



GAMING MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028

— IMPACT OF INFLATION, WAR IN UKRAINE AND COVID-19



About the report



The gaming market is one of the most dynamic branches of the Polish industry. Preliminary data show that the total expenditure on video games in 2022 maintained its upward trend. This result is significant in that the market is in a completely new situation. For the first time, the number of players using paid video games has fallen.

In terms of trends, the **situation of the Polish market is mainly determined by revenues from the sale of mobile, social-network and browser games.** This is related, among other things, to the increasing penetration of mobile devices and widespread access to the internet in mobile networks and mobile devices.

Theoretically, console games had the smallest share in the total market performance. On the other hand, this is a steadily growing segment that is likely to overtake PCs in the next few years.

For a complete analysis and 5-year growth forecasts, see PMR's latest report, "Gaming market in Poland 2023".

The report provides the video games market sizing by structure and individual subsegments. It presents key data and trends in the analysed market, based on a proprietary B2C survey of demand.

The individual market segments have also been measured in the macroeconomic context and, on the basis of these analyses, development forecasts up to 2028 have been prepared.



Details about the report

Main objective

To provide a comprehensive analysis of the gaming market in Poland and to present mid-term and long-term forecasts of its development.

Additional objectives:

- to present the value of the gaming market in Poland in terms of expenditure on video games
- to analyse individual segments that make up the gaming market:
 - **types of games** (mobile, browser, social-network games, PC and console games)
 - **types of players** (paying players and free-to-play players)
 - **payment methods for video games** (digital sales, physical sales, subscriptions)
 - **household equipment** for playing games (smartphones, PCs and consoles)
- analysis of the gaming industry as measured by the revenues of Polish producers and publishers listed on the WSE and NewConnect markets
- discussion of the impact of the macroeconomic and geopolitical situation on the gaming market in Poland and its growth rate in 2023-2028

What can be found in the report?

- **market value** measured by the expenditure on video games
- **number of market players** in Poland
- **value and volume breakdown** of the video game market by segments:
 - mobile, social-network and browser games
 - PC games
 - console games
- **value of expenditure on video games** in the subscription model
- **equipment of Polish households** with smartphones, PCs and consoles
- **Findings of PMR research**
- **characteristics of the Polish GameDev**, including breakdown of revenues of the largest Polish game developers
- **main trends** on the video games market in Poland and worldwide
- **market development forecasts** until 2028, by segment

Subject matter and scope

Time span: 2014-2022

Forecast period:..... 2023-2028

Geographic coverage: Poland

SCOPE OF SUPPLY

Video games on the Polish market are supplied by major global producers and publishers.

PRODUCTS COVERED

Segments:

- mobile, social-network and browser games
- PC games
- console games

SUBJECT MATTER

- impact of the macroeconomic situation on the gaming market in Poland
- market value and its growth rate based on expenditure on video games
- volume and growth rate of the gaming market
- value and volume breakdown of the gaming market by:
 - mobile, social-network and browser games
 - PC games
 - console games
- breakdown of the market value, by digital sales, physical sales and subscriptions
- findings of PMR research on the gaming market in Poland
- percentage of households in Poland equipped with smartphones, PCs and consoles; sales of devices (PCs and smartphones) and number of users (of smartphones)
- characteristics of Polish GameDev
- trends on the Polish and global gaming market
- forecasts for the market and each of its segments



Additional information

FORECASTS

For the report, long-term market development forecasts were prepared using econometric models and historical data for the market (8-year time series).

The forecasts cover the period 2023-2028.

The report presents **forecasts for 14 indicators**, including:

- number of market players by segment
- market value measured by the expenditure on games, by segment
- equipment of Polish households with smartphones, PCs and consoles
- sales of equipment, including smartphones and PCs

The forecasts presented in the report take into account **more than 60 variables** describing the Polish economy, consumer behaviour and their impact on the development of the gaming market in Poland.

RESEARCH METHODS

The report on the gaming market in Poland is based on the analysis of information from secondary data and PMR's own research.

Between 9 and 11 December 2022, PMR conducted a consumer survey on smart, IoT solutions and gaming on a representative sample of adult Poles using the CAWI method. Part of the study 1,000 interviews were carried out. Respondents were asked to answer questions related to the purchase of particular solutions in the last 12 months prior to their participation in the survey. The aim of the gaming section was to identify the percentage of Poles buying mobile, PC and console games and the sales channels for those products.

Secondary sources include:

- press releases from market participants
- trade press and specialist websites
- general press
- reports on individual gaming market segments in Poland and Europe
- other documents and studies
- findings from custom projects conducted by PMR

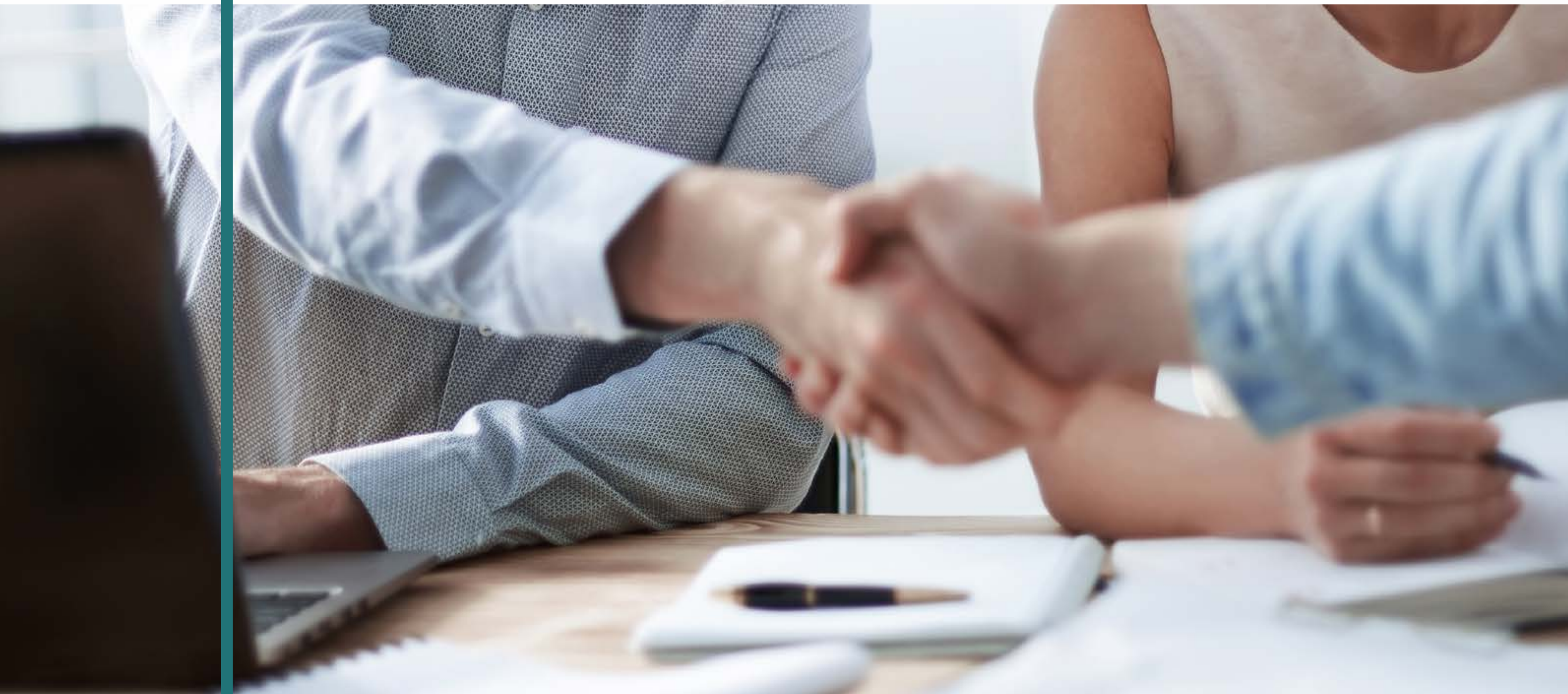
Benefits of purchasing the report

The report answers, for instance, the following questions:

- How many people in Poland play video games?
- Which gaming community is the largest?
- How much do gamers in Poland spend on video games?
- Which gaming community spends the most and which spends the least?
- What is the share of digital game sales?
- How many players use subscriptions and how much do they spend on them?
- How many video game producers and publishers are there in Poland?
- How many Polish producers and publishers of video games are listed on the WSE and NewConnect?
- What are revenues of Polish producers and publishers of video games listed on the WSE and NewConnect?
- What is the value of the Polish e-sports industry?
- How many households in Poland have at least one smartphone, PC or console?
- What are the development prospects for the gaming market in Poland?
- What is the impact of inflation and the war in Ukraine on the gaming market in Poland?

Together with the report, you will be provided with the most important data in the Excel spreadsheet for individual aggregation.





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