

Polish Gamers 2022



.01 Introduction



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In May 2014, together with our Partners, we presented the results of the first edition of the nationwide Polish Gamers Research. At the time, Grand Theft Auto V, released a year earlier, reigned supreme on the market, gamers were getting excited about the new Playstation 4, and Facebook games were rapidly losing popularity to mobile games. In Poland, we were eagerly awaiting the releases of The Witcher 3: Wild Hunt and the first installment of Dying Light, both of which were released only a year later. Premium SMS payments dominated among Polish users of free-to-play games, and the Battle Royale genre was in its infancy as a mod for ARMA 2 called DayZ. Fortnite would not be released until three years later.

Since then, we have completed a total of seven editions of gamer surveys, all of which are a testament to an undoubted fact – the gaming market is one of the fastest-changing entertainment sectors, thus requiring constant monitoring and analyses: the easiest way to fail in this market is losing touch with rapidly changing trends. For example, between 2014 and 2022, there were significant changes in the demographic profile of players, their preferences in terms of platforms and payment methods; the sheer number of players worldwide grew from 1.6 billion to more than 3 billion.

We are publishing this edition of Polish Gamers Research fully confident that the continuity of this program ensures its full relevance to the modern video game industry, and provides the most up-to-date information about Polish players. This continuity means that our findings are regularly updated, our tools constantly adjusted, and, most importantly, that we are also able to highlight significant trends and changes of attitudes among Polish gamers. For example, in this year's edition, for the first time, we took a closer look at the phenomenon of so-called passive gaming – a significant group of consumers, who, through video platforms such as Youtube or Twitch, passively watch other people's gameplay. In addition, the survey questionnaire was expanded this year to include not only questions about the impact of the pandemic and the war in Ukraine on players' habits, but also about knowledge of the NFT and the metaverse, among others.

This allowed us to supply both valuable, detailed, relevant and practical information to a wide range of stakeholders in the sector – from developers and investors to product departments and marketers who are increasingly using gaming as a channel to reach their desired target audiences.

The continuity of research also gives us increasing satisfaction with effectively tackling misleading and hurtful stereotypes concerning video games and players themselves. We present an impartial map of the gaming market, explaining the mechanics of false beliefs and myths such as confusing the esports and gaming markets. We would like to emphasize that the research is not carried out with any particular hypothesis in mind, nor is it conducted in the interest of any lobbying interest groups – our sole purpose is to describe the video game industry as it is, based on the obtained data.

The reports are done independently of any video game market stakeholders, political parties and state institutions. We are not subject to any external pressure.

We are convinced that the information gathered in both the Polish Gamers Research 2022 and the parallel Polish Gamers Kids 2022 report, carried out by Gry-OnLine S.A. and the Polish Gamers Observatory on the basis of the first comprehensive study of children gamers aged 9-15, will allow a better understanding of the environment of games and the habits and motivations of gamers, thus allowing more accurate business decisions to be made in the future.

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Research Methodology



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The seventh edition of the Polish Gamers Research survey was conducted between March 14 and 24, 2022, using the CAWI (Computer-Assisted Web Interview) method within the Ariadna panel, on a group of Internet users aged 15-65. This project was a collaboration of GRY-OnLine S.A., the Polish Gamers Observatory and Krakow Technology Park. The authors of the research questionnaire are Michał Bobrowski and Patrycja Rodzińska-Szary. Data Science, the research division of the world's third largest advertising group, Publicis Groupe, handled the technical capabilities of the Polish Gamers Research survey. The sample, including boosters, included a total of 1992 Internet users in the stated age range. This also included parents of children gamers (N=633), who were asked questions about both their own gaming habits and those of their children, including the level of parental control or adherence to PEGI age restrictions.

Each respondent met the condition of playing at least one of the platforms: consoles, mobile devices (smartphones and tablets), PCs, Internet browsers, or watching other players play via video streaming. To achieve more exact and meaningful results, data weighting methods were used to calculate them. In the conducted research, we considered all the most relevant socio-demographic factors (gender, age, material situation, motivations, place of residence, education), as well as detailed information on preferences related to game consumption.

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About the Authors



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Michał Bobrowski

Enthusiastic about the video game market, distant travels, and opera music. He began his adventure with games in the era of 8-bit computers. From 1995 to 2000, he was involved in the outdoor advertising market. Since 2001, he has combined his love of virtual entertainment and Internet advertising through his work at GRY-OnLine S.A. (now part of the Webedia Media Group), a company that is the undisputed leader of Polish gaming media. Since 2011, he has served as CMO and a member of the company's board.

Since 2022, he has chaired PURR Media, a dedicated gaming agency under GRY-OnLine S.A. Regular speaker at industry conferences including Digital Dragons, Games Connection, ChinaJoy and Poznań Game Arena. He is the originator and co-author of the "The State of Polish Video Games Sector" reports, the "Warsaw Game Industry 2019/20" report, as well as seven editions of Polish Gamers Research, and the first edition of the Polish Gamers Kids research.



Cezary Kulesza

A communications strategist with 15 years of experience; passionate about video games and digital culture. In his career, he has worked with tech companies, game developers and has been involved in gaming-based marketing strategies for mass-market brands. Throughout his career, he has been strongly oriented towards marketing and sociological research, as well as efficiency in achieving business goals. Privately, he is a Dad of two gamers of the younger generation.



Patrycja Rodzińska-Szary

A video game industry expert with more than 14 years of experience. Together with Michał Bobrowski, she is the founder of the Polish Gamers Observatory initiative. She is the co-originator and co-author of the "The State of Polish Video Games Sector" report series, Polish Gamers Kids and Polish Gamers Research surveys. She is interested in business development, premium monetization, free-to-play and play-to-earn products, product development, Big Data and AI-based, player and market research, and management consulting. She gained gaming experience at RASP/Onet, Playlink, GRY-OnLine S.A., and others, and worked with more than forty game development studios. She has been a speaker at numerous industry conferences such as Digital Dragons, Game Connection Paris, Autodesk Media & Entertainment Days, as well as university lectures. Privately, she enjoys video games, technological innovations, hiking, dancing, and spending here free time on the coasts of the Atlantic Ocean. She's also a happy Mom.



Konrad Sarzyński

Ph. D. in urban development and an economist who is not afraid of data analysis. His fascination with gadgets led him to the Tech department of GRY-OnLine S.A., where he writes, edits and publishes pop-sci and new-tech articles. He combines experience from the world of science with journalism, striving to present even the most complicated issues in a straightforward way.

He also works at an international scientific publishing house, overseeing several scientific journals in economics, psychology and education. From these sources he derives his keen attention to detail and sharp eye for logical inconsistencies.

Outside of work, he expands his Twitch channel, where he plays and pursues his other passion – baking.



Przemysław Włodarski

His involvement with media and data science goes back 15 years. He gained experience by leading and supporting performance activities for some of the largest enterprises on the Polish market (T-mobile, Samsung, PKO BP). Currently, coming from a strictly performance background, he supports clients in facing the challenges of the market, also based on data analysis well beyond only media. At GRY-OnLine S.A., he handles the operations of the analytical department, implementing media projects for the organization's most significant clients. Privately he is enthusiastic about strategy games and hard sci-fi literature.



Special thank you to Zach Casey and Shaun O`Neill who handled the proofing of the Report.



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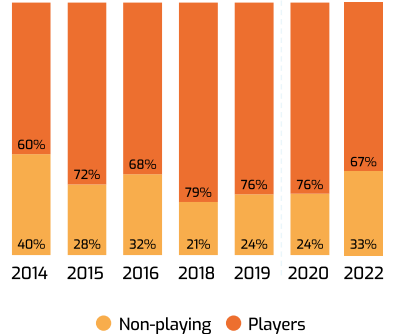
Chapter 1

POLISH PLAYERS – GENERAL INFORMATION



1.1 How many gamers are there among Polish Internet users?

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Q1 Which of the following activities did you perform in the last month? Basis: All respondents, 2022 N=1518
2020 - change of the internet panel for collecting interviews

PURR Media, Polish Gamers Observatory, Publicis Groupe - Data science - Research, CAWI, March 2022, TG: All, 15-65

Research conducted in March 2022 on a sample of nearly 2,000 users revealed a considerable decline in the number of gamers among Polish Internet users aged 15-65. Sixty-seven percent of respondents declared they had played at least once in the prior month, which represents a decrease of as much as 9 percentage points relative to the results of the 2020 survey. At the same time, this is the lowest share of gamers in the population of Polish Internet users in 8 years. The decline follows the 2018-2020 period, when gamers made up more than three quarters of the population.



We did not expect a drop of as much as nine percentage points compared to survey results in 2020, when 76% of Poles described themselves as gamers. This year, 13% of players openly admitted that the war in Ukraine was the reason for playing less video games. The players followed the media coverage of the war, which, according to our findings, caused stress, inability to focus, and an aversion to entertainment. Another factor contributing to the decline in the number of players is the loosening of Covid-related restrictions and the withdrawal of so-called "Covid players" from gaming and a return to their pre-lockdown hobbies. We signaled that trend was likely in the report "The State of the Polish Video Games Sector 2020", said Patrycja Rodzińska-Szary, co-author of Polish Gamers Research and co-founder of the Polish Gamers Observatory.



The coronavirus pandemic resulting in lockdowns was conducive to increasing the amount of gaming-related activity of people, leading to an increased number of new players. It came as no surprise to us, as well as other, foreign market research institutions, that obligatory stay at home regulations increased interest in video games as a way of spending time, both among adults and children. This occurred in Poland, the United States, and the rest of the European Union, including an increase in time spent on gaming by as much as 1.5 hours per week on average, among players aged 6-64. At the time, it was projected that by 2021 the number of players would exceed 2.8 billion. In fact, the number of players exceeded 3.0 billion. However, the increase in the number of players in 2022 will not be as dramatic, and it should equal about 4%. The industry and investors would like to see the same kind of increase in the number of players, and a corresponding increase in global revenues, as back in 2020, when revenues rose nearly 20% year-on-year. However, this will not be the case. A growth of 2% is considered optimistic, unless the pandemic locks us down again for another year.

It should also be noted that games compete for the leisure time of Polish users with subscription streaming services like Disney+ and Netflix, which are quite popular across the country. Gamers are one of the most important customer groups for SVOD platforms. Research shows that gamers who watch video game content are more likely to pay for SVOD access says Patrycja Rodzińska-Szary, co-author of Polish Gamers Research and co-founder of the Polish Gamers Observatory.



The study, conducted in May 2020, i.e., in the first months of the Covid-19 pandemic, indicated the opposite trend to our current results – gaming in Poland and around the world was even more popular than before the pandemic. From 2014, that is since Polish Gamers Research was first conducted, the downward trends have not been so significant. We are currently seeing declines in interest in gaming across all five platforms. Mobile devices are still the most popular gaming platform. Given the still unpredictable nature of events in Ukraine, estimating the duration and extent of their impact on many aspects of our lives remains difficult, including whether and how we consume video games, states Michał Bobrowski, co-author of the survey and co-founder of the Polish Gamers Observatory

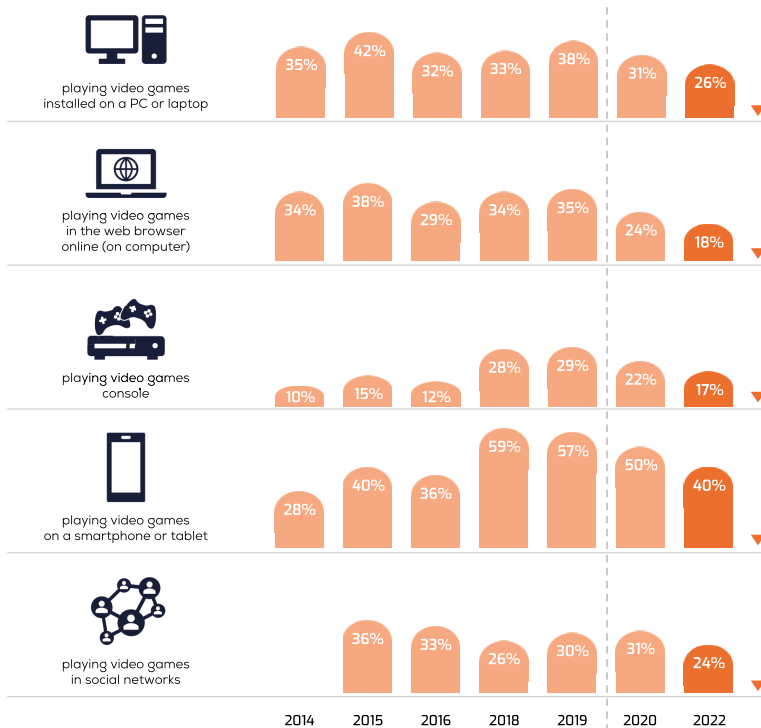
¹Raport Kondycja Polskiej Branży Gier 2020, Krakowski Park Technologiczny, GRY-OnLine S.A., Polish Gamers Observatory, grudzień 2020.
²Ipsos, ISFE (September 2020) Video Gaming in Lockdown. The impact of COVID-19 on video game play behaviours and attitudes

It's also worth remembering that war is not the only factor that has contributed to fewer respondents declaring they play video games in this year's survey. It also begs recognition that all populations are recovering from the pandemic. In 2020-21, interest in this form of entertainment clearly increased. Looking at the responses of players (available be-

low), one must remember that a considerable number of them declared in 2022 that they intended to play less than before. It can be assumed that some of them may have already chosen, for example, more physically engaging leisure activities.

1.2 How many gamers are there among Polish Internet users by platform?

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Q1 Which of the following activities did you perform in the last month? Base: All respondents, 2022 N=1518
2020 - change of the internet panel for collecting interviews

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The decline in the number of players can be seen across all platforms. Mobile devices have lost the most players – in 2020, one in two Poles played smartphone and tablet games; now, that number has decreased by 10 percentage points, to 40%. In other cases, the declines were smaller, around 5-7 percentage points. Equal declines across all platforms meant that smartphone and tablet games are still the most popular type of games. The least popular gaming platforms were again consoles, in the survey considered collectively – with no division by manufacturer or model. In 2022, only 17% of respondents answered they had played on any console in the prior month.



The results concerning the popularity of console gaming cannot be interpreted directly. The most significant aspect here is the global scarcity and reduced availability of consoles. After the increase in popularity and surge in sales in March 2020 – at the beginning of the pandemic – manufacturers' resources became depleted and have not yet been restored. We lack an objective picture of the popularity of particular brands and models across the world. The picture of console popularity is distorted – what matters is simply store-shelves availability to consumers. The 5-pp decline in popularity of consoles among Polish gamers seen in 2022 is affected by protracted disruptions of the supply chain caused by the pandemic, low availability of hardware, and consequently higher prices and a smaller number of new games releasing on the latest generation of consoles, adds Patrycja Rodzińska-Szary.



Consoles being the least popular, with one exception (2018) is not surprising at all, notes Michał Bobrowski. We need to bear in mind that the Polish video game market is mainly focused on the PC, and in the case of younger generations, the gaming devices of choice are mainly smartphones and tablets, particularly because they offer a very large selection of free-to-play games, which are very popular in Poland.

Regardless of the decreasing number of players compared to the previous survey, it should be noted that two thirds of the public still remain active players. Hence, it seems reasonable to assume that despite remarkable events like the war in Ukraine or the end of the Covid pandemic, lifestyles involving frequent contact with games have not changed. It would be

wrong to classify these two thirds of the population as heavy users or, for that matter, heavy gamers, but the fact that their lifestyles have only changed in the face of such significant, global events may suggest that those people have a very strong relationship with gaming in the way they spend their free time, adds Przemysław Włodarski.

1.3 The impact of the war in Ukraine on Polish players

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UKR. How has the Russian invasion of Ukraine affected your gaming habits? Base: video gamers aged 12+ years, N=958
UKR2. And how exactly did the Russian invasion of Ukraine affect your gaming habits? Base: Respondents who play less often than before N=124

PURR Media, Polish Gamers Observatory, Publicis Groupe - Data science - Research, CAWI, March 2022, TG: All, 15-65

For 13% of those surveyed, the Russian invasion of Ukraine decreased their frequency of gaming. Most respondents answered that they played less or followed current events; 15% did not feel interested in this form of entertainment or did not have time to play or were too stressed to play (12%). The vast majority of respondents (61%) declared that the conflict in Ukraine had not affected their habits at the time of the survey and they played as often as before the war. Another 21% could not determine the impact of these events on their gaming habits.

13% of respondents declaring that the war in Ukraine decreased the frequency of their gaming is a result that cannot be ignored. This is not a statistically insignificant result or a statistical error. Gamers stand for two thirds of the Polish population aged 15-65 and the observed result is in line with nationwide trends in consumer sentiments. With the widely improving Covid situation, consumer confidence have improved since the beginning of 2022, only to be curbed again by the situation in Ukraine, adds Patrycja Rodzińska-Szary.

In the mainstream media, we can still notice narratives stigmatizing players, portraying them as addicts that are alienating themselves from society. However, the answer to this survey question paints a vastly different picture of gamers as members of society. These are people who shape their actions in a conscious and fully controlled manner, are fully aware of the international situation, and devote their time and attention to it (24%). Two other responses are also noteworthy: 34% said that they simply played less, and 12% that they didn't have time to play. We can interpret this in two ways. The first one is related to Covid and implies a gradual return to the earlier lifestyles with more activities outside, for example; while the second one, related to the war, may suggest involvement in aid activities or active monitoring of the conflict. Regardless of whether the reasons above are true or not, we can conclude in light of these answers that it is impossible to classify gamers as being somewhat out of touch with the real world, adds Przemysław Włodarski.



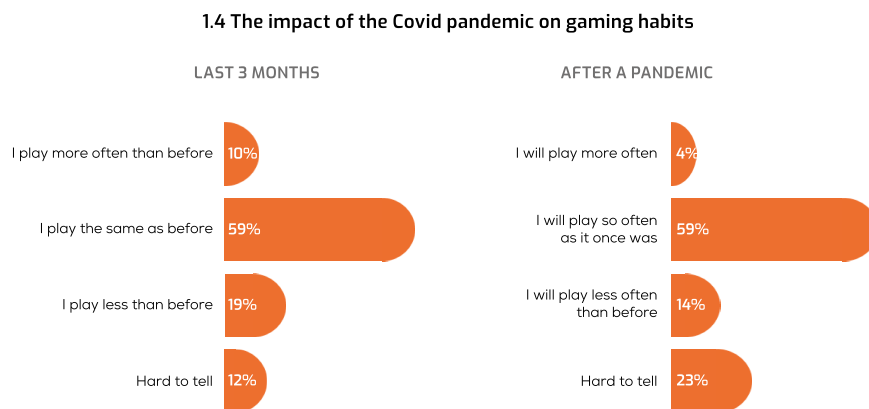
¹Raport Kondycja Polskiej Branży Gier 2020, Krakowski Park Technologiczny, GRY-OnLine S.A., Polish Gamers Observatory, grudzień 2020.
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Another thread is the growing discrepancy between the declaration of playing video games and interest in gaming per se. The pandemic, in addition to increased interest in gaming per se, has also brought increases in statistics numbers concerning watching game streams <https://twitchtracker.com/statistics>. Now that the epidemiological situation seems to have normalized considerably, the amount of free

time spent on entertainment should have returned to pre-pandemic levels, while at the same time, we see that watching streams continues to remain more popular than before the pandemic. In summary, gamers are keener on consuming gaming entertainment passively today than in earlier editions of the survey. - Cezary Kulesza adds.

1.4 The impact of the Covid pandemic on gaming habits



PAN1a Have you played more or less in the last 3 months? Base: Respondents playing games, N=958
 PAN4 After the pandemic is over and restrictions are lifted, will you play as often as before? Base: Respondents playing games, N=958

PURR Media, Polish Gamers Observatory, Publicis Groupe - Data science - Research, CAWI, March 2022, TG: All, 15-65

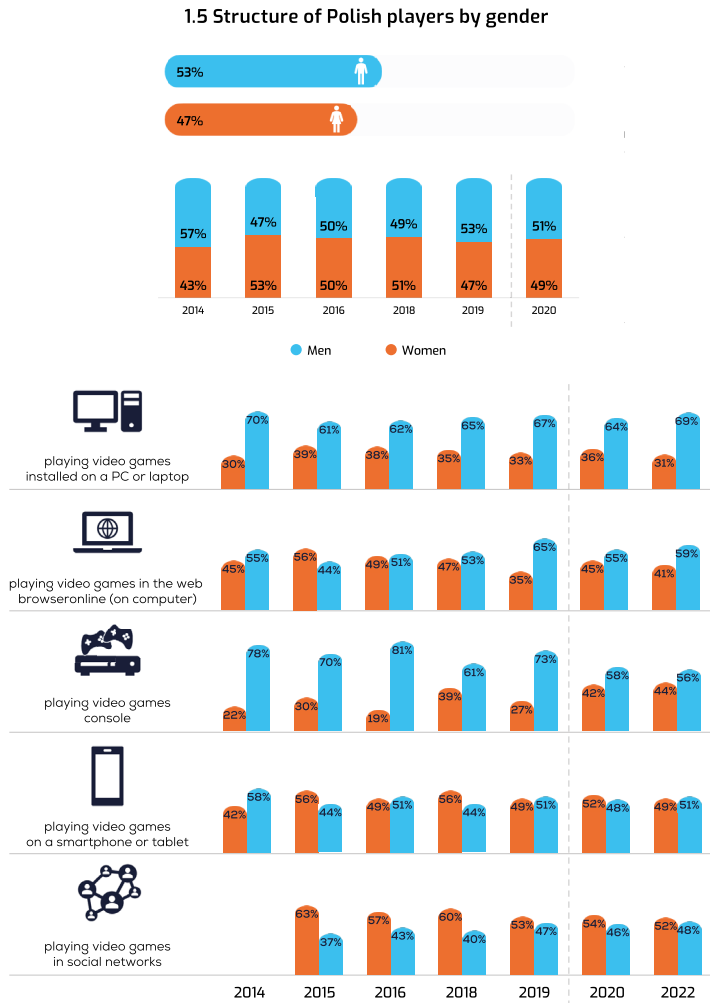
In the last three months since the survey was conducted – that is from December 2021 to January 2022, as well as between February and March 2022 – the vast majority of respondents (59%) stated they play as often as they used to. Moreover, after the pandemic, the same percentage of respondents plan to engage in electronic entertainment to the same extent as they do now. Nearly one in five respondents (19%), however, said they played less in the quarter preceding the survey than they used to. 14% of those surveyed expect their gaming time to decrease even further after the pandemic.

The declarations of Polish respondents about post-pandemic gaming are generally a good sign for the industry. At this point, it is estimated that the number of players worldwide will grow by about 4% every year. At the same time, global revenue growth is estimated at 2% year-on-year. This simply means that users will not abandon gaming, but instead they will either reduce their spending on games, or keep it at current levels. We should expect similar behavior from Polish players. Patrycja Rodzińska-Szary comments.



Source: blvdone / Stock.adobe.com

1.5 Structure of Polish players by gender



SEX. Please choose your gender
 Q1 Which of the following activities did you perform in the last month? Base: Respondents who play games, 2022 N = 1012
 2020 - change of the internet panel for collecting interviews

PURR Media, Polish Gamers Observatory, Publicis Groupe - Data science - Research, CAWI, March 2022, TG: All, 15-65

Gaming is slightly more popular among males. The differences are small and from the first years of the study, the results are evenly distributed, with slight deviations in favor of one gender or the other, although more often in favor of men. Compared to 2020, the number of female players dropped slightly, from 49% to 47%, returning to levels from 2019.

A larger gender gap is clear in the case of individual platforms. Traditionally, video games on social networks attract more women than men, although the 2022 gap is the lowest since 2015, when the survey first took into consideration the platform. It is also currently the only platform where the majority of players are women (52%), although the proportion is leveling off every year.

The most male-dominated platform is still the PC and laptops (69% men). Men also make up the majority of users of browser-based games (59%) and consoles (56%). Between 2014 and 2016, consoles were used overwhelmingly by men, but in 2018 the percentage of female gamers on these platforms doubled. After a temporary decline in 2019, the share of women in regular console gamers is still above 40%.



The bastion of male gaming has fallen. When conducting the Polish Gamers Research in May 2020, we noticed a significant increase (from 27% to 42%) of interest in console gaming among adult women. This platform was historically male-dominated. Interestingly, this trend has continued to 2022 despite the loosening of Covid restrictions. In 2022, as many as 44% of respondents playing on consoles were women, and the console they were most likely to use was the Playstation 4. This information seems pertinent for game and console manufacturers. It is worth bearing this in mind when developing new console games and building a marketing communications strategies. Gaming has become an egalitarian pastime. Gender does not matter. We also saw this in the results of a survey of children aged 9-15 playing video games, Patrycja Rodzińska-Szary explains.



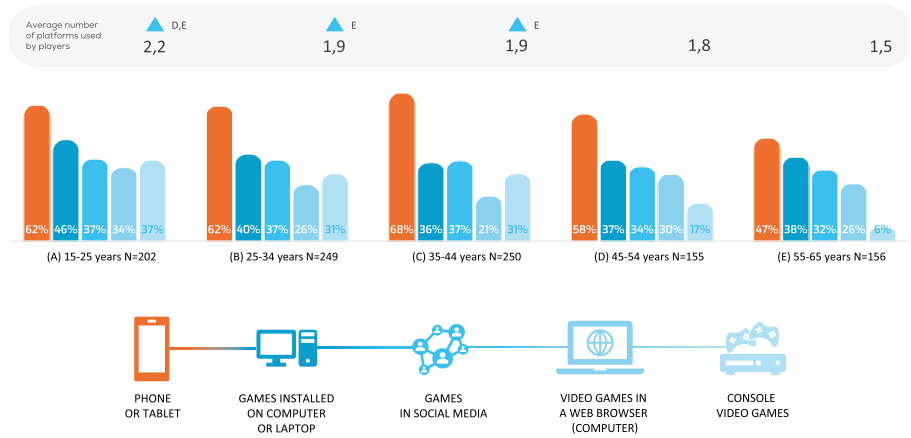
Nintendo Switch has influenced the console market, which is also apparent in the share of women among console gamers. The Switch launched in 2017, coinciding with the rise in popularity of consoles among women in a survey conducted a year later. As of 2020, women made up more than 40% of console gamers, which can be partially explained by the release of *Animal Crossing: New Horizons*, a game that sold 37.6 million copies by the end of 2021 and won the hearts of many gamers – regardless of age and gender. With its large offering of casual titles, the Switch has somewhat broken the spell of the console market, changing it from a hermetic environment for avid gamers to one that provides entertainment for everyone, comments Konrad Sarzyński.



Such even distribution of genders among players should come as no surprise. Where there is demand, there is also supply. While we tend to associate the most popular games with typically masculine gameplay full of spectacular explosions and combat, games characterized by a radically different approach to gameplay are also breaking records with regards to popularity. One such example is "Animal Crossing" on Nintendo Switch. Developers and publishers have long recognized the demand for a diverse catalog of games and have adjusted their strategies to meet these market expectations. The surprise that there is such a high share of women among gamers is no doubt related to the very stereotypical image of the gamer that persists in the media sphere. I am glad that this image is changing and becoming closer to the truth, adds Przemysław Włodarski.

1.6 Structure of Polish players by age

1.6.1 Structure of Polish players by age



Age has a significant impact on players' habits, including the platforms used. This study distinguished five different age groups, and while the overall trends were common for all of them, the generational differences are clear. The average number of platforms used by gamers decreases with age, from 2.2 among the youngest players to 1.5 in the 55-65 age range.

Consoles are popular among gamers aged 15-44, with about one in three respondents having played on some console in the month preceding the survey. Among the next two age groups, we can see a sharp decline in the popularity of consoles – 17% for the 45-54 age group and just 6% among the oldest players.

Although mobile devices were the most popular platforms across all age groups, the oldest gamers were overall much less likely to use a smartphone or tablet (47%). At the same time, these devices were the most popular among representatives of the 35-44 age group (68%). This group has the most unusual platform preferences, being the only one to favor video games on social networks (37%) over those on a PC (36%).

AGE. Please select the appropriate age range: Base: Respondents who play games, 2022 N = 1012
 Q1 Which of the following activities did you perform in the last month? Base: Respondents who play games, 2022 N = 1012
 Letters D, E provide a detailed explanation of the significant results (D - difference vs 45-54 years, E - difference vs 55-65 years)
PURR Media, Polish Gamers Observatory, Publicis Groupe - Data science - Research, CAWI, March 2022, TG: All, 15-65

1.6 Structure of Polish players by age - cont.



Analysis of the profile of mobile players deserves attention. The mobile gaming is the domain of more mature gamers and primarily women & a great simplification, in fact, getting an international earnings represented across of groups, and although it's functionally different from other types of gaming, we can...

...usually offers the most accessible and, at the same time, the most... in mobile games, with their widespread accessibility, simplifies... they can differ in operation with each other, and have been... that will be they do not belong to the world of gaming... that side of the phenomenon, side of the mobile game... ...to the world of mobile games, as well as the potential to...



1.6.2 Structure of Polish players by age



Dear readers - this is just 5% of the content of the entire report. The full version of Polish Gamers 2022 report contains 75 diligently analyzed topics describing Polish gamers aged 15-65, prepared on the basis of the 7th edition of the nationwide Polish Gamers Research, provided with expert commentaries.

On the next page, you can see the table of contents, which lists all the questions analyzed in the full report.

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If you are interested in accessing the full version of the Polish Gamers 2022 and Polish Gamers KIDS 2022 reports, please contact us at:

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