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ESCAPE ROOMS:
A NEW OFFER IN THE RECREATION SECTOR IN POLAND

Abstract: Globalization leaves its footprint on the leisure market contributing to the global popularization of brand new forms of recreation. A perfect example of such instant diffusion of innovation on a global scale is the rapid development of escape rooms. The aim of the article is to try and explain the extraordinary popularity of escape rooms in Poland, mainly through an analysis of what they offer. The author presents the origins and development of this particular form of recreation, discusses the location of nearly 600 facilities functioning in 2016, as well as giving a detailed description of escape rooms in the ten large Polish cities. The study leads to the conclusion that the phenomenon of escape rooms stems from, among other things, the fundamental assumptions of the experience economy.

Keywords: leisure time, forms of recreation, escape rooms, experience economy.

1. INTRODUCTION

In the globalization era, ways of spending leisure time are undergoing constant change, showing a tendency towards a rapid diffusion of innovation at the same time as easily adopting and adapting new models. It concerns not only affluent societies, but also the inhabitants of countries aspiring to belong to this group and readily copying the Western style of living. In hedonistic consumer societies, discretionary income is willingly allocated to all kinds of pleasures and increasingly sophisticated forms of recreation, to be a particular manifestation of the buyer's social position and status.

A response to the growing demand for attractive types of recreation is the development of the leisure industry. The term refers to the sector of economy including recreation, entertainment, sports and tourism services (REST). It encompasses extremely varied economic entities creating a commercial (paid) and professional (expertly prepared) offer of goods and services used for the purpose of organizing leisure time in an original way. Due to very strong market competition, people are continuously looking for new, more sophisticated, sometimes even extreme forms of

recreation, building new and fascinating attractions and facilities, as well as creating exceptional, emotions and experiences.

The political, social and economic system transformation in the 1990s introduced Poland to the global free market. As a result, all major globalization phenomena are reflected on the Polish market as well. This, of course, concerns the leisure market, too, although in Poland it has a particular character. The beginnings of the economic transformation were related to the pauperization of a large part of the society, which was the reason why the demand for recreation services did not appear until the end of the decade when the middle class emerged and developed, together with its aspirations.

The current dynamic growth of the recreation sector in Poland is based on the following:

- systematic popularization of recreation forms which until recently were regarded as exclusive and financially inaccessible for the majority interested in them, such as tennis, golf or horse riding;

– introducing attractions, popular in the West for years, but for various reasons absent from Poland e.g. gyms, fitness clubs, bowling alleys, shopping centres, theme parks, science and technology centres;
– a new leisure industry offer, e.g. climbing walls, ropes courses or military games (paintball, laser games, archery battles, air soft guns).

One of the latest phenomena on the recreation service market, not only in Poland but across the world, are escape rooms[1]. They have become a real hit of the second decade of the 21st c., and their number of fans is growing exponentially. The aim of the article is to explain the causes of the extraordinary popularity of escape rooms in Poland, mostly by analysing what they offer. The author presents the origins and development of this particular form of recreation, discusses the location of the 594 facilities functioning, as well as giving a detailed description of the 381 escape rooms in the ten largest Polish cities. The source of information was the data presented on lockme.pl website on 30th April 2016[2]. The author focuses above all on the issue of supply; the description of escape room users will be the subject of a separate article.

2. THE ORIGINS AND DEVELOPMENT OF ESCAPE ROOMS

TV game shows are sometimes considered to be the predecessors of escape rooms; the contestants discover the next clue to the treasure by accomplishing a variety of physical and mental fitness tasks. This category includes shows like the French 'Fort Boyard' and the British 'Crystal Maze', broadcast in many countries all over the world[3].

However, it was computer games that were closer in the form of play to escape rooms. The first game of this type appeared in 1988 and was based on… text only! The monitor screen presented the description of the adventure, including a locked room from which the player could escape after solving all the puzzles. Much greater possibilities were created in the later adventure games of the point-and-click type due to the visually more attractive graphics, full of detail. They required the player to solve puzzles or find hidden items; by clicking the mouse, the player led his/her hero through a virtual world. One of the first producers of this type of game was George Lucas. In the most famous of them, '*Myst*', the journey between worlds depended on solving the puzzles found in special books. The game is considered to be the pioneer of the 'escape-the-room' segment (KOWALIK 2015).

The real beginnings of today's escape rooms, however, should be sought in the world of computer games from 10 years ago. In 2006, a group of computer programmers from Silicon Valley, inspired by the books by Agatha Christie, designed a game entitled 'Origin'. It quickly became very popular, not only in the USA, but also in Asia.

The next stage in the development of escape rooms, i.e. moving from cyberspace into the real world, took place in the Far East. In 2007, in Kyoto, a publishing house SCRAP opened the first real escape room, known as Real Escape Game (REG). Interest in the new product went beyond the creators' boldest expectations. In the following years, similar escape rooms were created in many other Japanese cities, as well as in Singapore, Taiwan and in China. The escape rooms in Hong Kong even started to be used for educational purposes during youth camps for secondary school students (https://lockme.pl).

In short, we can say that the idea of a real escape room was conceived in the marriage of TV game shows and point-and-click computer adventure games (KOWALIK 2015). As a result, "the virtual escape room was transformed into a real life escape room" (https://lockme.pl). The game really became real – the player who had been sitting in front of the computer screen could personally enter a mysterious room, experience it with all his/her senses and 'do the mission' (solve all puzzles and leave the room within the set time limit).
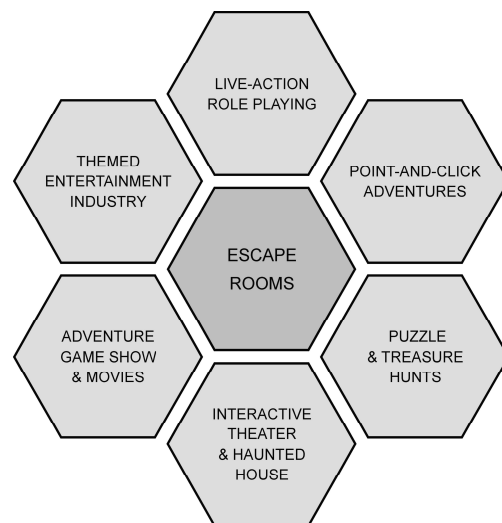

Fig. 1. Escape room precursors (NICHOLSON 2015)

A definitely more complex version of the origins of escape rooms is presented by S. NICHOLSON (2015) who believes that there were six precursors to escape rooms (Fig. 1). Apart from the point-and-click adventures and TV adventure game shows and movies, he includes the following:
– **live action role-playing**[4] – the extraordinary popularity of the fantasy game 'Dungeons and

Dragons' inspired in the 1980s sets of rules and scenarios for this type of game; in some of them the players were supposed to look for clues and solve puzzles in order to escape from locked rooms. This conception was used, for instance, in 2003, during the Gen Con convention (one of the largest conventions of fantasy fans in the USA);

– **puzzle & treasure hunts** – in puzzle hunts, teams of players (from several up to even 200) solve puzzles (traditional, both 'on paper', e.g. crossword puzzles, jig-saw puzzles, anagrams, codes or sudoku, or in a digital version) which led them to further puzzles or so-called meta-puzzles (only by solving a number of minor puzzles is it possible to solve a major one)[5]. Treasure hunts[6] are based on similar principles – the participants must find clues hidden in the area and overcome numerous obstacles so they could finally reach the target. A modern version of this game is geocaching, in which finding the hidden 'treasure' is possible using the GPS (Global Positioning System);

– **interactive theatre & haunted house** – some escape rooms make use of the interactive theatre idea where the border between the actors and the audience is purposefully blurred, and the audience is drawn into the performance in various ways. The spectators are not just passive observers but take an active part in the spectacle, interact with the actors, have influence on the course of action, etc. On the one hand, the scenes played in escape rooms by actors make the players more active and provide them with the clues they need, and on the other hand, they create the atmosphere of a game, e.g. a horror game like those played in haunted houses;

– themed entertainment industry – escape room models also include all kinds from the entertainment industry. For instance, in the Entros restaurant opened in Seattle in 1993, diners waiting for their meals could solve puzzles throughout the room, and in the '5 Wits Productions', the players could find themselves in the very centre of a film or video game action thanks to computer special effects and physical interaction.

S. NICHOLSON (2015) points out, however, that there is no single inspiration that would be common for all escape rooms. They have been created independently and their creators were inspired by different experiences.

At the beginning of the second decade of the 21st c., the fashion for escape rooms reached the USA, Canada and Europe where they immediately became realistic, furnished rooms, situated in ordinary flats in city centres (https://lockme.pl). It is interesting that the pioneers of this type of entertainment on the 'Old Continent' were Hungary and Switzerland. In 2013, the first escape room was created in Poland at Wrocław called 'Let Me Out'.

Towards the end of 2013, in Beijing, there were 120 such facilities and in 2015 – 182 (Fig. 2). In October 2014, on the Escape Room Directory website, there were 514 registered escape rooms all over the world, while in June 2015 – 1,765. This is not, of course, the full list as it includes only English-language rooms. According to MarketWatch, globally, there could be at least 2,800 registered escape rooms. Nearly all of them have been created over the last five years, since 2010. The growth rate is clearly explosive. Some escape room proprietors and fans claim, however, that this boom cannot last forever and that in many cities the market is slowly becoming saturated (FRENCH & SHAW 2015), but in many countries, including Poland, there is still a lot of space for new escape rooms.
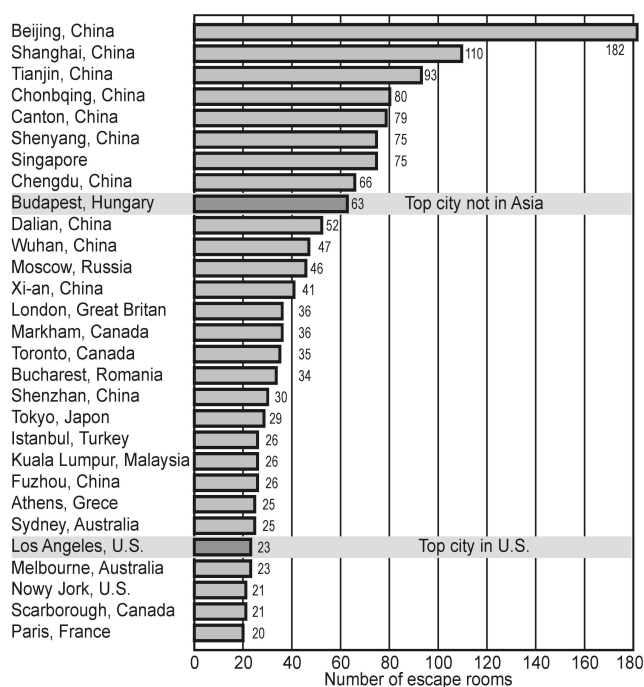

Fig. 2. Cities with the largest number of escape rooms, according to the Escape Room Discovery (as of 20/07/2015) Source: S. FRENCH & J.M. SHAW (2015)

It is an interesting fact that the idea of an escape room was used for the production of a TV game show entitled 'Race to Escape', broadcast in 2015 in the USA and Australia. The spectators were excited to observe a contest between two teams that competed against each other to leave the themed escape room as fast as possible. The prize for the winner of each of the six episodes of the series was 25,000 USD (https://en. wikipedia.org/wiki/Race_to_Escape).

3. THE IDEA, TYPES AND ORGANIZATION OF ESCAPE ROOMS

The escape room rules are very simple. It is a feature game, in which all the players are voluntarily locked in a room, and they must leave it within a time set (usually 45-60 minutes) with the help of the clues and items found there. To achieve this, they must perform a variety of specially prepared tasks. They can be ordinary mind games (crossword puzzles, sudoku, puzzles), looking for hidden objects or padlock codes, or manual tasks checking the player's reflexes and skilfulness. Every item, word, symbol or element of the room's furnishing may be significant and move the players one step closer to winning the key which will allow them to unlock the door.

The majority of games are designed for groups consisting of 2-5 people because some puzzles cannot be solved alone requiring the cooperation of at least two players. Thus, they are team games, requiring not only perceptiveness, intelligence and cleverness, but also the ability to work in a group, good communication skills and an effective share of duties. The emotions evoked by solving subsequent puzzles are additionally intensified by the pressure of the running time.

The attractiveness of an escape room depends not only on how interesting the puzzles are, but also on the room's atmosphere. Therefore, the most popular are rooms having one leading theme. As the aim of the game is to get out of a locked room, the first escape rooms were modelled the following types of interior: a prison cell, space station, hospital room, doctor's surgery, etc. With time, the range of room themes was expanded and may intrigue, amuse or scare the players. Apart from themes commonly known from computer games, literature or films, original local conceptions and motifs based on the local heritage (history, art, legends, etc.) can be found.

Analysing the themes of 175 escape rooms across the world, S. NICHOLSON (2015) noticed that most of them referred to reality, to specific historical sites and periods: 25% to 2000-15, 24% to the 20th c., and 13% – to the 18-19th c. The most popular themes are horror (13%), fantasy (12%), science/laboratory (12%), future/ new technologies (7%), the military (7%), and a toy room (3%). The character of every tenth room was abstract and did not represent any specific theme.

As for the game conception and storyline, nearly every third (30%) escape room was based on an escape from some strange and unpleasant place, e.g. a dungeon, prison or a kindergarten. Other, but less frequent motifs, included investigating criminal cases and mysteries (9%), fighting supernatural powers (8%), solving a murder (5%), diffusing explosive devices (5%), being an adventurer (4%), collecting information and spying (4%), or taking part in a robbery (4%).

Taking into account the theme and narration criteria at the same time, S. NICHOLSON (2015) distinguished four possible types of escape room:

– **rooms without a leading theme** (13%), where a sequence of puzzles does not have a common theme or narration;
– **themed but not narrative rooms** (27%), whose interiors, props and soundtrack create a special atmosphere, but the game does not have any pre-planned storyline ('a stage set without a screenplay'); so during each game the players create their own story;
– **narrative rooms** (21%), in which the plot is outlined and individual players are ascribed specific roles (an introductory video, the gamemaster's story); the puzzles are not always strictly related to the story and solving them does not necessarily have to move the action forward;
– **fully narrative rooms** (39%), in which the puzzles do not exist independently, but are an integral part of a story; it is impossible to leave the room until the whole scenario has been played out. Fully narrative rooms are most popular in Asia, where they make up 52% of all escape rooms.

Immersing the players in the atmosphere of the game requires well-thought out and meticulous interior design. The room ambience is created not only by the furniture, but also the colour and texture of the walls, the floor, carefully assorted objects (historical or contemporary), appropriate lighting, as well as sounds and special effects making the game more attractive. On the other hand, there are also escape rooms with a highly minimalist, even ascetic décor (e.g. a white room with only one padlocked chest of drawers). Mobile escape rooms are becoming more and more popular; they are organized for company team-building events. In these cases, the hotel room décor options are quite limited.

Regardless of the theme and narration, nearly all escape rooms include several common, almost obligatory, elements[7]:

– the **door** – a symbolic attribute of the game; opening them and leaving the room is the main aim; in reality, however, in 22% of rooms the door is not really locked for security reasons (quick evacuation in an emergency);
– the **clock** – placed in a prominent place, measures the time to the end of the game; it happens that in order to raise the level of players' emotion, the room operators change the timing, e.g. by prolonging the last 10 minutes to 12 minutes, or the last minute to 90 seconds;

– a **desk** and **stationery** (a notebook, ballpoint pen, pencil, etc.) – needed to make notes, solve puzzles, do tasks, etc.;

– **artefacts** – items which are of key importance in the course of the game; they may be visible elements of the room's furnishing (though with a hidden meaning), or they may be hidden; in the latter case, the players must find the props they need (e.g. clues, tools, valuable objects), following the rule of 'non-force' at the same time, and they must not move the furniture; to make the game more difficult, there are also false clues and trails (red herrings) planted in the room;

– the **soundtrack** (music, noises, human voices) – serves the purpose of creating the general atmosphere of the room (e.g. melodies related to the leading theme), and working on the players' imagination and emotions (e.g. mysterious, terrifying sounds, whispers), as well as building up tension during the game (e.g. the sound of a ticking clock);

– the **'gamemaster'** – introducing the players to the room, explaining the rules of the game, watching over its course, helping find solutions to some puzzles (if necessary);

– **monitoring** (CCTV) – a system which makes it possible to oversee the players' actions; in the case of company events; it also makes it possible to film/record the game in order to analyse the psychological profiles of the players and choose natural team leaders;

– the **casket** (**box**) – another symbolical prop; a series of puzzles to be solved leads to opening the box and finding the key which unlocks the door; the average success rate for escape rooms all over the world is 41%, but differs considerably in the case of individual rooms (the most difficult SCRAP room in the USA, called 'Escape from the Mysterious Room' is actually left by only 2% of players).

Room organization is fundamental for the whole undertaking. From the players' point of view, it is important that the game is exciting, original and challenging to the very end. Therefore, it is essential that the difficulty level should be defined appropriately, i.e. in such a way that the puzzles are not solved too rapidly but are not too difficult either. As a rule, two-thirds of the players need a little help from the staff to leave the room within the time set. Another necessary feature of a good escape room is the ability to evoke real emotions – both the arrangement of the room and the storyline together with the game scenario should involve the players; they should be putting themselves in the shoes of the characters they play to the maximum and forget about everything except the room. Escape scenarios are constantly being improved and changed in order to match the clients' requirements and to complicate the game even more (many rooms have more than one exit), or simply to refresh the original conception.

S. NICHOLSON (2015) identified three basic ways of organizing escape rooms:

– **path-based structure** (45%) – the most popular, consisting of several paths through puzzles which the players may solve; they need to have all the answers to solve the meta-puzzle, which signifies victory;

– **sequential structure** (37%), where the puzzles are presented linearly; solving one puzzle unlocks the next, solving the last puzzle ends the game;

– **open structure** (13%) – the players can solve different puzzles at the same time and their results lead them to final success (cf. Fig. 3a).
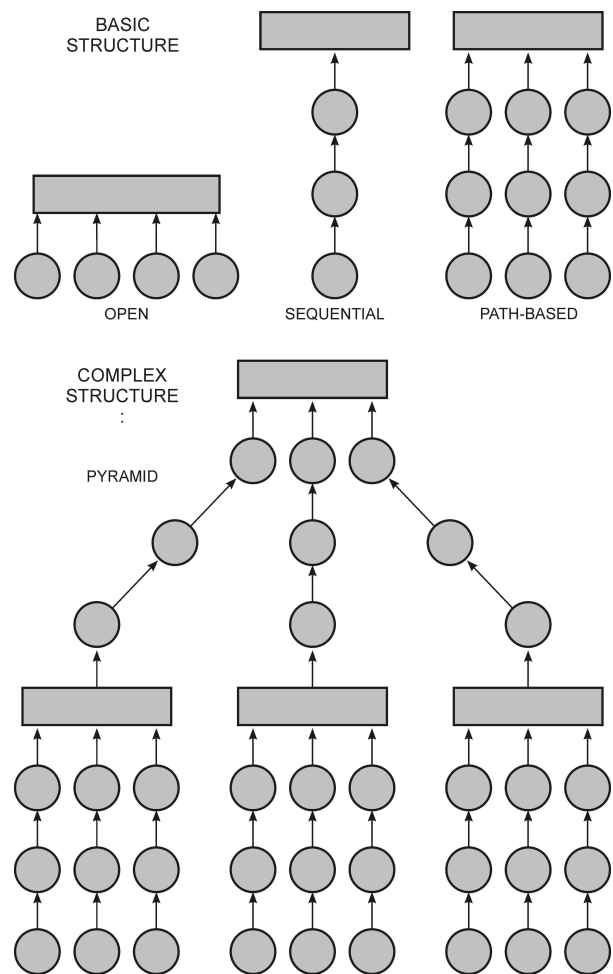

Fig. 3. Puzzle structures in escape rooms:
a) basic structures: open, sequential (linear), path-based;
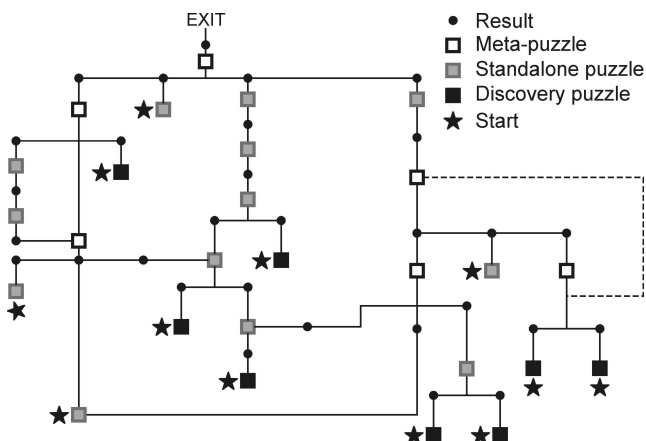b) complex structure: pyramids
Source: S. NICHOLSON (2015)

Fig. 4. The puzzle structure in Bewilder Box Brighton
Source: www.bewilderbox.co.uk, after S. NICHOLSON (2015)

Combining two or three simple structures produces a complex (hybrid) structure, which may take the form of a pyramid (Fig. 3b). On the market, even more complicated puzzle structures are created which include variants of the paths leading to the 'escape', or even enabling the players to go from one room to another (Fig. 4).

4. ESCAPE ROOMS IN POLAND

The first Polish escape room was created in Wrocław in 2013. Three friends gave up their jobs and set up a company called 'Let Me Out', which originally managed two rooms in the city centre. The company quickly became the pioneer, setting the standards of this form of entertainment (number of players, game time limit, price, etc.).

The new form of recreation instantaneously gained an army of fervent fans, and companies opening escape rooms started to spring up all over Poland. Their number rose dramatically – in three years, over 600 escape rooms offering various themes were opened. Apart from typical themed rooms, special rooms for children or only for adults (18+) appeared. In 2015, in Łódź, the first room of fury was created, and in Szczecin, the first underwater escape room is being built. Commissioned by large international corporations, mobile rooms are created in hotels, and open-air events involving mass escape games are becoming increasingly popular. The internet offers special websites describing and evaluating escape rooms where you can directly book tickets (e.g. http://lockme.pl), and the fans of real escape rooms run blogs in which they describe the facilities they have visited (cf. SAKOSIK 2015 and http://room-busters.blogspot.com).

The escape room market is growing not only because new companies appear, but also as a result of franchising – franchise suppliers offer their recognizable brands, experience and know-how (a conception of the room décor, puzzles and tests). This is how (e.g. Let Me Out) the largest company on the Polish escape room market is growing – in April 2016, it operated in nine cities, offering a total of 24 rooms (four in Wrocław, three in Gdańsk, Katowice, Kraków and Lublin, two in Bydgoszcz, Poznań, Sosnowiec and Warsaw). They are planning to go international, with a first room opening in Brussels (KOWALIK 2015). Other leaders include *Tkalnia Zagadek* (*Puzzle Weaving Plant*) with 20 rooms (Łódź – 4, Kalisz, Płock, Poznań, Radom – 3 each, Wrocław, Zielona Góra – 2 each), Escaperooms.pl with 14 rooms (Gdańsk – 6, Bydgoszcz, Warsaw – 4 each), 'Exit Room' with 8 rooms (Wrocław – 6, Poznań – 2) and 'Sir Lock' with 7 rooms (Warsaw – 5, Łódź – 2)[8].

Most escape rooms in Poland are arranged in rented rooms which need renovation and complete refurnishing. The 'Let Me Out' company, as a part of the franchising system, set the medium level of investment in a flat at about 80,000 PLN, and 'Sir Lock' estimated the value of equipment in one of their rooms at 30,000 PLN (KOWALIK 2015). The majority of Polish escape rooms, however, are arranged at a much lower price.

Initial costs additionally include the rent (to a few thousand PLN monthly), and advertising in the media and marketing[9]. Despite that, running escape rooms is a very profitable business and with 200 visits, one flat can generate 20,000 PLN a month (KOWALIK 2015). Also in other countries, running escape rooms is considered to be a very lucrative undertaking. In the USA, in 2013, the cost of preparing a modest room (7,000 USD) was returned after one month, and the annual income rate reached 800%. In 2015, the profit brought by one room could reach 70,000 USD monthly (FRENCH & SHAW 2015).

5. LOCATION

According to *lockme.pl*, in 2016, there were 594 escape rooms at 67 destinations in Poland. Their distribution, however, is very uneven, with the majority found in the largest agglomerations: Warsaw, Trójmiasto, Łódź, Poznań, Kraków, Wrocław and the Upper Silesia conurbation. The smallest number is found in the eastern and north-eastern provinces (Fig. 5 and 6).

Facilities of this type are in principle opened in cities big enough to guarantee adequate attendance and it is assumed than an escape room may function well in a city inhabited by at least 100,000 people (KOWALIK 2015). And indeed, among the 25 Polish cities with the largest number of escape rooms, there
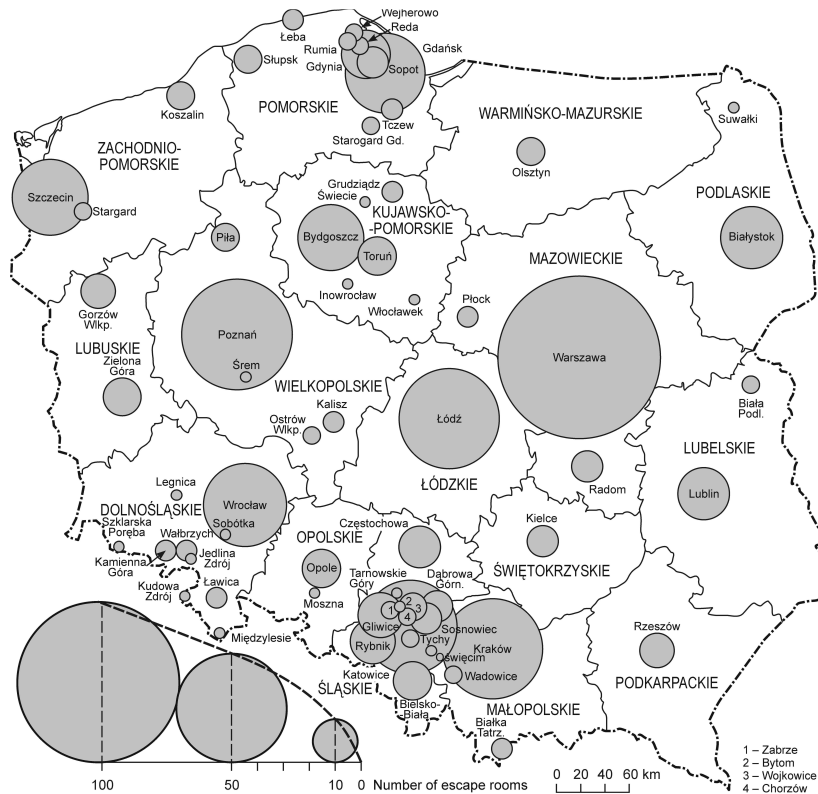
Fig. 5. Distribution of escape rooms in Poland (30/04/2016)
Source Figs 5-12: author, based on https://lockme.pl

was only one with a smaller number of inhabitants, Sopot, one of the most popular seaside holiday resorts and at the same time a part of the Trójmiasto agglomeration inhabited by 750,000 people.

Fig. 6. Number of escape rooms in Polish destinations

The largest number of escape rooms can obviously be found in the largest city – Warsaw, where 38 companies run 97 escape rooms. Warsaw is followed by Poznań (49 rooms, 24 companies) and Łódź (42 rooms, 16 companies). What may be surprising is the relatively low position of Wrocław, where escape rooms in Poland began. At present, there are 33 there, managed by 14 companies, including some large ones operating nationally. Perhaps it is the strong competition among the biggest players on the market that prevents new facilities from opening. Although Wrocław is outrun only by Katowice with its 300,000 inhabitants, we must remember the surroundings of the latter. After all, it is the capital of an Upper Silesian conurbation inhabited by 2.2 to 3.5 million people[10], depending on how we delimit the area.

In the largest Polish cities, a single company runs an average of over two rooms (2.34). However, there are significant differences between individual centres: e.g. in Gdańsk, there are three rooms per company and in Bydgoszcz – only 1.8 (we must remember here that there some companies operate in several cities).

As regards escape rooms, saturation rates look interesting (Table 1). In most cities, there are 5-6 rooms per 100,000 inhabitants, with the exception of Poznań (nearly 9) and Katowice (over 12). The number of companies running escape rooms usually varies between 2 and 3 per 100,000 inhabitants. Only in three cities is
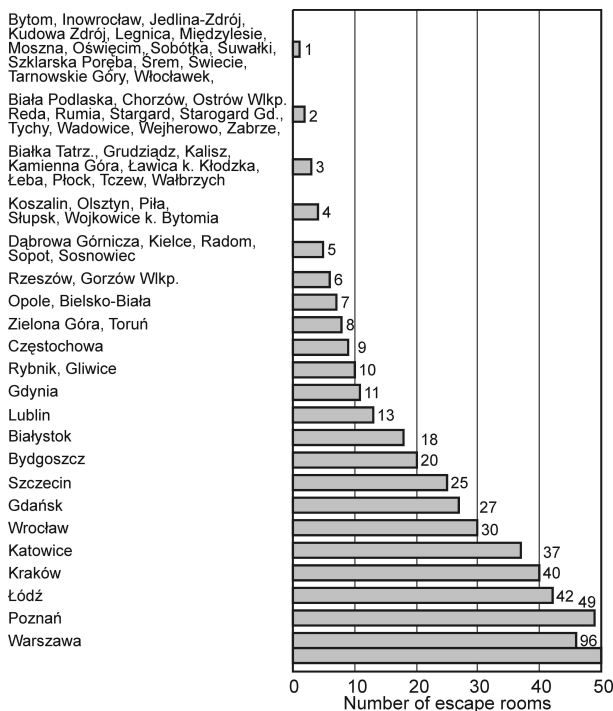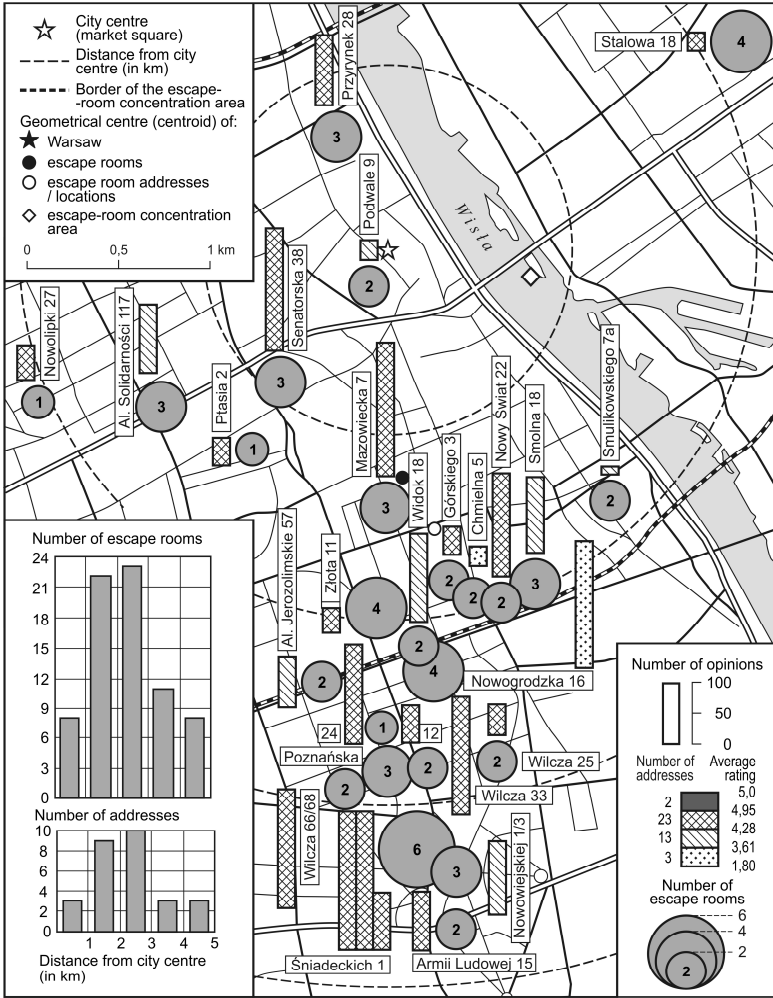
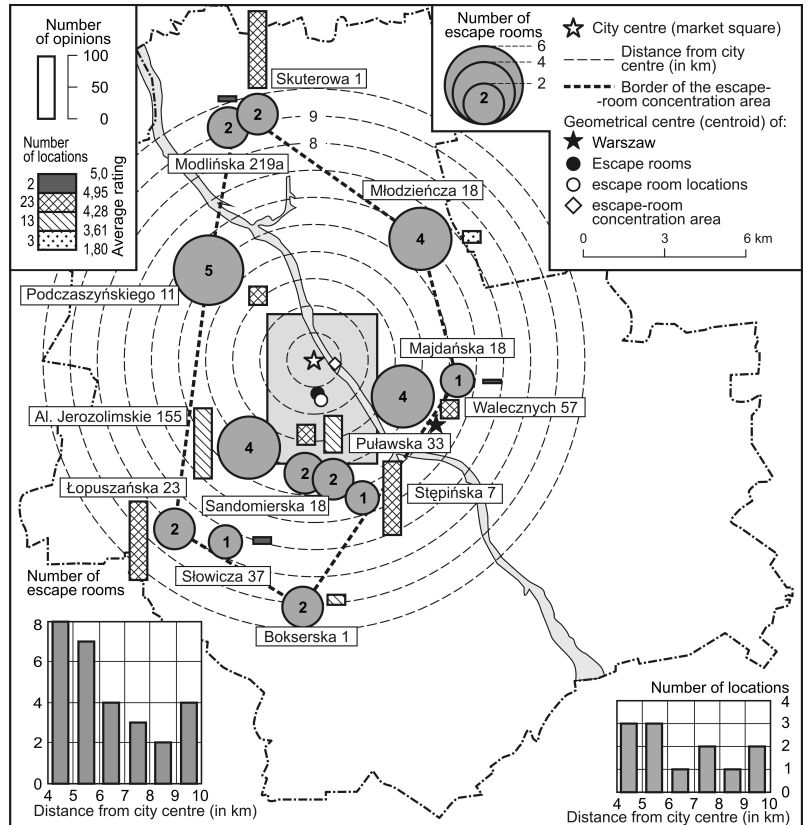Fig. 7. Location of escape rooms in Warsaw

Table 1. Cities in Poland with the largest number of escape rooms

No.	City	Number		No of rooms/ companies	No of inhabitants (31.12.2014)	No of rooms/ 100 000 inhabitants	No of companies/ 100 000 inhabitants
		rooms	companies				
1.	Warsaw	97	38	2.55	1, 735,442	5.59	2.19
2.	Poznań	49	24	2.04	545,680	8.98	4.40
3.	Łódź	42	16	2.63	706,004	5.95	2.27
4.	Kraków	39	18	2.17	761,873	5.12	2.36
5.	Katowice	37	16	2.31	301,834	12.26	5.30
6.	Wrocław	33	14	2.36	634,487	5.20	4.31
7.	Gdańsk	27	9	3.00	461,489	5.85	2.21
8.	Szczecin	21	11	1.91	407,180	5.16	1.95
9.	Bydgoszcz	18	10	1.80	357,652	5.03	2.37
10.	Białystok	18	7	2.57	295,459	6.09	2.70

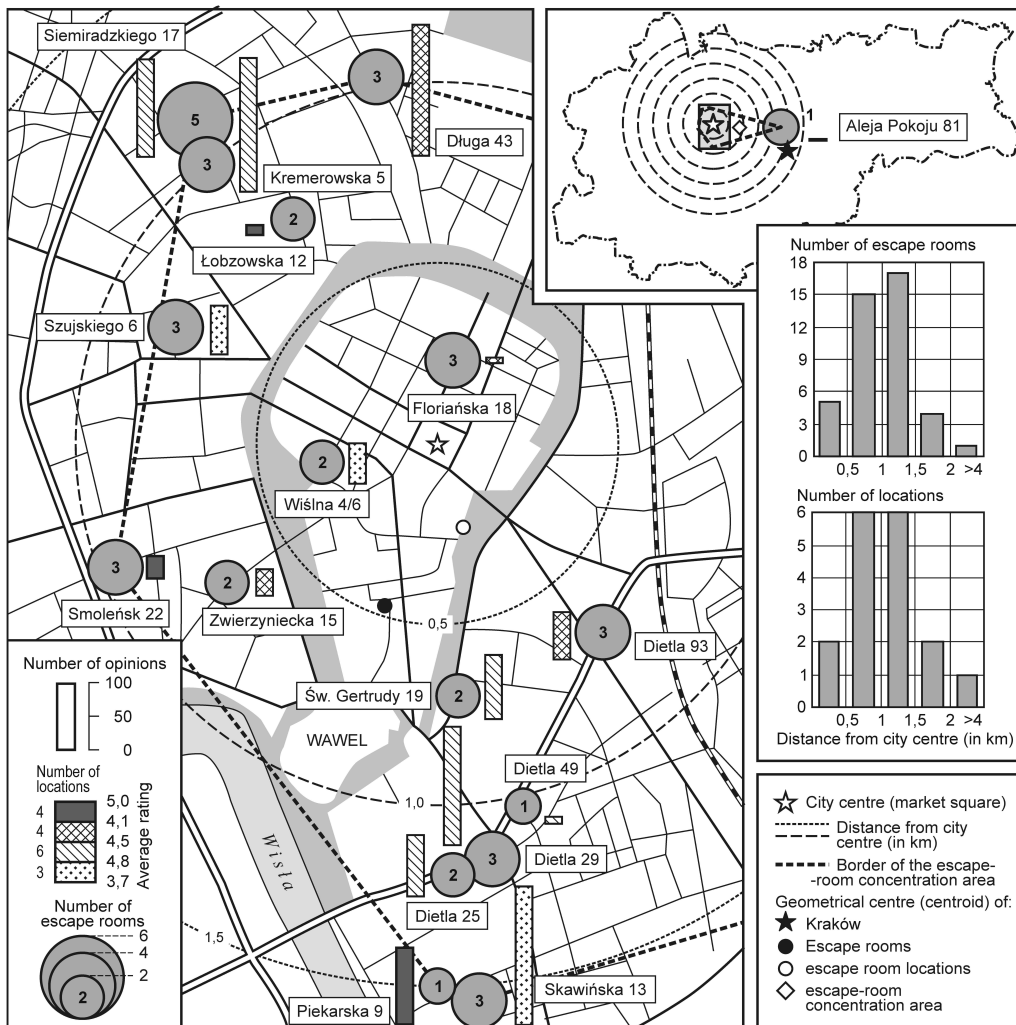Source: author, based on https://lockme.pl.

Fig. 8. Location of escape rooms in Krakow

this rate higher (Katowice – 5.3, Poznań – 4.4; Wrocław – 4.3). It can be assumed then that in Polish conditions, there are on average 2-3 companies managing 5-6 rooms which operate among 100,000 inhabitants. In huge cities, the market seems to be already saturated, but there are still medium-sized cities, inhabited by 100-200,000 to consider.

The study of the exact location of escape rooms in the ten large cities led to several interesting conclusions. In nearly all the cities, the escape rooms are
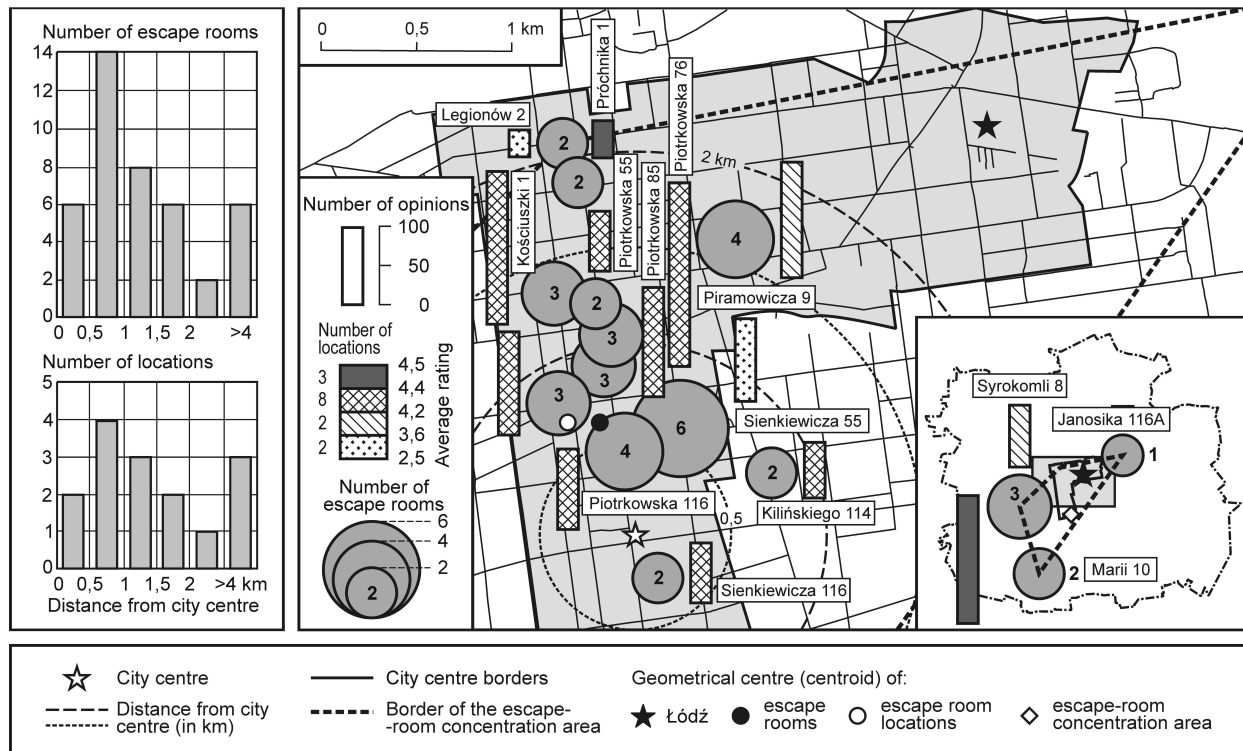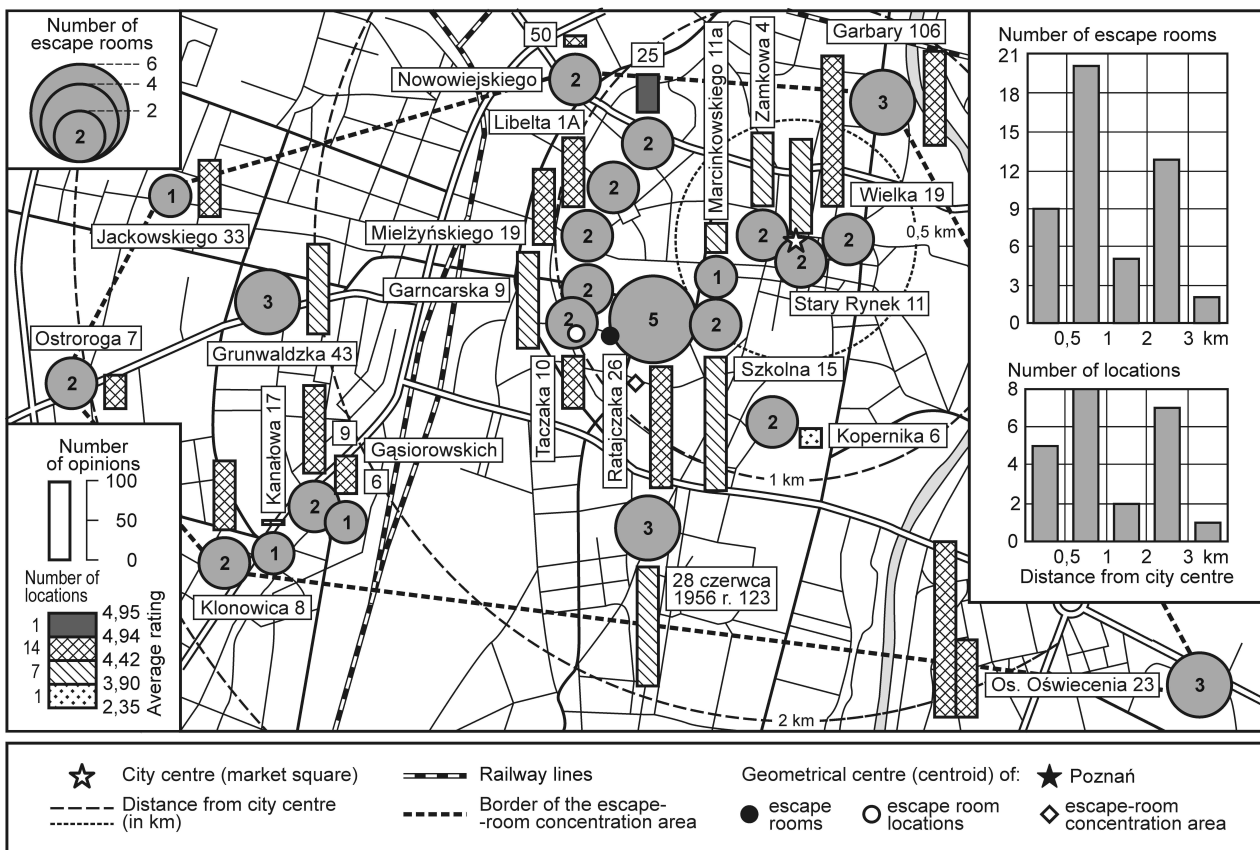
Fig. 9. Location of escape rooms in Łódź

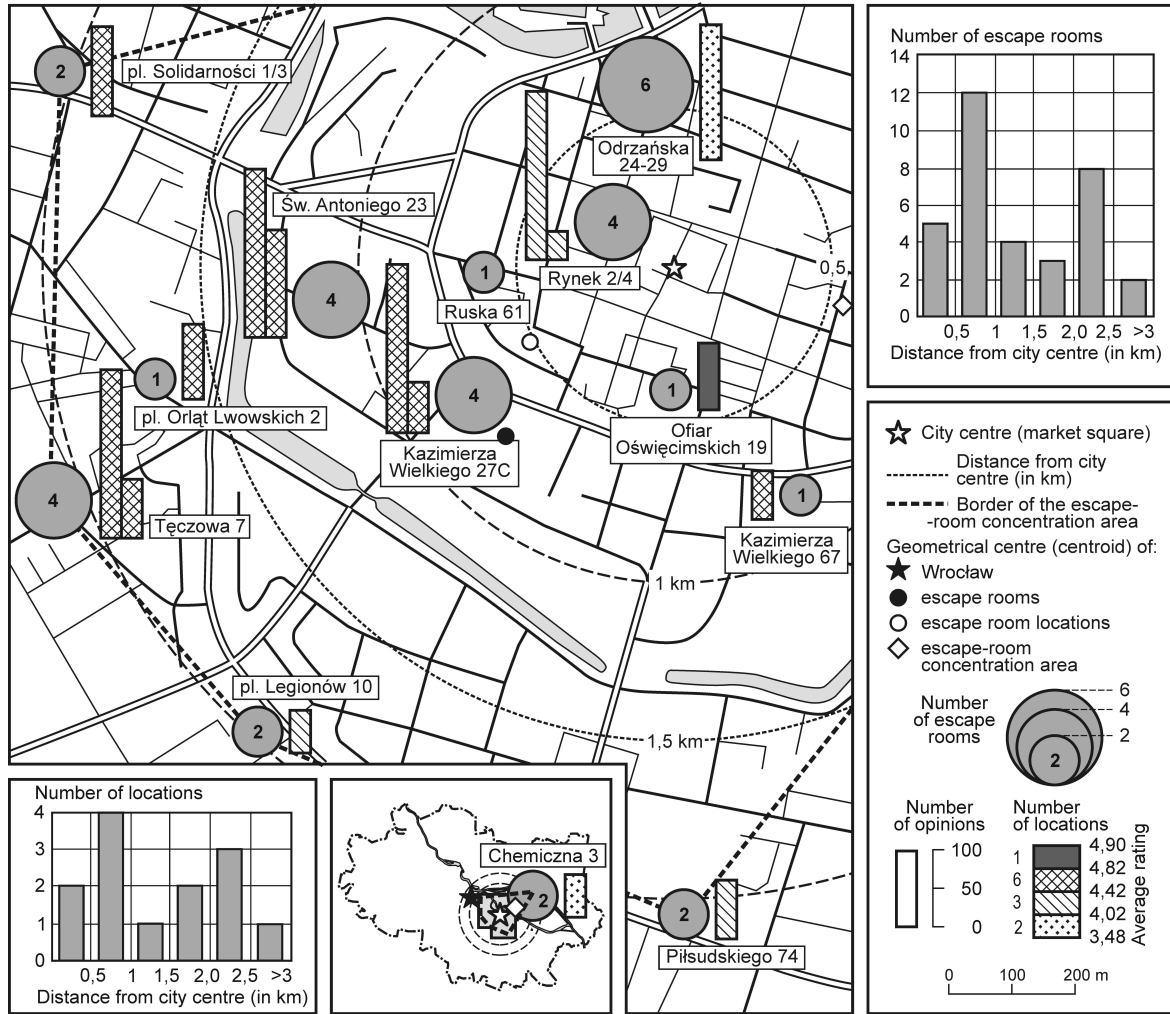Fig. 10. Location of escape rooms in Poznań

Fig. 11. Location of escape rooms in Wrocław

situated in the strict centre, usually in the immediate neighbourhood of the Old Town market square (cf. Fig. 7-12). At least 80% of all escape rooms are found within a distance of 2-2.5 km from the central point, with the exception of Warsaw where the escape room concentration zone has a wider radius – up to 5 km, due to the much larger scale of the city. It partly comes from the fact that the Old Town in the capital lies on the side of the present city centre, which is the Dmowski Roundabout (the junction of Marszałkowska St and Jerozolimskie Av). It is in the northern and southern city centres where the largest number of Warsaw escape rooms can be found. Another special case is Łódź, where the escape rooms are situated mostly on Piotrkowska St and nearby. As a result, we are dealing with a concentration zone from north to south. Escape rooms situated further from the city centre are rare.

The tendency to locate escape rooms in the city centre is not surprising and results from several basic factors. The city centre is a district focusing the activity of inhabitants and tourists which creates potential demand for different kinds of entertainment. In effect, it is easier for a facility to achieve a high attendance rate. Convenient accessibility by transport is also quite important. What is more, the historical centre of the city features representative buildings with interiors capable of creating a special atmosphere (tenement houses, villas, etc.) and providing appropriate settings for escape rooms, without making major investments. High rent is not a problem as escape rooms are highly profitable.

6. OFFER DESCRIPTION

Over the few years that escape rooms have been functioning in Poland, certain standards of this form of recreation have been established, sometimes different from those set in other countries. A game in an escape room is a team game. In most Polish cities, an offer of
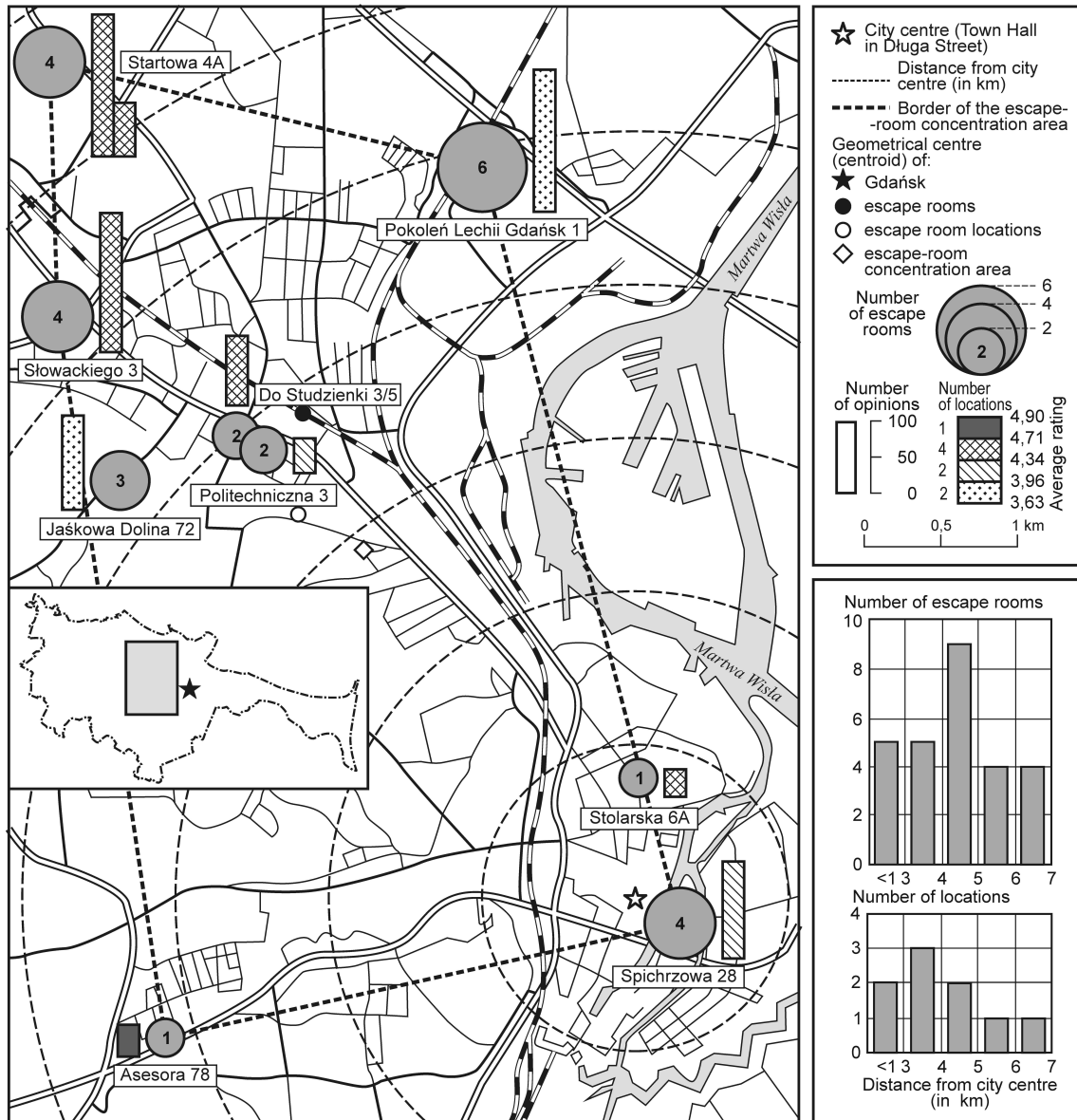
Fig. 12. Location of escape rooms in Gdańsk

this type is designed for groups of 2-5 people, more rarely for teams of 2-4 players. The possibility of playing alone or in a team consisting of 6-7 people is really rare.

Small groups of players are typical for Australia and Europe (2-7 people, 3.98 on average). In Asia and North and South America, the teams are definitely larger, sometimes consisting of more than 10 people (6.07 on average). While in the first case the players arrange to play the game together earlier, in other situations the teams are made up from volunteers on the spot (so the team consists of players who do not know one another, which may have a negative effect on their comfort and satisfaction with the game). Globally, the average capacity of the rooms is 4.58 persons (NICHOLSON 2015).

In Poland, games usually last 60 minutes due to their graphics. One-hour modules dominate in eight cities (Wrocław – 64%, Kraków – 67%, Białystok – 78%, Bydgoszcz, Gdańsk, Poznań, Szczecin, Warsaw – over 80%). Only in two cities is the offer more varied as regards timing. In Łódź, one third of the games take 60 minutes, one third – 50 minutes, and 28.6% – 45 minutes. In Katowice, one-hour games make up 43.2% and 45-minute games – 37.8%. The latter game format is standard in escape rooms run in different cities of the country by the largest firms: 'Let Me Out' and *Tkalnia Zagadek* (*Puzzle Weaving Plant*). Games lasting longer than one hour (70, 80 or 90 minutes) are relatively rare. The longest game offered in Polish escape rooms is the 120-minute 'Ocean's 2', offered by *Show Escape* in Warsaw, and the shortest – the 30-

minute 'Golden Train' in the *NIEpokój* Escape Room in Szczecin[11].

Due to the considerable unification of the length of visits in escape rooms, the total time of games available in individual cities is tightly correlated with the number of the existing rooms. In order to visit all the rooms in the capital, one would need 5,730 minutes (95.5 hours), in Poznań – nearly 2,940 minutes (49 hours), and in Wrocław, Katowice, Łódź and Kraków – 2,000–2,200 minutes. The 'shortest' offer is that in Białystok and Bydgoszcz – slightly over 1,000 minutes. In total, we can spend nearly 370 hours in the escape rooms in the studied cities.

The average distance from the city centre to escape rooms ranges between 1 and 2 km (Kraków, Poznań, Łódź). It is shorter only in Wrocław (0.6 km). The most distant from the city centre (3.5-4 km, on average) are the escape rooms in Warsaw and Gdańsk (Fig. 13).
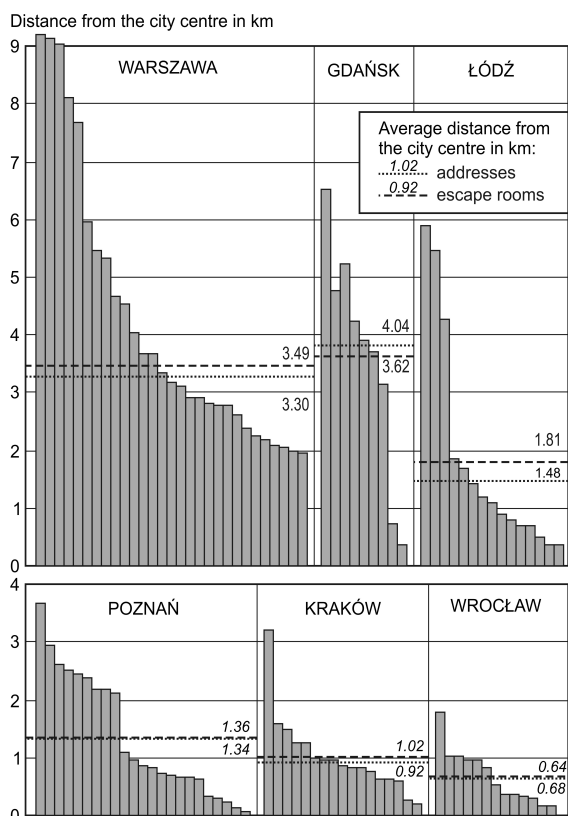

Fig. 13. Average distance between escape rooms and addresses and the centres of the studied cities
Source: author, based on https://lockme.pl

The descriptions of escape rooms found on https://lockme.pl show that their themes are not much different from the themes of escape rooms all over the world. The majority are thriller-crime rooms (28.1%)[12], where the players play the roles of the police or detectives identify the murderer, find stolen treasure or an ab-ducted person or, as criminals, rob a bank or steal money from a safe. A popular theme is horror

(14.2%) – these games are to give players a shiver of emotion, e.g. during a meeting with a ghost, sadistic murderer or just… a dentist. Every tenth room refers to literature and film (11%) or history (10.5%). In the first group, inspirations are above all world-known crime stories (*Sherlock Holmes, James Bond, Arsene Lupin, Pink Panther*), thrillers and horror films (*Saw, The Shining*), science-fiction and fantasy films (*Alice in Wonderland, Star Wars, The Lord of the Rings, Matrix, Jumanji, Game of Thrones*), or adventure stories (*Indiana Jones*). Polish films as leading themes of escape rooms are used extremely rarely (*Seksmisja, Stawka większa niz życie*), in contrast to historical rooms which are often based on various events from the history of Poland. You can look for the treasure of Gdańsk pirates, the Amber Room, or the Golden Train, try to break the Enigma code or steal the secrets of the Riese project, help Warsaw insurgents or deal with the absurdities of socialist times in Poland.

A much less popular kind of escape room are scientific (laboratory) rooms – 6.3%, adventure rooms (desert island, looking for treasure) – 5.3%, futuristic and science fiction rooms – 4.2%, military and medical rooms (hospital, dentist's office) – 3.2% each, as well as logical/abstract rooms – 2.1%. Over 20% of escape rooms represent still other themes demonstrating their broad thematic spectrum.

The difficulty level in escape rooms is extremely important for player satisfaction. The game should be neither too easy, because then it ends too fast, nor too difficult, because despite hints the players may become discouraged. The escape rooms described on lockme.pl were ascribed four levels of difficulty (first timers, beginners, advanced players and experts). Generally, the majority of escape rooms in Poland are suitable for beginners, which obviously comes from the fact that it is a relatively new form of entertainment and there are still few experienced players. It can be assumed, however, that with time the number of more difficult rooms will increase. In the 10 cities under study, rooms for beginners make up around two thirds, while the remaining one third is an offer for more advanced players ('first time' rooms are rare). The largest number of 'difficult' escape rooms can be found in Białystok (61.1%), Szczecin (54.6%) and Warsaw (50.5%), while the smallest number – in Poznań (20.4%), Kraków (15.4%, no rooms for experts) and Bydgoszcz (16.7%). Due to a lack of information about the evaluation criteria concerning the difficulty level of puzzles, we cannot draw far-reaching conclusions from the room structure (e.g. regarding the growing popularity of escape rooms in a given city or the number of advanced players)[13].

There are two basic ways of charging people for using an escape room: the price is calculated either per player (one person) or per game (all participants);

Table 2. Escape room offer in selected cities in Poland

City	Percentage of 60-min. rooms	Total game time (min.)	Percentage of 'difficult' rooms		Average price per game (PLN)	No of opinions	No of opinions per room	Average evaluation
			A	AE				
Białystok	77.78	1,020	55.56	61.11	78.72	225	12.50	4.67
Poznań	83.67	2,940	18.37	20.42	93.45	2,056	41.96	4.53
Bydgoszcz	83.33	1,065	11.11	16.67	86.78	651	36.17	4.52
Wrocław	63.64	2,040	24.24	30.30	105.64	1,753	53.12	4.51
Warsaw	83.51	5,730	37.11	50.52	120.61	3,934	40.56	4.47
Katowice	43.24	2,070	27.27	33.33	80.83	1,038	28.05	4.46
Szczecin	86.36	1,240	45.46	54.55	86.71	651	31.00	4.41
Łódź	33.33	2,215	38.10	45.24	110.60	1,605	38.21	4.35
Kraków	66.67	2,250	15.38	15.38	86.49	1,454	37.28	4.34
Gdańsk	85.19	1,590	44.44	44.44	89.11	1,169	43.30	4.25
Total	70.67	22,160	31.70	37.20	93.89	14,536	36.22	4.45

Key: A – for advanced players; AE – for advanced players and experts.
Source: author, based on https://lockme.pl.

globally, the first option is more popular. The average cost of play in the escape rooms examined by S. NICHOLSON (2015) was 23.68 USD per person or 74.42 USD per team (after recalculating local currencies into American dollars). However, prices on individual continents are greatly diversified. S. FRENCH & J.M. SHAW (2015) estimate the cost of a game for one person in an American escape room at 25-30 USD. Europeans pay definitely less (12 USD), not to mention Asians (only 5 USD), though if we refer these prices to the GDP per capita in individual countries, it will turn out that they are the highest ticket prices anyway (NICHOLSON 2015).

From the Polish user's point of view, the prices charged in other countries may seem shocking and in this respect, the escape room market is quite different. Firstly, charging per game is common practice, regardless of the number of players (within an acceptable limit, of course). Secondly, due to the fact that Polish society is not as well-off as for citizens of most developed countries, the prices are established at a much lower level. It is assumed that escape rooms were to become competition for the cinema, so the price for a game should be around the same as the price of 4-5 cinema tickets, i.e. ca. 100 PLN (KOWALIK 2015).

The average price for one game in the ten Polish cities under study was slightly below 94 PLN (Table 2). Naturally, Warsaw is most expensive (over 120 PLN per game), followed by Łódź (over 110 PLN per room), which is surprising, both because the city is perceived as 'poor' and because escape rooms in Łódź offer the shortest game times. Another city where we will pay over 100 PLN for an escape room is Wrocław (over 105 PLN, on average). Prices in Poznań are

closest to the average price in Poland. The cheapest escape rooms are offered in Katowice (slightly below 81 PLN) and Białystok (slightly below 79 PLN).

The lockme.pl portal makes it possible to evaluate the visited escape rooms (on a scale 0-5) and post a descriptive justification. The overall assessment encompasses three components: service, difficulty level and atmosphere. By 20th April 2016, over 14,500 opinions had been posted on the website, concerning the escape rooms in the cities under study, their spatial distribution being highly diversified (Table 2). The largest number of opinions (27% – nearly 4,000) regarded rooms in Warsaw, the smallest (only 225) – in Białystok. The number of opinions is obviously related to the size of the city and the number of escape rooms, although the largest number per room (over 53) was recorded in Wrocław[14]. With the exception of Białystok, the rooms in the remaining cities were evaluated at least 30-40 times, on average. It is certainly not a representative sample, but it allows us to draw, with caution, some conclusions.

Generally, escape rooms in Poland are readily accepted and very highly evaluated. The arithmetic mean from the 13,500 posts was 4.45. Escape rooms in Białystok were assessed the highest (4.67), but due to the small number of opinions, the result may raise doubts. Marks above the national mean were also allocated to rooms in five cities, including three with marks above 4.5 (Poznań – 4.53, Bydgoszcz – 4.52, Wrocław – 4.51). Gdańsk was definitely the worst (4.25).

It is difficult to summarize briefly and objectively the descriptive evaluations posted on lockme.pl. Many of them contain words of praise concerning the atmosphere (mystery, horror, adventure) and the imagin-

ativeness of the people designing the rooms and inventing tasks for players. The authors stress the exceptional excitement and incredible emotions accompanying solving the puzzles, as well as the professionalism and helpfulness of the staff. Occasionally, there are also voices of criticism, pointing to faults or mistakes in the puzzles, the lack of logic in a storyline, the visual incoherence of the interior, technical faults in the equipment or a lack of proper support from the facility staff.

7. SUMMARY

The beginning of the 21st c. brought many dynamic changes to the world tourism and leisure market (cf. WEIERMAIR & MATHIES 2004, NIEZGODA 2014, MOKRAS-GRABOWSKA 2015). In the globalization era, these phenomena spread fast and become popular in other countries and on other continents. A perfect example of such instantaneous global diffusion of innovation may be the birth, development and international career of a brand new form of recreation – escape rooms. At present, escape rooms are certainly among the most interesting phenomena on the leisure market. Over just a few years, in many countries all over the world (with totally different traditions and culture), they have become a real alternative to bowling, billiards or cinema. The phenomenon of escape rooms is intriguing, as they require mental effort (rather avoided by the modern consumer) rather than physical.

Based on the study of the escape room offer in Poland, as well as available foreign publications, we may venture to distinguish the most significant causes of the extraordinary popularity of such rooms. They include the following:

– transferring the love of computer games into reality – having the opportunity to experience adventures known from cyberspace into the real world, with all senses;
– creating an attractive diversion from the everyday – having the possibility of relieving stress by students and yuppies, or escape from the burdensome condition of living in a metropolis (cf. *Real-life escape games offer…*);
– satisfying the desire to experience something new, original, unique and not the banal so common in hedonistic consumptive societies, to experience strong emotions, excitement, etc.;
– making international corporations interested in organizing unconventional integration and motivation events (often combined with observation of behaviours and an analysis of the psychological predispositions of the game participants).

What supplements (or rather strengthens) the demand stimuli are an exceptionally favourable supply factors: lack of the prerequisites to start such a business, a still unsaturated market (weak competition), the ease of copying ideas and business conceptions, relatively low cost of starting and running business activity, and first of all, regardless of country, the high profitability of such undertakings.

It seems that the success of escape rooms depends on yet another, less obvious factor. Escape rooms are based on the fundamental assumptions of the experience economy (PINE & GILMORE 1999). This advanced form of economy is based mainly on services which provide customers with unique experiences, strongly saturated with emotion. Among its other significant features, I. SKOWRONEK (2012) also distinguishes: exceeding the buyers' expectations, creating sensory products and services affecting the customers' senses, using aesthetics in marketing, managing the buyers' perception and emotions, building relations based on the emotional value. The essence of the market success is then turning an ordinary product into an extraordinary experience (LASALLE & BRITTOn 2003), which will stay permanently in the buyer's memory.

Escape rooms fit these assumptions perfectly. They offer sequences of events which engage the players on the emotional, physical, intellectual and even spiritual plane. The product, meticulously prepared, guarantees a departure from everyday routine, moving to a different reality, engaging all senses, the so-called 'emotional story', dramatization of space, interactivity, active participation and co-creating one's own and others' experiences. In order to achieve that, it is necessary to reorient thinking: concentrate on the product (the process of production, maintaining quality, management, etc.) must be replaced by concentration on experience (planning the desired experience, creating sensory products, customers' perception and emotions management, generating their emotional involvement, etc.). As a result, the product is not so much a service package as an experience package. The Reverse Thinking Model proposed by the Performance Solution company fully proves itself in the planning and practical organization of escape rooms.

All the factors listed above have certainly contributed to the massive increase in the number of escape rooms in Poland. Over just three years, 600 establishments have appeared, situated mostly in the centres of the largest cities. The large city market seems to be almost fully saturated (5-6 rooms per 100,000 inhabitants). The greatest development potential lies in middle-sized towns whose offer in this respect is still quite limited. Polish escape rooms do not differ much from those abroad. They represent

a full spectrum of game themes and storylines, although the predominant themes are the same as those popular all over the world: thrill and crime (28.1%), horror (14.2%), literature and film (11%) and history (10.5%). Local specificity is stressed in escape rooms which refer to various episodes from the Polish history (mainly World War II and the socialist era). About two thirds of the escape rooms are addressed to beginners, and only one third to more advanced players.

These proportions will probably be reversed in time. In comparison with escape rooms abroad, the Polish ones are different above all as regards financial issues: the commonly accepted charge for a room/ game and low prices – ca. 24 USD per room, which is equal to the average world price paid for a game by… one person (NICHOLSON 2015). The new form of recreation has been enthusiastically received by Poles (4.45/ 5). The elements which particularly delight the players are the meticulously prepared interiors and atmosphere of the rooms, surprising storylines of the games, imaginative puzzles and exceptional emotions accompanying the 'escape'. We can be hopeful, than, that the escape room market in Poland will continue to develop.

However, regardless of the causes and the scale of the extraordinary popularity of escape rooms, one question remains open: will they be a permanent element of contemporary recreation services or, like many other attractions before, will they be ephemeral, enjoying the short-term interest of customers constantly looking for new experiences?

FOOTNOTES

[1] The term commonly used in Poland is 'mystery room' (*pokój zagadek*), though it is not a word-for-word translation of the English 'escape room', and neither does it express the idea of the game (escaping from a room).

[2] Lockme.pl is the largest internet website devoted to escape rooms in Poland. It is a continuously updated and enlarged source of information. It provides data on e.g. the room location and theme, the game timing, the level of difficulty, prices, information how to book a game, and users' opinions. As the internet is the main promotion and distribution channel for this form of entertainment, it can be assumed that it is the fullest data base concerning escape rooms in Poland. As regards the analysis of the escape rooms in 10 cities, data was verified on the basis of the websites of individual companies. The percentage of rejected addresses was minimal (individual rooms, either not active any more or about to be opened), which entitles the author to consider the data source to be reliable and highly credible. Naturally, there must be escape rooms which have not been included on lockme.pl. Their number and importance, however, do not seem statistically significant.

[3] In Poland, Fort Boyard was broadcast in the 1990s, on two cable TV channels, and in 2008-9, TVP2 broadcast two series, 13 episodes each.

[4] A role-playing game (RPG) – a game based on narration, in which the players assume the roles of fictional characters living in a world which exists only in their imagination. The aim of the game is to play it according to a pre-planned scenario, following an established set of rules (so-called game mechanics). Apart from traditional pen and paper games, there are also computer games (based on https://pl.wikipedia.org/wiki/Gra_fabularna).

[5] One of the most popular games of this type is the MIT Mystery Hunt (played annually since 1981) – a search for a symbolical coin on the premises of the Massachusetts Institute of Technology by even 40 teams (2000 players) at a time, who for 48 hours are solving up to 160 puzzles prepared for them by the previous year winners.

[6] The game resembles the Polish *podchody* (Hare and Hounds) or the German *Schnitzeljagd.*

[7] Based on: S.FRENCH and J.M.Shaw (2015), who provide the quoted figures.

[8] Based on: http://escaperooms.pl, http://exitroom.pl, http://sirlock.pl, http://tkalniazagadek.pl, www.letmeout.pl, https:// lockme.pl (13 May 2016).

[9] Escape room proprietors run low cost promotion campaigns, mostly on the Internet. They have their own websites (of the room or a network of rooms belonging to a given company) and Facebook profiles. They offer discounts on popular group shopping webpages (e.g. Groupon). Mostly, however, advertising is based on recommendations from satisfied customers.

[10] In the whole Upper Silesian conurbation, there were 79 escape rooms, nearly half of which were situated in Katowice.

[11] After study materials had been collected, games lasting 10-15 minutes were introduced in Łódź and Szczecin.

[12] The rooms could be classified into several theme groups.

[13] The difficulty level of rooms is indirectly related to the percentage of games which end in "escape". According to S. NICHOLSON (2015), 41% of all games end successfully (in both Americas – 26%, in Asia -33%, in Europe – 52%), out of which in rooms described as easy – 61.7%, medium difficult – 48.5% and difficult – 36.3%. Studies of this kind as regards Polish escape rooms have not been conducted yet.

[14] This is most probably caused by the fact that Wrocław is the cradle of Polish escape rooms, and the lockme.pl operator is based in this city.

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