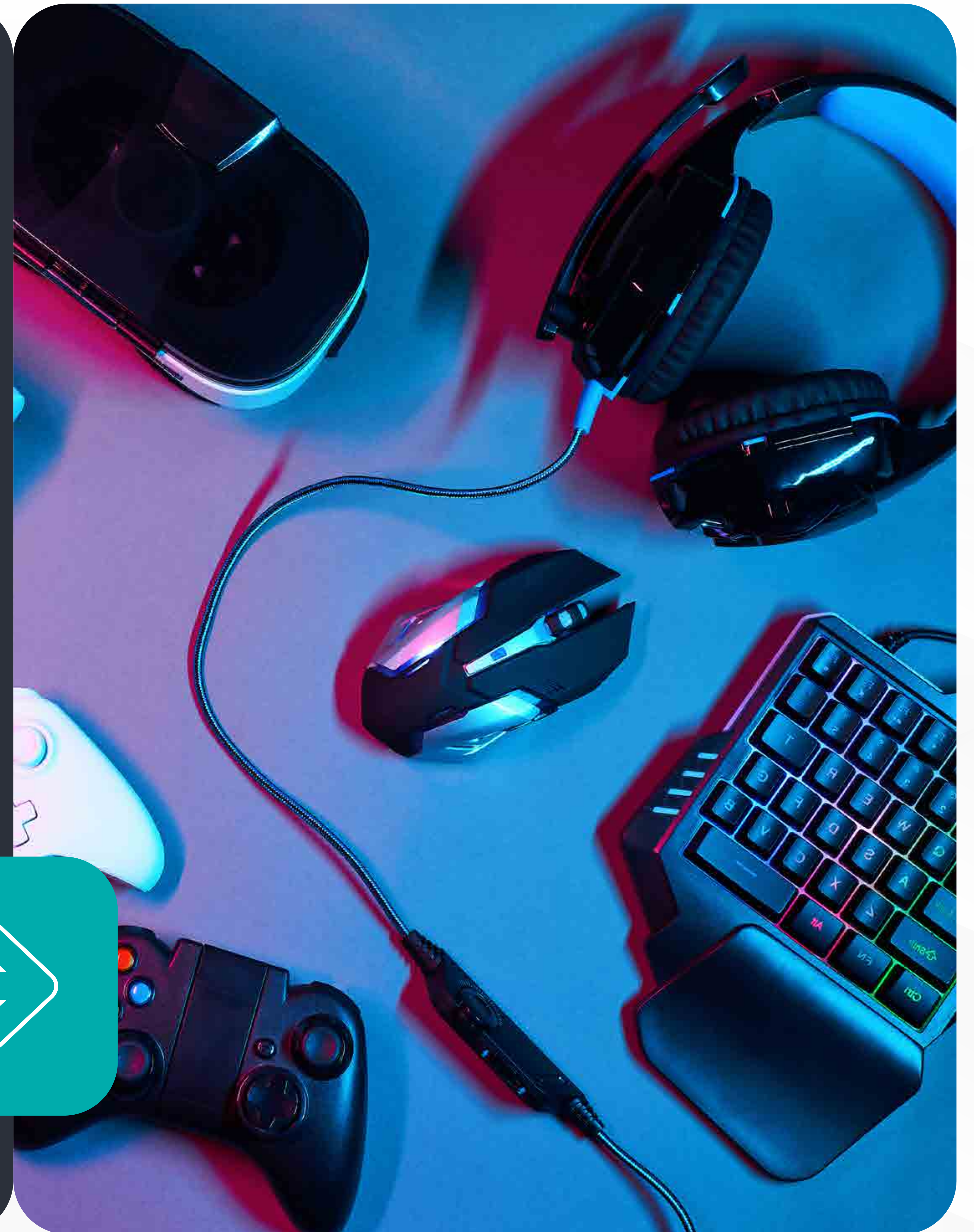


GAMING MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030



The dynamics of innovation in the video game industry and the related technological progress in gaming hardware are accelerating significantly. Next-generation consoles, mobile devices, VR technology, and subscription models are just a few elements that define current player expectations and place high demands on the performance of available devices. Cloud gaming is also gaining popularity in the market, redefining the traditional model of game distribution. This technology has the potential to shape the future directions of the gaming industry, making it even more accessible.

The strength of the Polish game development sector and domestic productions should not be overlooked either. In 2024, titles such as “Manor Lords” by Slavic Magic, “Silent Hill 2” by Bloober Team, “Frostpunk 2” by 11 bit studios, and “Nobody Wants to Die” by Critical Hit Games captured the attention of players worldwide, thereby increasing the overall value of the Polish gaming industry.

The PMR report “**Gaming market in Poland 2025**” provides a detailed overview of the video game market, divided into structures and specific market segments. The report presents key data and trends in the analyzed market based on proprietary B2C demand-side research. Individual market segments are also assessed in the context of the macroeconomic situation, and based on these analyses, development forecasts have been prepared through 2030.



Main objective

providing a comprehensive description of the gaming market in Poland together with its medium and long-term development forecasts

Additional objectives

- presentation of the value of the gaming market in Poland in terms of expenditure on video games
- analysis of the segments making up the gaming market in Poland - types of games (mobile, browser and social games, PC games and console games), types of gamers (pay-to-play and free-to-play), methods of payment for video games (digital sales, physical sales, subscriptions) and household equipment for gaming (smartphones, PCs and gaming 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 in the gaming market in Poland and its growth rate in 2025-2030

What can be found in the report?

- **market value** measured by the expenditure on video games
- **number of gamers** in Poland
- **value and volume structure of the** video games market by segments:
 - mobile, social and browser games
 - PC games
 - console games
- **value of the expenditure** on video games in the subscription model
- **equipment of Polish households** with smartphones, PCs and gaming consoles
- **value and segmentation** of gaming accessories**
- **findings of PMR research**
- **characteristics of the Polish GameDev industry**, including a breakdown of revenues of the largest Polish game developers
- **main trends** in the video games market in Poland and worldwide
- **market development forecasts**, broken down into segments

TIME SPAN: 2015-2023

FORECAST HORIZON: 2024-2029

GEOGRAPHIC COVERAGE: Poland

SUPPLY RANGE: Video games on the Polish market are supplied by major global producers and publishers

SCOPE

Segments:

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

SUBJECT MATTER

- macroeconomic situation and its impact on the gaming market in Poland
- market value and its growth rate based on the expenditure on video games
- volume and growth rate of the gaming market
- value and volume structure of the gaming market by segments
- value structure of the market, broken down into digital sales, physical sales and subscriptions
- findings of PMR research on the gaming market in Poland
- Polish gamers' approach to gaming hardware and related devices and accessories
- value of the gaming accessories market by category
- percentage of households in Poland equipped with smartphones, PCs and gaming consoles; sales of devices (PCs and smartphones) and number of users (smartphones)
- characteristics of the Polish GameDev industry
- trends on the Polish and global gaming market
- value and volume forecasts for the entire market and each of its segments



GAMING ACCESSORIES

Mobile games:

- gamepad (controller)
- headphones
- power bankstand
- external fan
- case
- memory card

PC and laptops:

- mouse
- keyboard
- headphones
- mouse pad
- webcam
- gamepad (controller)
- monitor
- gaming chair
- gaming desk

Consoles:

- gamepad (controller)
- headphones
- CD docking station
- additional memory card
- controller charging station
- monitor
- TV (as a screen)
- gaming chair
- gaming desk



FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical, 8-year time series for the market. The forecasts cover the period 2025-2030.

The report presents forecasts for 14 indicators, including:

- number of gamers by segment,
- market value measured by the expenditure on games in individual segments,
- equipment of Polish households with smartphones, PCs and gaming 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 USED IN THE REPORT

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

In May 2025, PMR conducted a consumer survey regarding video games in Poland. The survey was carried out on a representative group of adult Poles using the CAWI technique. It involved 1116 interviews.

The secondary sources include: press releases and financial reports of the market participants, trade magazines and specialist websites, general newspapers, reports on specific segments of the gaming market in Poland and Europe and other documents and studies, as well as conclusions from custom projects carried out by PMR.



Why to buy this report, i.e. what important questions it answers:

- How many people in Poland play video games?
- Which gaming community is the largest?
- How much do gamers in Poland spend on video games?
- How many players pay for 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 the 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 gaming console?
- What are the development prospects for the gaming market in Poland?
- What is the impact of inflation on gamers' spending in Poland?
- What is the impact of the war in Ukraine on the gaming market?

Together with the report, we provide the most important data in the Excel spreadsheet for individual aggregation.



We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

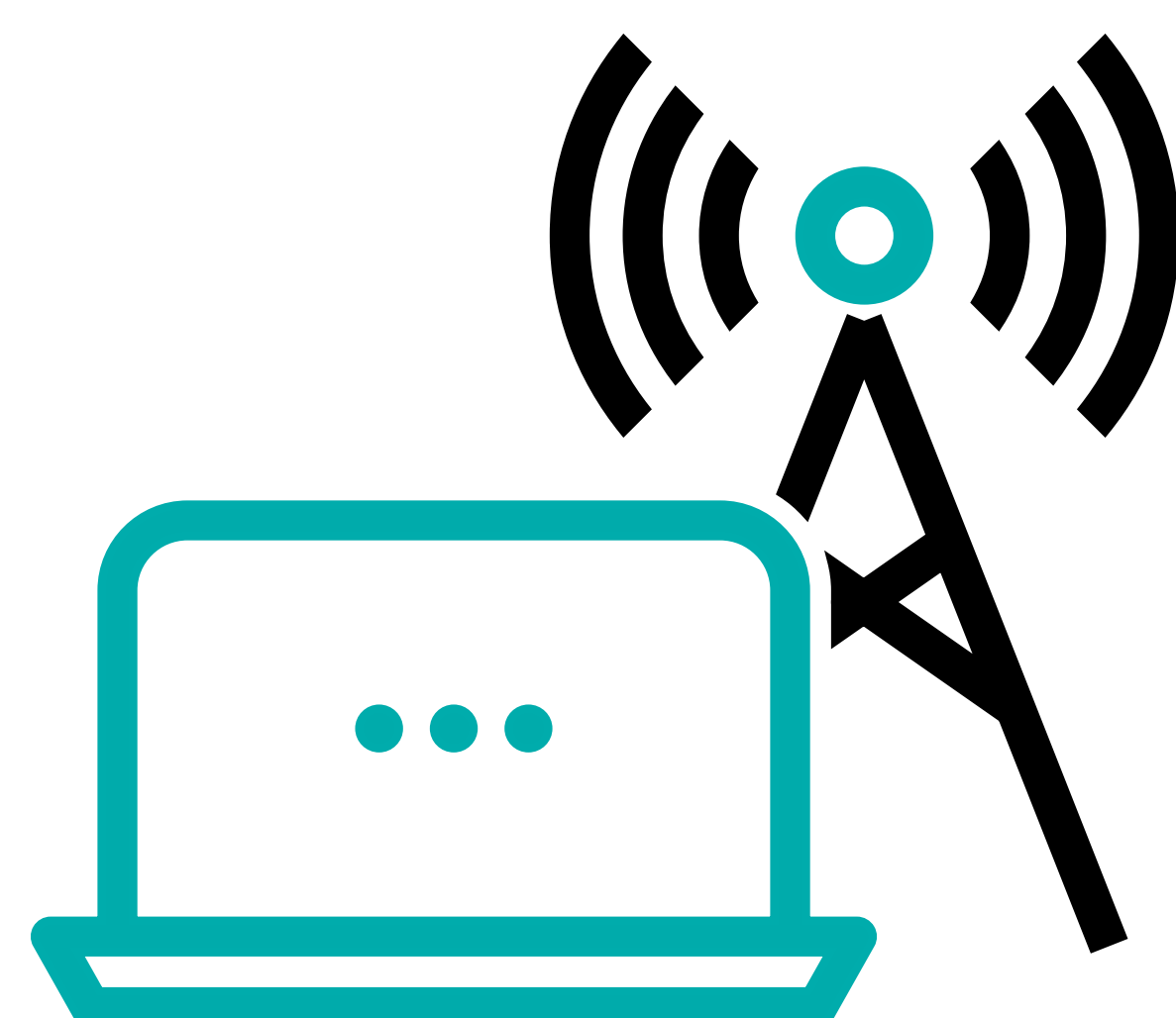
We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors:**

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. marketing research, market sizing, forecasting, and sales management.





ICT & TMT

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- **AI market in Poland**
- **Cloud computing market in Poland**
- **IT equipment and consumer electronics resale market in Poland**
- **Internet of Things market in Poland**
- **Data centre market in Poland**
- **Online services market in Poland**
- **Gaming market in Poland – trends in the market for video games, equipment and accessories**
- **Pay TV and VOD market in Poland**
- **Integrated telecommunications services market in Poland**
- **Telecommunications services for business and carrier segment in Poland**
- **ICT market in Poland**
- **Mobile internet and value-added services market in Poland**
- **Cybersecurity market in Poland**
- **Telecommunications market in Poland**
- **Business systems and applications market in Poland**
- **IT services market in Poland**
- **Labour market and IT wage structure in Poland**
- **ESG reporting – challenges and development prospects in Poland**
- **Smart home market in Poland**
- **Wearables market in Poland**

NOVELTIES

Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



PMR

MARKET
EXPERTS



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