



2011 PopCap Games Mobile Phone Gaming Research
Information Solutions Group

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Research Overview

Research Objectives

- Determine the percentage of mobile phone owners who play mobile phone games
- Understand current mobile phone game play activity and preferences
- Gather previous and future mobile phone game and/or game content purchase trends
- Benchmark to 2009 AT&T/PopCap mobile phone gaming survey where possible

Data Collection Overview

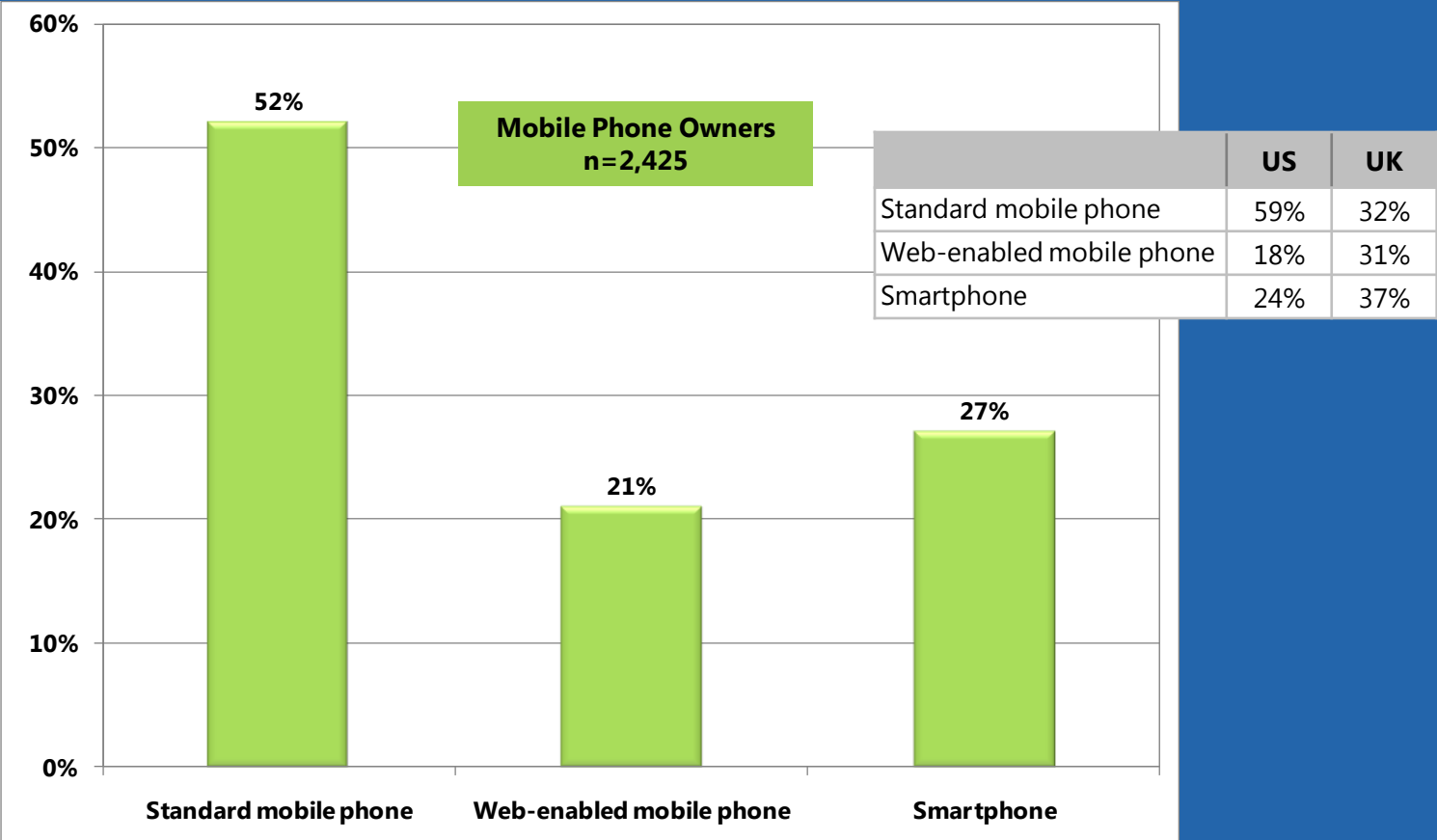
- Methodology: Web survey (ePanel)
- Audience (US and UK mobile phone owners)
- Survey length: 26 questions
- Survey period: January 25, 2011 - January 31, 2011
- 814 qualified responses (486 US, 328 UK)

Survey Qualifications

- Live in the United States or United Kingdom
- Own a mobile phone
- Played a game on a mobile phone within the past month

RESEARCH OVERVIEW - MOBILE PHONE OWNERSHIP

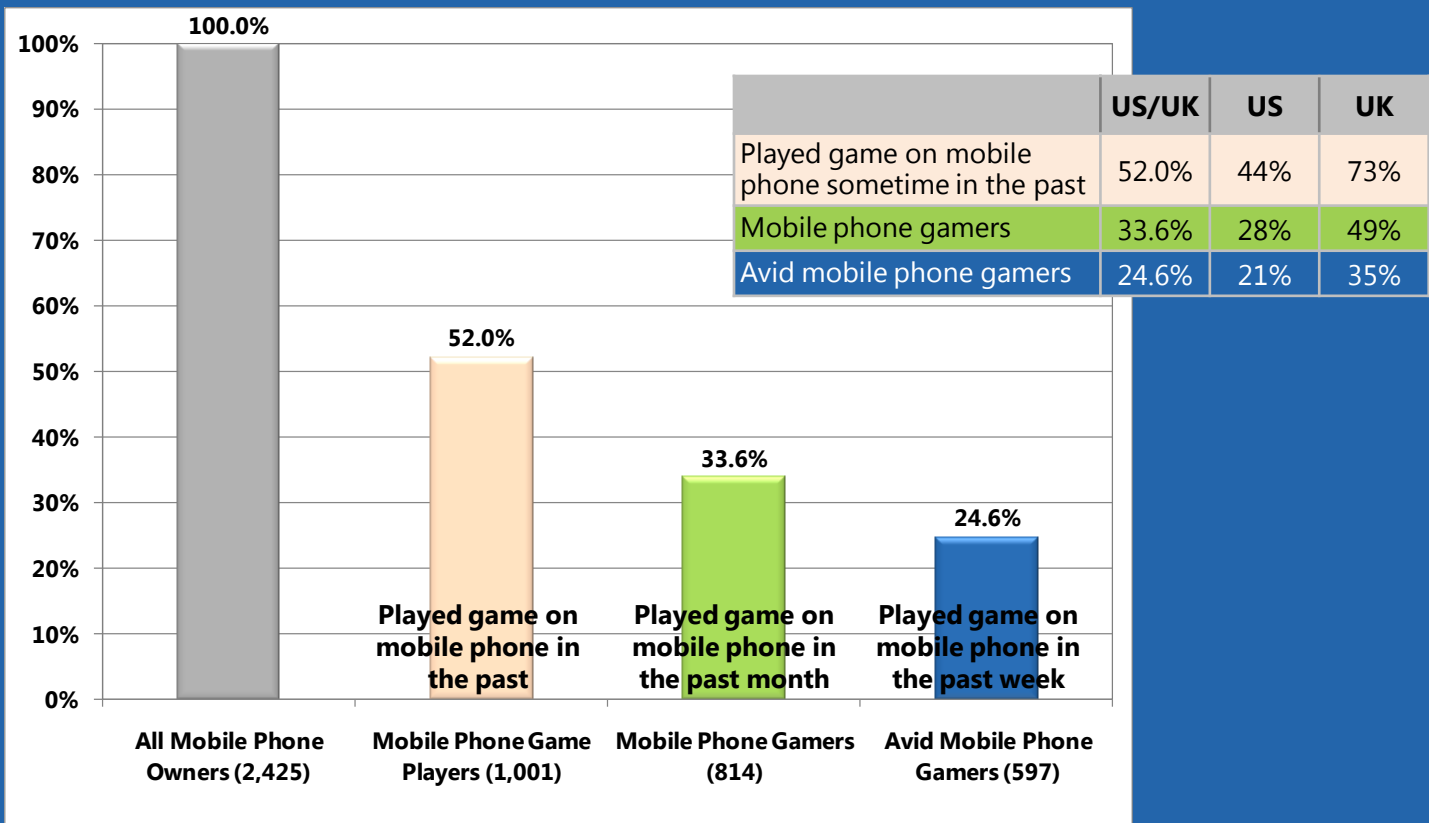
- Half (52%) of all mobile phone owners use a standard mobile phone, followed by one-fourth (27%) who have a smartphone and 21% who have a web-enabled phone.
- Smartphones and web-enabled phones have penetrated the UK market significantly more than in the US.



Q1 What type of mobile phone do you currently own and use?

RESEARCH OVERVIEW - MARKET SIZING OF MOBILE PHONE GAMERS

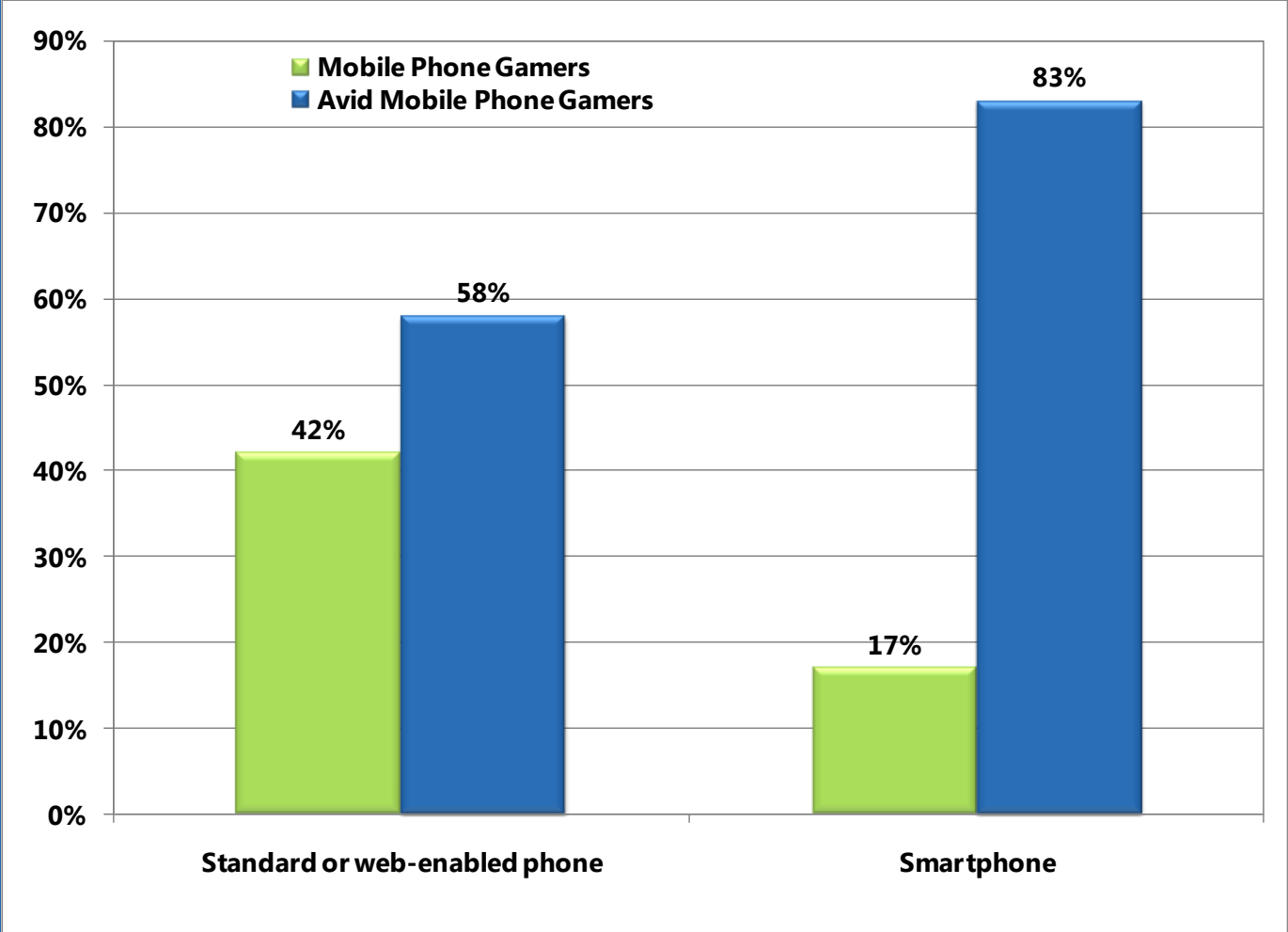
- Half (52%) of those who own a mobile phone have played a game on their mobile phone.
 - At 73%, mobile phone owners in the UK have played a game on a mobile phone at some point, compared to 44% of those in the US.
- 33.6% (814) of the mobile phone owners played a game on their phone within the past month and are classified as mobile phone gamers, while 24.6% (597) are classified as avid mobile phone gamers, those who played a game on their phone within the past week.



RESEARCH OVERVIEW - MARKET SIZING OF MOBILE PHONE GAMERS

- 83% of mobile phone gamers who own a smartphone have played a game on their mobile phone in the past week and are classified as avid mobile phone gamers.

Research Overview



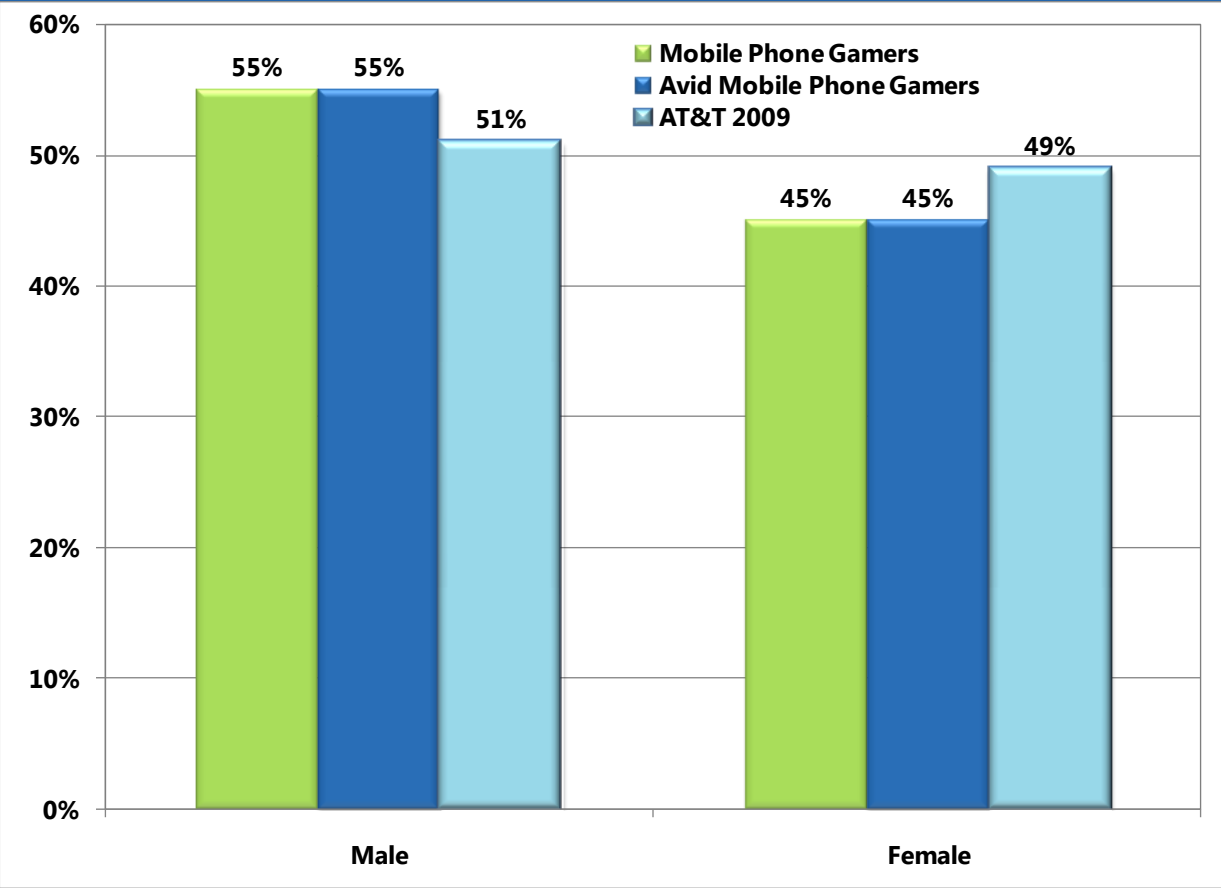


Mobile Phone Gamer Profile

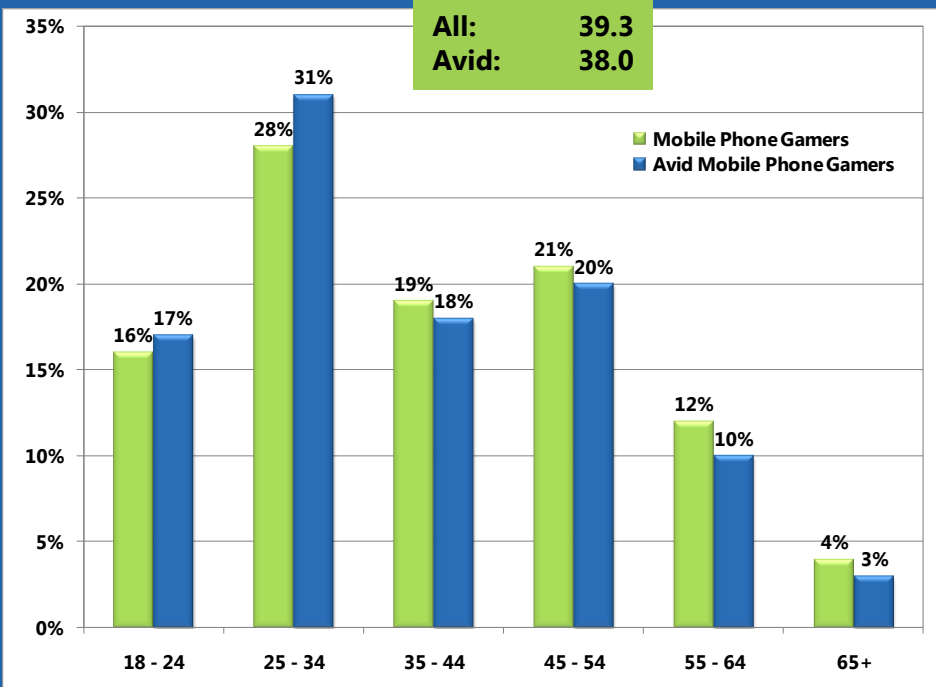
*For the purposes of this survey a mobile phone gamer is defined as someone who has played a game on his/her phone in the past month.
In addition, an avid mobile phone gamer is defined a someone who has played a game on his/her phone in the past week.*

GENDER

- At 55%, slightly more males play games on their mobile phone than females (45%).
- In the 2009 AT&T/PopCap mobile phone games survey, 51% of those playing mobile phone games were male and 49% were female.



Q24 Gender



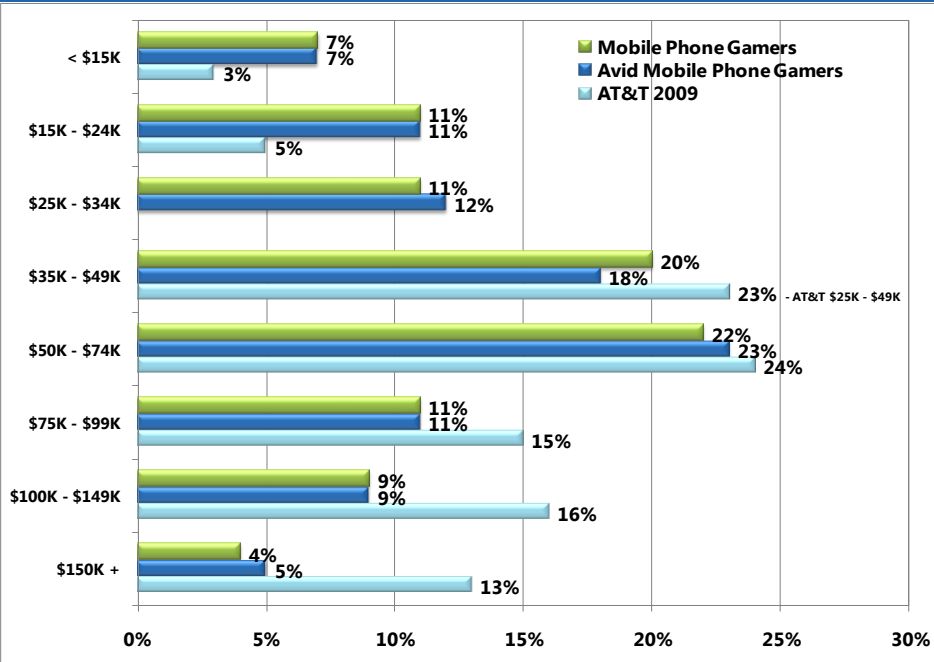
- The average age of a mobile phone gamer is 39.3 years, while avid mobile phone gamers are slightly younger at 38.0 years.
- 44% of the mobile phone gamers are less than 34 years old, another 40% are between 35 and 54 years old, while the remaining 16% are 55 or older.
- Avid mobile phone gamers are slightly younger with 48% less than 34 years old, 38% between 35 and 54 years old, and 13% 55 years and older.

	Std/Web phone	Smart Phone	US	UK
18 - 24	14%	17%	17%	14%
25 - 34	20%	34%	27%	30%
35 - 44	17%	20%	16%	23%
45 - 54	28%	17%	22%	20%
55 - 64	17%	9%	13%	10%
65 +	5%	3%	5%	2%

- Mobile phone gamers who own a smartphone tend to be younger (37.3 years) than those who have a standard or web-enabled phone (42.4 years).
- Mobile phone gamers from the UK are also slightly younger (38.5 years) than those in the US (39.8).

HOUSEHOLD INCOME (BEFORE TAXES)

Mobile Phone Gamer Profile



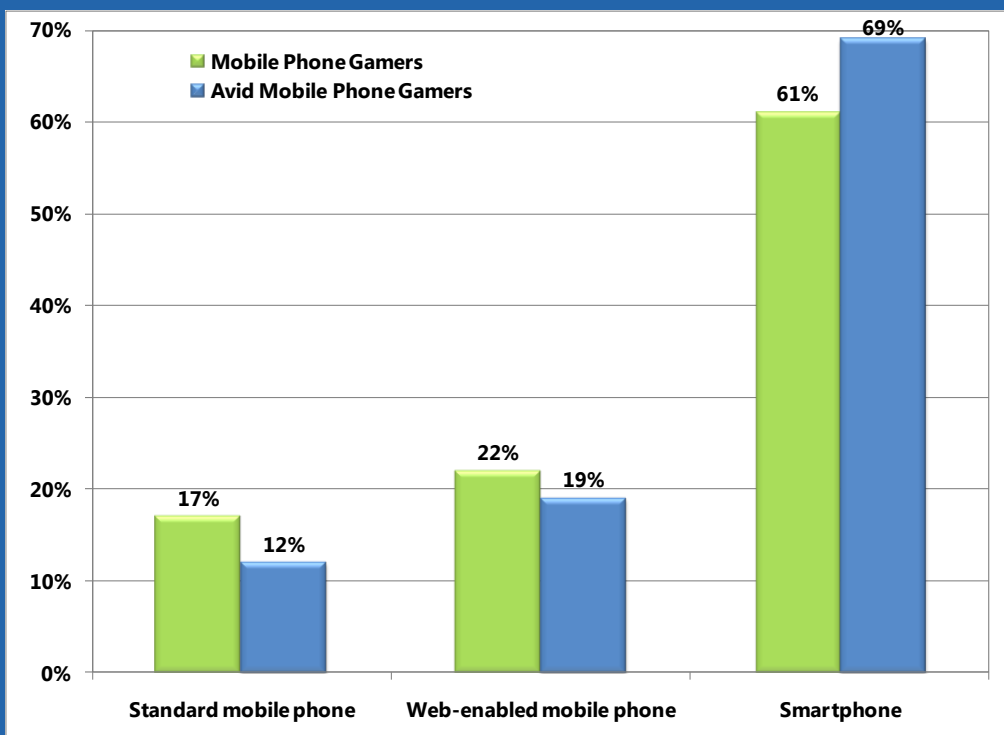
- The annual household income of mobile phone gamers and avid mobile phone gamers is comparable, with half earning less than \$50,000, one out of five earning between \$50,000 and \$74,999 and the remainder earning more the \$75,000 annually.
- Those who own a smartphone earn more annually, with one-third (32%) earning more than \$75,000.
- Mobile phone gamers in the US earn more annually than those in the UK.

	Std/Web phone	Smart phone	US	UK
< \$15K	11%	4%	8%	5%
\$15K - \$24K	13%	9%	9%	13%
\$25K - \$34K	12%	11%	11%	12%
\$35K - \$49K	22%	18%	17%	24%
\$50K - \$74K	23%	22%	23%	22%
\$75K - \$99K	7%	14%	12%	10%
\$100K - \$149K	4%	12%	12%	5%
\$150K +	2%	6%	6%	1%

Q26 Annual household income before taxes

MOBILE PHONE OWNERSHIP

Mobile Phone Gamer Profile



- The majority (61%) of the mobile phone gamers own a smartphone, followed by 22% who have a web-enabled phone and 17% who have a standard mobile phone.
- The number of those owning a smartphone increases among avid mobile phone gamers, with 69% smartphone owners, 19% web-enabled phone owners and 12% standard mobile phone owners.
- Although smartphone usage is higher in general in the UK than in the US, the same is not true among mobile phone gamer.
 - Slightly more of those in the US who are mobile phone gamers own a smartphone than those in the UK (63% vs. 57%).

	US	UK
Standard mobile phone	18%	15%
Web-enabled mobile phone	19%	28%
Smartphone	63%	57%

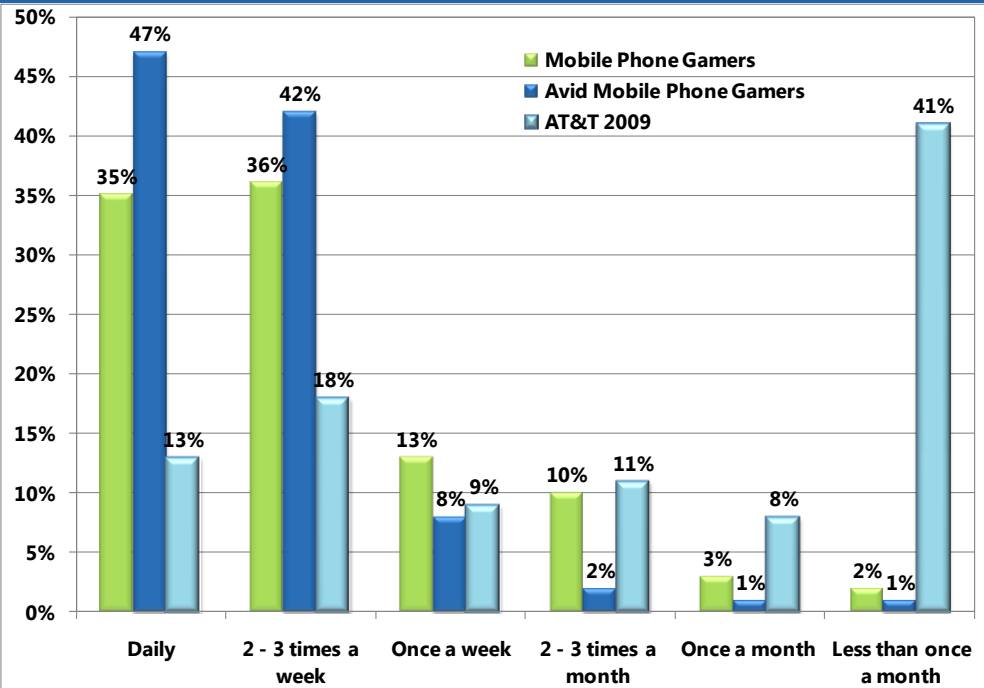
Q2 What type of mobile phone do you currently own and use?



Mobile Phone Game Play Activity

FREQUENCY OF MOBILE PHONE GAME PLAY

Mobile Phone Game
Play Activity



- A shift has occurred in the frequency of mobile phone game play over the past two years.
- 84% of mobile phone gamers and 97% of avid mobile phone gamers currently play games on their mobile phone at least once a week, compared to only 40% in 2009.
- Daily mobile phone game play has more than doubled with 35% of mobile phone gamers and 47% of avid mobile phone gamers playing daily, compared to 13% in 2009.

	Std/Web phone	Smart phone
Daily	20%	45%
2 - 3 times a week	35%	37%
Once a week	18%	10%
2 - 3 times a month	17%	6%
Once a month	6%	2%
Less than once a month	3%	1%

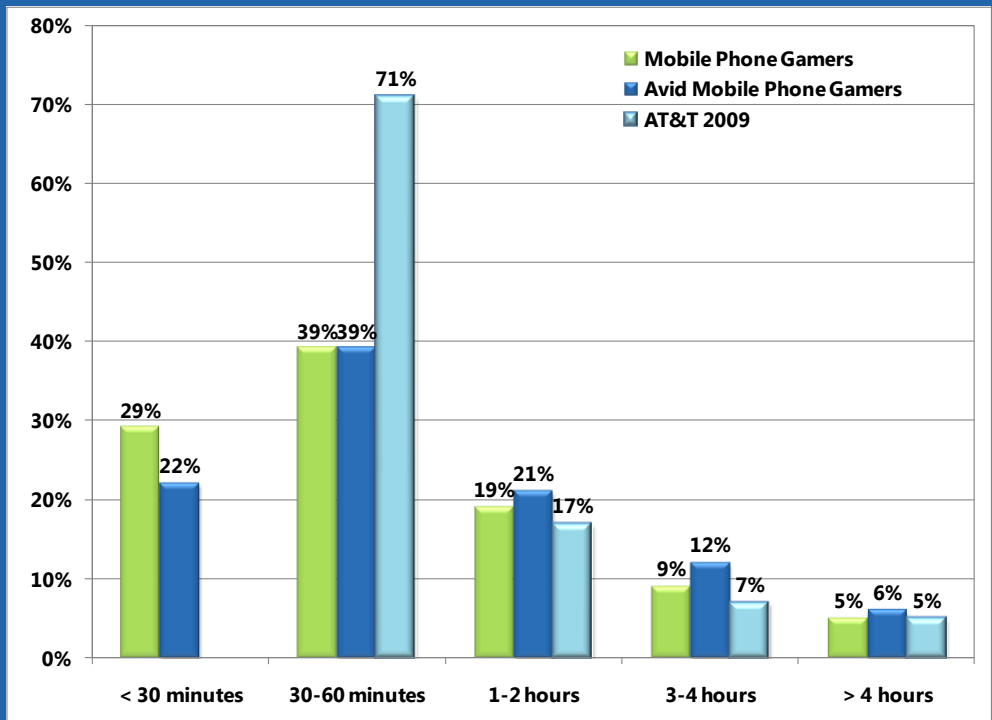
92%

- The expanded adoption of smartphones has also influenced the increased frequency of mobile phone game play.
- 92% of mobile phone owners who own a smartphone play mobile phone games weekly, and 45% play daily.

Q5 How often do you typically play games on your mobile phone?

NUMBER OF HOURS PER WEEK GAMES PLAYED ON MOBILE PHONE

Mobile Phone Game
Play Activity



* The 2009 AT&T/PopCap survey only captured < 1 hour, while the current survey broke it down further.

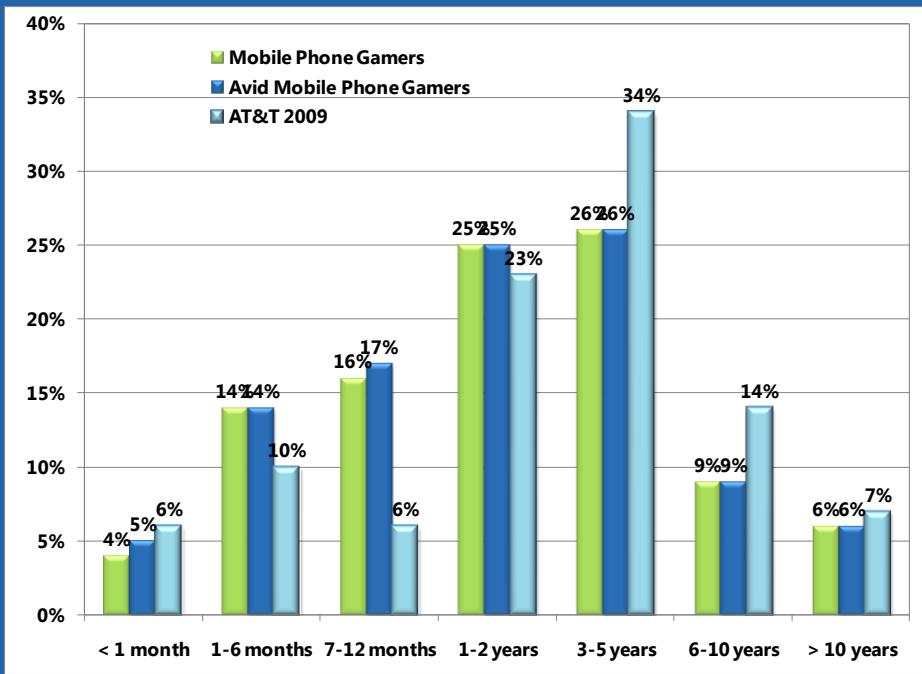
	Std/Web phone	Smart phone
< 30 minutes	37%	23%
30 - 60 minutes	38%	39%
1 - 2 hours	18%	19%
3 - 4 hours	5%	12%
> 4 hours	2%	6%

- Although the frequency of mobile phone game play has increased over the past two years, the number of total hours per week has not increased, compared to the 2009 results.
- 68% of the mobile phone gamers and 61% of the avid mobile phone gamers play less than one hour per week, compared to 71% of those in 2009.
- 37% of smartphone owners spend at least one hour a week playing mobile phone games, compared to 25% of the standard and web-enabled phone owners.

Q6 How many hours per week do you play games on your mobile phone?

LENGTH OF TIME PLAYING GAMES ON MOBILE PHONE

Mobile Phone Game
Play Activity



- Two-thirds (66%) of the mobile phone gamers and avid mobile phone gamers have been playing games on a mobile phone for at least one year.
- This is lower than the 2009 AT&T/PopCap survey results, where 78% had been playing mobile phone games for at least one year. This indicates an increase in the number of mobile phone owners who are fairly new to mobile phone gaming.

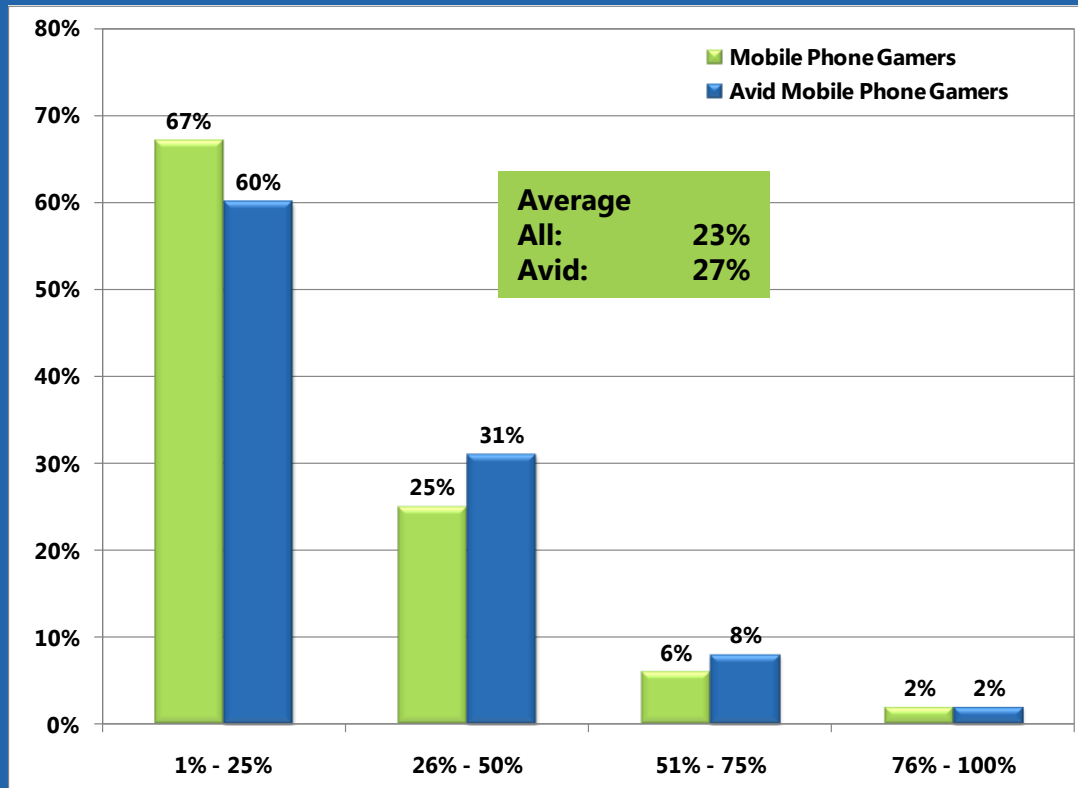
	Std/Web phone	Smart phone
< 1 month	3%	4%
1 - 6 months	10%	17%
7 - 12 months	15%	17%
1 - 2 years	25%	25%
3 - 5 years	30%	23%
6 - 10 years	10%	9%
> 10 years	7%	5%

- 62% of the smartphone owners have been playing mobile phone games for at least one year.

Q7 How long have you been playing games on a mobile phone?

% OF TIME SPENT ON MOBILE PHONE PLAYING GAMES (EXCLUDING CALLS)

- Excluding making and receiving calls, mobile phone game play accounts for an average of 23% of a mobile phone gamers' phone usage, while avid mobile phone gamers spend 27% of their mobile phone time (excluding calls) playing games.
- Smartphone owners spend one-quarter (25%) of their mobile phone time (excluding calls) playing games.

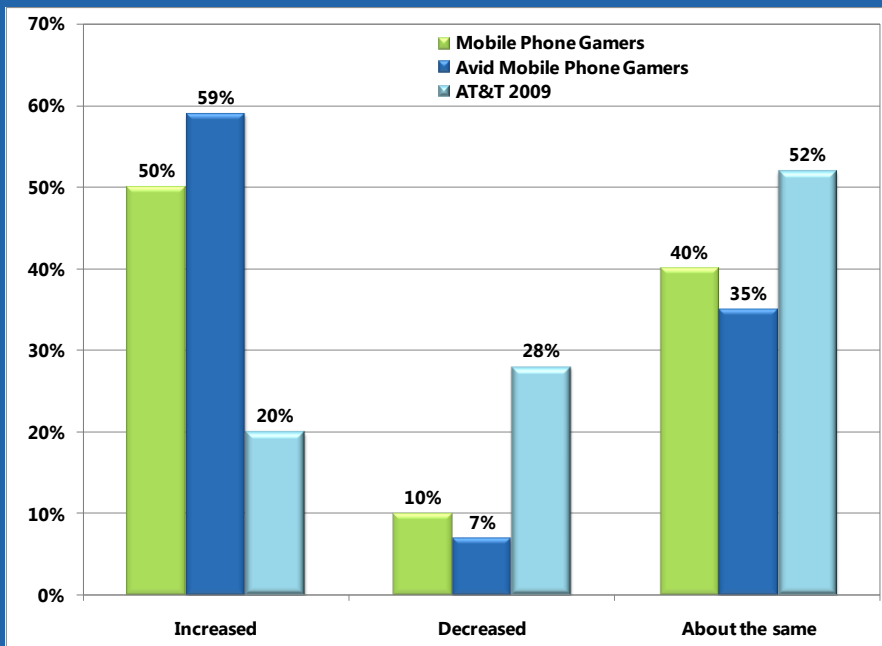


	Std/Web phone	Smart phone
Average	20%	25%
1% - 25%	73%	63%
26% - 50%	21%	28%
51% - 75%	4%	7%
76% - 100%	2%	2%

Q8 Excluding making and receiving calls, what percent of the time you spend using your mobile phone, do you spend playing games?

CHANGE IN MOBILE PHONE GAME PLAY ACTIVITY OVER PAST YEAR

- Half (50%) of the mobile phone gamers said their game play has increased over the past year, 40% said it is about the same, while 10% said it has decreased.
- Among the avid mobile phone gamers, 59% said their game play has increased, and 35% said it was about the same.
- A comparison of the current results to those from the 2009 survey indicates a sharp jump in the number of mobile phone gamers who said their mobile phone game play activity has increased.
- Smartphone ownerships is a primary driver towards increased mobile phone game play, with 63% indicating their mobile phone game play has increased over the past year.

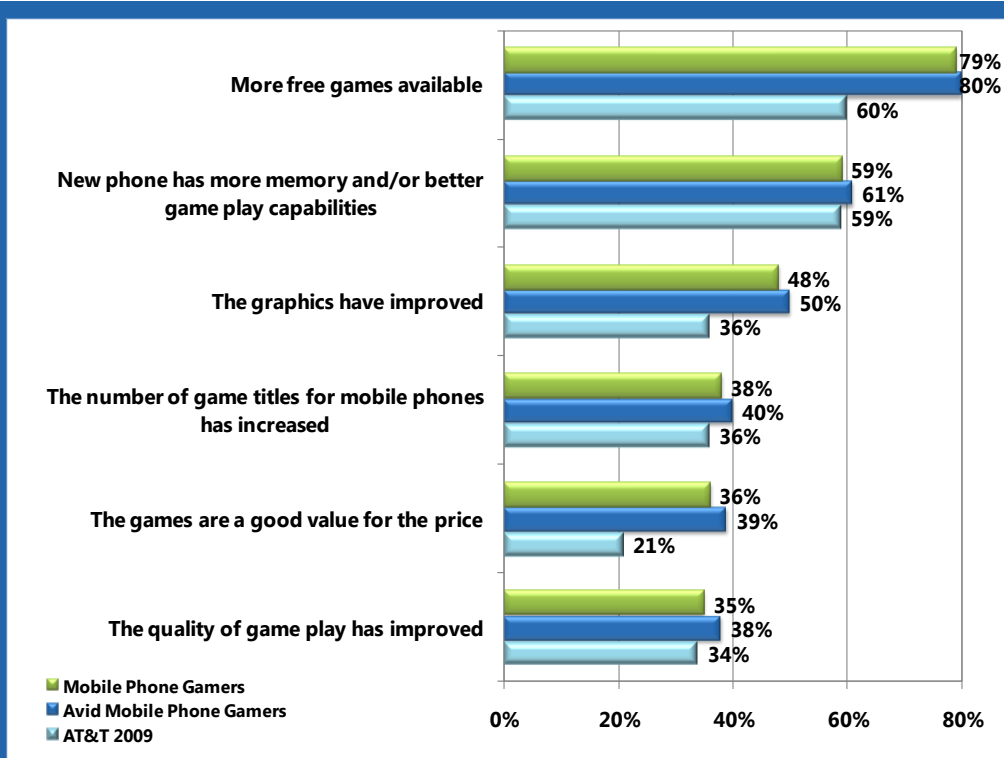


	Std/Web phone	Smart phone
Increased	29%	63%
Decreased	17%	6%
About the same	55%	31%

Q9 In terms of time spent, how has your mobile phone game play activity changed over the past year?

FACTORS INFLUENCING INCREASED MOBILE PHONE GAME PLAY

Mobile Phone Game
Play Activity



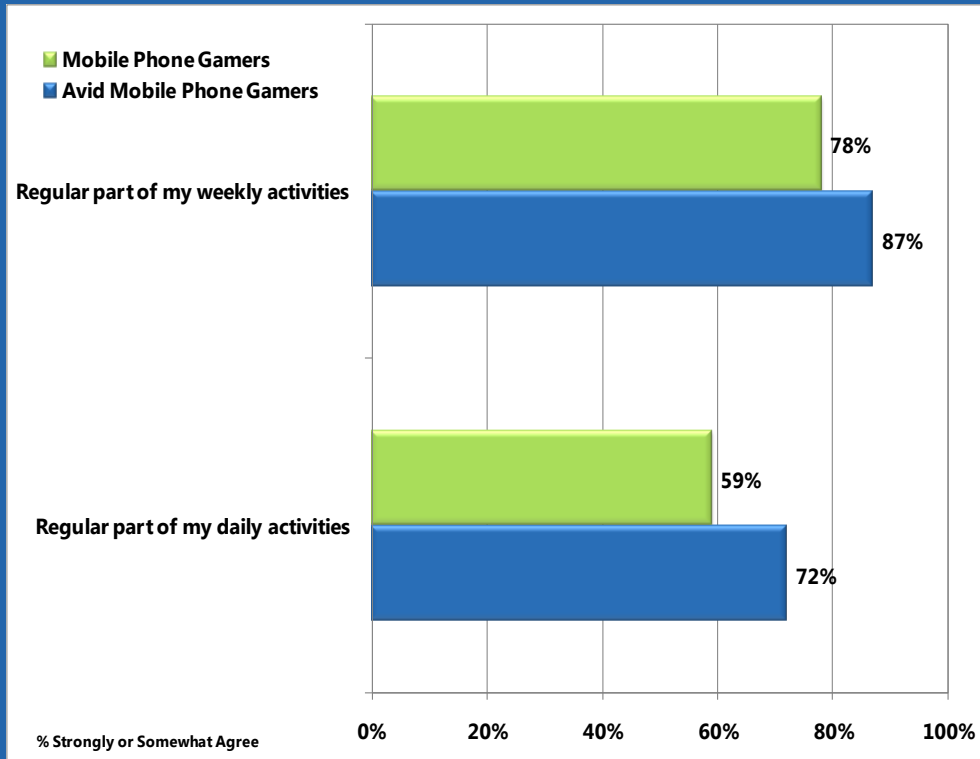
- The availability of more free games (79%) is the number one factor driving increased mobile phone game play, followed by the acquisition of a new phone with more memory or better game play capabilities at 59%.
- Almost half (48%) cited improved game graphics as influencing their increased mobile phone game play.
- Almost two-thirds (63%) of smartphone owners said getting a new phone with more memory and better game play capabilities influenced their increased mobile phone game play.

	Std/Web phone	Smart phone	US	UK
More free games available	75%	81%	84%	73%
New phone has more memory/better game play capabilities	46%	63%	58%	60%
The graphics have improved	27%	54%	48%	48%
The number of game titles for mobile phones has increased	32%	40%	39%	37%
The quality of game play has improved	20%	40%	35%	35%
The games are a good value for the price	30%	38%	40%	30%

Q10 What has influenced the increase in your game play on your mobile phone?

MOBILE PHONE GAMING A REGULAR PART OF DAILY/WEEKLY ACTIVITIES

Mobile Phone Game
Play Activity



- Three-fourths (78%) of the mobile phone gamers Agree (Strongly and Somewhat Agree) that mobile phone gaming has become a regular part of their *weekly* activities, while 59% said they Strongly and Somewhat Agree that mobile phone gaming has become a regular part of their *daily* activities.
- 87% of avid mobile phone gamers Agree that mobile phone gaming has become a regular part of their *weekly* activities, while 72% Strongly or Somewhat Agree that mobile phone gaming has become a regular part of their *daily* activities.
- Among smartphone owners 87% said mobile phone gaming has become a regular part of their *weekly* activities, compared to 68% who said it has become a regular part of their *daily* activities.

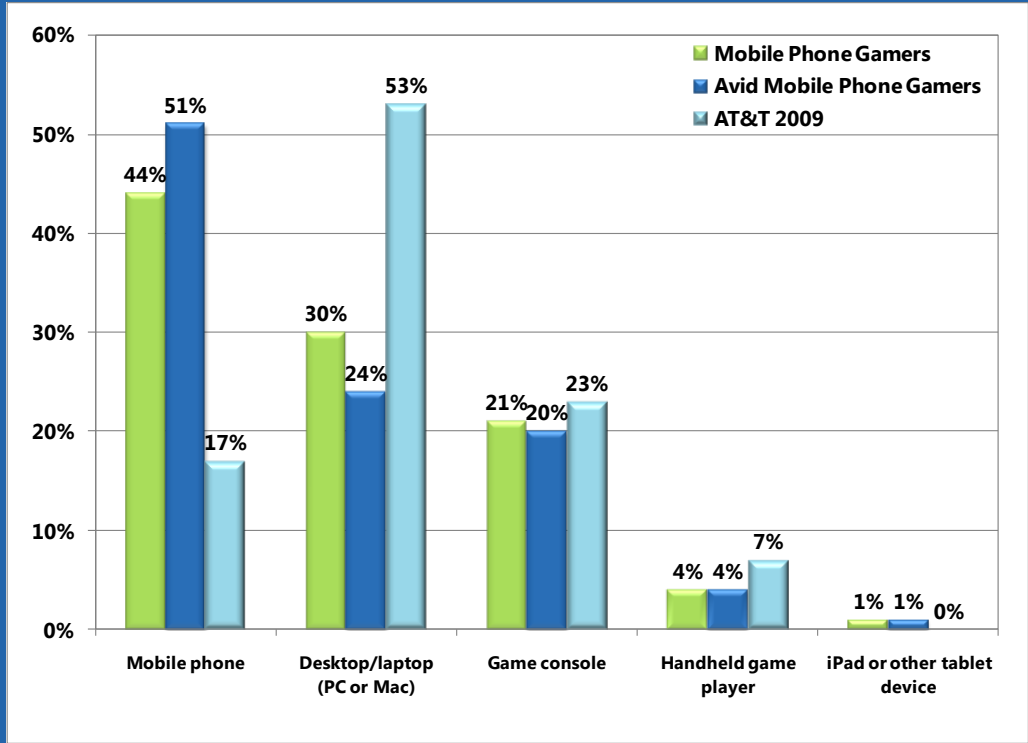
Strongly Agree/Agree	Std/Web phone	Smart phone	US	UK
Weekly activities	68%	84%	81%	73%
Daily activities	47%	68%	63%	53%

Q11 How much do you agree or disagree with the following:

11A - Mobile phone gaming has become a regular part of my weekly activities. 11B - Mobile phone gaming has become a regular part of my daily activities.

DEVICE USED MOST OFTEN WHEN PLAYING GAMES

Mobile Phone Game
Play Activity



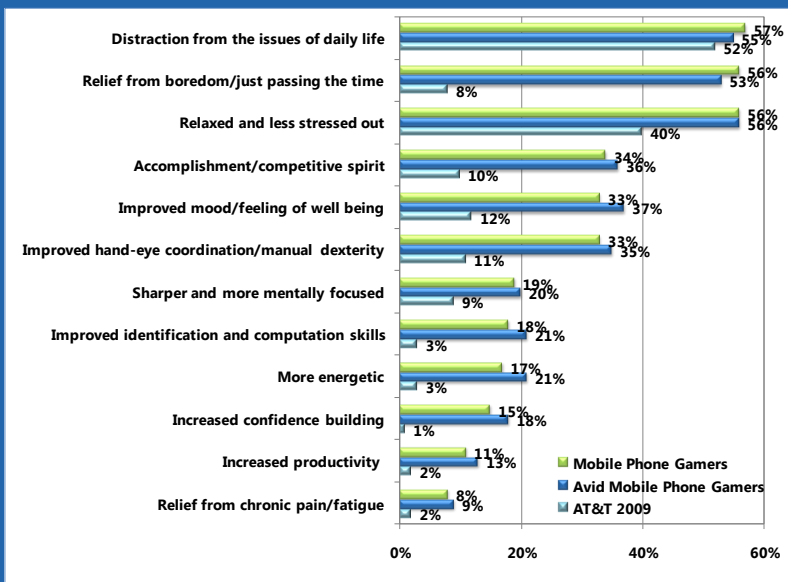
- Over the past two years, a shift has occurred among mobile phone gamers away from game play on desktop/ laptop computers and towards game play on a mobile phone.
- The current survey results reveal that 44% of mobile phone gamers said the majority of their game play is on their mobile phone, followed by 30% who continue to play games most often on a computer.
- In 2009, 53% said they play games most often on their computer, while only 17% said they play most often on their mobile phone.
- More than half (55%) of the smartphone owners, who play games on their mobile phone, play most often on their mobile phones, followed by 22% who play games most often on a desktop/laptop computer.

	Std/Web phone	Smart phone
Mobile phone	28%	55%
Desktop/laptop computer	43%	22%
Game console	22%	20%
Handheld game player	7%	3%
iPad or other tablet device	0%	1%

Q13 Which device do you play games on most often?

BENEFITS EXPERIENCED FROM PLAYING GAMES ON MOBILE PHONE

Mobile Phone Game
Play Activity



- The primary benefits derived from playing games on a mobile phone include a distraction from the issues of daily life (57%), relief from boredom (56%) and relaxed and less stressed out (56%).

	Std/Web phone	Smart phone	US	UK
Relief from boredom/just passing the time	61%	52%	57%	54%
Distraction from the issues of daily life	60%	55%	59%	53%
Relaxed and less stressed out	55%	56%	59%	50%
Accomplishment/competitive spirit	34%	33%	32%	36%
Improved hand-eye coordination	33%	33%	35%	31%
Improved mood/feeling of well being	27%	36%	36%	27%
Sharper and more mentally focused	19%	19%	23%	14%
Improved identification & computation skills	17%	20%	19%	17%
Increased confidence building	13%	16%	16%	13%
More energetic	11%	21%	21%	11%
Increased productivity	7%	13%	12%	8%
Relief from chronic pain/fatigue	7%	8%	8%	6%

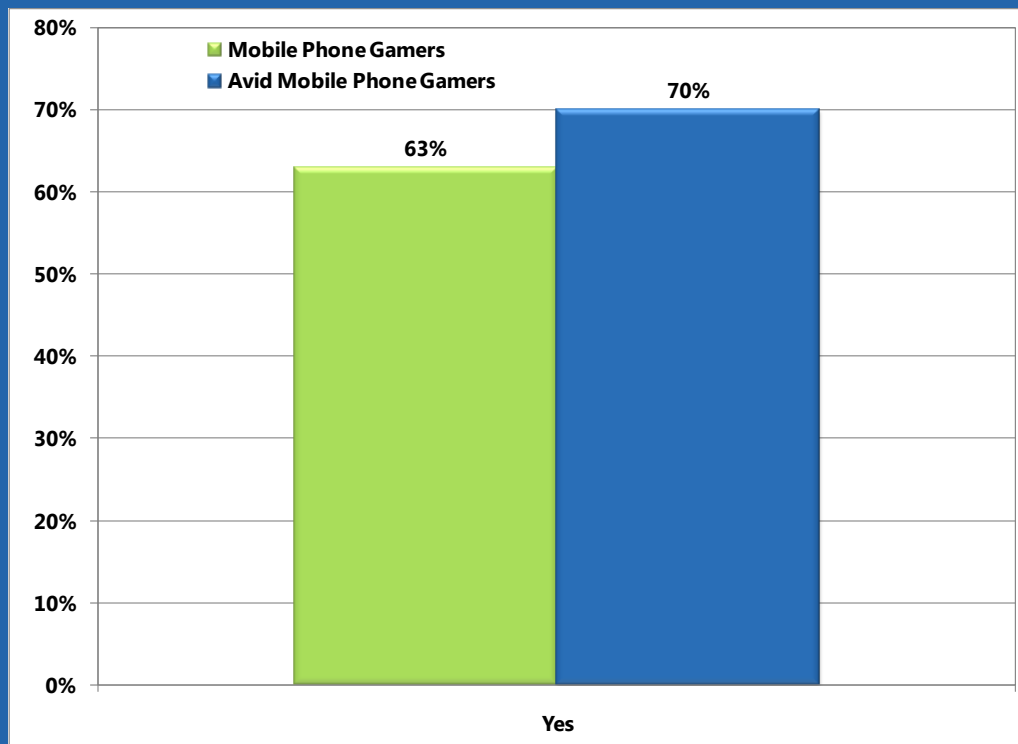
Q12 Which of the following benefits have you experienced as a result of playing games on your mobile phone?



Social Game Play on Mobile Phone

ACCESSED FACEBOOK, MYSPACE OR BEBO FROM MOBILE PHONE

- Almost two-thirds (63%) of mobile phone gamers and 70% of avid mobile phone gamers are involved in social networking and have accessed Facebook, MySpace or Bebo from their mobile phone in the past month.
- 78% of smartphone owners, who have played a game on their mobile phone, have accessed Facebook, MySpace or Bebo from their mobile phone in the past month.
- 66% of the US mobile phone gamers accessed Facebook, MySpace or Bebo from their mobile phone, compared to 60% of those in the UK.



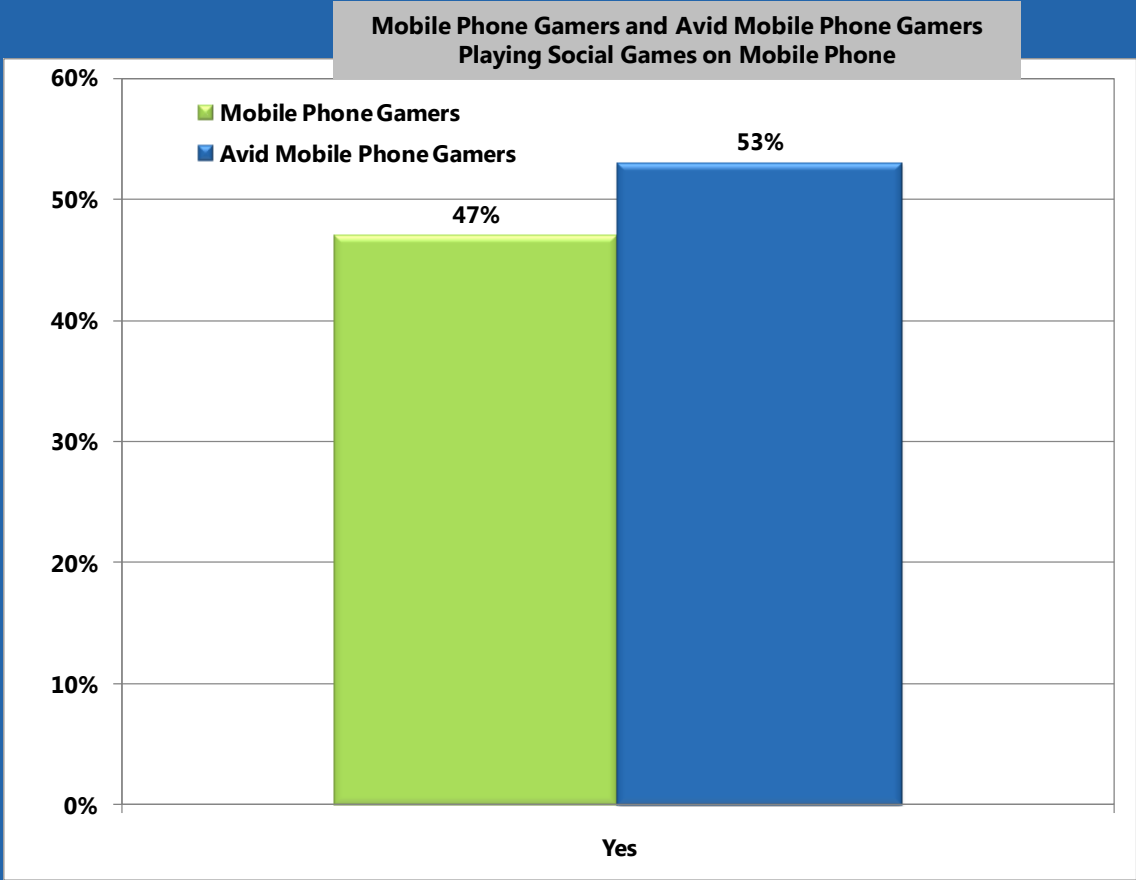
Std/Web phone	Smart phone	US	UK
40%	78%	66%	60%

Q20 In the past month, have you accessed Facebook, MySpace or Bebo from your mobile phone?

SOCIAL GAMEPLAY ON MOBILE PHONE

Social Game Play on
Mobile Phone

- Almost half (47%) of mobile phone gamers and 53% of avid mobile phone gamers play social networking games on their mobile phone.
- 57% of smartphone owners play social networking games on their mobile phone, while those in the US are more likely to play social games on their mobile phone (50%) than those in the UK (43%).



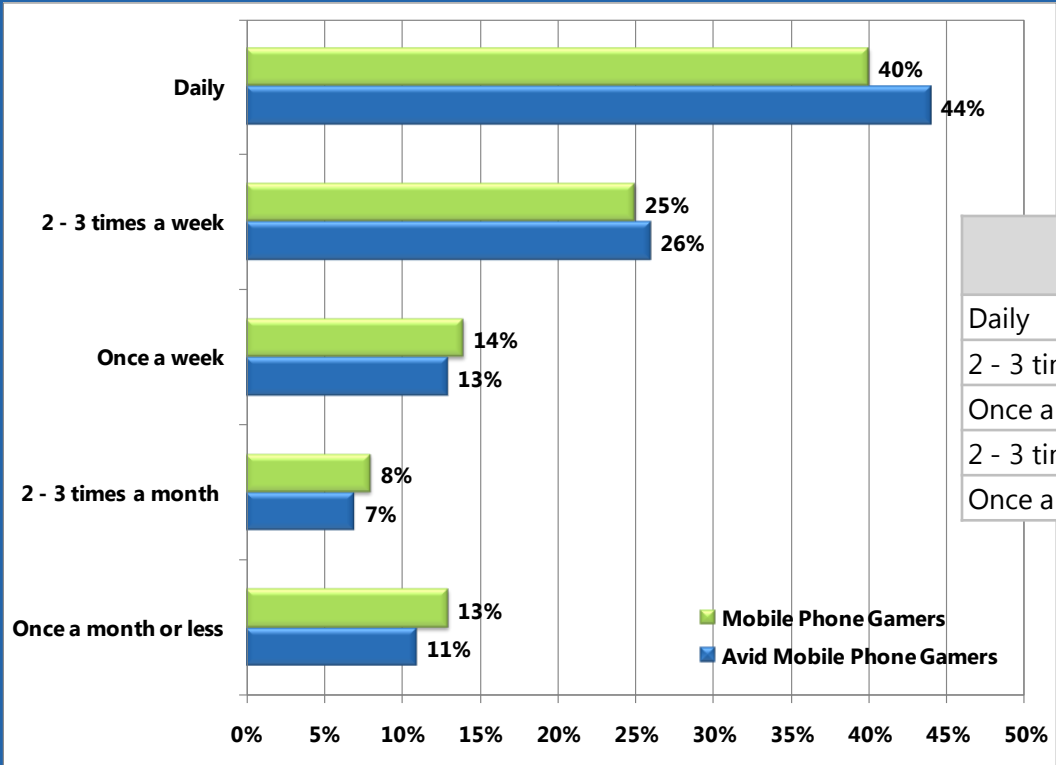
Std/Web phone	31%
Smartphone	57%
US	50%
UK	43%

Q21 How often do you play social networking games on your mobile phone?

FREQUENCY OF SOCIAL GAMEPLAY ON MOBILE PHONE

Social Game Play on
Mobile Phone

- Three-fourths (75%) of the mobile phone gamers who play social games on their mobile phone do so at least once a week, with 40% playing daily.
- 83% of the avid mobile phone gamers play social games on their mobile phone at least once a week, with 44% playing daily.
- 82% of the smartphone owners who play social games are their mobile phone do so on a weekly basis, with 42% playing daily.



	Std/Web Phone	Smart phone
Daily	33%	42%
2 - 3 times a week	19%	27%
Once a week	15%	13%
2 - 3 times a month	10%	7%
Once a month or less	22%	10%

Q21 How often do you play social networking games on your mobile phone?

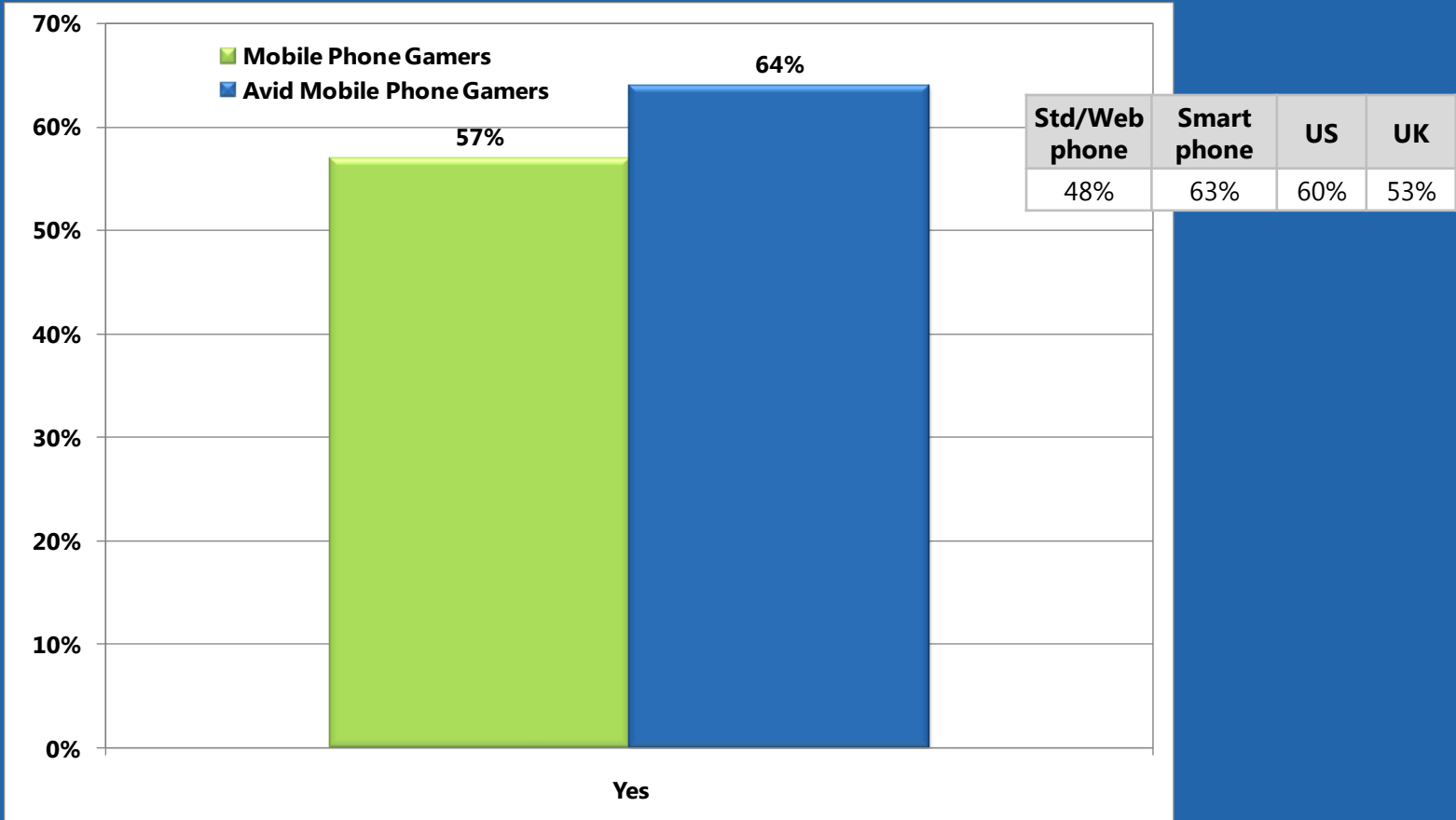


Recommendation Behavior

RECOMMENDATION OF MOBILE PHONE GAMES TO OTHERS

Recommendation Behavior

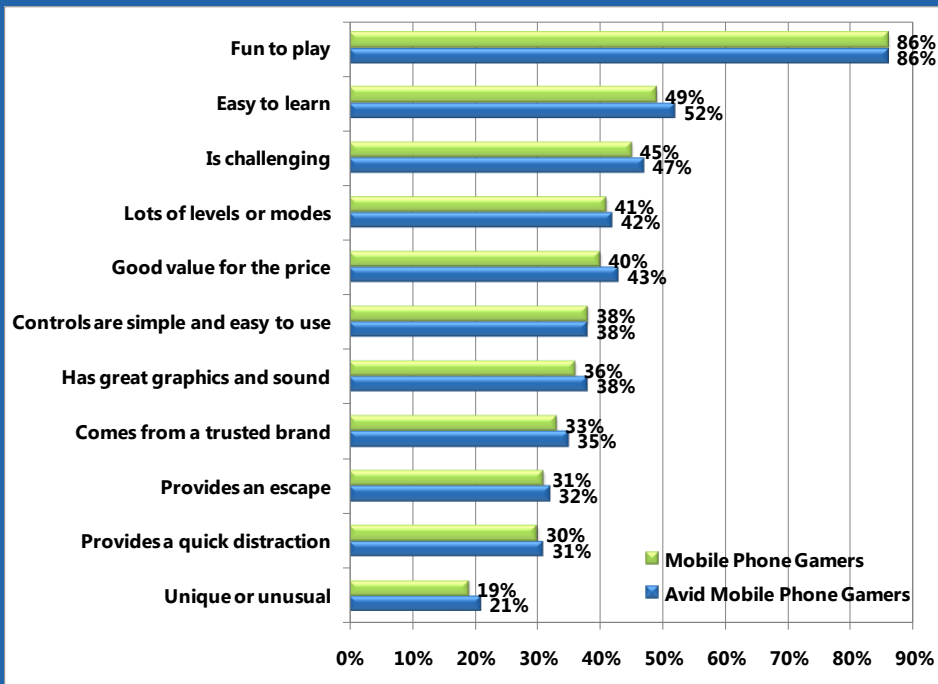
- 57% of the mobile phone gamers and 64% of the avid mobile phone gamers have recommended a mobile phone game to someone else, as did 63% of smartphone owners.
- At 60%, US mobile phone gamers are more likely to recommend a mobile phone game than those in the UK (53%).



Q22 Have you ever recommended a mobile phone game to someone else?

GAME CHARACTERISTICS INFLUENCING RECOMMENDATIONS

Recommendation Behavior



- Fun to play (86%) and easy to learn (49%) are the top two game characteristics that most influenced those who have recommend mobile phone games to others.
- Challenging (45%), lots of levels or modes (41%) and good value for the price (40%) round out the top five most influential game characteristics that influence recommendations.

	Std/Web phone	Smart phone
Fun to play	90%	84%
Easy to learn	45%	51%
Is challenging	45%	45%
Lots of levels or modes	41%	41%
Controls are simple and easy to use	40%	37%
Good value for the price	32%	44%
Provides a quick distraction	32%	30%
Provides an escape	32%	31%
Has great graphics and sound	29%	39%
Comes from a trusted brand	29%	36%
Unique or unusual	15%	21%

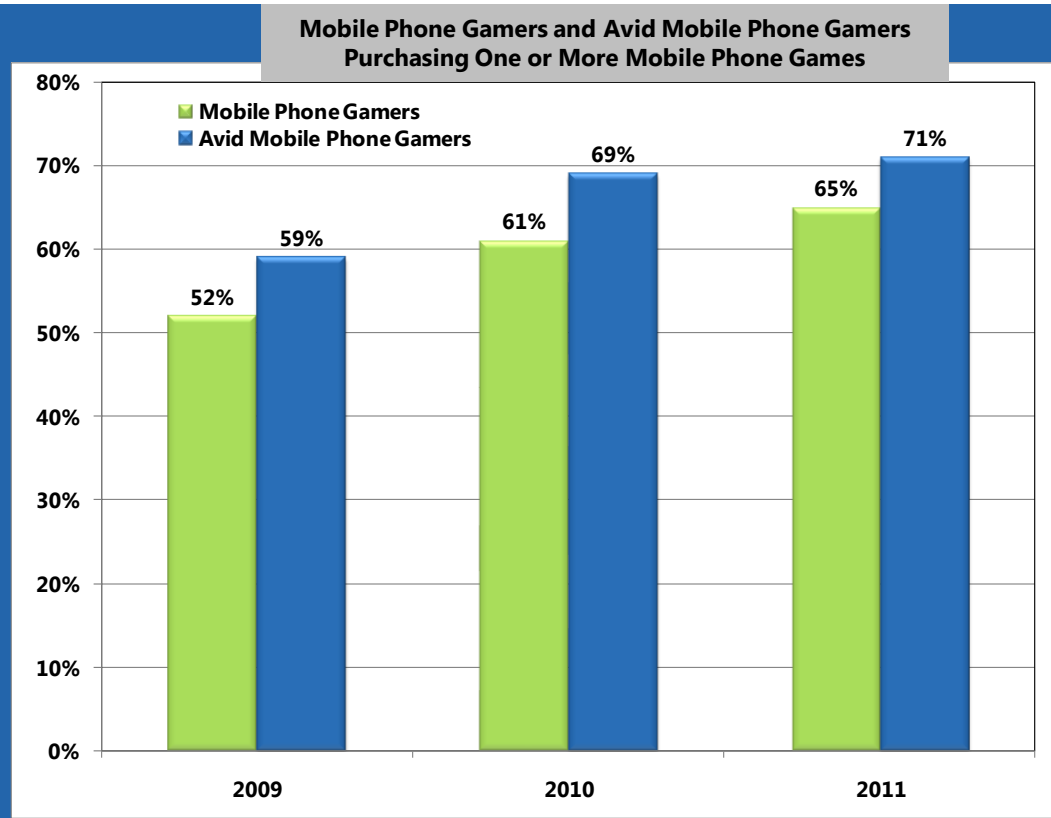
Q23 Which of the following influenced you when you recommended a mobile phone game to others?



Mobile Phone Game Purchase Behavior

MOBILE PHONE GAMES PURCHASED AND PLAN TO PURCHASE

Mobile Phone Game
Purchase Behavior



- There is a positive trend upwards with respect to the number of mobile phone gamers who have purchased or plan to purchase one or more mobile phone games.
- In 2009, 52% of the mobile phone gamers and 59% of the avid mobile phone gamers purchased at least one mobile phone game. This increased to 61% and 69% respectively in 2010 and is projected to jump to 65% and 71% this year.

	Std/Web phone	Smart phone	US	UK
2009	46%	56%	55%	48%
2010	51%	68%	62%	61%
2011	54%	72%	66%	62%

- Between 2009 and 2010, the number of smartphone owners purchasing one or more mobile phone games increased 12%. This trend is also evident among mobile phone gamers in the UK.

Q14 How many games have you purchased for your mobile phone in 2009 and 2010? Q18 How many do you anticipate purchasing in 2011?

NUMBER OF MOBILE PHONE GAMES PURCHASED AND PLAN TO PURCHASE

- The average number of mobile phone games purchased from 2009 to 2010 increased, although when asked how many mobile phone games they anticipate purchasing in 2011, respondents provided more conservative estimates, resulting in a slight pull back.
- Smartphone owners purchased almost twice as many games for their mobile phones in 2010 as those who own a standard or web-enabled phone (5.4 vs. 2.9).

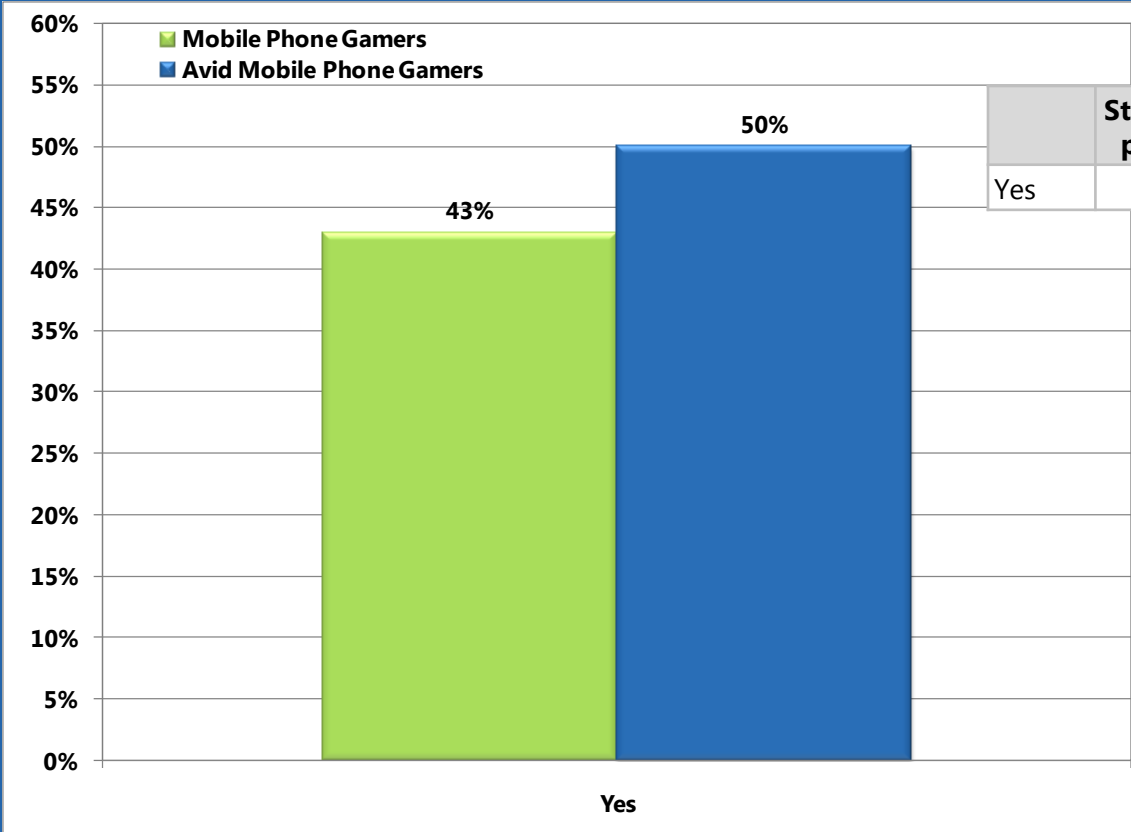
	Mobile phone gamers			Avid mobile phone gamers			Std/Web phone			Smart phone			US			UK		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
Avg. # Mobile Phone Games	4.3	4.6	4.2	4.6	4.9	4.6	3.1	2.9	2.8	4.9	5.4	4.9	4.2	4.5	4.3	4.4	4.7	4.1
1	15%	21%	21%	12%	17%	16%	26%	32%	34%	9%	15%	15%	14%	20%	22%	16%	22%	20%
2	24%	19%	22%	23%	19%	21%	29%	26%	29%	22%	16%	18%	22%	19%	19%	28%	20%	25%
3	18%	16%	17%	18%	16%	17%	18%	19%	16%	18%	14%	18%	21%	17%	18%	14%	14%	16%
4	15%	9%	10%	17%	10%	12%	12%	10%	10%	17%	9%	11%	18%	10%	10%	11%	8%	11%
5	6%	8%	6%	6%	9%	7%	5%	4%	3%	6%	9%	8%	6%	9%	7%	6%	7%	5%
>5	22%	28%	23%	25%	30%	27%	10%	9%	8%	29%	36%	31%	21%	26%	24%	25%	30%	22%

Q14 How many games have you purchased for your mobile phone in 2009 and 2010? Q18 How many do you anticipate purchasing in 2011?

UPGRADED FREE GAME TRIAL OR FREE APP TO PAID VERSION

Mobile Phone Game Purchase Behavior

- 43% of the mobile phone gamers and 50% of the avid mobile phone gamers upgraded a free mobile phone game trial or free mobile phone game app to a paid version in the past year.
- Half (49%) of smartphone owners have upgraded a free mobile phone game trial or free mobile phone game app to a paid version in the past year.



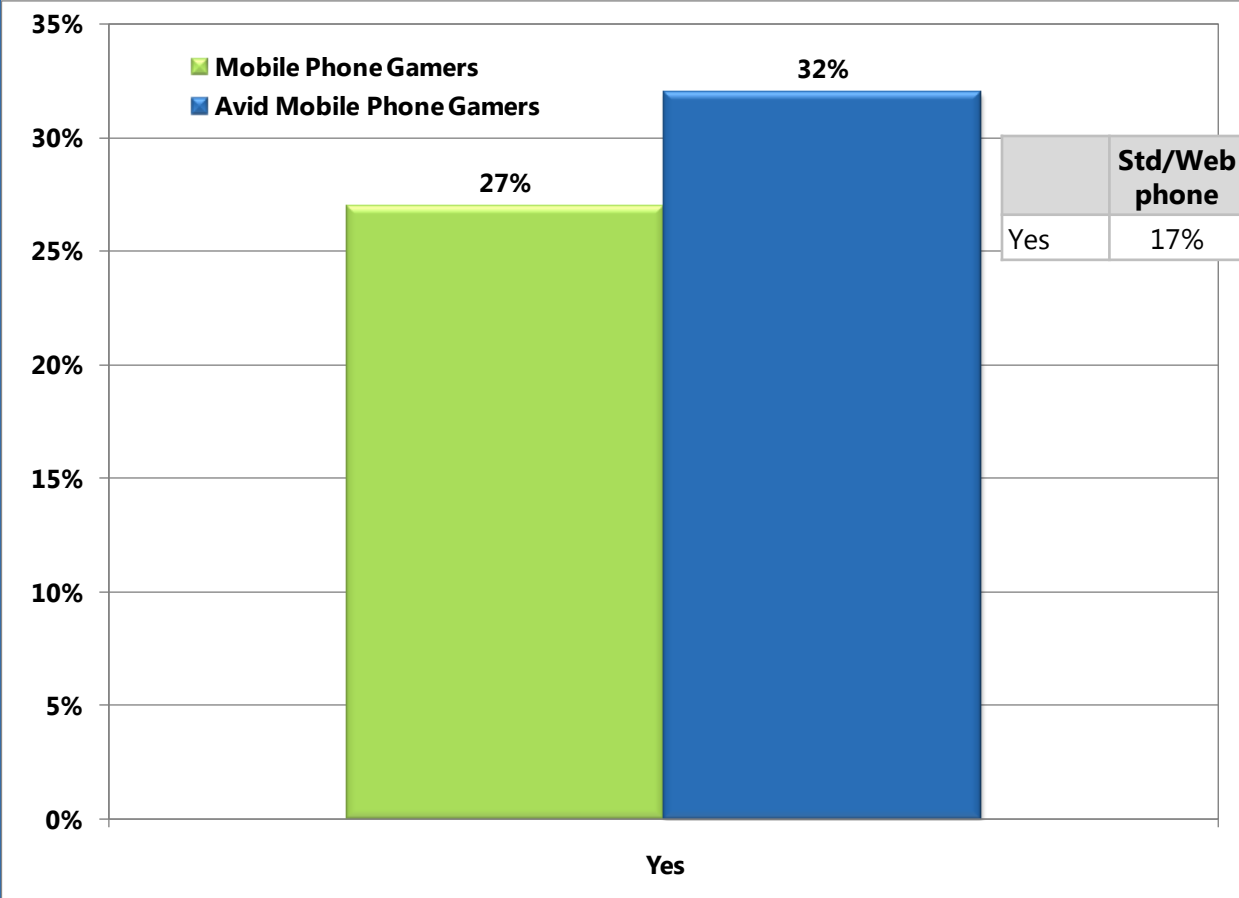
	Std/Web phone	Smart phone	US	UK
Yes	34%	49%	44%	42%

Q15 In the past year, have you upgraded a free game trial or free game app on your mobile phone to a paid version?

CONTENT PURCHASE (POWER-UPS, NEW LEVELS/MODES)

Mobile Phone Game
Purchase Behavior

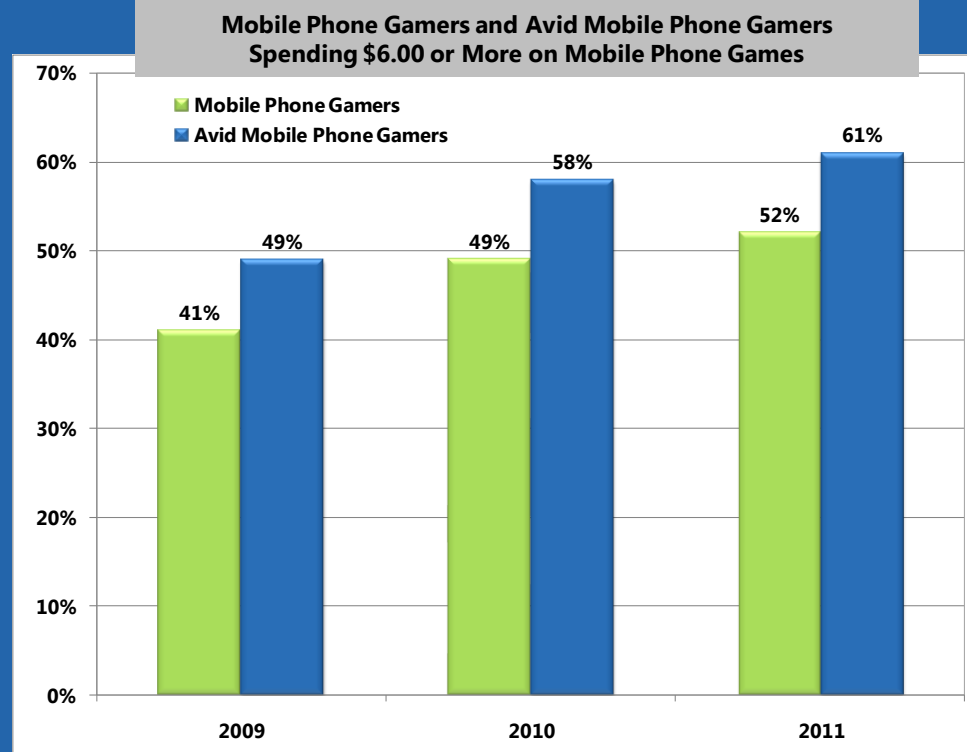
- 27% of the mobile phone gamers and 32% of the avid mobile phone gamers purchased content for a mobile phone game they originally obtained for free.
- One-third (34%) of smartphone owners purchased content for a mobile phone game they originally obtained for free.



	Std/Web phone	Smart phone	US	UK
Yes	17%	34%	29%	23%

Q16 In the past year, have you purchased any content (power-ups, new levels/modes, etc.) for a mobile phone game that you originally obtained for free?

AMOUNT SPENT AND PLAN TO SPEND ON MOBILE PHONE GAMES (\$6.00 +)



- There is a positive trend upwards with respect to the number of mobile phone gamers who have spent or plan to spend at least \$6.00 per year on games for their mobile phone.
 - In 2009, 41% of the mobile phone gamers and 49% of the avid mobile phone gamers spent at least \$6.00 on mobile phone games. This increased to 49% and 58% respectively in 2010 and is projected to jump to 52% and 61% this year.

	Std/Web phone	Smart phone	US	UK
2009	34%	47%	47%	36%
2010	39%	56%	51%	47%
2011	42%	61%	55%	50%

- Between 2009 and 2010, the number of smartphone owners spending \$6.00 or more on mobile phone games increased sharply. This trend is also evident among mobile phone gamers in the UK.

Q17 How much did you spend on games for your mobile phone in 2009 and 2010? Q19 How much do you anticipate spending in 2011?

AMOUNT SPENT AND PLAN TO SPEND ON MOBILE PHONE GAMES

- The average amount spent on mobile phone games from 2009 to 2010 increased among both mobile phone gamers and avid mobile phone gamers, while the anticipated spending in 2011 indicates a slight increase.
- Smartphone owners spent almost \$10.00 more on mobile phone games in 2010 as those who own a standard or web-enabled phone (\$25.57 vs. \$15.70).
- Those in the US spend significantly more on mobile phone games than those in the UK.

	Mobile phone gamers			Avid mobile phone gamers			Std/Web phone			Smart phone			US			UK		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
Avg. \$	\$21.15	\$22.36	\$23.22	\$22.65	\$24.35	\$25.27	\$15.18	\$15.70	\$15.70	\$24.40	\$25.57	\$27.04	\$23.70	\$25.25	\$25.94	\$16.73	\$17.85	\$18.82
\$1 - \$5	21%	20%	18%	18%	17%	16%	30%	24%	24%	17%	19%	15%	19%	20%	17%	26%	21%	20%
\$6 - \$10	22%	21%	21%	20%	20%	19%	22%	28%	28%	21%	17%	18%	22%	19%	20%	20%	24%	23%
\$11 - \$15	15%	16%	16%	16%	15%	17%	18%	18%	19%	14%	15%	15%	15%	16%	15%	15%	15%	18%
\$16 - \$25	20%	20%	17%	22%	21%	17%	16%	19%	16%	22%	20%	18%	17%	18%	15%	24%	23%	20%
\$26 - \$50	11%	10%	15%	11%	12%	16%	10%	6%	10%	11%	12%	17%	11%	10%	17%	11%	11%	11%
>\$50	11%	13%	13%	13%	15%	15%	4%	5%	4%	15%	17%	17%	15%	18%	17%	4%	6%	7%

Q17 How much did you spend on games for your mobile phone in 2009 and 2010? Q19 How many do you anticipate spending in 2011?



Key Takeaways

KEY TAKEAWAYS

Key Takeaways

- Half of those who own a mobile phone have played a game on their mobile phone. Mobile phone owners in the UK are more likely to play games on their mobile phone than those in the US (73% vs.44%).
- The majority (61%) of those playing games on their mobile phone own a smartphone.
- Three-fourths of those who play mobile phone games are avid mobile phone gamers who played a game on their mobile phone in the past week. One-fourth are mobile phone gamers who have played a game on their mobile phone in the past month.
- The average age of a mobile phone gamer is 39.3 years, while avid mobile phone gamers are slightly younger at 38.0 years.
- 83% of those owning a smartphone played a mobile phone game in the past week, and therefore are classified as avid mobile phone gamers.
- The frequency of mobile phone game play has increased over the past two years. 84% of mobile phone gamers and 97% of avid mobile phone gamers currently play games on their mobile phone at least once a week, compared to only 40% in 2009.
- Daily mobile phone game play has more than doubled in the past two years, with 35% of mobile phone gamers and 47% of avid mobile phone gamers playing daily, compared to 13% in 2009.
- The expanded adoption of smartphones has also influenced the increased frequency of mobile phone game play, with 92% of smartphone owners playing mobile phone games weekly and 45% playing daily.

KEY TAKEAWAYS

Key Takeaways

- Mobile phone game play accounts for one-fourth of a mobile phone gamer's phone usage (excluding calls).
- 59% of the avid mobile phone gamers said their mobile phone game play has increased over the past year.
- 87% of avid mobile phone gamers Agree that mobile phone gaming has become a regular part of their weekly activities, while 72% Agree that mobile phone gaming has become a regular part of their daily activities.
- In 2009, 53% of mobile phone gamers said they play games most often on their computer, while only 17% said they play most often on their mobile phone. Currently, half of the avid mobile phone gamers play most often on their mobile phone.
- More than half of the avid mobile phone gamers play social networking games on their phone, with more than three-fourths playing at least once a week, and 44% playing daily.
- Smartphone owners purchased almost twice as many games for their mobile phones in 2010 as those who own a standard or web-enabled phone (5.4 vs. 2.9).
- Smartphone owners spent almost \$10.00 more on mobile phone games in 2010 as those who own a standard or web-enabled phone (\$25.57 vs. \$15.70).
- Half of the avid mobile phone gamers upgraded a free game trial or free game app to a paid version in the past year, while one-third purchased content for a mobile phone game they originally obtained for free.



Research Methodology

This international research was conducted by Information Solutions Group (ISG; www.infosolutionsgroup.com) exclusively for PopCap Games. The results are based on 2,425 online surveys completed by members of the world's largest online ePanel (Toluna) in the United States and United Kingdom between January 25 and January 31, 2011.

To qualify for participation in the survey, individuals must own and use a mobile phone. Among these mobile phone owners, 814 were identified as mobile phone gamers (those who played a game on his/her mobile phone in the past month). In addition, 597 of the mobile phone gamers were identified as *avid* mobile phone gamers (those who played a game on his/her mobile phone within the past week). Finally, 495 of the mobile phone gamers were also identified as smartphone owners. In theory, in 19 cases out of 20, the results will differ by no more than 2.4 percentage points from what would have been obtained by seeking out and polling all US and UK mobile phone owners age 18 and over. Smaller subgroups reflect larger margins of sampling error. Other sources of error, such as variations in the order of questions or the wording within the questionnaire, may also contribute to different results.



About ISG

Information Solutions Group (ISG) specializes in providing its clients with full-service market research programs designed to enable businesses to make sound strategic decisions. Its services include a wide range of custom research and analysis solutions for both consumer and business-to-business product and service companies. ISG's services include market segmentation, customer satisfaction measurement, product development, public relations, competitive performance and pricing research. ISG uses online, telephone and mail survey methodologies and provides design, implementation and analysis services in the North American, EMEA and Asia Pacific markets. Examples of the type of information an ISG program can deliver can be obtained at www.infosolutionsgroup.com



About Toluna/Greenfield

Toluna Online is the world's leading independent online panel and survey technology provider to the global market research industry. The company provides online sample and survey technology solutions to the world's leading market research agencies, media agencies and corporations, from its 17 offices in Europe, North America and Asia Pacific. In 2009, Toluna welcomed Greenfield Online and Ciao Surveys into the group – complementing its traditional strengths in Europe and increasing its online sample and delivery capacity in the US, Canada and Asia Pacific. Additional information on Toluna can be obtained at <http://www.toluna-group.com/en/>



Segmentation Analysis Appendix



Segmentation Report

Q4: When was the last time you played a game on your mobile phone?

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone owners (2425)	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
What country do you live in?				
United States	72%	60%	61%	
United Kingdom	28%	40%	39%	
What type of mobile phone do you currently own and use?				
Standard mobile phone – limited to voice and texting	52%	17%	12%	
Web-enabled mobile phone – voice, texting and Internet access	21%	22%	19%	
Smartphone, e.g., iPhone, Android, Windows Phone 7, BlackBerry or PDA	27%	61%	69%	
Have you ever played a game on a mobile phone?				
Yes <QUALIFIED>	52%	100%	100%	
No <NOT QUALIFIED>	48%	0%	0%	
When was the last time you played a game on your mobile phone?				
Within the past week <QUALIFIED>	48%	73%	100%	
Within the past month <QUALIFIED>	18%	27%	0%	
Within the past 2 to 3 months <NOT QUALIFIED>	10%	0%	0%	
Within the past 4 to 6 months <NOT QUALIFIED>	5%	0%	0%	
Within the past 7 to 12 months <NOT QUALIFIED>	6%	0%	0%	
More than a year ago <NOT QUALIFIED>	13%	0%	0%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
How often do you typically play games on your mobile phone?			
Daily	35%	47%	13%
2 - 3 times a week	36%	42%	18%
Once a week	13%	8%	9%
2 - 3 times a month	10%	2%	11%
Once a month	3%	1%	8%
Less than once a month	2%	1%	41%
On average, how many hours per week do you play games on your mobile phone?			
Less than 30 minutes	29%	22%	71%
30 - 60 minutes	39%	39%	
1 - 2 hours	19%	21%	17%
3 - 4 hours	9%	12%	7%
More than 4 hours	5%	6%	5%
How long have you been playing games on a mobile phone?			
Less than 1 month	4%	5%	6%
1 - 6 months	14%	14%	10%
7 - 12 months	16%	17%	6%
1 - 2 years	25%	25%	23%
3 - 5 years	26%	26%	34%
6 - 10 years	9%	9%	14%
More than 10 years	6%	6%	7%

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Excluding making and receiving calls, what percent of the time do you spend playing games when using your mobile phone?			
Average percent:	23%	27%	
1% - 25%	67%	60%	
26% - 50%	25%	31%	
51% - 75%	6%	8%	
76% - 100%	2%	2%	
In terms of time spent, how has your mobile phone game play activity changed over the past year?			
My game play on my mobile phone has increased <CONTINUE>	50%	59%	20%
My game play on my mobile phone has decreased <SKIP TO Q11>	10%	7%	28%
My game play on my mobile phone is about the same <SKIP TO Q11>	40%	35%	52%
What has influenced the increase in your game play on your mobile phone?			
More free games available	79%	80%	60%
New phone has more memory and/or better game play capabilities	59%	61%	59%
The games are a good value for the price	36%	39%	21%
The graphics have improved	48%	50%	36%
The number of game titles for mobile phones has increased	38%	40%	36%
The quality of game play has improved	35%	38%	34%

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Mobile phone gaming has become a regular part of my <i>weekly</i> activities	2.98	3.19	
Strongly agree	26%	35%	
Agree	52%	52%	
Disagree	17%	11%	
Strongly disagree	6%	2%	
Mobile phone gaming has become a regular part of my <i>daily</i> activities	2.69	2.94	
Strongly agree	20%	26%	
Agree	39%	46%	
Disagree	31%	23%	
Strongly disagree	10%	4%	
Which of the following benefits have you experienced as a result of playing games on your mobile phone?			
Accomplishment/competitive spirit	34%	36%	10%
Distraction from the issues of daily life	57%	55%	52%
Improved hand-eye coordination/manual dexterity	33%	35%	11%
Improved identification and computation skills	18%	21%	3%
Improved mood/feeling of well being	33%	37%	12%
Increased confidence building	15%	18%	1%
Increased productivity	11%	13%	2%
More energetic	17%	21%	3%
Relaxed and less stressed out	56%	56%	40%
Relief from chronic pain/fatigue	8%	9%	2%
Relief from boredom/just passing the time	56%	53%	8%
Sharper and more mentally focused	19%	20%	9%

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Which device do you play games on most often?			
Mobile phone	44%	51%	17%
Desktop/laptop computer (PC or Mac)	30%	24%	53%
Game console	21%	20%	23%
Handheld game player	4%	4%	7%
iPad or other tablet device	1%	1%	N/A
In the past two years how many games have you purchased for your mobile phone?			
Average number of mobile phone games purchased in 2009	4.3	4.6	
None – I did not purchase any games for my mobile phone in 2009	48%	41%	
1	8%	7%	
2	13%	13%	
3	9%	11%	
4	8%	10%	
5	3%	4%	
More than 5	12%	14%	
Average number of mobile phone games purchased in 2010	4.6	4.9	
None – I did not purchase any games for my mobile phone in 2010	39%	31%	
1	13%	12%	
2	12%	13%	
3	10%	11%	
4	6%	7%	
5	5%	6%	
More than 5	17%	21%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
How many games do you anticipate purchasing for your mobile phone in 2011?			
Average number of mobile phone games plan to purchase in 2011	4.2	4.6	
None – I do not plan to purchase any games for my mobile phone in 2011	35%	29%	
1	14%	11%	
2	14%	15%	
3	11%	12%	
4	7%	8%	
5	4%	5%	
More than 5	15%	19%	
Percent purchasing one or more mobile phone games in:			
2009	52%	59%	
2010	61%	69%	
2011	65%	71%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Approximately how much did you spend on games for your mobile phone in 2009 and 2010			
Average amount (\$) spent on mobile phone games in 2009	\$21.15	\$22.65	
Nothing – I did not purchase any games or game content for my mobile phone in 2009	47%	41%	
\$1 - \$5	11%	11%	
\$6 - \$10	11%	12%	
\$11 - \$15	8%	9%	
\$16 - \$25	10%	13%	
\$26 - \$50	6%	7%	
More than \$50	6%	8%	
Average amount (\$) spent on mobile phone games in 2010			
Nothing – I did not purchase any games or game content for my mobile phone in 2010	\$22.36	\$24.35	
\$1 - \$5	38%	31%	
\$6 - \$10	13%	12%	
\$11 - \$15	13%	14%	
\$16 - \$25	10%	10%	
\$26 - \$50	12%	15%	
More than \$50	6%	8%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
How much do you anticipate spending on games for your mobile phone in 2011?			
Average amount (\$) plan to spend on mobile phone games in 2011	\$23.22	\$25.27	
Nothing – I don't plan to purchase any games or game content for my mobile phone in 2011	35%	28%	
\$1 - \$5	12%	11%	
\$6 - \$10	14%	14%	
\$11 - \$15	10%	12%	
\$16 - \$25	11%	12%	
\$26 - \$50	9%	12%	
More than \$50	8%	11%	
Percent spending \$6.00 or more on mobile phone games in:			
2009	41%	49%	
2010	49%	58%	
2011	52%	61%	
In the past year, have you upgraded a free game trial or free game app on your mobile phone to a paid version?			
Yes	43%	50%	
No	57%	50%	
In the past year, have you purchased any content (power-ups, new levels/modes, etc.) for a mobile phone game that you originally obtained for free?			
Yes	27%	32%	
No	73%	68%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
In the past month, have you accessed Facebook, MySpace or Bebo from your mobile phone?			
Yes	63%	70%	
No <SKIP TO Q22>	37%	30%	
Played a social networking game on mobile phone			
Yes	47%	53%	
No	53%	47%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are a sub-set of those who have played a social networking game on a mobile phone.</i>			
Daily	40%	44%	
2 - 3 times a week	25%	26%	
Once a week	14%	13%	
2 - 3 times a month	8%	7%	
Once a month or less	13%	11%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are presented as a percentage of the total of each specified segment, e.g., all mobile phone gamers, all avid mobile phone gamers, all smartphone owners, etc.</i>			
Daily	19%	23%	
2 - 3 times a week	12%	14%	
Once a week	6%	7%	
2 - 3 times a month	4%	4%	
Once a month or less	7%	6%	

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Have you ever recommended a mobile phone game to someone else?			
Yes	57%	64%	
No <SKIP TO Q24>	43%	36%	
Which of the following influenced you when you recommended a mobile phone game to others?			
Comes from a trusted brand	33%	35%	
Controls are simple and easy to use	38%	38%	
Easy to learn	49%	52%	
Fun to play	86%	86%	
Good value for the price	40%	43%	
Has great graphics and sound	36%	38%	
Is challenging	45%	47%	
Lots of levels or modes	41%	42%	
Provides a quick distraction	30%	31%	
Provides an escape	31%	32%	
Unique or unusual	19%	21%	
Gender:			
Male	55%	55%	51%
Female	45%	45%	49%

Q4: RECENCY OF MOBILE PHONE GAME PLAY (TYPE OF MOBILE PHONE GAMER)

	Mobile phone gamers (814)	Avid mobile phone gamers (597)	2009 AT&T (659)
Age:			
18 - 24	16%	17%	
25 - 34	28%	31%	
35 - 44	19%	18%	
45 - 54	21%	20%	
55 - 64	12%	10%	
65+	4%	3%	
Annual household income before taxes:			
Less than \$15,000	7%	7%	3%
\$15,000 - \$24,999	11%	11%	5%
\$25,000 - \$34,999	11%	12%	23%
\$35,000 - \$49,999	20%	18%	
\$50,000 - \$74,999	22%	23%	24%
\$75,000 - \$99,999	11%	11%	15%
\$100,000 - \$149,999	9%	9%	16%
\$150,000 or more	4%	5%	13%
Prefer not to answer	5%	4%	N/A



Segmentation Report

Q2: What type of mobile phone do you currently own and use?

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
What country do you live in?			
United States	56%	62%	
United Kingdom	44%	38%	
What type of mobile phone do you currently own and use?			
Standard mobile phone – limited to voice and texting	43%	0%	
Web-enabled mobile phone – voice, texting and Internet access	57%	0%	
Smartphone, e.g., iPhone, Android, Windows Phone 7, BlackBerry or PDA	0%	100%	
Have you ever played a game on a mobile phone?			
Yes <QUALIFIED>	100%	100%	
No <NOT QUALIFIED>	0%	0%	
When was the last time you played a game on your mobile phone?			
Within the past week <QUALIFIED>	58%	83%	
Within the past month <QUALIFIED>	42%	17%	
Within the past 2 to 3 months <NOT QUALIFIED>	0%	0%	
Within the past 4 to 6 months <NOT QUALIFIED>	0%	0%	
Within the past 7 to 12 months <NOT QUALIFIED>	0%	0%	
More than a year ago <NOT QUALIFIED>	0%	0%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
How often do you typically play games on your mobile phone?			
Daily	20%	45%	13%
2 - 3 times a week	35%	37%	18%
Once a week	18%	10%	9%
2 - 3 times a month	17%	6%	11%
Once a month	6%	2%	8%
Less than once a month	3%	1%	41%
On average, how many hours per week do you play games on your mobile phone?			
Less than 30 minutes	37%	23%	71%
30 – 60 minutes	38%	39%	
1 - 2 hours	18%	19%	17%
3 - 4 hours	5%	12%	7%
More than 4 hours	2%	6%	5%
How long have you been playing games on a mobile phone?			
Less than 1 month	3%	4%	6%
1 - 6 months	10%	17%	10%
7 - 12 months	15%	17%	6%
1 - 2 years	25%	25%	23%
3 - 5 years	30%	23%	34%
6 - 10 years	10%	9%	14%
More than 10 years	7%	5%	7%

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Excluding making and receiving calls, what percent of the time do you spend playing games when using your mobile phone?			
Average percent:	20%	25%	
1% - 25%	73%	63%	
26% - 50%	21%	28%	
51% - 75%	4%	7%	
76% - 100%	2%	2%	
In terms of time spent, how has your mobile phone game play activity changed over the past year?			
My game play on my mobile phone has increased <CONTINUE>	29%	63%	20%
My game play on my mobile phone has decreased <SKIP TO Q11>	17%	6%	28%
My game play on my mobile phone is about the same <SKIP TO Q11>	55%	31%	52%
What has influenced the increase in your game play on your mobile phone?			
More free games available	75%	81%	60%
New phone has more memory and/or better game play capabilities	46%	63%	59%
The games are a good value for the price	30%	38%	21%
The graphics have improved	27%	54%	36%
The number of game titles for mobile phones has increased	32%	40%	36%
The quality of game play has improved	20%	40%	34%

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Mobile phone gaming has become a regular part of my <i>weekly</i> activities	2.73	3.14	
Strongly agree	15%	33%	
Agree	53%	51%	
Disagree	23%	13%	
Strongly disagree	9%	3%	
Mobile phone gaming has become a regular part of my <i>daily</i> activities	2.41	2.87	
Strongly agree	11%	26%	
Agree	36%	42%	
Disagree	38%	27%	
Strongly disagree	16%	6%	
Which of the following benefits have you experienced as a result of playing games on your mobile phone?			
Accomplishment/competitive spirit	34%	33%	10%
Distraction from the issues of daily life	60%	55%	52%
Improved hand-eye coordination/manual dexterity	33%	33%	11%
Improved identification and computation skills	17%	20%	3%
Improved mood/feeling of well being	27%	36%	12%
Increased confidence building	13%	16%	1%
Increased productivity	7%	13%	2%
More energetic	11%	21%	3%
Relaxed and less stressed out	55%	56%	40%
Relief from chronic pain/fatigue	7%	8%	2%
Relief from boredom/just passing the time	61%	52%	8%
Sharper and more mentally focused	19%	19%	9%

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Which device do you play games on most often?			
Mobile phone	28%	55%	17%
Desktop/laptop computer (PC or Mac)	43%	22%	53%
Game console	22%	20%	23%
Handheld game player	7%	3%	7%
iPad or other tablet device	0%	1%	N/A
In the past two years how many games have you purchased for your mobile phone?			
Average number of mobile phone games purchased in 2009	3.1	4.9	
None – I did not purchase any games for my mobile phone in 2009	54%	44%	
1	12%	5%	
2	13%	12%	
3	8%	10%	
4	5%	9%	
5	3%	3%	
More than 5	4%	16%	
Average number of mobile phone games purchased in 2010	2.9	5.4	
None – I did not purchase any games for my mobile phone in 2010	49%	32%	
1	16%	10%	
2	13%	11%	
3	10%	10%	
4	5%	6%	
5	2%	6%	
More than 5	5%	25%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
How many games do you anticipate purchasing for your mobile phone in 2011?			
Average number of mobile phone games plan to purchase in 2011	2.8	4.9	
None – I do not plan to purchase any games for my mobile phone in 2011	46%	28%	
1	18%	11%	
2	16%	13%	
3	8%	13%	
4	5%	8%	
5	2%	6%	
More than 5	4%	22%	
Percent purchasing one or more mobile phone games in:			
2009	46%	56%	
2010	51%	68%	
2011	54%	72%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Approximately how much did you spend on games for your mobile phone in 2009 and 2010			
Average amount (\$) spent on mobile phone games in 2009	\$15.18	\$24.40	
Nothing – I did not purchase any games or game content for my mobile phone in 2009	52%	44%	
\$1 - \$5	14%	9%	
\$6 - \$10	11%	12%	
\$11 - \$15	8%	8%	
\$16 - \$25	8%	12%	
\$26 - \$50	5%	6%	
More than \$50	2%	9%	
Average amount (\$) spent on mobile phone games in 2010			
Nothing – I did not purchase any games or game content for my mobile phone in 2010	\$15.70	\$25.57	
\$1 - \$5	49%	31%	
\$6 - \$10	12%	13%	
\$11 - \$15	14%	12%	
\$16 - \$25	9%	10%	
\$26 - \$50	10%	14%	
More than \$50	3%	8%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
How much do you anticipate spending on games for your mobile phone in 2011?			
Average amount (\$) plan to spend on mobile phone games in 2011	\$15.70	\$27.04	
Nothing – I don't plan to purchase any games or game content for my mobile phone in 2011	44%	29%	
\$1 - \$5	13%	11%	
\$6 - \$10	15%	13%	
\$11 - \$15	10%	11%	
\$16 - \$25	9%	13%	
\$26 - \$50	5%	12%	
More than \$50	3%	12%	
Percent spending \$6.00 or more on mobile phone games in:			
2009	34%	47%	
2010	39%	56%	
2011	42%	61%	
In the past year, have you upgraded a free game trial or free game app on your mobile phone to a paid version?			
Yes	34%	49%	
No	66%	51%	
In the past year, have you purchased any content (power-ups, new levels/modes, etc.) for a mobile phone game that you originally obtained for free?			
Yes	17%	34%	
No	83%	66%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
In the past month, have you accessed Facebook, MySpace or Bebo from your mobile phone?			
Yes	40%	78%	
No <SKIP TO Q22>	60%	22%	
Played a social networking game on mobile phone			
Yes	31%	57%	
No	69%	43%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are a sub-set of those who have played a social networking game on a mobile phone.</i>			
Daily	33%	42%	
2 - 3 times a week	19%	27%	
Once a week	15%	13%	
2 - 3 times a month	10%	7%	
Once a month or less	22%	10%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are presented as a percentage of the total of each specified segment, e.g., all mobile phone gamers, all avid mobile phone gamers, all smartphone owners, etc.</i>			
Daily	10%	24%	
2 - 3 times a week	6%	15%	
Once a week	5%	7%	
2 - 3 times a month	3%	4%	
Once a month or less	7%	6%	

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Have you ever recommended a mobile phone game to someone else?			
Yes	48%	63%	
No <SKIP TO Q24>	52%	37%	
Which of the following influenced you when you recommended a mobile phone game to others?			
Comes from a trusted brand	29%	36%	
Controls are simple and easy to use	40%	37%	
Easy to learn	45%	51%	
Fun to play	90%	84%	
Good value for the price	32%	44%	
Has great graphics and sound	29%	39%	
Is challenging	45%	45%	
Lots of levels or modes	41%	41%	
Provides a quick distraction	32%	30%	
Provides an escape	32%	31%	
Unique or unusual	15%	21%	
Gender:			
Male	52%	56%	51%
Female	48%	44%	49%

Q2: TYPE OF PHONE USED

	Std/web phone owners (319)	Smartphone owners (495)	2009 AT&T (659)
Age:			
18 - 24	14%	17%	
25 - 34	20%	34%	
35 - 44	17%	20%	
45 - 54	28%	17%	
55 - 64	17%	9%	
65+	5%	3%	
Annual household income before taxes:			
Less than \$15,000	11%	4%	3%
\$15,000 - \$24,999	13%	9%	5%
\$25,000 - \$34,999	12%	11%	23%
\$35,000 - \$49,999	22%	18%	
\$50,000 - \$74,999	23%	22%	24%
\$75,000 - \$99,999	7%	14%	15%
\$100,000 - \$149,999	4%	12%	16%
\$150,000 or more	2%	6%	13%
Prefer not to answer	7%	4%	N/A



Segmentation Report

Q1: What country do you live in?

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
What country do you live in?						
United States	60%	100%	100%	0%	0%	
United Kingdom	40%	0%	0%	100%	100%	
What type of mobile phone do you currently own and use?						
Standard mobile phone – limited to voice and texting	17%	34%	13%	26%	10%	
Web-enabled mobile phone – voice, texting and Internet access	22%	28%	15%	36%	24%	
Smartphone, e.g., iPhone, Android, Windows Phone 7, BlackBerry or PDA	61%	38%	72%	38%	66%	
Have you ever played a game on a mobile phone?						
Yes <QUALIFIED>	100%	100%	100%	100%	100%	
No <NOT QUALIFIED>	0%	0%	0%	0%	0%	
When was the last time you played a game on your mobile phone?						
Within the past week <QUALIFIED>	73%	0%	100%	0%	100%	
Within the past month <QUALIFIED>	27%	100%	0%	100%	0%	
Within the past 2 to 3 months <NOT QUALIFIED>	0%	0%	0%	0%	0%	
Within the past 4 to 6 months <NOT QUALIFIED>	0%	0%	0%	0%	0%	
Within the past 7 to 12 months <NOT QUALIFIED>	0%	0%	0%	0%	0%	
More than a year ago <NOT QUALIFIED>	0%	0%	0%	0%	0%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
How often do you typically play games on your mobile phone?						
Daily	35%	0%	48%	2%	46%	13%
2 - 3 times a week	36%	25%	42%	14%	42%	18%
Once a week	13%	30%	7%	28%	8%	9%
2 - 3 times a month	10%	31%	1%	40%	2%	11%
Once a month	3%	8%	1%	14%	1%	8%
Less than once a month	2%	7%	0%	3%	1%	41%
On average, how many hours per week do you play games on your mobile phone?						
Less than 30 minutes	29%	40%	21%	55%	23%	71%
30 – 60 minutes	39%	40%	37%	34%	41%	
1 - 2 hours	19%	14%	23%	9%	19%	17%
3 - 4 hours	9%	4%	12%	1%	10%	7%
More than 4 hours	5%	1%	6%	0%	6%	5%
How long have you been playing games on a mobile phone?						
Less than 1 month	4%	1%	4%	2%	5%	6%
1 - 6 months	14%	17%	13%	17%	14%	10%
7 - 12 months	16%	16%	19%	15%	13%	6%
1 - 2 years	25%	29%	25%	20%	25%	23%
3 - 5 years	26%	29%	25%	23%	28%	34%
6 - 10 years	9%	6%	8%	16%	9%	14%
More than 10 years	6%	3%	6%	8%	5%	7%

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Excluding making and receiving calls, what percent of the time do you spend playing games when using your mobile phone?						
Average percent:	23%	13%	27%	14%	27%	
1% - 25%	23%	13%	27%	14%	27%	
26% - 50%	25%	8%	28%	14%	25%	
51% - 75%	6%	1%	8%	2%	6%	
76% - 100%	2%	1%	2%	0%	2%	
In terms of time spent, how has your mobile phone game play activity changed over the past year?						
My game play on my mobile phone has increased <CONTINUE>	50%	26%	57%	22%	62%	20%
My game play on my mobile phone has decreased <SKIP TO Q11>	10%	20%	8%	19%	5%	28%
My game play on my mobile phone is about the same <SKIP TO Q11>	40%	55%	35%	59%	34%	52%
What has influenced the increase in your game play on your mobile phone?						
More free games available	79%	81%	85%	71%	73%	60%
New phone has more memory and/or better game play capabilities	59%	42%	61%	52%	62%	59%
The games are a good value for the price	36%	19%	44%	14%	32%	21%
The graphics have improved	48%	29%	51%	43%	48%	36%
The number of game titles for mobile phones has increased	38%	23%	42%	29%	38%	36%
The quality of game play has improved	35%	16%	38%	19%	38%	34%

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Mobile phone gaming has become a regular part of my <i>weekly</i> activities	2.98	2.52	3.27	2.29	3.07	
Strongly agree	26%	4%	40%	2%	26%	
Agree	52%	55%	49%	44%	58%	
Disagree	17%	31%	9%	35%	13%	
Strongly disagree	6%	11%	2%	19%	3%	
Mobile phone gaming has become a regular part of my <i>daily</i> activities	2.69	2.07	3.02	1.91	2.82	
Strongly agree	20%	2%	30%	2%	20%	
Agree	39%	24%	45%	17%	48%	
Disagree	31%	55%	21%	51%	27%	
Strongly disagree	10%	20%	4%	30%	5%	
Which of the following benefits have you experienced as a result of playing games on your mobile phone?						
Accomplishment/competitive spirit	34%	21%	35%	33%	38%	10%
Distraction from the issues of daily life	57%	64%	57%	57%	51%	52%
Improved hand-eye coordination/manual dexterity	33%	25%	38%	32%	31%	11%
Improved identification and computation skills	18%	8%	23%	17%	17%	3%
Improved mood/feeling of well being	33%	27%	39%	15%	32%	12%
Increased confidence building	15%	6%	19%	7%	16%	1%
Increased productivity	11%	3%	15%	3%	10%	2%
More energetic	17%	7%	26%	5%	14%	3%
Relaxed and less stressed out	56%	56%	60%	49%	50%	40%
Relief from chronic pain/fatigue	8%	1%	11%	5%	7%	2%
Relief from boredom/just passing the time	56%	66%	53%	56%	53%	8%
Sharper and more mentally focused	19%	19%	24%	15%	13%	9%

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Which device do you play games on most often?						
Mobile phone	44%	26%	51%	24%	51%	17%
Desktop/laptop computer (PC or Mac)	30%	46%	27%	47%	20%	53%
Game console	21%	23%	19%	21%	22%	23%
Handheld game player	4%	3%	2%	7%	6%	7%
iPad or other tablet device	1%	1%	1%	1%	1%	N/A
In the past two years how many games have you purchased for your mobile phone?						
Average number of mobile phone games purchased in 2009	4.3	2.8	4.5	3.2	4.7	
None – I did not purchase any games for my mobile phone in 2009	48%	65%	38%	66%	47%	
1	8%	11%	7%	9%	7%	
2	13%	8%	13%	14%	13%	
3	9%	8%	12%	3%	8%	
4	8%	3%	12%	2%	6%	
5	3%	2%	4%	1%	4%	
More than 5	12%	2%	14%	5%	15%	
Average number of mobile phone games purchased in 2010	4.6	3.1	4.8	3.5	5.0	
None – I did not purchase any games for my mobile phone in 2010	39%	57%	32%	60%	31%	
1	13%	17%	11%	15%	13%	
2	12%	7%	13%	10%	13%	
3	10%	7%	12%	5%	9%	
4	6%	4%	7%	1%	6%	
5	5%	3%	6%	0%	6%	
More than 5	17%	5%	20%	8%	22%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
How many games do you anticipate purchasing for your mobile phone in 2011?						
Average number of mobile phone games plan to purchase in 2011	4.2	2.6	4.6	2.7	4.5	
None – I do not plan to purchase any games for my mobile phone in 2011	35%	52%	28%	56%	30%	
1	14%	20%	13%	20%	9%	
2	14%	11%	13%	11%	18%	
3	11%	9%	13%	5%	12%	
4	7%	2%	8%	2%	9%	
5	4%	2%	5%	0%	5%	
More than 5	15%	3%	20%	5%	18%	
Percent purchasing one or more mobile phone games in:						
2009	52%	35%	62%	34%	53%	
2010	61%	43%	68%	40%	69%	
2011	65%	48%	72%	44%	70%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Approximately how much did you spend on games for your mobile phone in 2009 and 2010						
Average amount (\$) spent on mobile phone games in 2009	\$21.15	\$15.29	\$25.36	\$13.38	\$17.65	
Nothing – I did not purchase any games or game content for my mobile phone in 2009	47%	63%	38%	65%	47%	
\$1 - \$5	11%	12%	10%	15%	12%	
\$6 - \$10	11%	12%	13%	7%	11%	
\$11 - \$15	8%	4%	10%	5%	8%	
\$16 - \$25	10%	3%	12%	3%	15%	
\$26 - \$50	6%	3%	7%	4%	6%	
More than \$50	6%	2%	11%	1%	3%	
Average amount (\$) spent on mobile phone games in 2010	\$22.36	\$13.63	\$27.73	\$12.53	\$19.04	
Nothing – I did not purchase any games or game content for my mobile phone in 2010	38%	55%	31%	63%	31%	
\$1 - \$5	13%	14%	12%	15%	12%	
\$6 - \$10	13%	9%	13%	13%	15%	
\$11 - \$15	10%	12%	10%	3%	12%	
\$16 - \$25	12%	7%	12%	2%	19%	
\$26 - \$50	6%	0%	8%	4%	8%	
More than \$50	8%	2%	15%	1%	4%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
How much do you anticipate spending on games for your mobile phone in 2011?						
Average amount (\$) plan to spend on mobile phone games in 2011	\$23.22	\$14.58	\$28.60	\$14.80	\$19.81	
Nothing – I don't plan to purchase any games or game content for my mobile phone in 2011	35%	49%	27%	58%	30%	
\$1 - \$5	12%	13%	11%	15%	11%	
\$6 - \$10	14%	15%	13%	13%	15%	
\$11 - \$15	10%	7%	11%	5%	14%	
\$16 - \$25	11%	10%	10%	4%	16%	
\$26 - \$50	9%	4%	14%	2%	9%	
More than \$50	8%	2%	14%	3%	5%	
Percent spending \$6.00 or more on mobile phone games in:						
2009	41%	24%	53%	20%	43%	
2010	49%	30%	58%	23%	58%	
2011	52%	38%	62%	27%	59%	
In the past year, have you upgraded a free game trial or free game app on your mobile phone to a paid version?						
Yes	43%	22%	51%	25%	49%	
No	57%	78%	49%	75%	51%	
In the past year, have you purchased any content (power-ups, new levels/modes, etc.) for a mobile phone game that you originally obtained for free?						
Yes	27%	13%	35%	11%	28%	
No	73%	87%	65%	89%	72%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
In the past month, have you accessed Facebook, MySpace or Bebo from your mobile phone?						
Yes	63%	43%	73%	45%	66%	
No <SKIP TO Q22>	37%	57%	27%	55%	34%	
Played a social networking game on mobile phone						
Yes	47%	30%	56%	30%	48%	
No	53%	70%	44%	70%	52%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are a sub-set of those who have played a social networking game on a mobile phone.</i>						
Daily	40%	17%	45%	24%	42%	
2 - 3 times a week	25%	22%	27%	21%	23%	
Once a week	14%	17%	12%	14%	16%	
2 - 3 times a month	8%	8%	7%	21%	7%	
Once a month or less	13%	36%	9%	20%	12%	
How often do you play social networking games on your mobile phone? <i>Note: These figures are presented as a percentage of the total of each specified segment, e.g., all mobile phone gamers, all avid mobile phone gamers, all smartphone owners, etc.</i>						
Daily	19%	5%	25%	7%	20%	
2 - 3 times a week	12%	7%	15%	6%	11%	
Once a week	6%	5%	7%	4%	8%	
2 - 3 times a month	4%	2%	4%	6%	3%	
Once a month or less	7%	11%	6%	6%	6%	

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Have you ever recommended a mobile phone game to someone else?						
Yes	57%	40%	67%	39%	59%	
No <SKIP TO Q24>	43%	60%	33%	61%	41%	
Which of the following influenced you when you recommended a mobile phone game to others?						
Comes from a trusted brand	33%	19%	39%	32%	28%	
Controls are simple and easy to use	38%	38%	40%	30%	36%	
Easy to learn	49%	52%	55%	22%	45%	
Fun to play	86%	90%	86%	86%	85%	
Good value for the price	40%	29%	43%	24%	43%	
Has great graphics and sound	36%	23%	40%	32%	34%	
Is challenging	45%	29%	48%	51%	44%	
Lots of levels or modes	41%	33%	43%	41%	41%	
Provides a quick distraction	30%	27%	31%	24%	32%	
Provides an escape	31%	27%	35%	24%	28%	
Unique or unusual	19%	10%	20%	11%	22%	
Gender:						
Male	55%	55%	54%	51%	57%	51%
Female	45%	45%	46%	49%	43%	49%

Q1: COUNTRY

	US/UK (814)	US Mobile Phone Gamers (121)	US Avid Mobile Phone Gamers (365)	UK Mobile Phone Gamers (96)	UK Avid Mobile Phone Gamers (232)	2009 AT&T (659)
Age:						
18 - 24	16%	12%	19%	11%	16%	
25 - 34	28%	21%	29%	20%	34%	
35 - 44	19%	21%	15%	21%	24%	
45 - 54	21%	23%	22%	26%	17%	
55 - 64	12%	17%	12%	17%	7%	
65+	4%	7%	4%	5%	1%	
Annual household income before taxes:						
Less than \$15,000	7%	7%	8%	6%	5%	3%
\$15,000 - \$24,999	11%	10%	9%	10%	14%	5%
\$25,000 - \$34,999	11%	9%	12%	10%	12%	23%
\$35,000 - \$49,999	20%	20%	16%	28%	22%	
\$50,000 - \$74,999	22%	20%	24%	23%	22%	24%
\$75,000 - \$99,999	11%	14%	12%	7%	11%	15%
\$100,000 - \$149,999	9%	12%	12%	3%	6%	16%
\$150,000 or more	4%	2%	7%	1%	1%	13%
Prefer not to answer	5%	7%	2%	10%	6%	N/A



Segmentation Report

Q25: Respondent's Age

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
What country do you live in?				
United States	60%	59%	57%	68%
United Kingdom	40%	41%	43%	32%
What type of mobile phone do you currently own and use?				
Standard mobile phone – limited to voice and texting	17%	13%	20%	22%
Web-enabled mobile phone – voice, texting and Internet access	22%	18%	24%	31%
Smartphone, e.g., iPhone, Android, Windows Phone 7, BlackBerry or PDA	61%	70%	56%	46%
Have you ever played a game on a mobile phone?				
Yes <QUALIFIED>	100%	100%	100%	100%
No <NOT QUALIFIED>	0%	0%	0%	0%
When was the last time you played a game on your mobile phone?				
Within the past week <QUALIFIED>	73%	81%	70%	61%
Within the past month <QUALIFIED>	27%	19%	30%	39%
Within the past 2 to 3 months <NOT QUALIFIED>	0%	0%	0%	0%
Within the past 4 to 6 months <NOT QUALIFIED>	0%	0%	0%	0%
Within the past 7 to 12 months <NOT QUALIFIED>	0%	0%	0%	0%
More than a year ago <NOT QUALIFIED>	0%	0%	0%	0%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
How often do you typically play games on your mobile phone?				
Daily	35%	44%	30%	20%
2 - 3 times a week	36%	34%	39%	37%
Once a week	13%	11%	14%	17%
2 - 3 times a month	10%	7%	12%	15%
Once a month	3%	1%	4%	8%
Less than once a month	2%	2%	2%	2%
On average, how many hours per week do you play games on your mobile phone?				
Less than 30 minutes	29%	25%	30%	35%
30 – 60 minutes	39%	39%	39%	35%
1 - 2 hours	19%	19%	18%	20%
3 - 4 hours	9%	11%	9%	6%
More than 4 hours	5%	6%	4%	4%
How long have you been playing games on a mobile phone?				
Less than 1 month	4%	4%	4%	3%
1 - 6 months	14%	16%	10%	20%
7 - 12 months	16%	16%	16%	19%
1 - 2 years	25%	21%	29%	25%
3 - 5 years	26%	27%	28%	19%
6 - 10 years	9%	10%	9%	7%
More than 10 years	6%	6%	5%	6%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Excluding making and receiving calls, what percent of the time do you spend playing games when using your mobile phone?				
Average percent:	23%	28%	22%	15%
1% - 25%	67%	60%	69%	83%
26% - 50%	25%	29%	26%	14%
51% - 75%	6%	9%	5%	2%
76% - 100%	2%	3%	1%	1%
In terms of time spent, how has your mobile phone game play activity changed over the past year?				
My game play on my mobile phone has increased <CONTINUE>	50%	61%	45%	30%
My game play on my mobile phone has decreased <SKIP TO Q11>	10%	10%	12%	6%
My game play on my mobile phone is about the same <SKIP TO Q11>	40%	30%	43%	64%
What has influenced the increase in your game play on your mobile phone?				
More free games available	79%	78%	81%	82%
New phone has more memory and/or better game play capabilities	59%	61%	57%	58%
The games are a good value for the price	36%	36%	41%	18%
The graphics have improved	48%	52%	44%	37%
The number of game titles for mobile phones has increased	38%	41%	36%	32%
The quality of game play has improved	35%	38%	32%	34%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Mobile phone gaming has become a regular part of my <i>weekly</i> activities	2.98	3.09	2.91	2.87
Strongly agree	26%	33%	22%	17%
Agree	52%	47%	54%	59%
Disagree	17%	15%	18%	19%
Strongly disagree	6%	5%	7%	6%
Mobile phone gaming has become a regular part of my <i>daily</i> activities	2.69	2.80	2.65	2.48
Strongly agree	20%	24%	17%	15%
Agree	39%	41%	42%	30%
Disagree	31%	27%	31%	43%
Strongly disagree	10%	9%	10%	12%
Which of the following benefits have you experienced as a result of playing games on your mobile phone?				
Accomplishment/competitive spirit	34%	34%	35%	31%
Distraction from the issues of daily life	57%	54%	57%	63%
Improved hand-eye coordination/manual dexterity	33%	31%	31%	44%
Improved identification and computation skills	18%	21%	14%	22%
Improved mood/feeling of well being	33%	31%	35%	31%
Increased confidence building	15%	15%	16%	12%
Increased productivity	11%	16%	8%	4%
More energetic	17%	20%	14%	17%
Relaxed and less stressed out	56%	49%	58%	68%
Relief from chronic pain/fatigue	8%	6%	8%	10%
Relief from boredom/just passing the time	56%	54%	55%	61%
Sharper and more mentally focused	19%	16%	17%	32%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Which device do you play games on most often?				
Mobile phone	44%	49%	42%	36%
Desktop/laptop computer (PC or Mac)	30%	21%	33%	49%
Game console	21%	25%	20%	12%
Handheld game player	4%	4%	5%	2%
iPad or other tablet device	1%	1%	0%	1%
In the past two years how many games have you purchased for your mobile phone?				
Average number of mobile phone games purchased in 2009	4.3	4.4	4.4	3.7
None – I did not purchase any games for my mobile phone in 2009	48%	41%	52%	57%
1	8%	9%	5%	10%
2	13%	12%	14%	10%
3	9%	11%	8%	8%
4	8%	9%	7%	6%
5	3%	4%	3%	2%
More than 5	12%	13%	11%	7%
Average number of mobile phone games purchased in 2010	4.6	4.9	4.6	3.4
None – I did not purchase any games for my mobile phone in 2010	39%	32%	42%	49%
1	13%	13%	12%	13%
2	12%	11%	12%	13%
3	10%	11%	9%	9%
4	6%	6%	5%	6%
5	5%	6%	5%	2%
More than 5	17%	21%	17%	7%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
How many games do you anticipate purchasing for your mobile phone in 2011?				
Average number of mobile phone games plan to purchase in 2011	4.2	4.4	4.3	3.3
None – I do not plan to purchase any games for my mobile phone in 2011	35%	32%	37%	41%
1	14%	13%	13%	19%
2	14%	15%	12%	16%
3	11%	11%	12%	9%
4	7%	7%	7%	5%
5	4%	5%	4%	2%
More than 5	15%	17%	15%	9%
Percent purchasing one or more mobile phone games in:				
2009	52%	59%	48%	43%
2010	61%	68%	58%	51%
2011	65%	68%	63%	59%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Approximately how much did you spend on games for your mobile phone in 2009 and 2010				
Average amount (\$) spent on mobile phone games in 2009	\$21.15	\$19.29	\$23.07	\$22.72
Nothing – I did not purchase any games or game content for my mobile phone in 2009	47%	41%	51%	56%
\$1 - \$5	11%	14%	9%	9%
\$6 - \$10	11%	13%	9%	13%
\$11 - \$15	8%	10%	8%	3%
\$16 - \$25	10%	12%	10%	6%
\$26 - \$50	6%	5%	6%	8%
More than \$50	6%	6%	6%	6%
Average amount (\$) spent on mobile phone games in 2010	\$22.36	\$21.86	\$23.41	\$20.98
Nothing – I did not purchase any games or game content for my mobile phone in 2010	38%	33%	39%	48%
\$1 - \$5	13%	14%	12%	10%
\$6 - \$10	13%	14%	11%	14%
\$11 - \$15	10%	10%	10%	7%
\$16 - \$25	12%	14%	11%	11%
\$26 - \$50	6%	6%	8%	2%
More than \$50	8%	9%	8%	7%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
How much do you anticipate spending on games for your mobile phone in 2011?				
Average amount (\$) plan to spend on mobile phone games in 2011	\$23.22	\$22.63	\$24.33	\$22.15
Nothing – I don't plan to purchase any games or game content for my mobile phone in 2011	35%	31%	37%	41%
\$1 - \$5	12%	13%	11%	10%
\$6 - \$10	14%	16%	11%	13%
\$11 - \$15	10%	11%	11%	8%
\$16 - \$25	11%	10%	11%	14%
\$26 - \$50	9%	10%	10%	6%
More than \$50	8%	9%	9%	7%
Percent spending \$6.00 or more on mobile phone games in:				
2009	41%	46%	39%	36%
2010	49%	53%	48%	41%
2011	52%	56%	52%	48%
In the past year, have you upgraded a free game trial or free game app on your mobile phone to a paid version?				
Yes	43%	49%	42%	30%
No	57%	51%	58%	70%
In the past year, have you purchased any content (power-ups, new levels/modes, etc.) for a mobile phone game that you originally obtained for free?				
Yes	27%	32%	25%	19%
No	73%	68%	75%	81%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
In the past month, have you accessed Facebook, MySpace or Bebo from your mobile phone?				
Yes	63%	76%	57%	45%
No <SKIP TO Q22>	37%	24%	43%	55%
Played a social networking game on mobile phone				
Yes	47%	54%	44%	35%
No	53%	46%	56%	65%
How often do you play social networking games on your mobile phone? <i>Note: These figures are a sub-set of those who have played a social networking game on a mobile phone.</i>				
Daily	40%	48%	34%	25%
2 - 3 times a week	25%	24%	27%	23%
Once a week	14%	12%	15%	16%
2 - 3 times a month	8%	7%	7%	16%
Once a month or less	13%	9%	17%	20%
How often do you play social networking games on your mobile phone? <i>Note: These figures are presented as a percentage of the total of each specified segment, e.g., all mobile phone gamers, all avid mobile phone gamers, all smartphone owners, etc.</i>				
Daily	19%	26%	15%	9%
2 - 3 times a week	12%	13%	12%	8%
Once a week	6%	6%	7%	6%
2 - 3 times a month	4%	4%	3%	6%
Once a month or less	7%	5%	8%	7%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Have you ever recommended a mobile phone game to someone else?				
Yes	57%	62%	55%	50%
No <SKIP TO Q24>	43%	38%	45%	50%
Which of the following influenced you when you recommended a mobile phone game to others?				
Comes from a trusted brand	33%	36%	28%	40%
Controls are simple and easy to use	38%	43%	31%	40%
Easy to learn	49%	51%	48%	46%
Fun to play	86%	86%	84%	94%
Good value for the price	40%	41%	37%	46%
Has great graphics and sound	36%	35%	39%	33%
Is challenging	45%	42%	46%	54%
Lots of levels or modes	41%	44%	39%	38%
Provides a quick distraction	30%	31%	27%	35%
Provides an escape	31%	26%	32%	49%
Unique or unusual	19%	19%	18%	21%
Gender:				
Male	55%	49%	59%	58%
Female	45%	51%	41%	42%

Q25: AGE

	All mobile phone gamers (814)	18-34 (360)	35-54 (327)	55+ (127)
Age:				
18 - 24	15%	36%	0%	0%
25 - 34	28%	64%	0%	0%
35 - 44	19%	0%	47%	0%
45 - 54	21%	0%	53%	0%
55 - 64	12%	0%	0%	76%
65+	4%	0%	0%	24%
Annual household income before taxes:				
Less than \$15,000	7%	9%	5%	5%
\$15,000 - \$24,999	11%	14%	7%	11%
\$25,000 - \$34,999	11%	12%	12%	7%
\$35,000 - \$49,999	20%	18%	21%	19%
\$50,000 - \$74,999	22%	19%	24%	28%
\$75,000 - \$99,999	11%	12%	11%	11%
\$100,000 - \$149,999	9%	5%	13%	9%
\$150,000 or more	4%	4%	3%	6%
Prefer not to answer	5%	7%	3%	4%