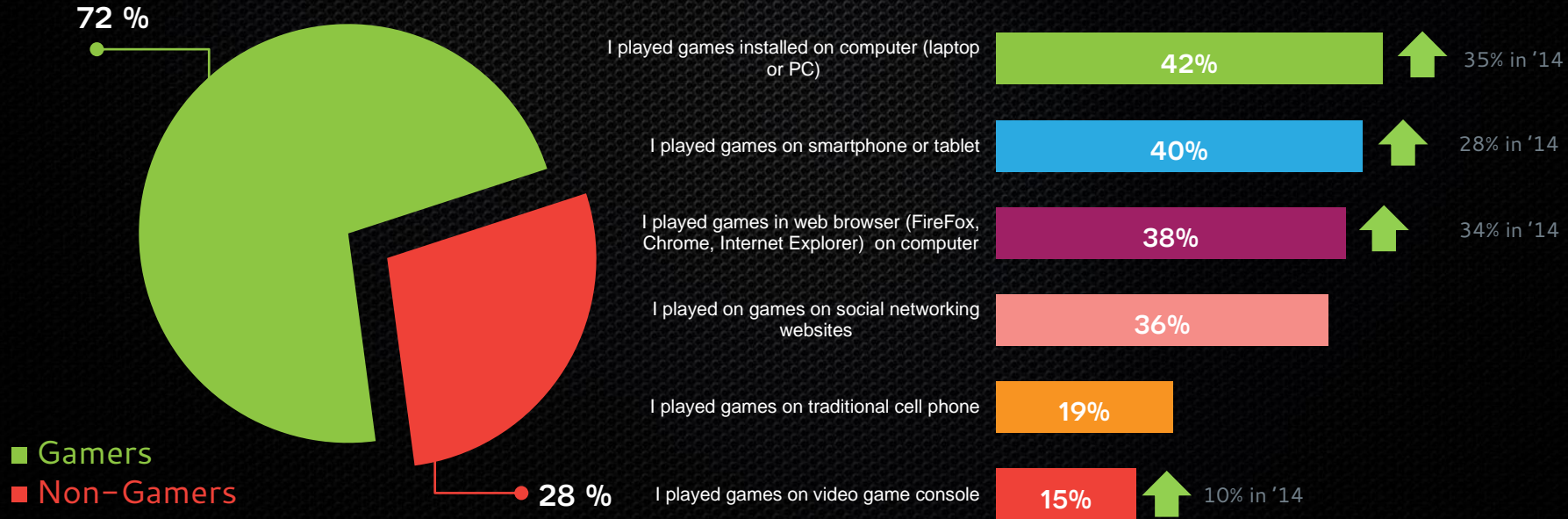




HOW MANY GAMERS
ARE THERE AMONG
POLISH INTERNET
USERS?

HOW MANY GAMERS

are there among Polish internet users?

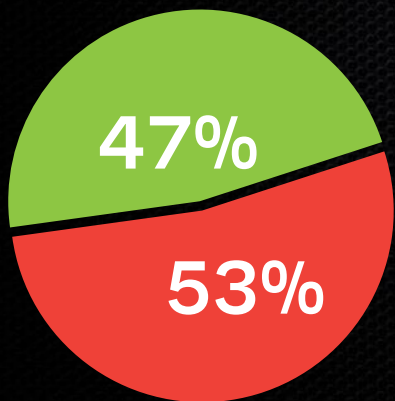


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PROFILE OF POLISH GAMERS

PEOPLE OF POLISH GAMERS AMONG INTERNET USERS

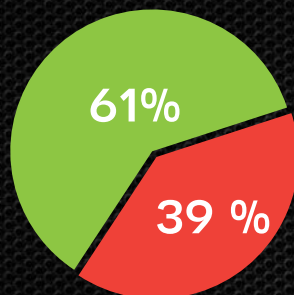
ALL GAMERS



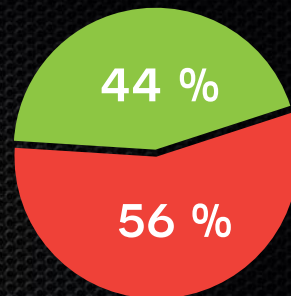
■ Male
■ Female



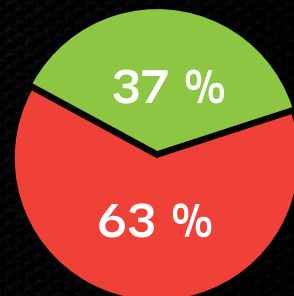
GAMERS
PLAYING
INSTALLED
GAMES



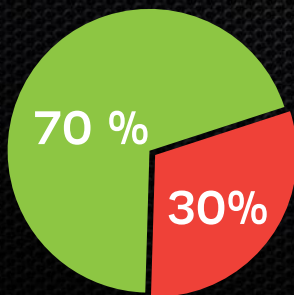
WEB
BROWSER
GAMERS



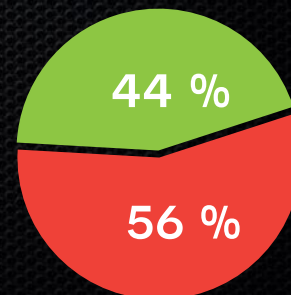
SOCIAL
NETWORKING
WEBSITES GAMERS



CONSOLE
GAMERS

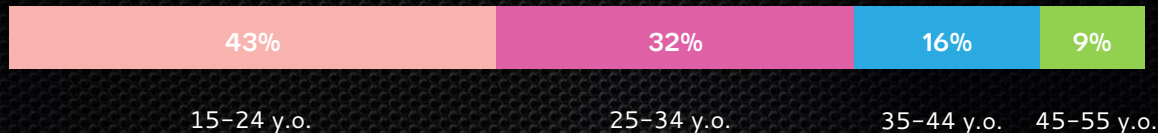


MOBILE
GAMERS

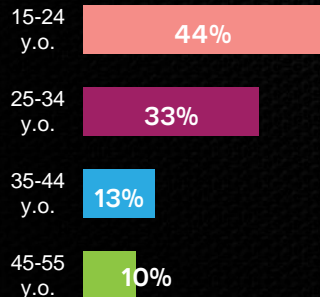


BY AGE

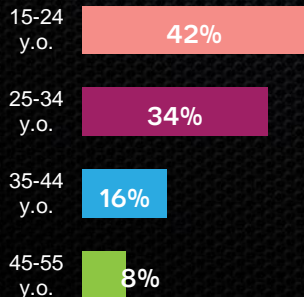
ALL GAMERS



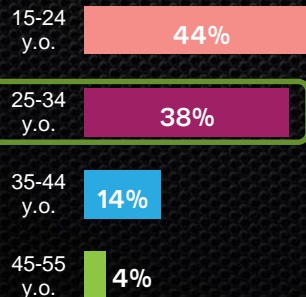
GAMERS PLAYING INSTALLED GAMES



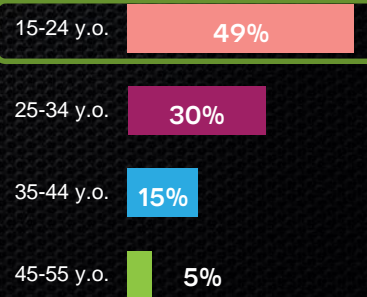
WEB BROWSER GAMERS



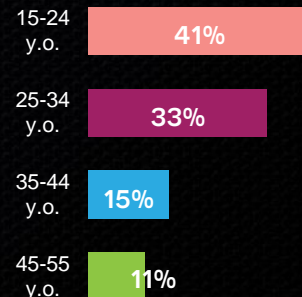
CONSOLE GAMERS



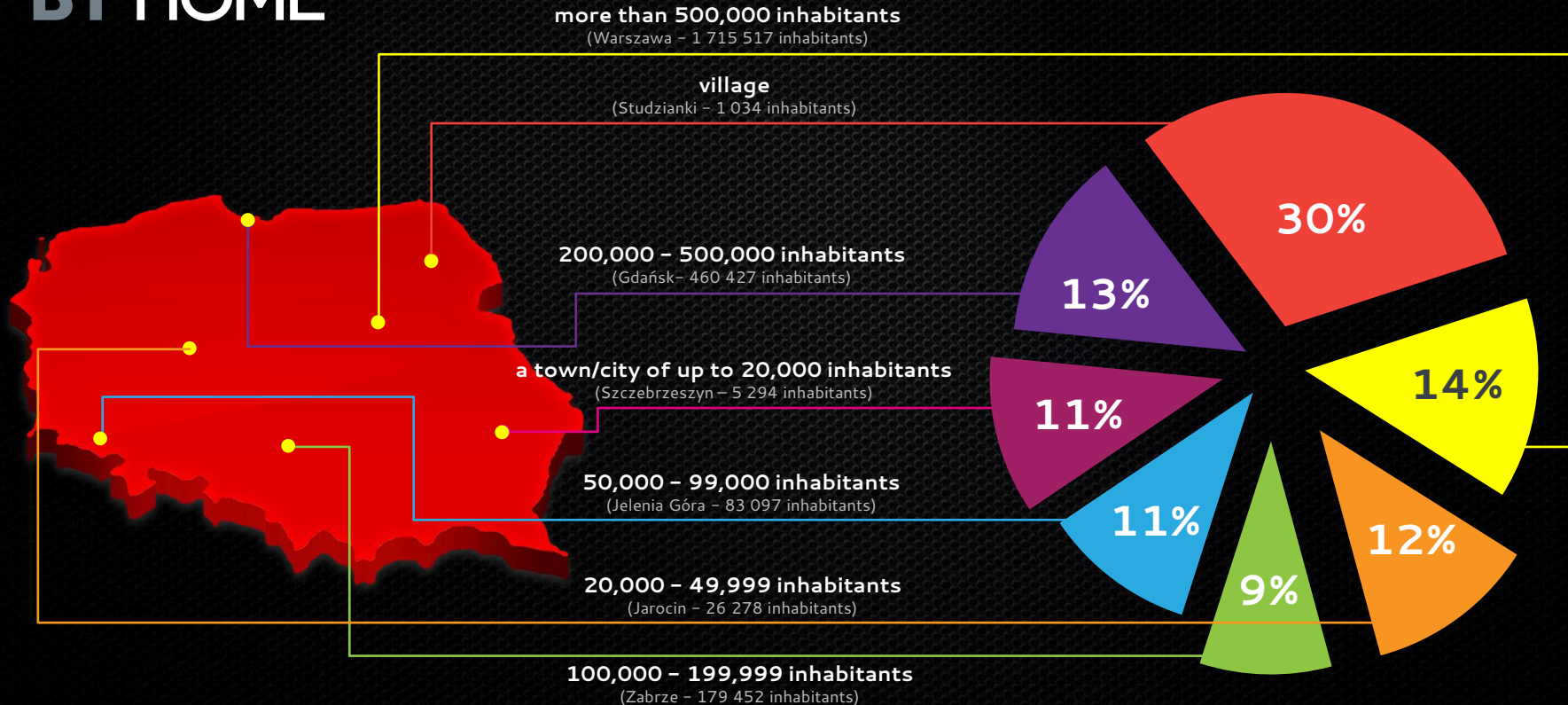
MOBILE GAMERS



SOCIAL NETWORKING WEBSITES GAMERS



BY HOME



BY EDUCATION

ALL GAMERS



GAMERS PLAYING
INSTALLED GAMES

primary

30%



WEB BROWSER
GAMERS

secondary

44%



CONSOLE GAMERS



MOBILE GAMERS

higher

26%



SOCIAL NETWORKING
WEBSITES GAMERS



BY PROFESSION

ALL GAMERS



GAMERS PLAYING
INSTALLED GAMES

pupils, junior students

25%



WEB BROWSER
GAMERS

academic student

14%



CONSOLE GAMERS

part-time job

9%



MOBILE GAMERS

unemployed

5%



SOCIAL NETWORKING
WEBSITES GAMERS

not working, home-maker

6%



BY FINANCIAL STATUS

ALL GAMERS



GAMERS PLAYING
INSTALLED GAMES

poor household financial situation

12%



WEB BROWSER
GAMERS

average household financial situation

39%



CONSOLE GAMERS



MOBILE GAMERS

good household financial situation

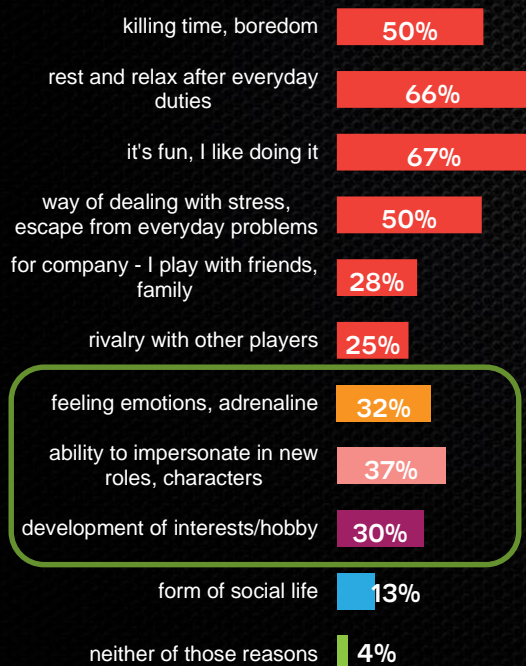
37%



SOCIAL NETWORKING
WEBSITES GAMERS

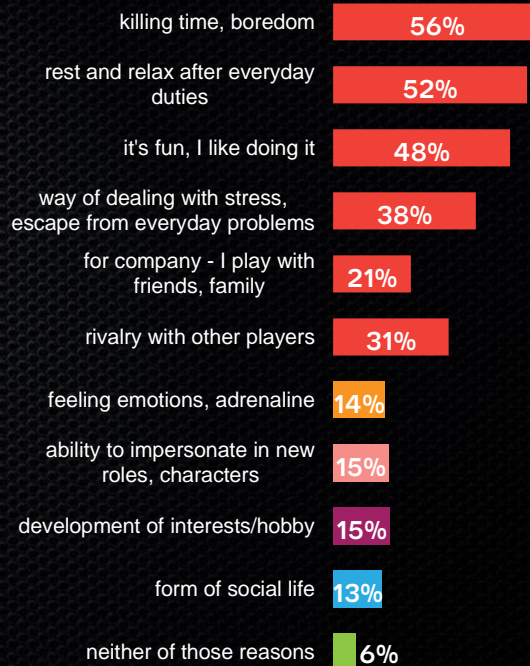


MOTIVATIONS TO PLAY ON EACH PLATFORM

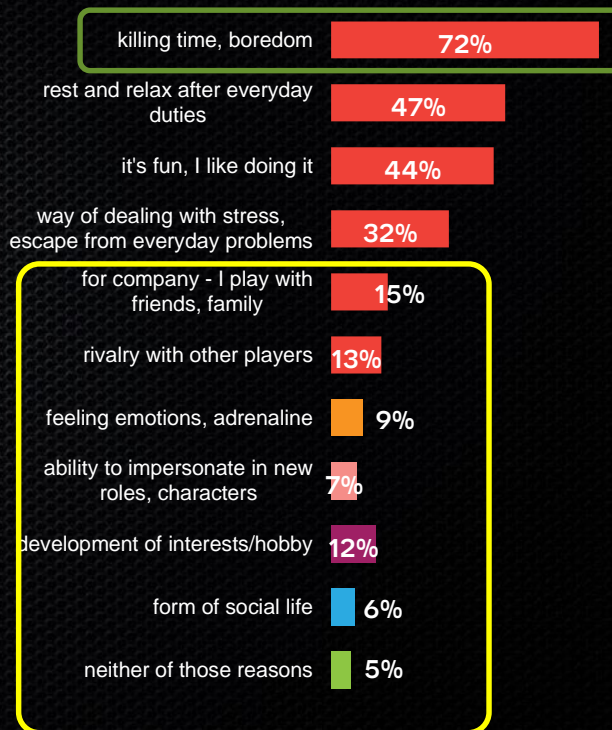
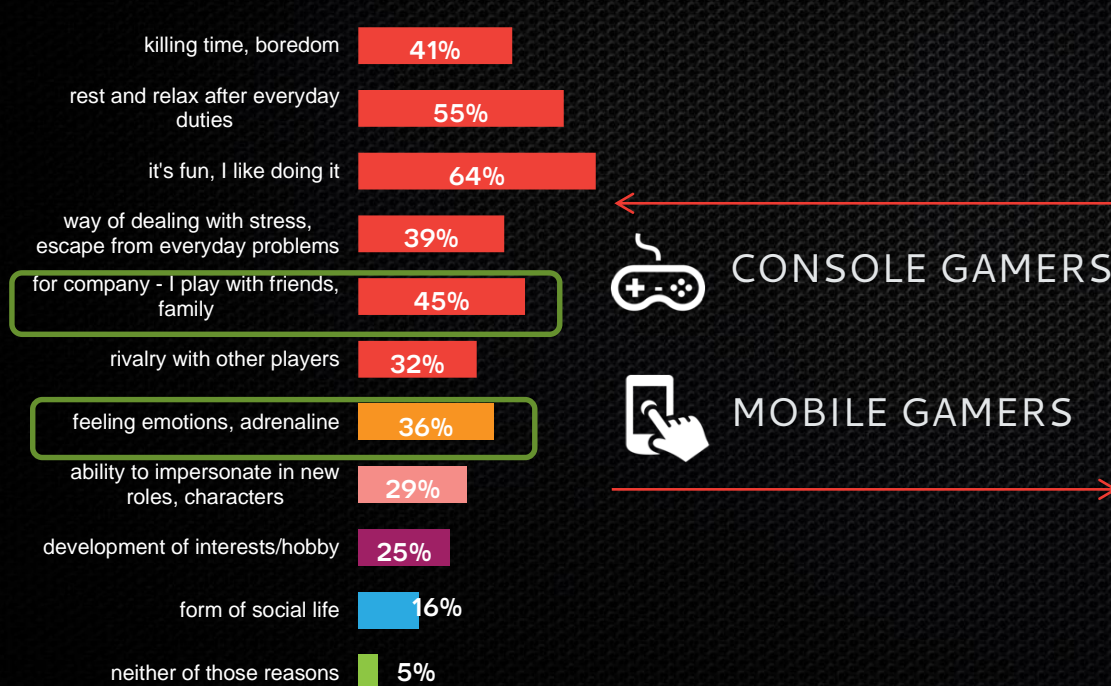


GAMERS PLAYING INSTALLED GAMES

WEB BROWSER GAMERS



MOTIVATIONS TO PLAY ON EACH PLATFORM

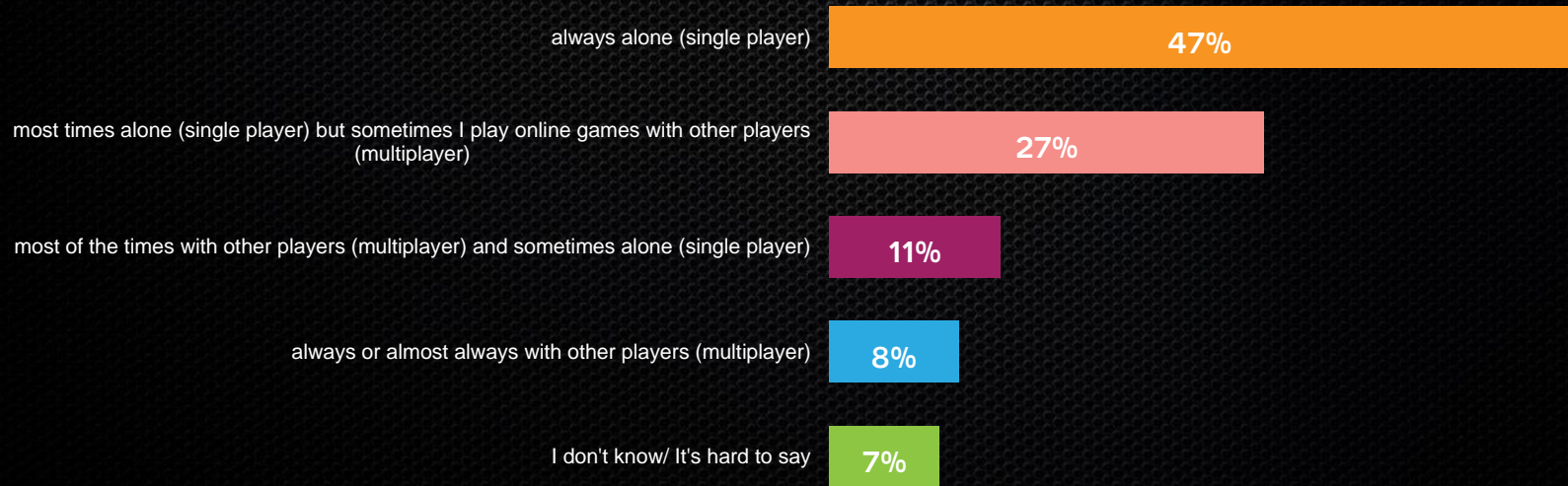


MOTIVATIONS TO PLAY ON EACH PLATFORM



GAMING STYLES

playing alone vs playing with others



GAMING STYLES AMONG DIFFERENT PLATFORMS

playing alone vs playing with others

GAMERS PLAYING INSTALLED GAMES

always alone
(single player) **43%**

most times
alone (single
player) **34%**

most of the
times with
other players
(multiplayer) **12%**

always or
almost always
with other
players **7%**

I don't know/
It's hard to say **5%**

WEB BROWSER GAMERS

40%

33%

10%

11%

7%

CONSOLE GAMERS

23%

38%

20%

14%

5%

MOBILE GAMERS

64%

25%

5%

3%

3%

SOCIAL NETWORKING WEBSITES GAMERS

49%

21%

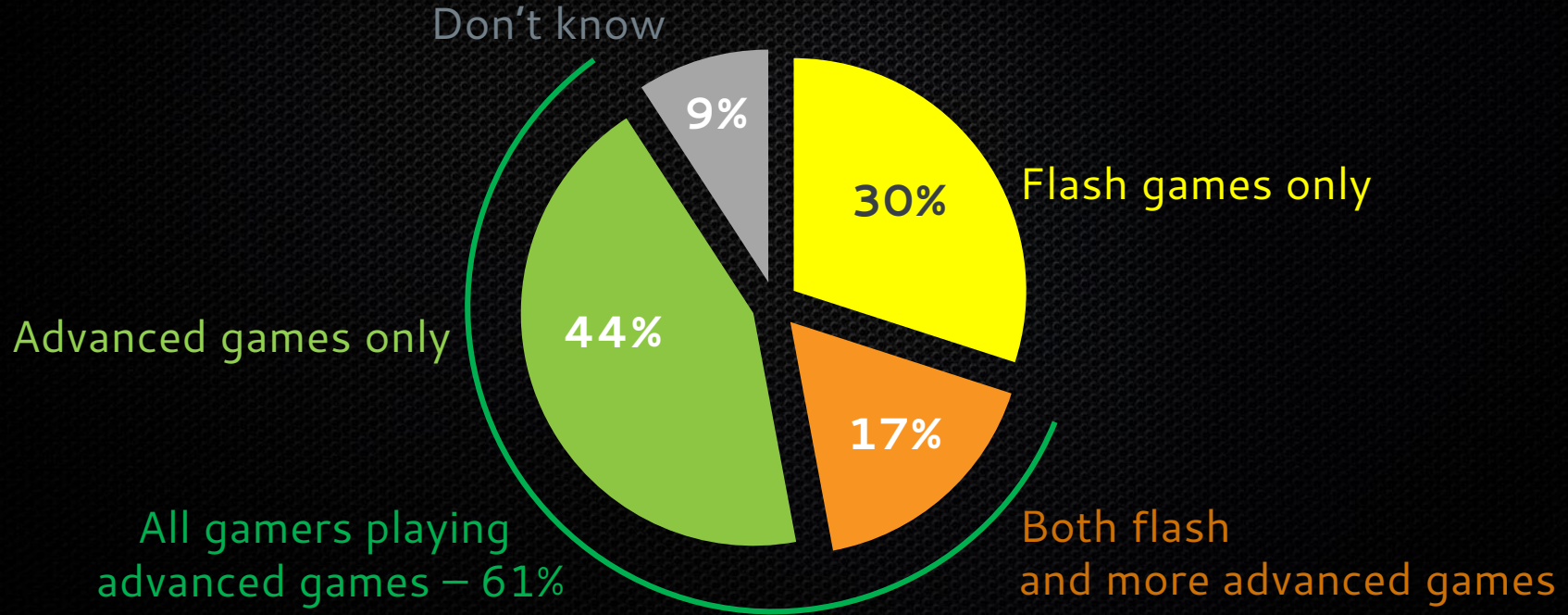
10%

7%

13%

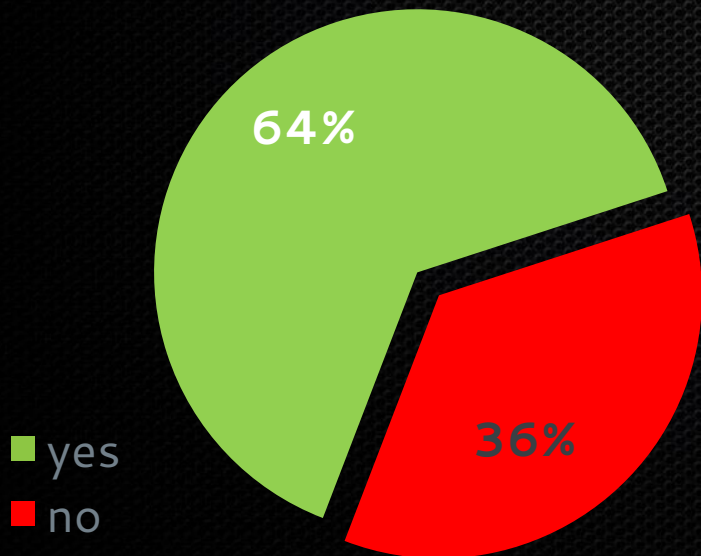


GENERAL CHARACTERICTIC OF ONLINE GAMES



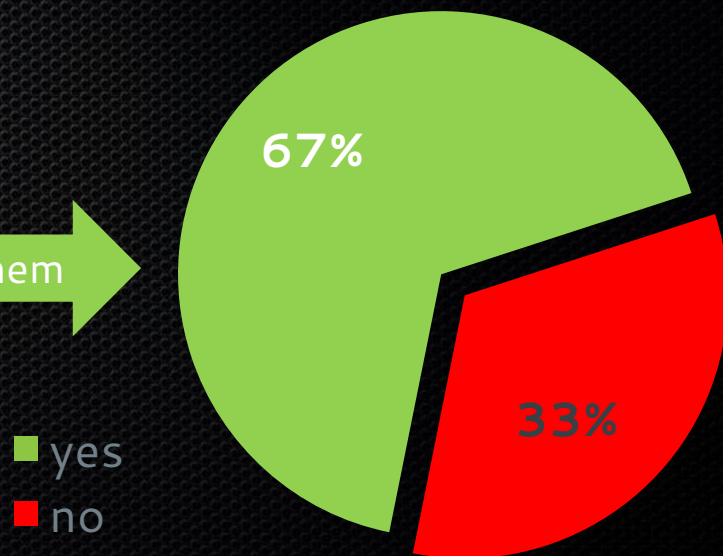
POPULARITY OF FREE TO PLAY GAMES

ever playing



among them

playing last month



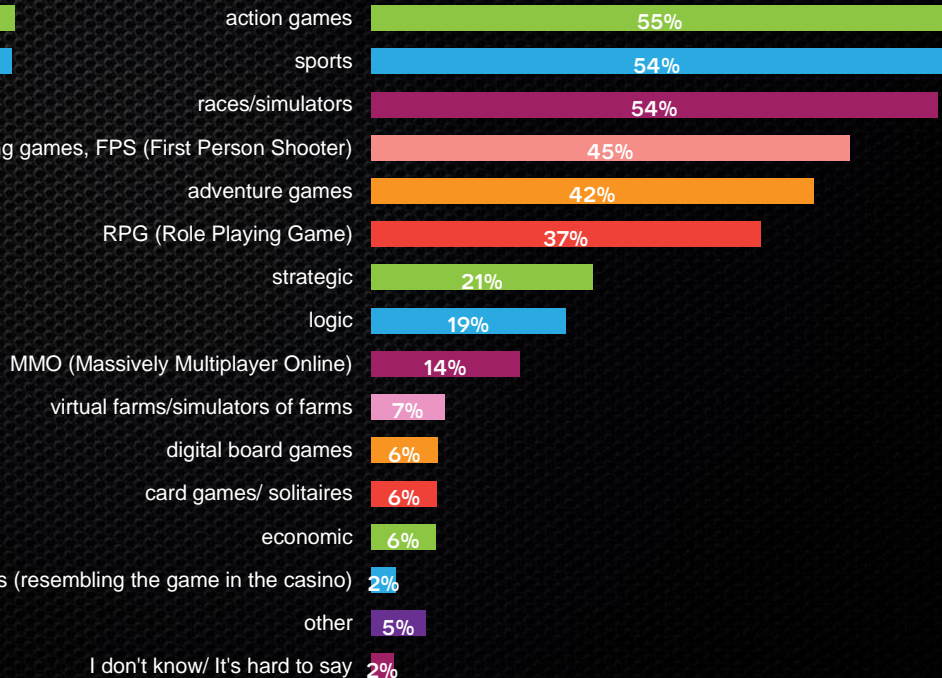
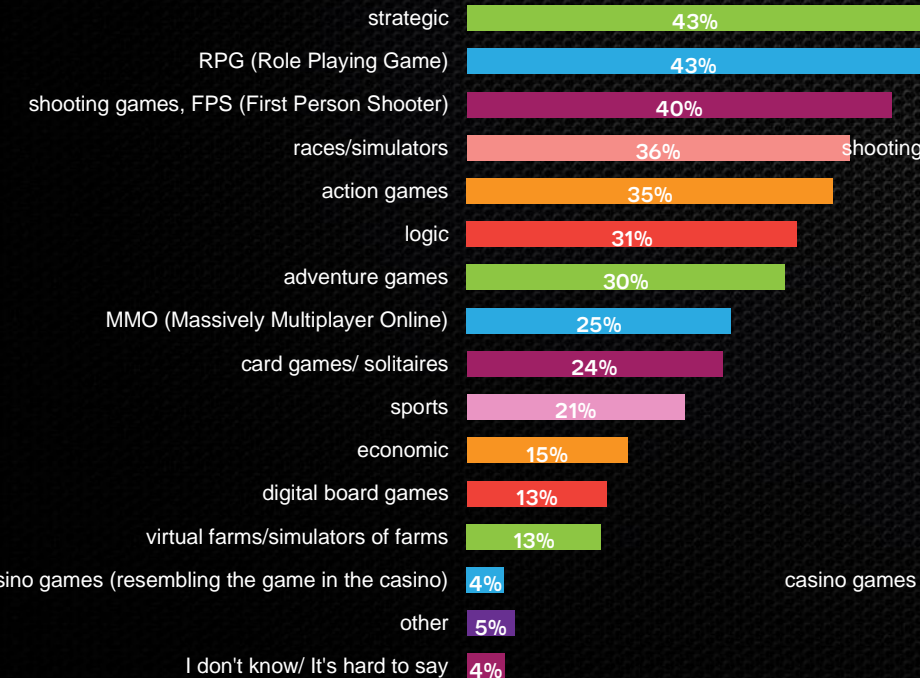
POPULARITY OF DIFFERENT TYPES OF GAMES



GAMERS PLAYING
INSTALLED GAMES



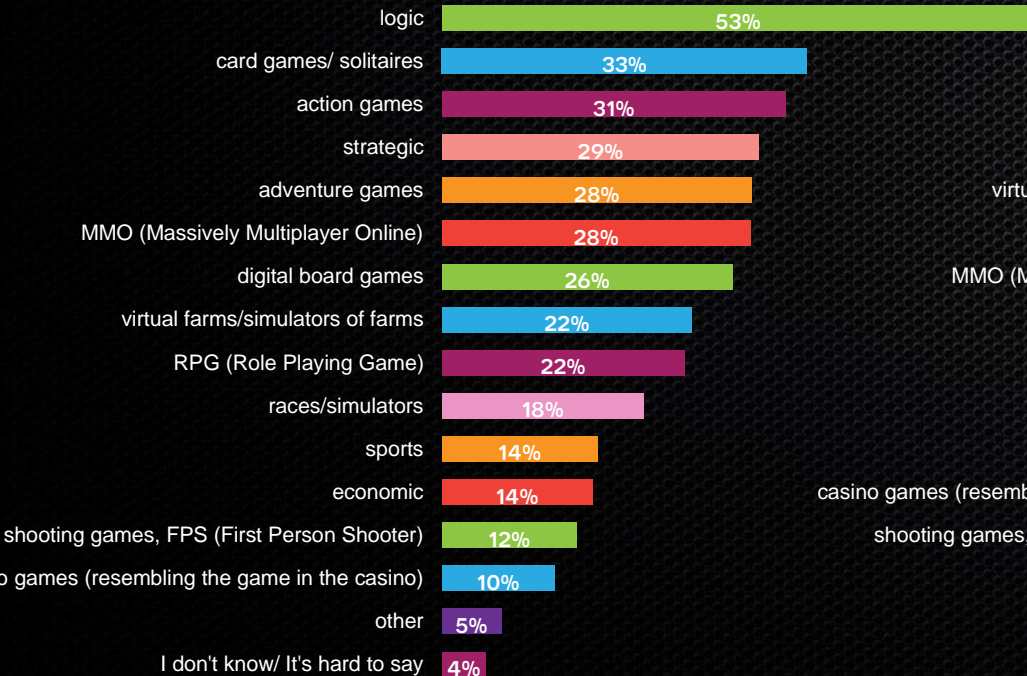
CONSOLE
GAMERS



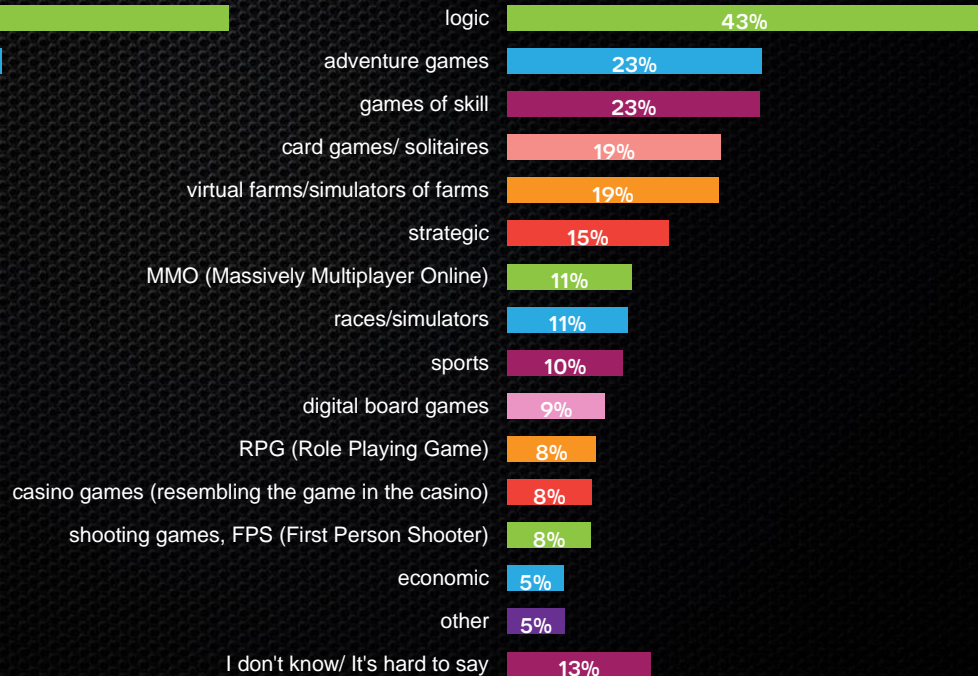
POPULARITY OF DIFFERENT TYPES OF GAMES



WEB BROWSER
GAMERS



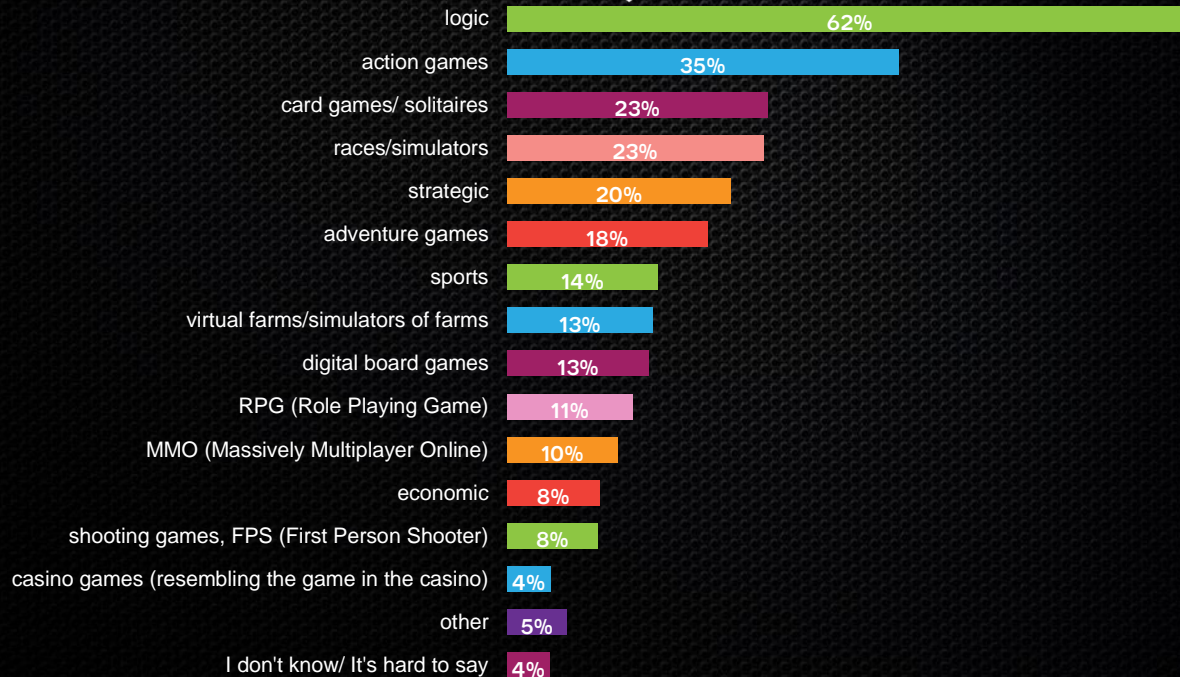
SOCIAL NETWORKING
WEBSITES GAMERS



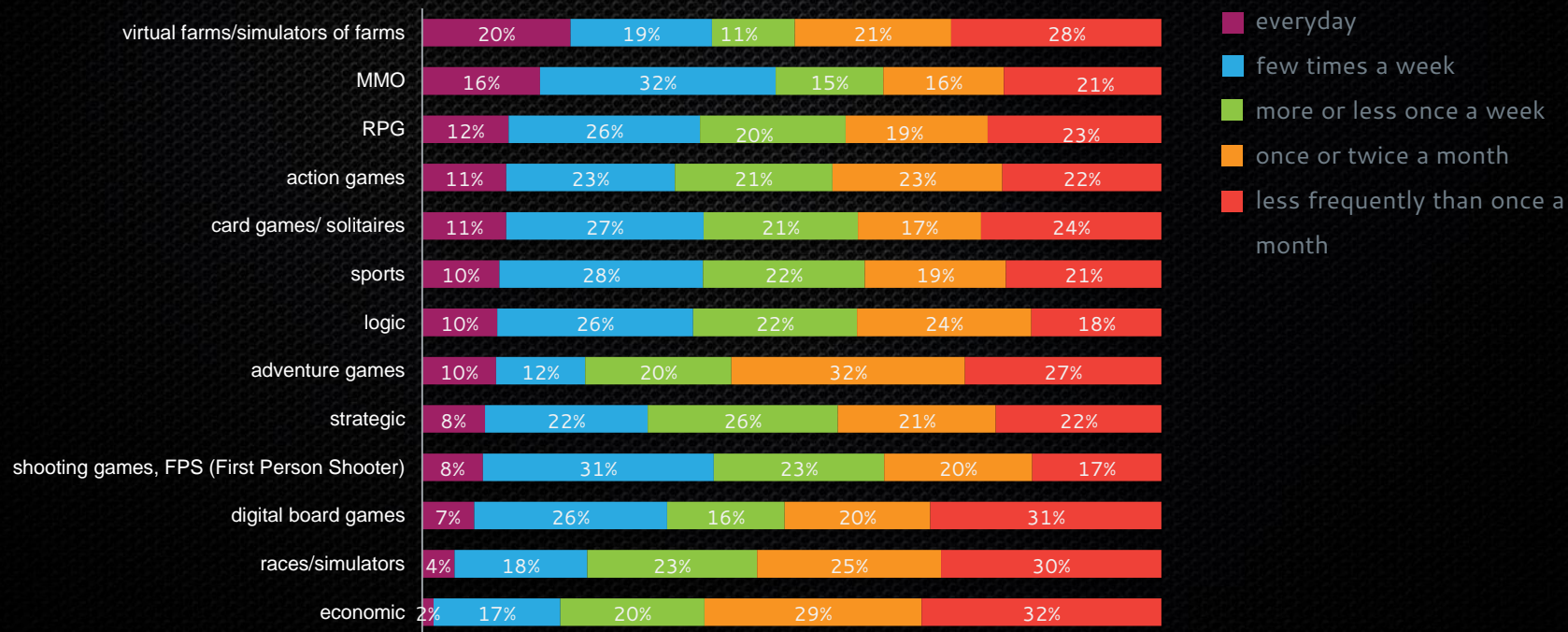
POPULARITY OF DIFFERENT TYPES OF GAMES



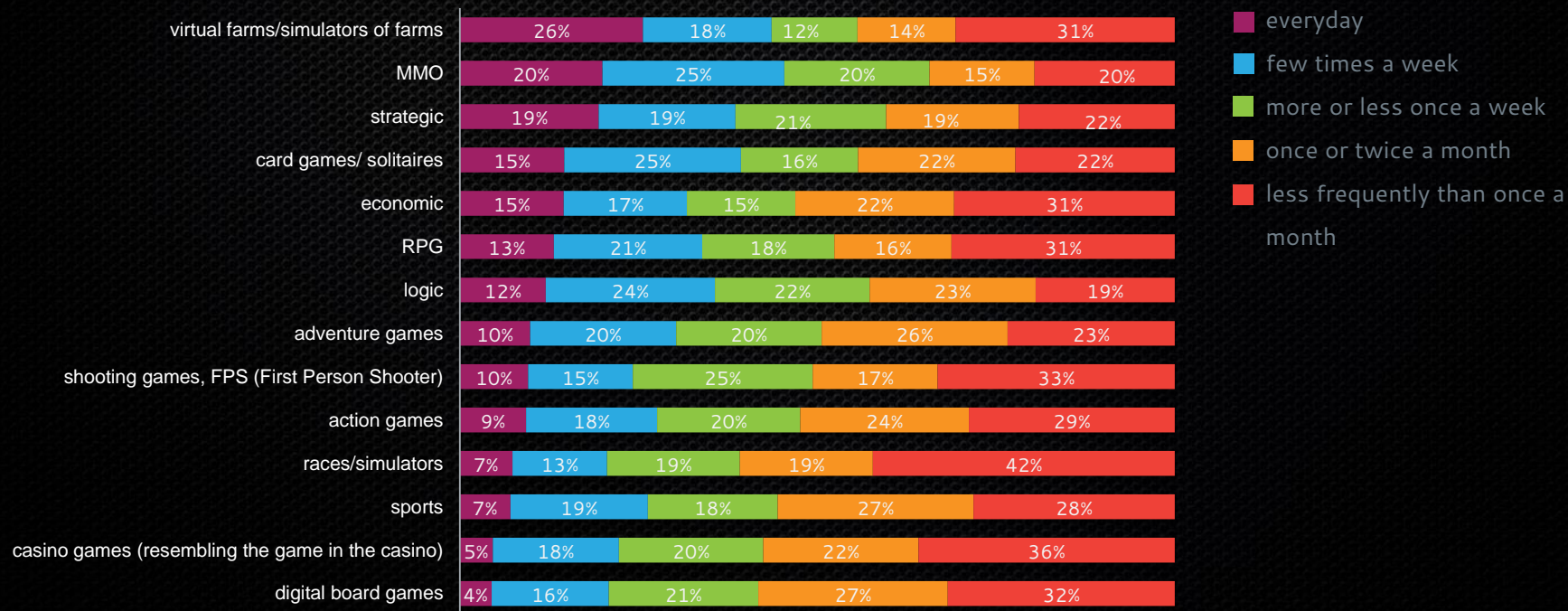
MOBILE
GAMERS



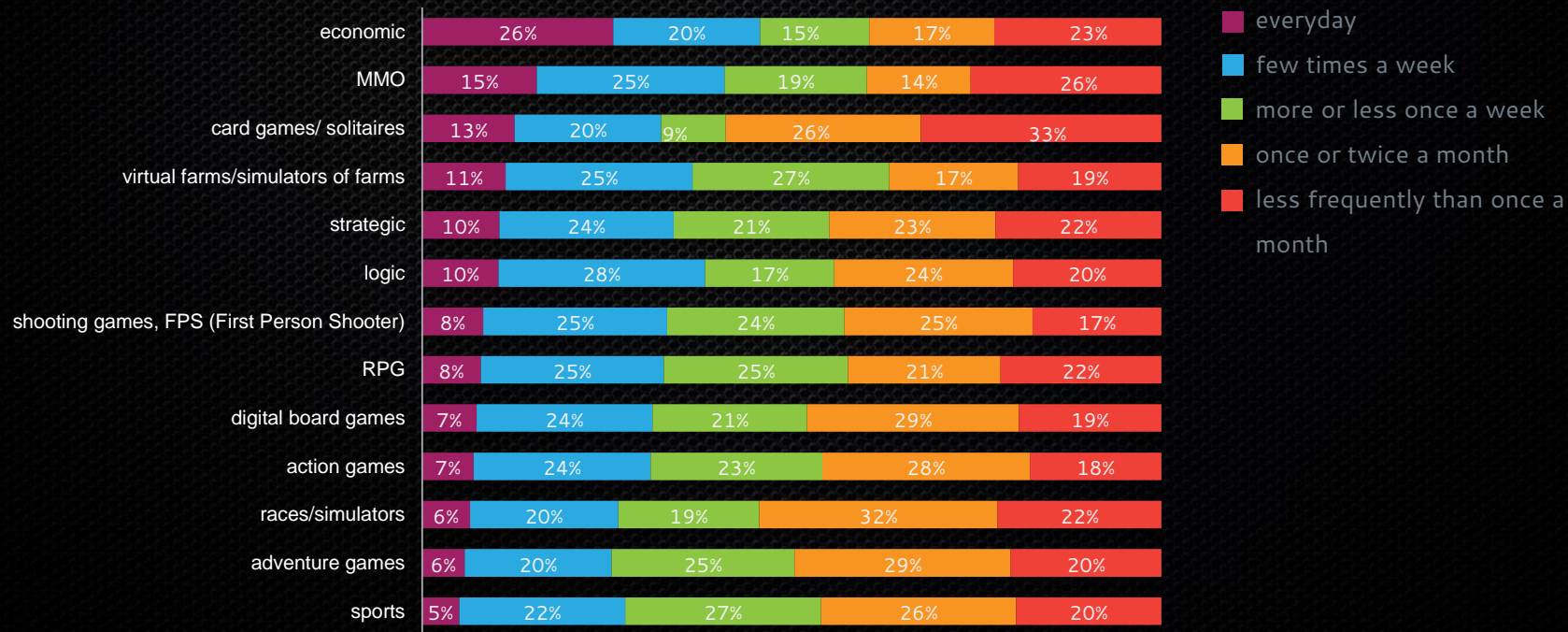
FREQUENCY OF PLAYING OF EACH TYPE OF GAME INSTALLED ON PC



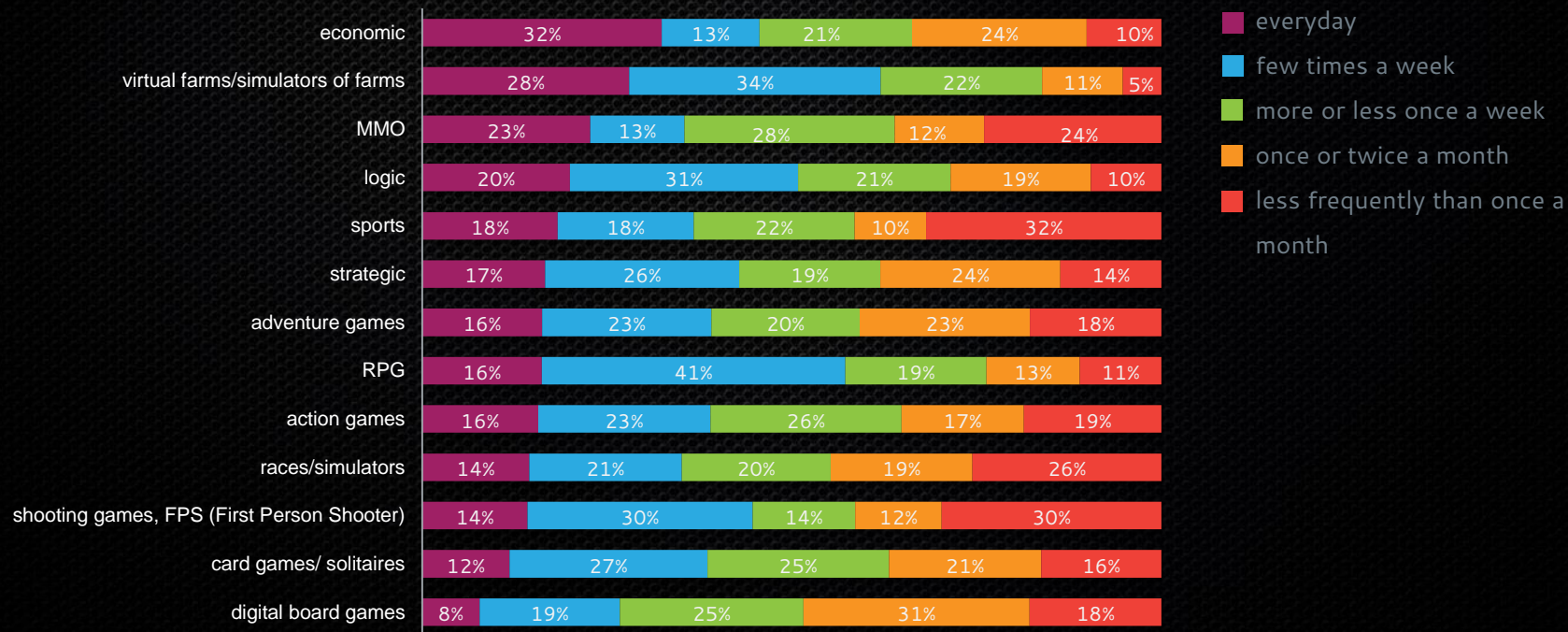
FREQUENCY OF PLAYING OF EACH TYPE OF ONLINE GAME IN BROWSER



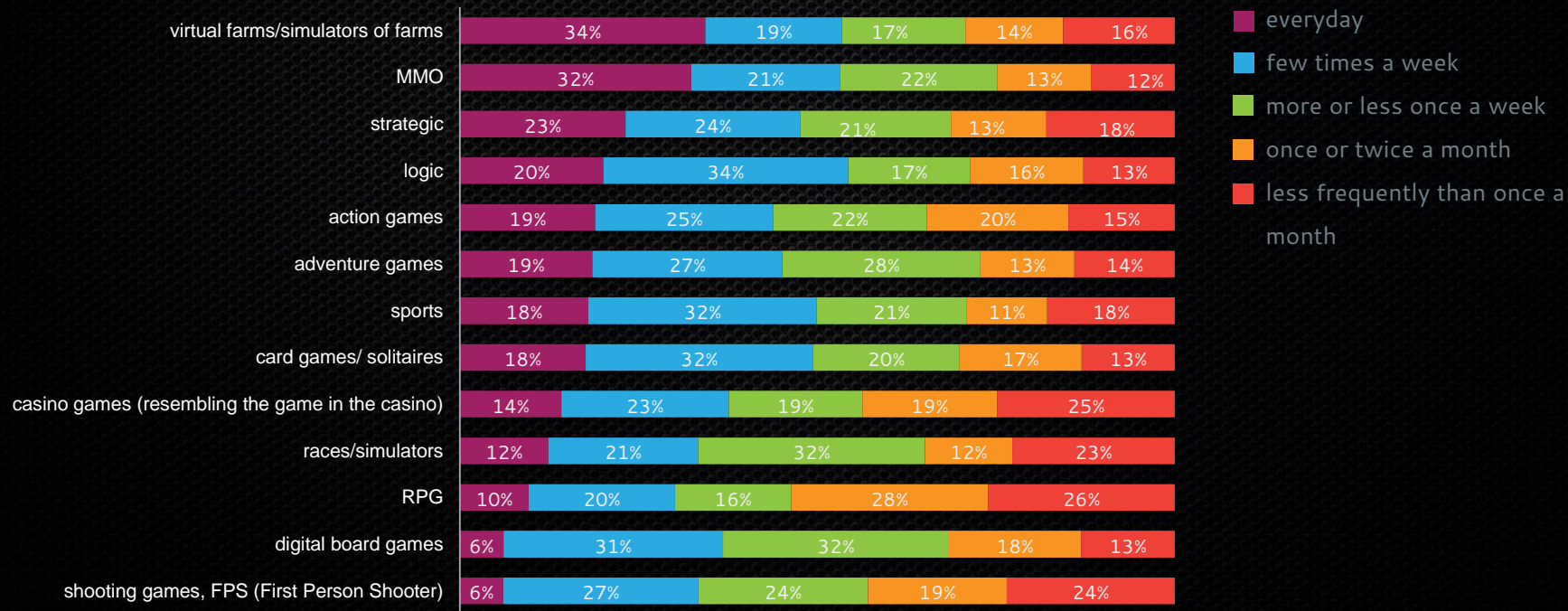
FREQUENCY OF PLAYING OF EACH TYPE OF GAME ON VIDEO GAMING CONSOLE



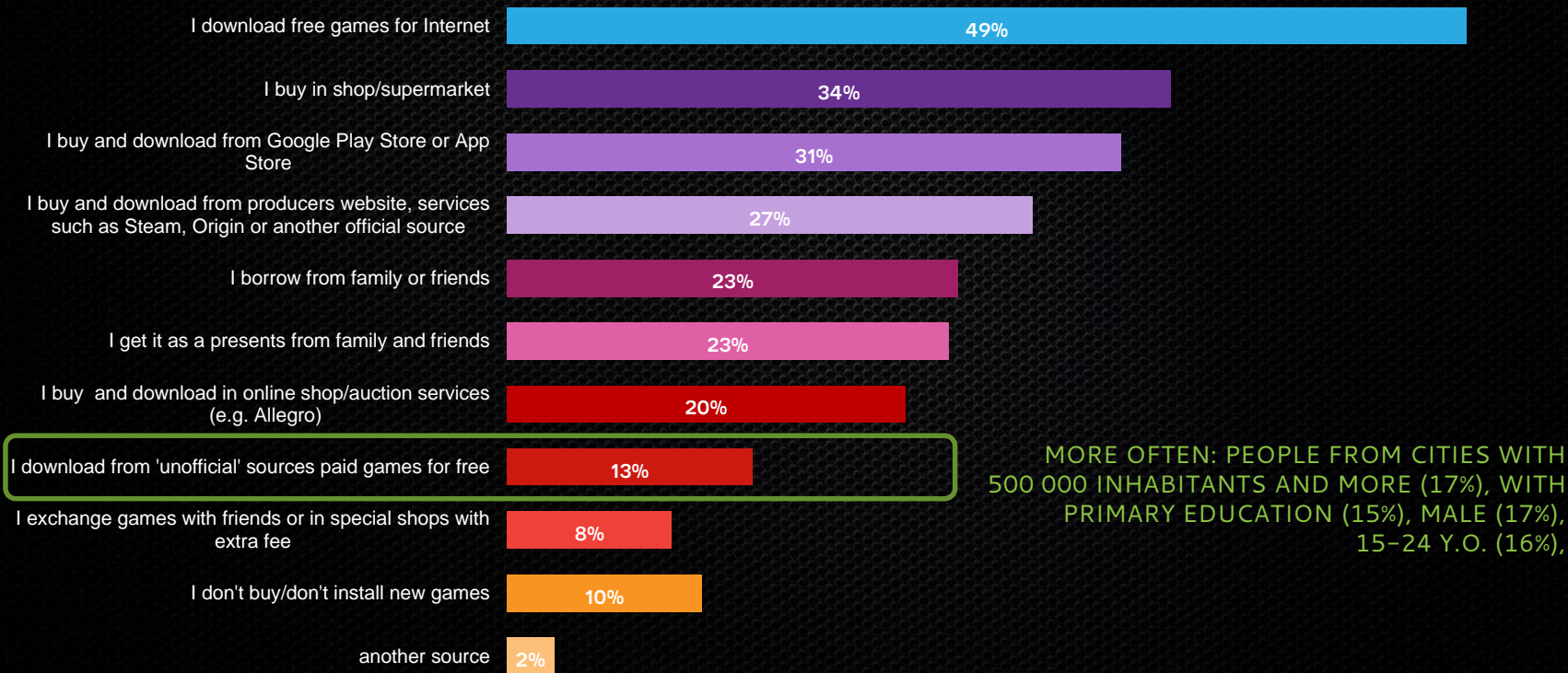
FREQUENCY OF PLAYING OF EACH TYPE OF GAME ON SMARTPHONE / TABLET PC



FREQUENCY OF PLAYING OF EACH TYPE OF GAME ON SOCIAL NETWORKING WEBSITES

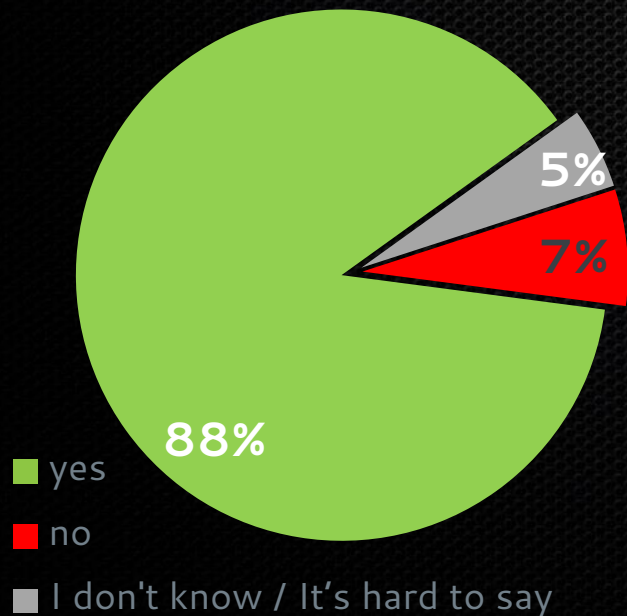


SOURCES OF NEW GAMES



SOURCE OF GAMES ON MOBILE DEVICES

ever installed game from their app store



games downloaded from places, where they are shared by official producers or with their agreement (e.g. z Google Play, App Store)

82%

games that has been installed on smartphone or tablet from the beginning

19%

online games in web browser

14%

games in social media

13%

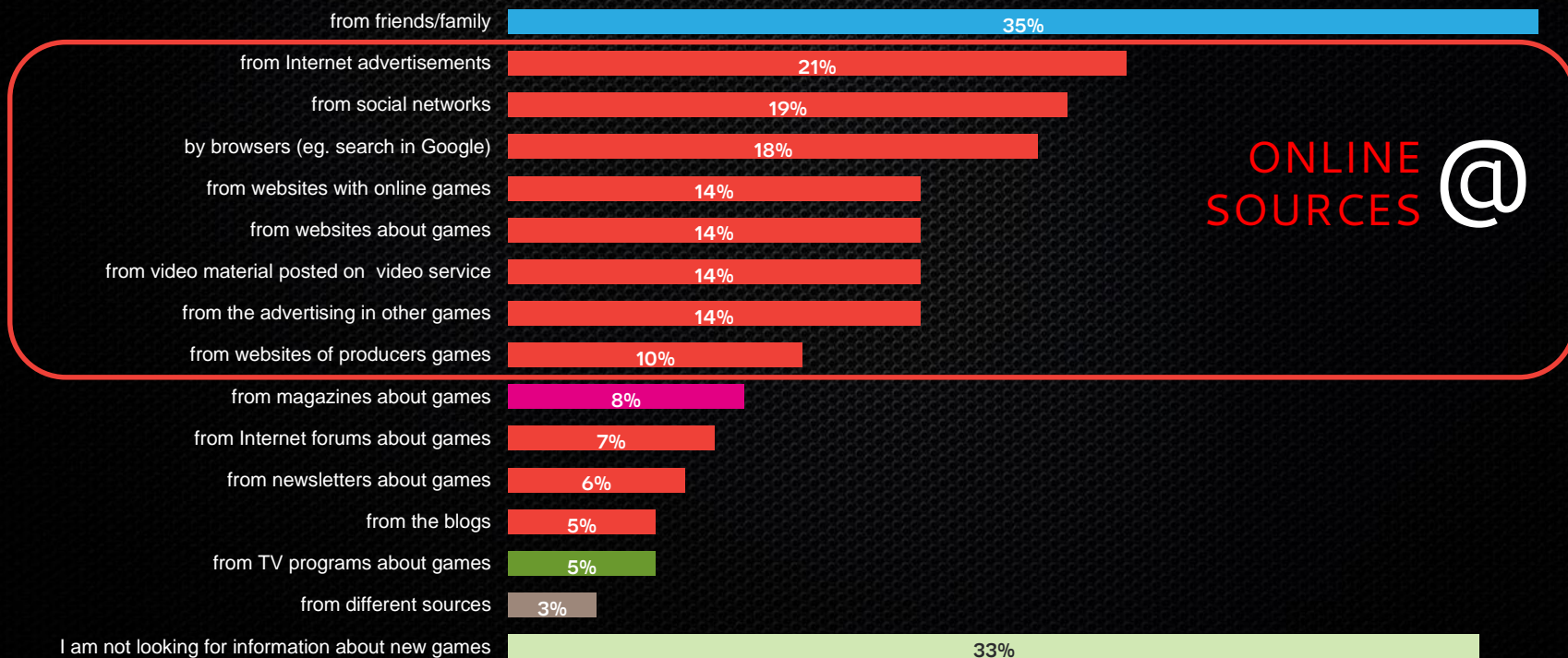
games downloaded from the Internet from places where they are shared "unofficially" by other users

7%

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

4%

SOURCES OF INFORMATION ABOUT NEW GAMES IN GENERAL



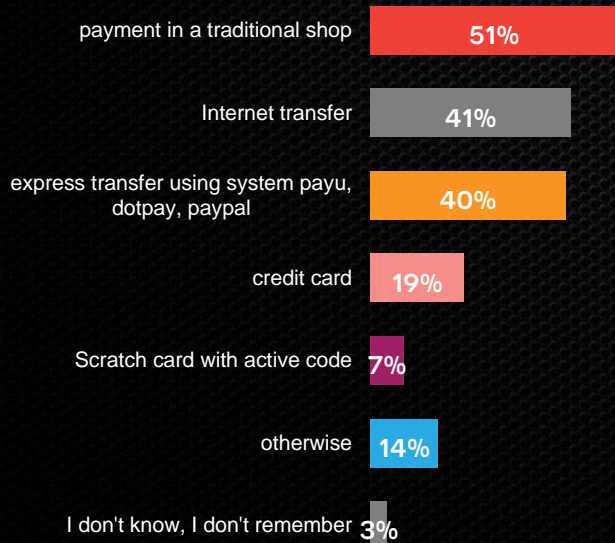


MONEY

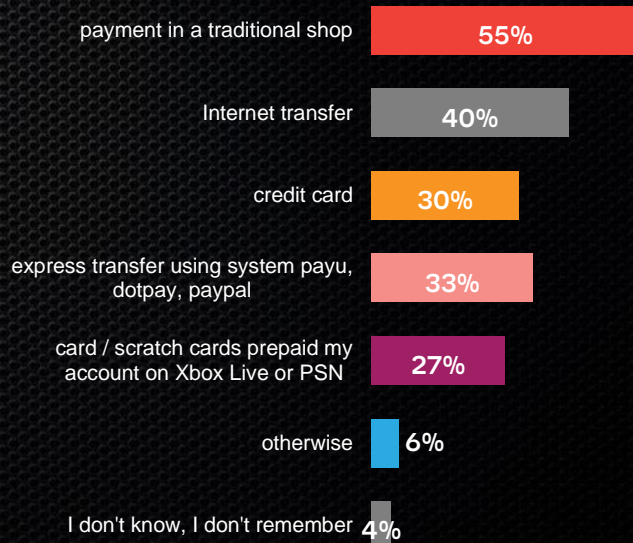
METHOD OF PAYMENT



GAMERS PLAYING INSTALLED GAMES



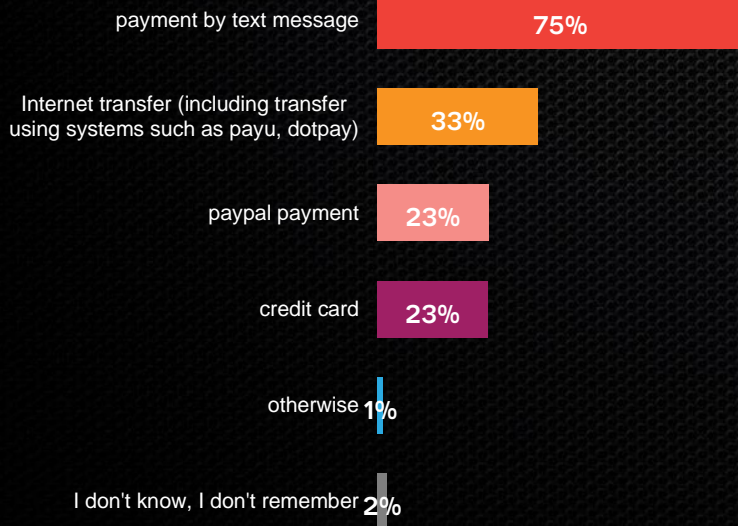
CONSOLE GAMERS



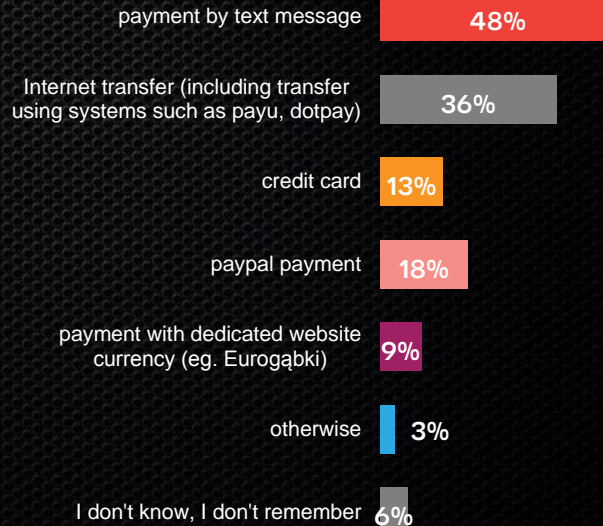
METHOD OF PAYMENT



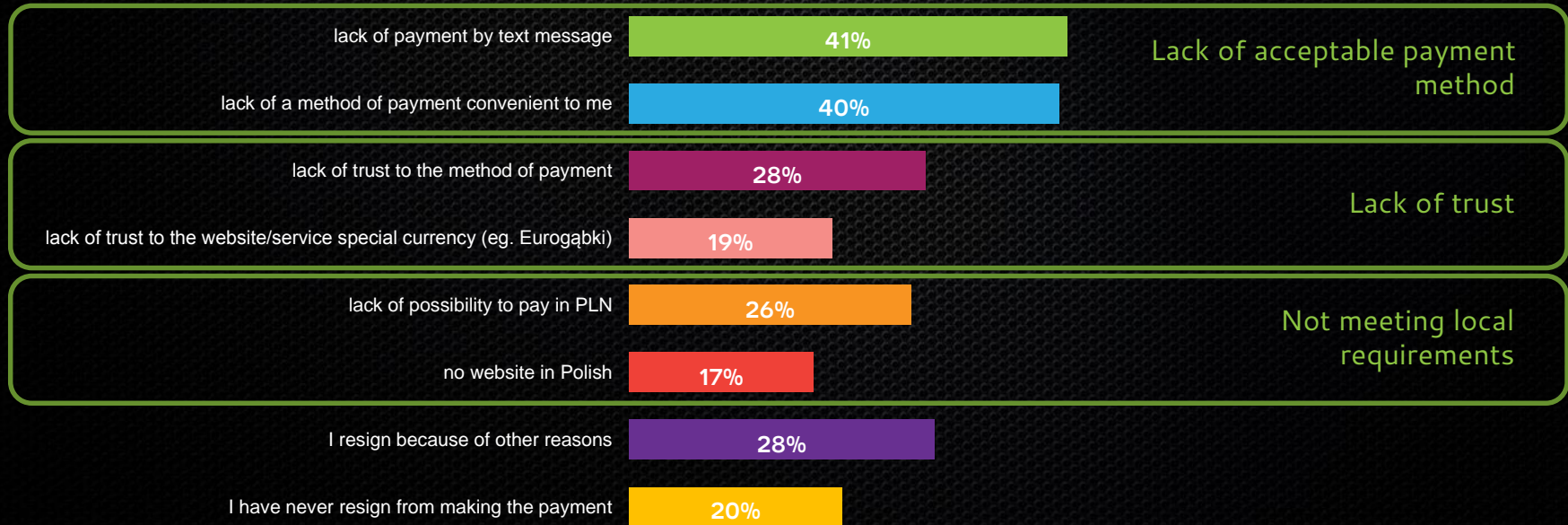
WEB BROWSER GAMERS



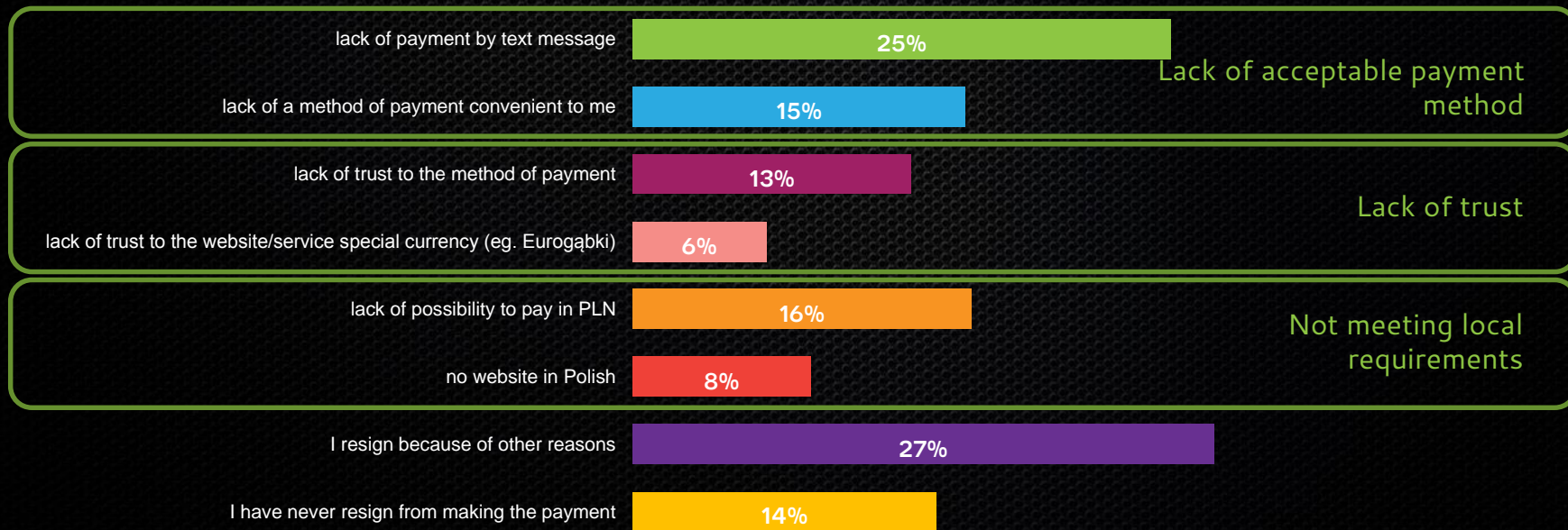
SOCIAL NETWORKING WEBSITES GAMERS



REASONS OF RESIGNING FROM MAKING A PAYMENT IN ONLINE GAME



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

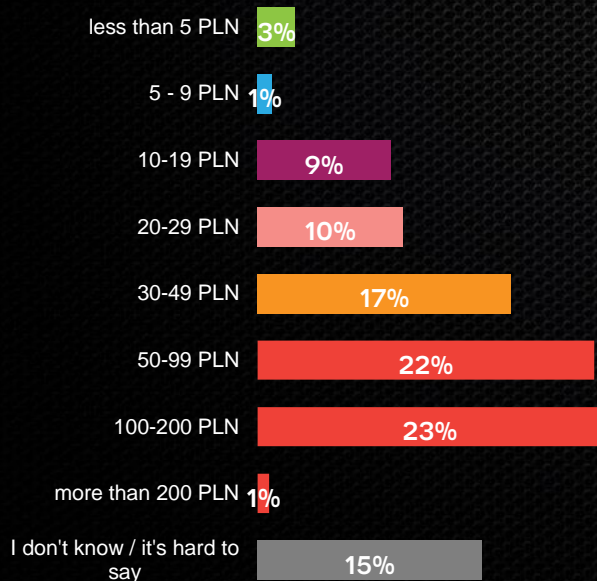




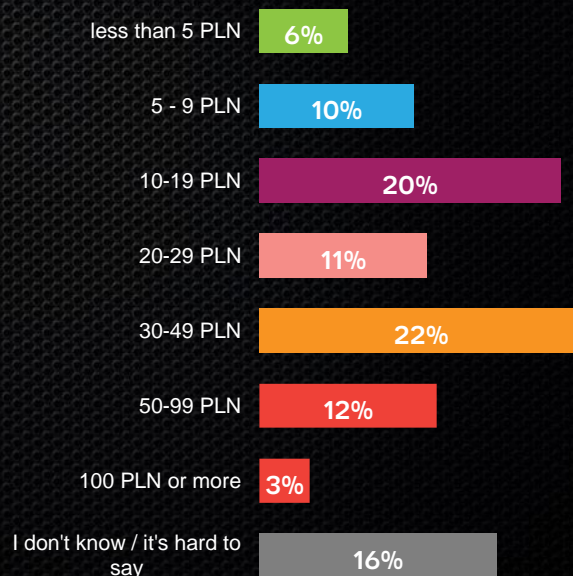
AVERAGE EXPENSES ON GAMES

AVERAGE EXPENSES ON GAMES INSTALLED ON COMPUTER

AVERAGE ONE TIME EXPENSES ON GAME

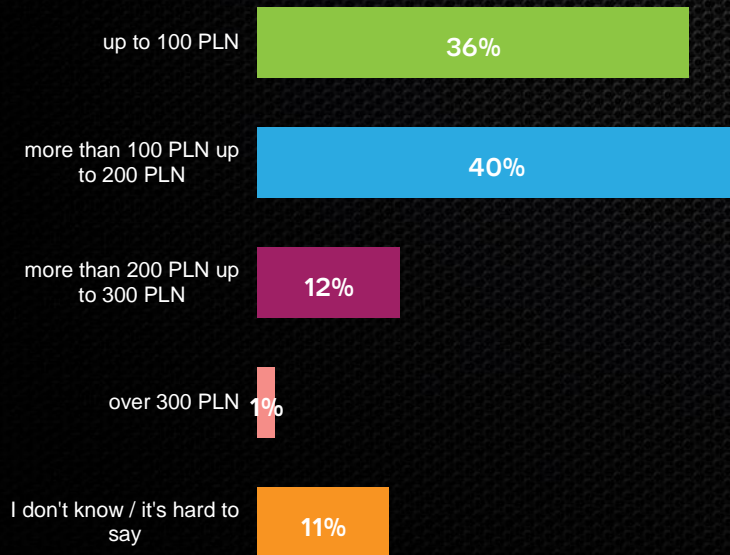


AVERAGE ONE TIME EXPENSES ON GAME EXTENSIONS

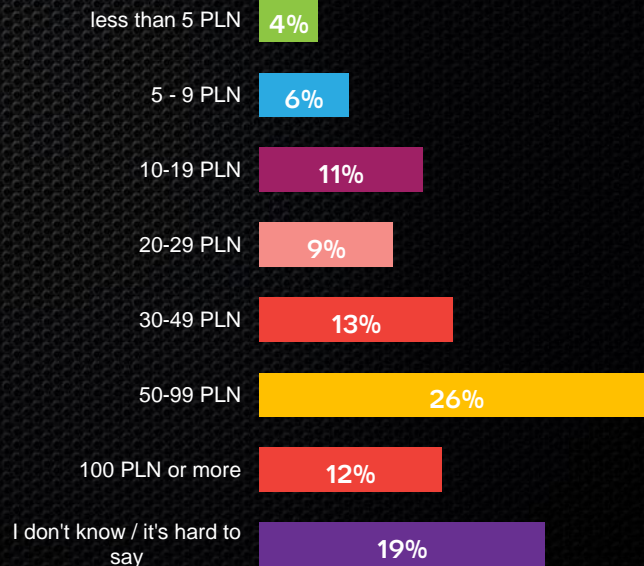


AVERAGE EXPENSES ON CONSOLE GAMES

AVERAGE ONE TIME EXPENSES ON GAME

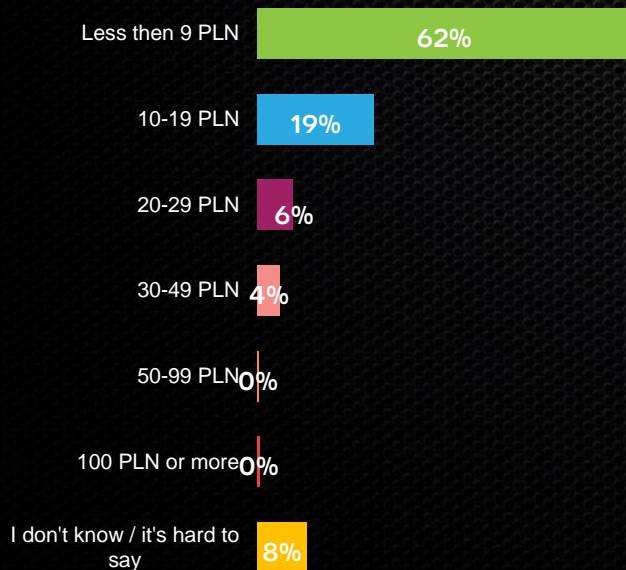


AVERAGE ONE TIME EXPENSES ON GAME EXTENSIONS

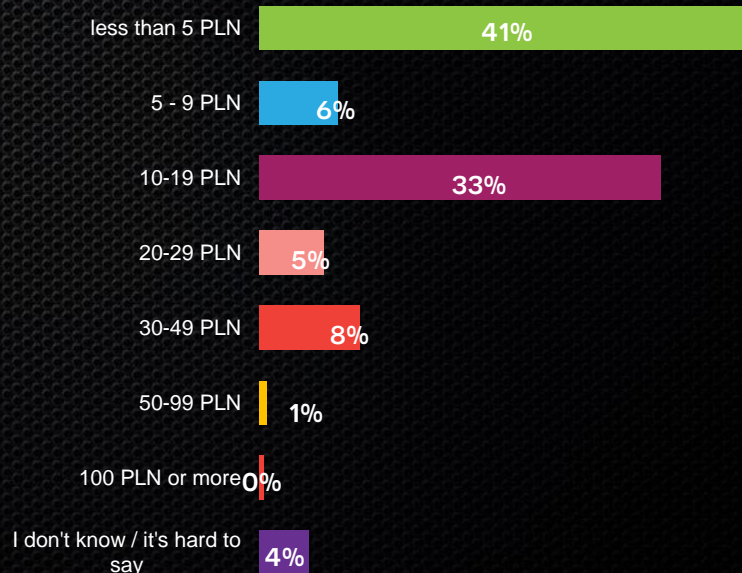


AVERAGE EXPENSES ON GAMES FOR SMARTPHONES AND TABLETS

AVERAGE ONE TIME EXPENSES ON GAME



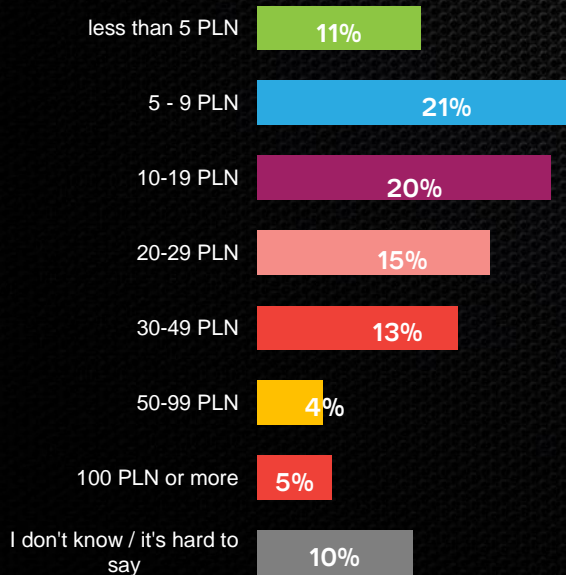
AVERAGE ONE TIME EXPENSES ON GAME EXTENSIONS



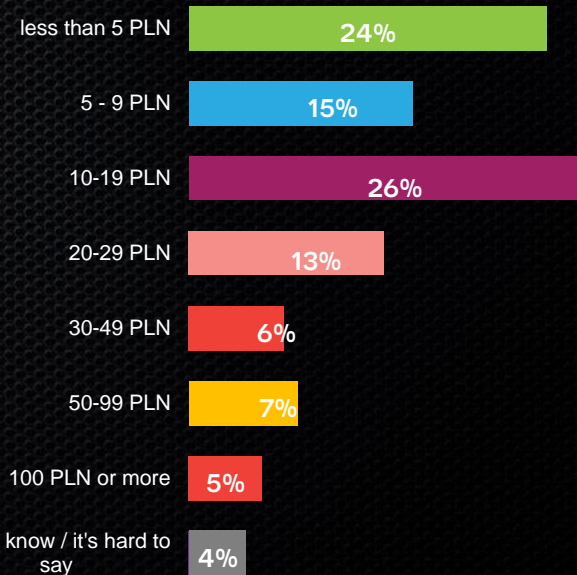
AVERAGE EXPENSES ON ONLINE GAMES AND GAMES ON SOCIAL NETWORKING WEBSITES



WEB BROWSER GAMERS



SOCIAL NETWORKING WEBSITES GAMERS



AVERAGE ONE TIME EXPENSES ON GAME EXTENSIONS





SUMMARY OF THE RESULTS

POLISH MARKET IS PROMISING FOR GAMING INDUSTRY THE GAMING MARKET IN POLAND IS GROWING – THE SHARE OF GAMERS AMONG INTERNET USERS 15–55 Y.O. HAS INCREASED FROM 60% TO 69% SINCE APRIL 2014, AND WHEN WE INCLUDE GAMERS PLAYING ON SOCIAL NETWORKING WEBSITES IT IS EVEN 72%.



MOBILE GAMES ARE GAINING ON POPULARITY – RANKS OF MOBILE GAMERS INCREASE WITH THE HIGHEST SPEED. THEIR SHARE GROWTH FROM 28% TO 40% DURING PAST 12 MONTHS. THESE MAKES MOBILE SECOND MOST POPULAR CATEGORY AFTER GAMES INSTALLED ON PC.

THE USER PROFILE IS SLIGHTLY CHANGING – THE GROWTH OF MOBILE GAMES CATEGORY AFFECTED ITS STRUCTURE – IN 2014 WE HAD SLIGHTLY MORE MALES AMONG MOBILE PLAYERS, THIS YEAR THE PROPORTION IS REVERSED – THERE IS ABOUT 56% OF WOMEN. **CONSOLE GAMES ARE STILL THE MOST DOMINATED BY MALE GAMERS.**

MOST POPULAR MOTIVATION FOR PLAYING GAMES INSTALLED ON COMPUTER ARE BECAUSE IT'S FUN AND TO REST AND RELAX AFTER EVERYDAY DUTIES, BUT KILLING TIME, BOREDOM IS ALSO AN IMPORTANT REASON – THE MOST IMPORTANT ONE FOR WEB BROWSER GAMERS.



PLAYING GAMES ON GAMING CONSOLE IS MORE OFTEN A SOCIAL ACTIVITY – ALMOST HALF OF CONSOLE GAMERS CLAIM THAT THEY ARE PLAYING FOR COMPANY. SURPRISINGLY SOCIAL FACTOR IS LESS IMPORTANT FOR GAMERS PLAYING GAMES ON SOCIAL NETWORKING WEBSITES – 49% CLAIM THAT THEY ALWAYS PLAY ALONE.



FREE TO PLAY GAMES ARE VERY POPULAR – 2/3 OF GAMERS ADMITS THAT THEY PLAYED THIS KIND OF GAME AT LEAST ONCE, AND AMONG THEM 2/3 PLAYED THIS KIND OF GAME DURING PAST MONTH.

ONLY 13% ADMITS PIRACY. PIRATES ARE MORE OFTEN YOUNG PEOPLE FROM BIG CITIES.

– THE MAIN BARRIERS FOR PAYING FOR ONLINE GAMES ARE LACK OF PREFERABLE PAYMENT METHOD OR LACK OF TRUST TO IT OR NO POSSIBILITY TO PAY IN PLN. HOWEVER ABOUT 30% OF GAMERS PLAYING ONLINE GAMES IN WEB BROWSERS ARE THOSE WHO PLAY ONLY SIMPLE, FLASH GAMES WHERE PAYMENT IS NOT POSSIBLE.



**THANK
YOU**

FOR WATCHING AND
LISTENING

See you soon!