



## 2010 Social Gaming Research

Information Solutions Group



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## Research Overview

### Research Objectives

- Determine the percentage of US and UK Internet users who play social games at least once a week.
- Understand the game play behavior and preferences of social game players.
- Create a profile of the typical social game player.

### Methodology/Audience

Web Survey: 41 Questions  
ePanel: US and UK Internet Users

### Data Collection Period

January 7, 2010 - January 12, 2010

**1,202**  
**Total Responses**

*Confidence interval:*  
*+/- 2.5 percentage points*  
*(US - 3.0, UK - 4.2)*

### % of Internet Users Playing Social Games

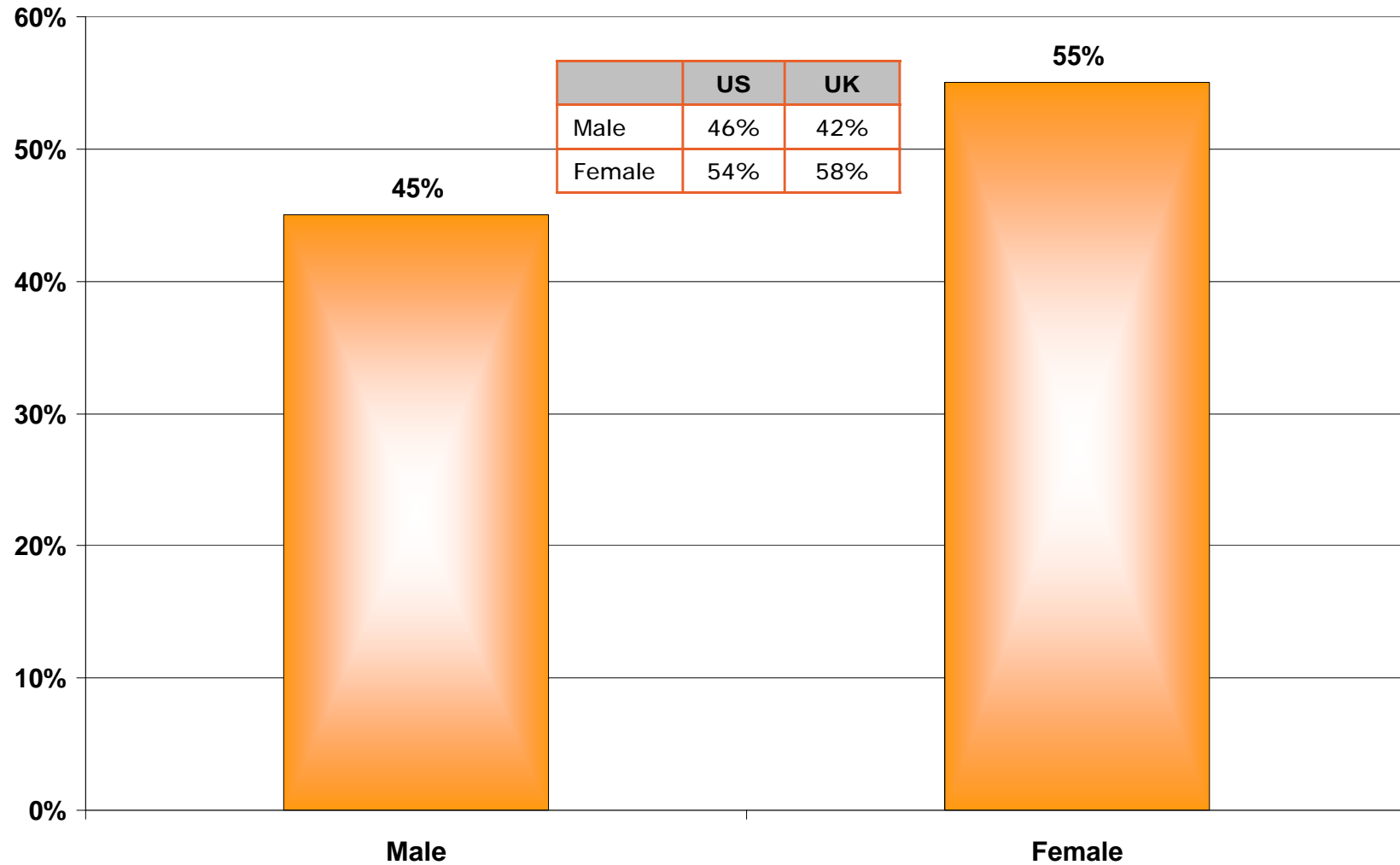
Total Responses - 4,917  
Total Qualified - 1,202  
24% of Internet Users Play  
Social Games at least once a  
week (US and UK only)



# Profile of Social Game Players

## Profile of Social Game Players - Gender

- More females play social games (55% vs. 45%).
  - In the UK, the percentage of female social game players is slightly higher at 58%.

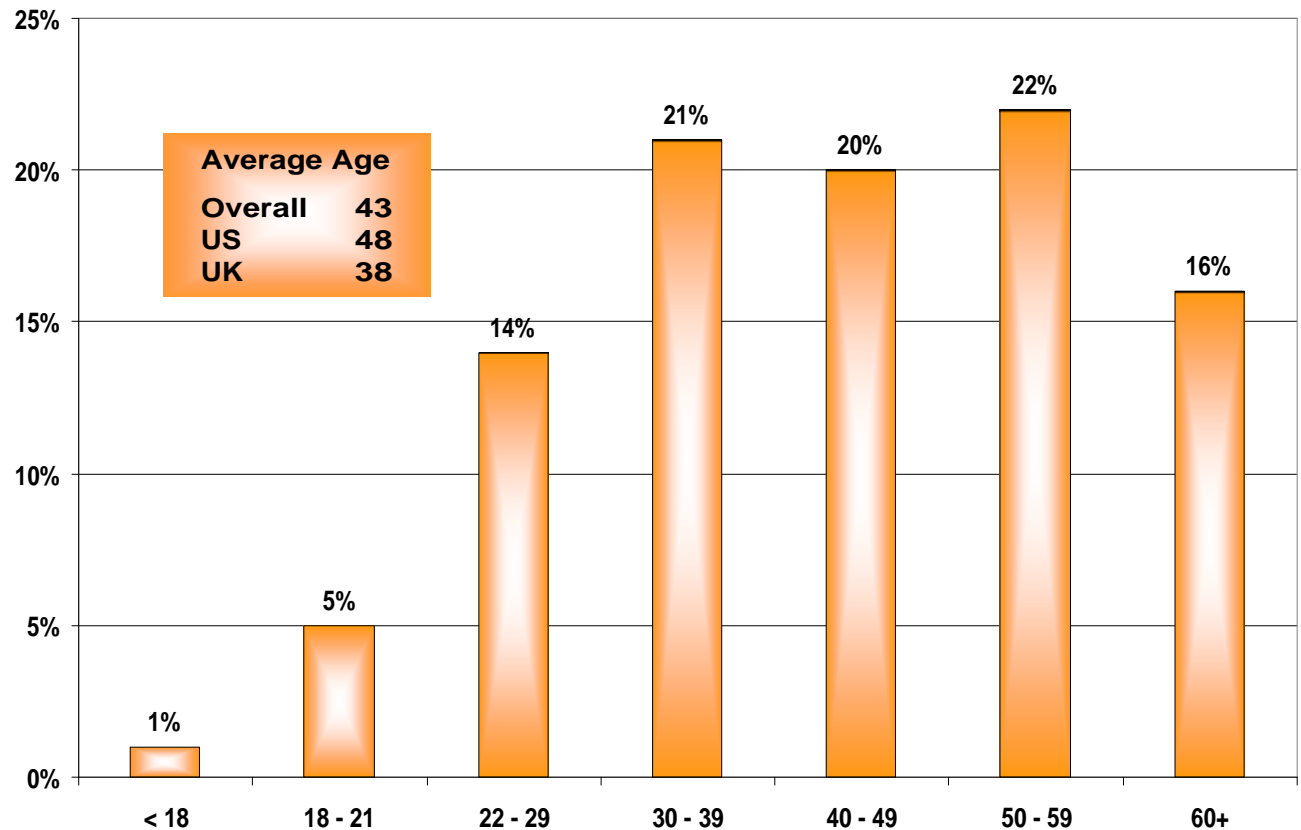


Q32 Gender

## Profile of Social Game Players - Age

- Social game players average 43 years in age. 20% are less than 30 years old, 21% are 30 – 39 years old, 20% are 40 – 49 years old, while a total of 38% are at least 50 years old.
  - Social game players in the US tend to be older than those in the UK with 46% at least 50 years old, compared to only 23% in the UK. The average age of US social gamers is 48, while UK social gamers average only 38 years old.

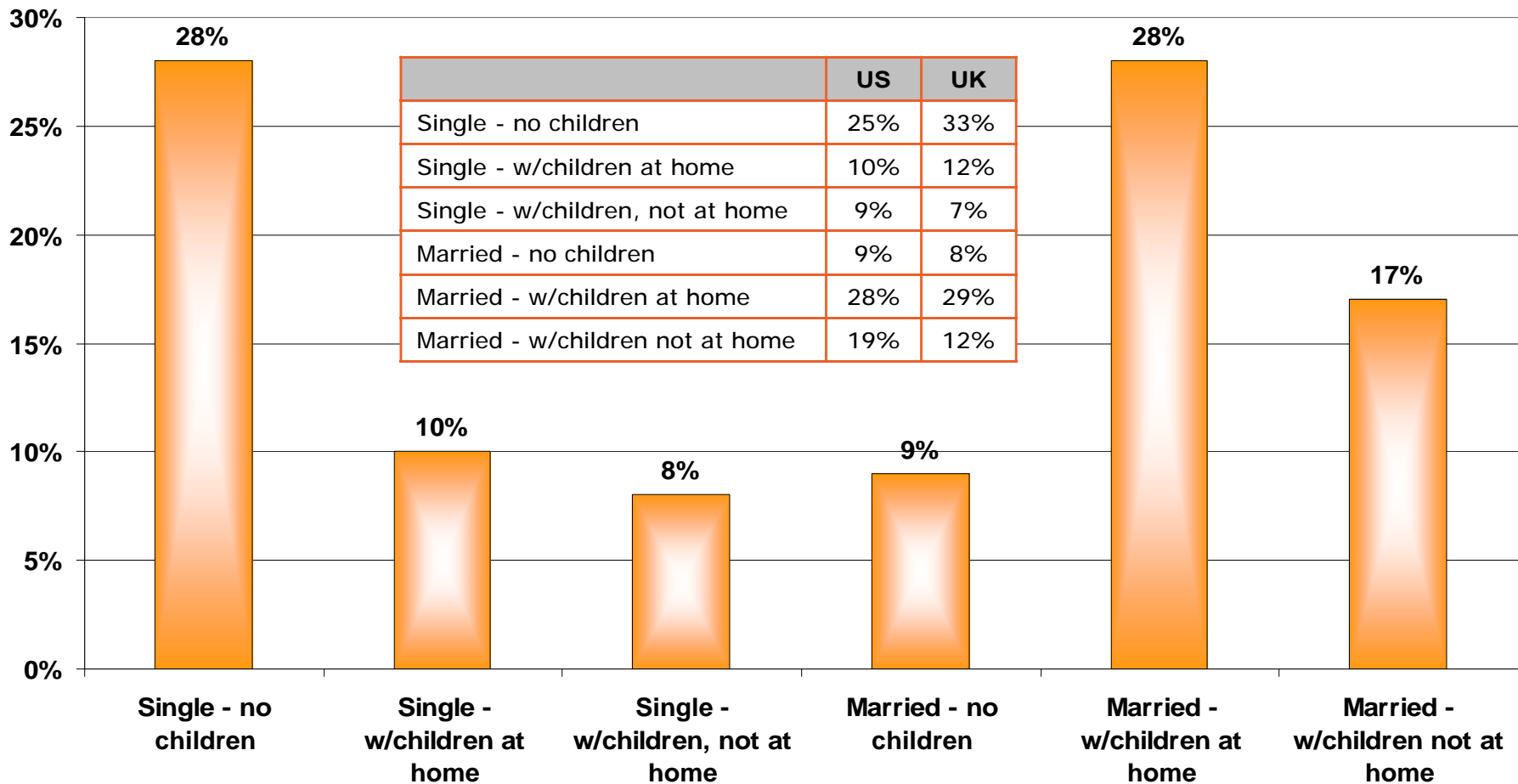
	US	UK
< 18	0%	1%
18 - 21	4%	8%
22 - 29	11%	22%
30 - 39	20%	25%
40 - 49	20%	22%
50 - 59	26%	15%
60+	20%	8%



Q33 Age

## Profile of Social Game Players - Living Situation

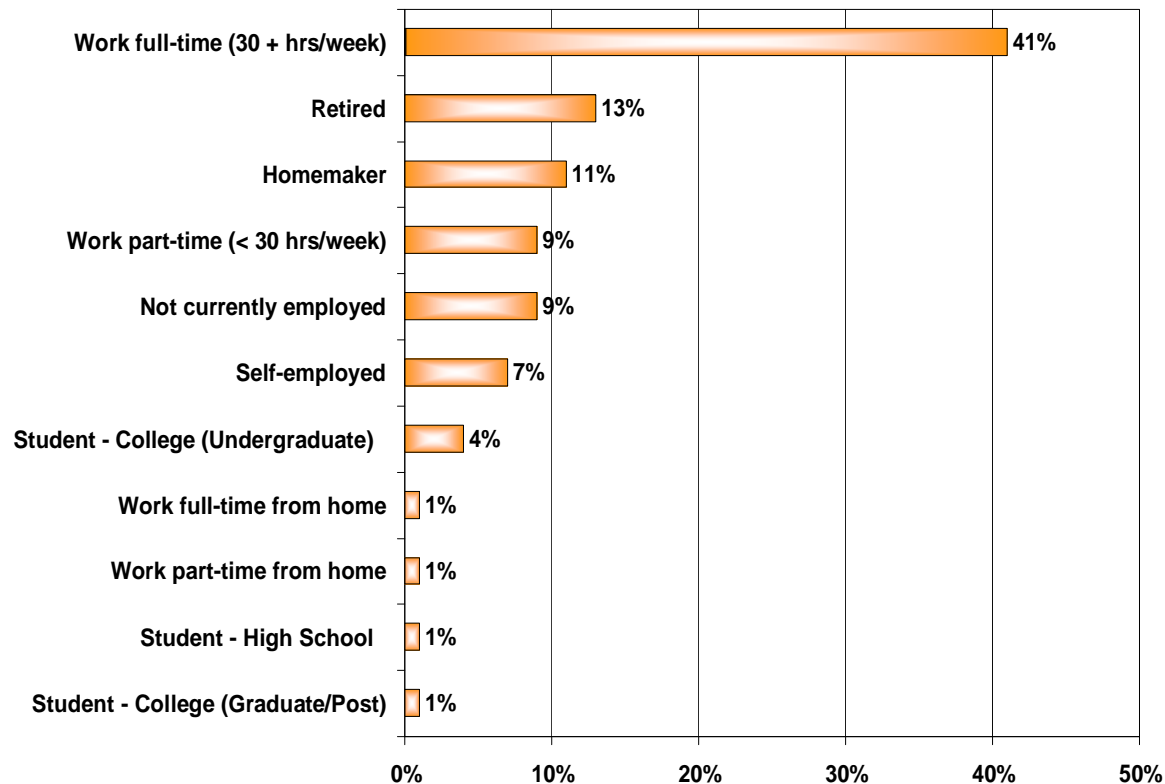
- Social game players are broken into three primary categories: Single with no children (28%), Married with children living at home (28%) and Married with children not living at home (17%).
  - Due to the younger age of social gamers in the UK, more of these individuals are single with no children.



Q34 Living situation

## Profile of Social Game Players - Employment Status

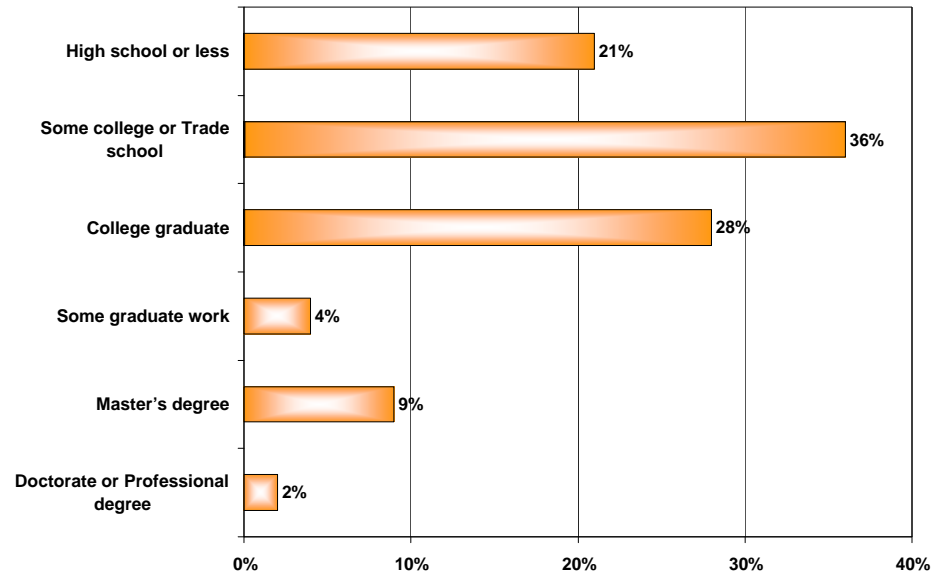
- The majority (41%) of those playing social games work full-time, followed by 13% who are retired and 11% who are homemakers. 9% work part-time and another 9% are not currently working.
  - Due to the younger age of social gamers in the UK, more of these social gamers work full-time (47% vs. 38%), while more of the US social gamers are retired (16% vs. 8%).



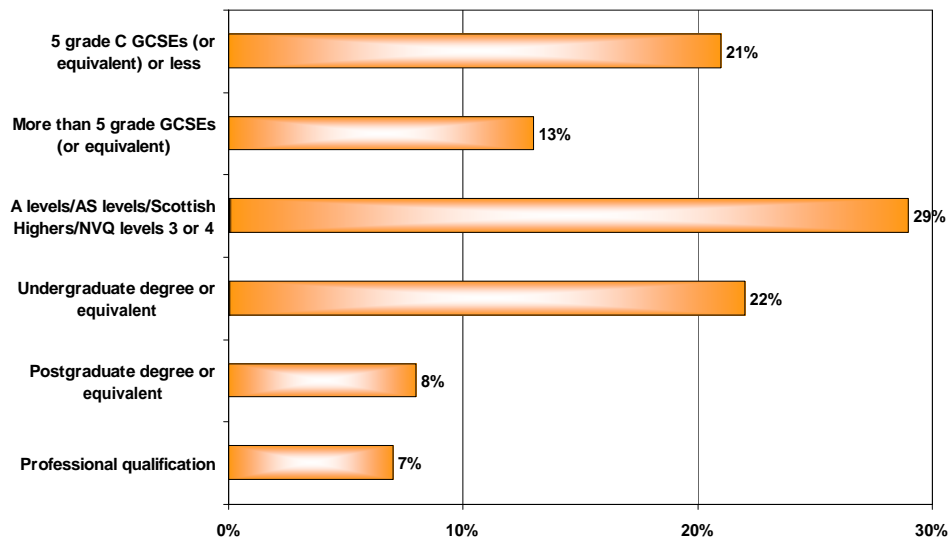
	US	UK
Work full-time	38%	47%
Retired	16%	8%
Homemaker	11%	11%
Work part-time	9%	10%
Not currently employed	10%	7%
Self-employed	7%	6%
Student - College (Undergraduate)	4%	5%
Work full-time from home	1%	1%
Work part-time from home	1%	1%
Student - High School	0%	2%
Student - College (Graduate/Post)	1%	1%

Q35 Which of the following best describes your employment status?

## Profile of Social Game Players - Educational Attainment (US and UK)



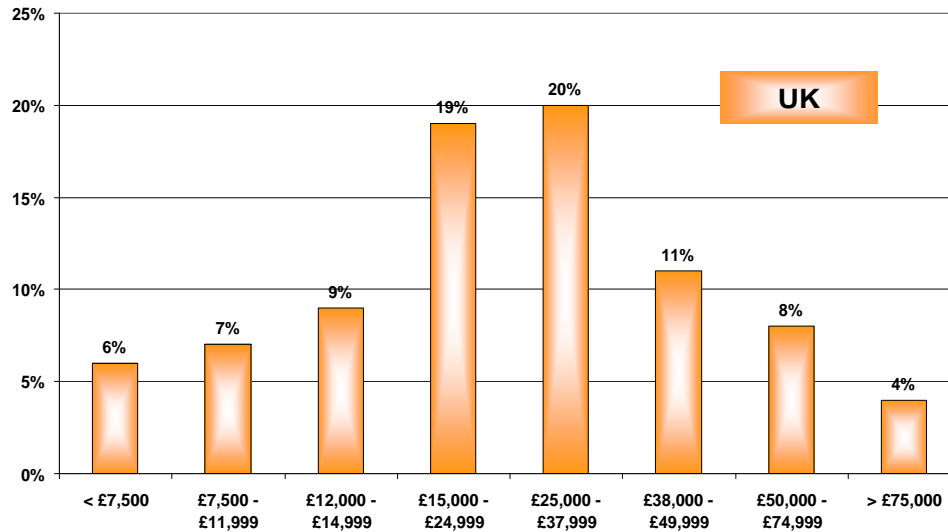
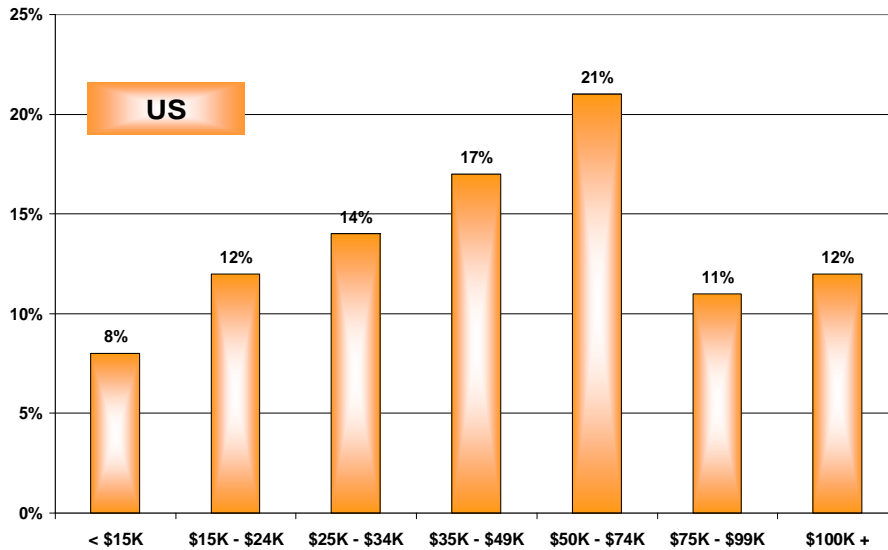
- Less than half (43%) of those in the US who play social games are college graduates with 28% receiving a 4-year degree.
- 36% have completed some college or trade school.



- A total of 37% in the UK who play social games have received an undergraduate degree or higher, while 29% received an A levels/AS levels/Scottish Highers/NVQ levels 3 or 4.
- Another 13% received more than 5 grade GCSEs or equivalent.

Q36 Education

## Profile of Social Game Players - Income



Q37 Annual household income

- One-third (34%) of the US social gamers earn less than \$35,000 annually, 17% earn between \$35,000 and \$49,000, 21% earn between \$50,000 and \$75,000 and 23% earn at least more than \$75,000. As a comparison, the median household income in the US in 2008 was \$52,000.
- The annual income of social game players in the UK is slightly lower than those in the US.
  - 22% of the UK social gamers earn less than £15,000 (\$24K) annually, 19% earn between £15,000 and £25,000 (\$24K - \$40K), 20% earn £25,000 and £38,000 (\$40K - \$61K) and 23% earn £38,000 (\$61K) or more.

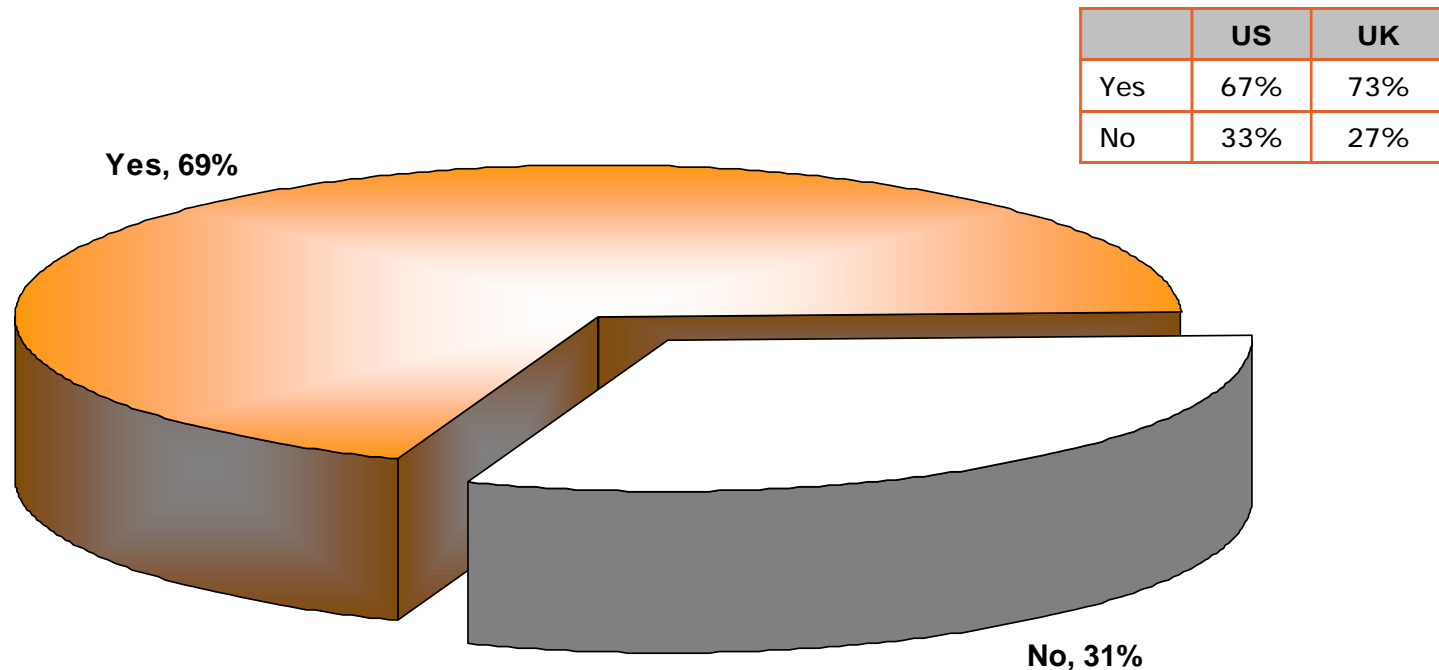
Conversion Table	
British £	US \$
£7,500	\$12K
£11,999	\$19.5K
£14,999	\$24.4K
£24,999	\$40K
£37,999	\$61K
£49,999	\$81K
£74,999	\$122K



# General Game Play Behavior

## General Game Play Behavior - Other Game Play, In Addition to Social Games

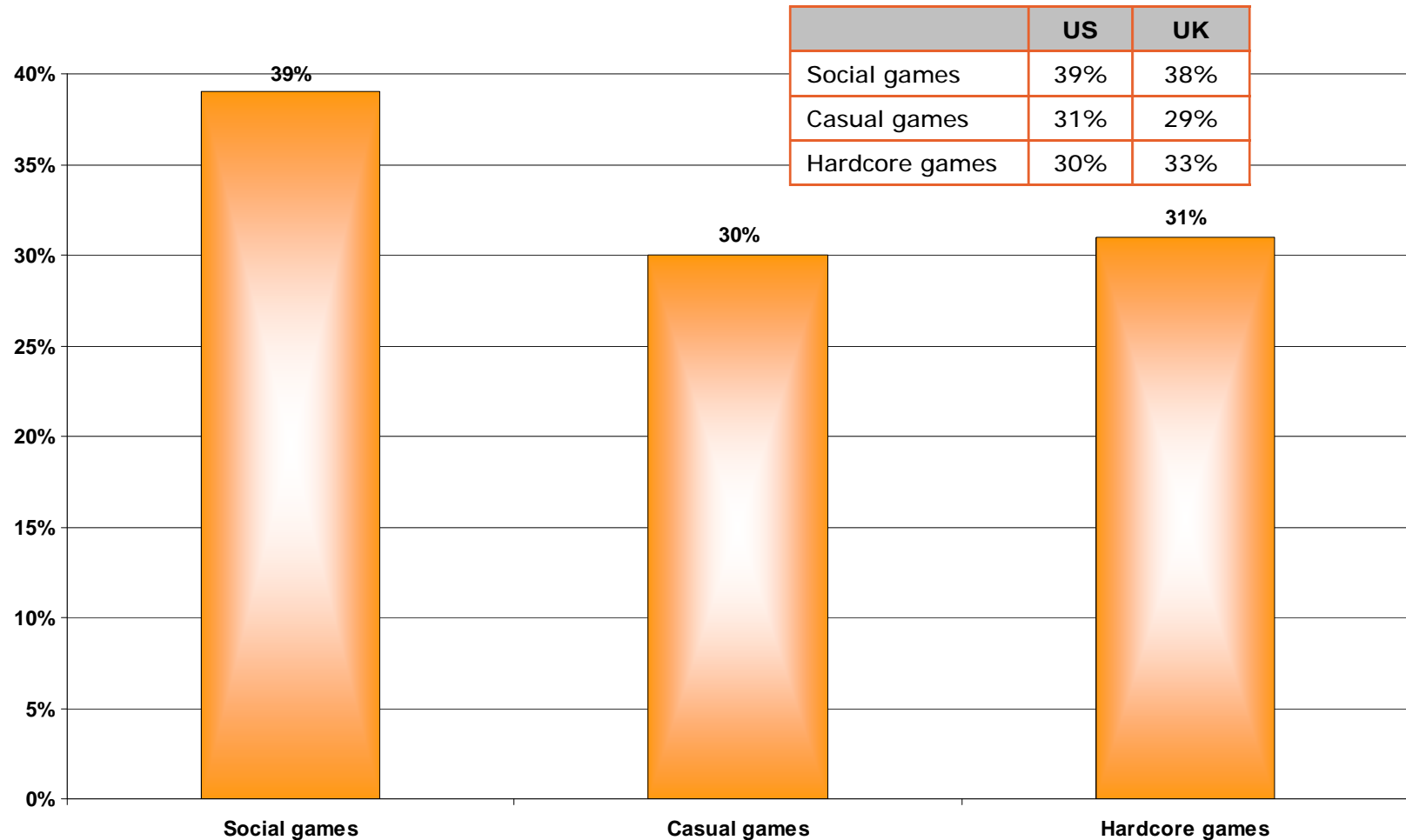
- Two-thirds (69%) of social game players also play other types of video games including casual and/or hardcore games.
  - Almost three-fourth (73%) of social game players in the UK play other games, compared to 67% of US social game players.



Q8 In addition to the social games you play on a social networking site, do you play other video games, including casual games or hardcore games on a computer, handheld game device, console game system or mobile phone?

## General Game Play Behavior - Percent of Game Play Time For Various Genres

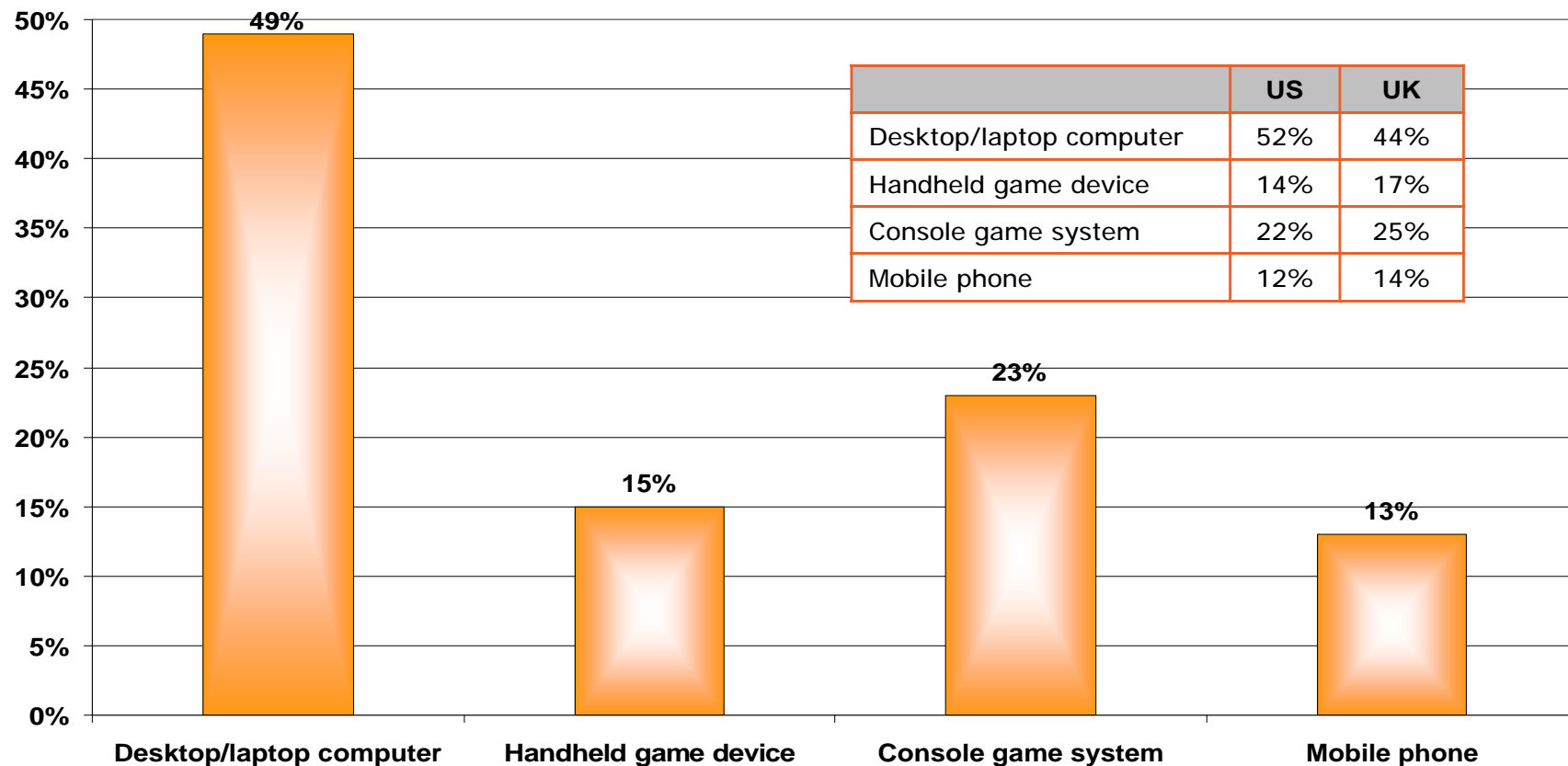
- Among those who play games other than social games, social games represent 39% of their total game play time, followed by hardcore games at 31% and casual games at 30%.



Q9 Please specify the percentage of your game play represented by each of the following.

## General Game Play Behavior - Percent of Game Play On Various Devices

- At 49%, desktop and laptop computers continue to be the device used most to play social, casual and/or hardcore games, followed by console game systems at 23% and handheld game devices at 15%.
  - Those in the UK, who play games from multiple genres, use a desktop or laptop computer to play those games less often than those in the US.



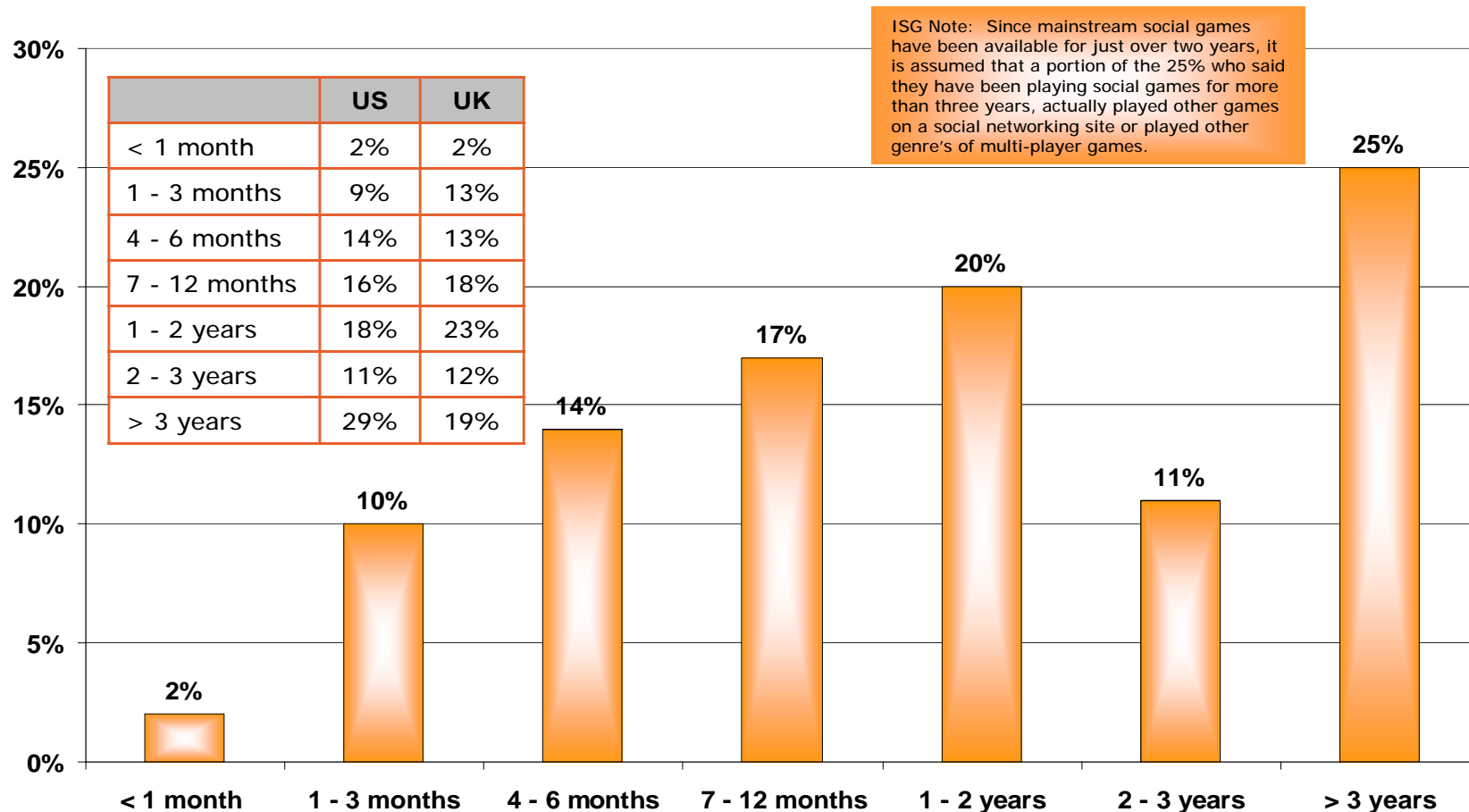
Q10 In terms of the total amount of time you spend playing various types of games including social, casual and/or hardcore games, what percentage of your game play is played on the following devices?



# Social Game Play Behavior

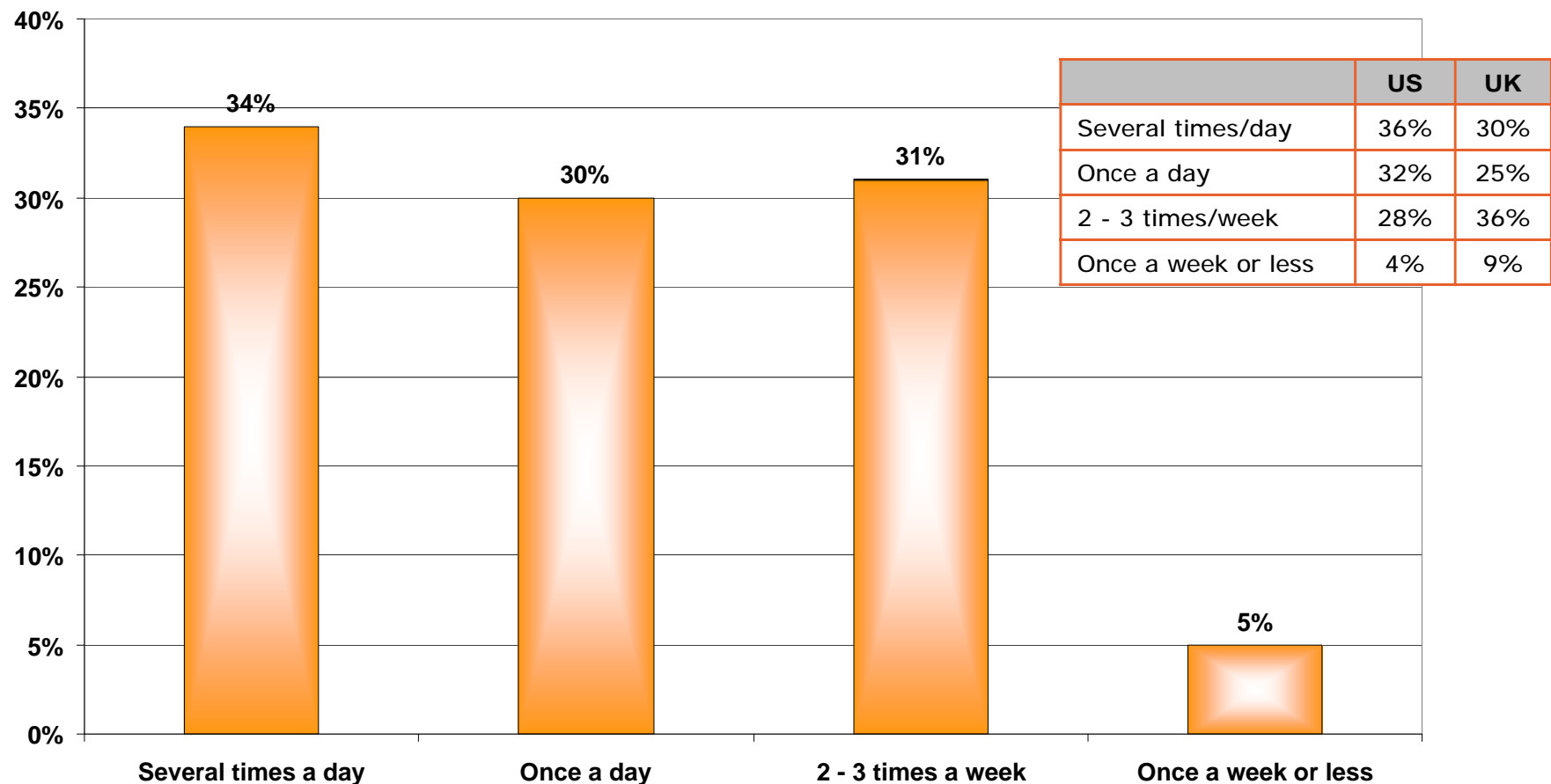
## Social Game Play Behavior - Length of Time Playing Social Games

- More than half (56%) of those surveyed have been playing social games for at least one year. One-fourth (26%) are fairly new to social gaming and have been playing for six months or less, followed by 17% who have played 7 to 12 months.
  - Those in the UK are newer to social gaming with only 31% playing two or more years, compared to 40% of those in the US.



## Social Game Play Behavior - Frequency of Social Game Play

- The majority (95%) of those surveyed play social games multiple times a week with 34% playing several times a day, 30% playing once a day and 31% playing 2 to 3 times a week.
  - Those in the US tend to play more frequently with a total of 68% playing at least once a day, compared to 55% of the UK players.

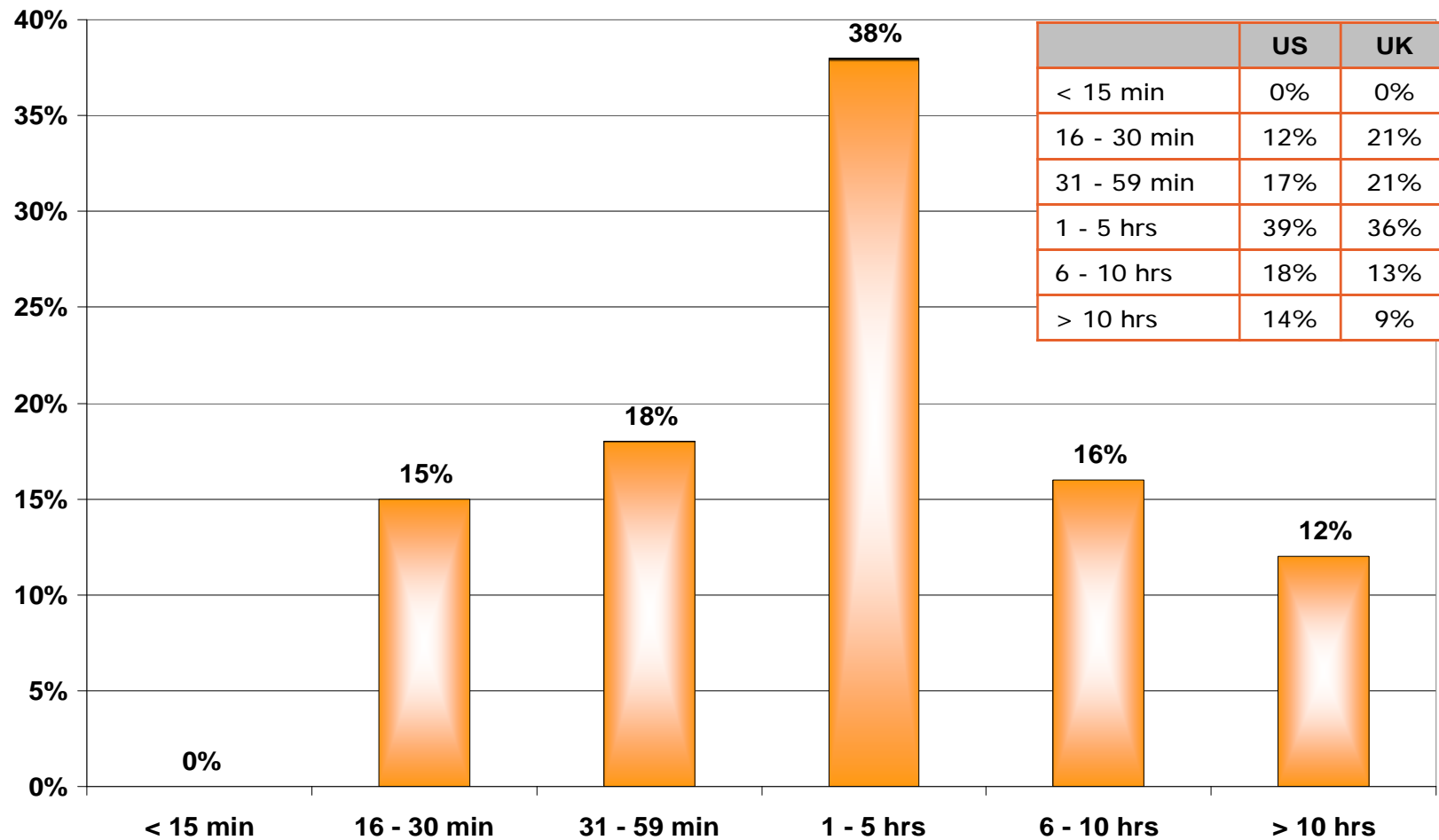


Q2 How often do you typically play social games?

2010 PopCap Social Gaming Research – Confidential

## Social Game Play Behavior - Hours Per Week Playing Social Games

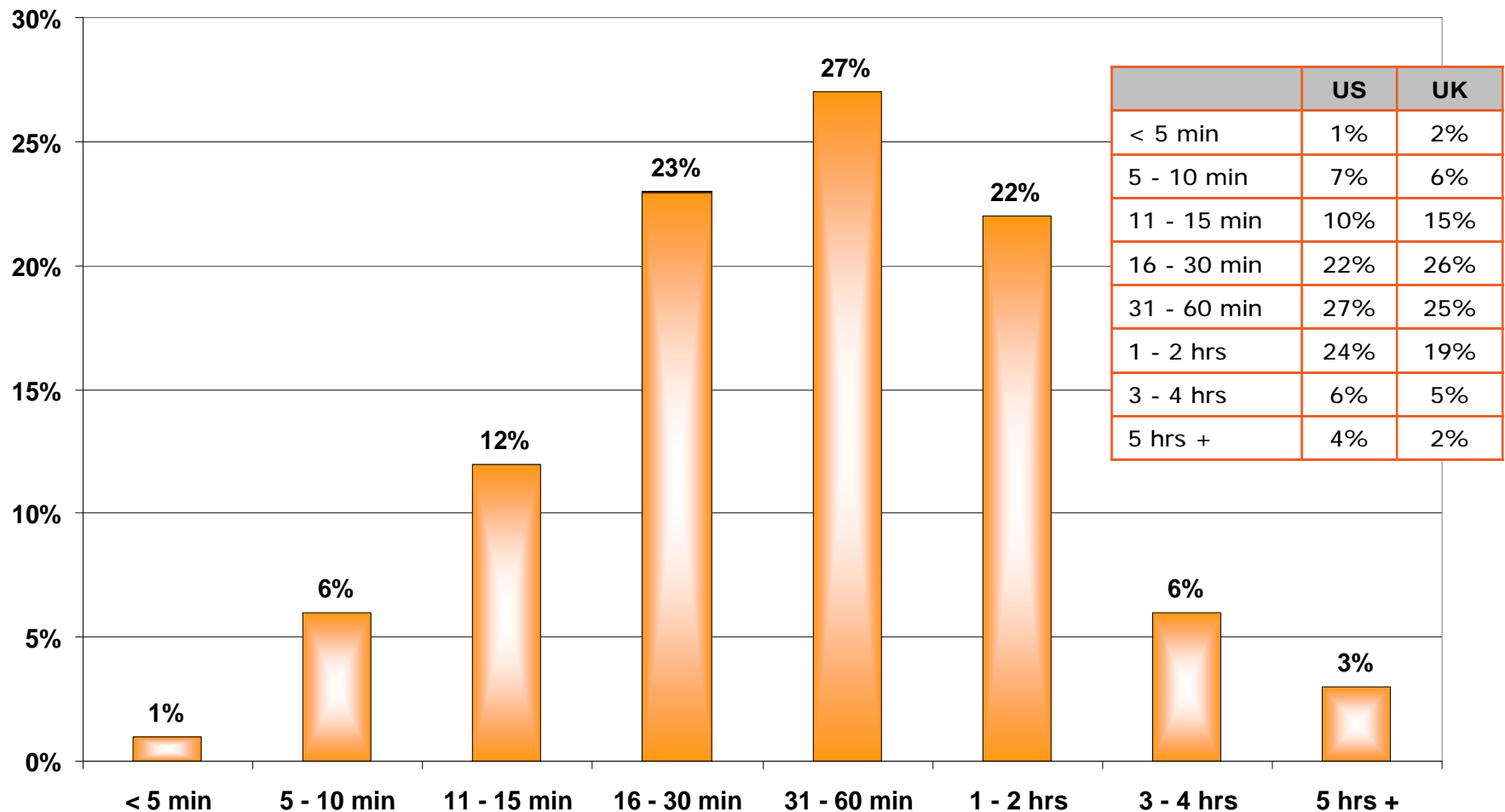
- One-third (33%) of social gamers spend less than one hour a week playing social games, 38% spend 1 to 5 hours playing, while 28% play six or more hours a week.
  - Those in the US spend more time playing social games with 32% playing six or more hours a week, compared to 22% in the UK.



S3 How many hours per week do you play online social games?

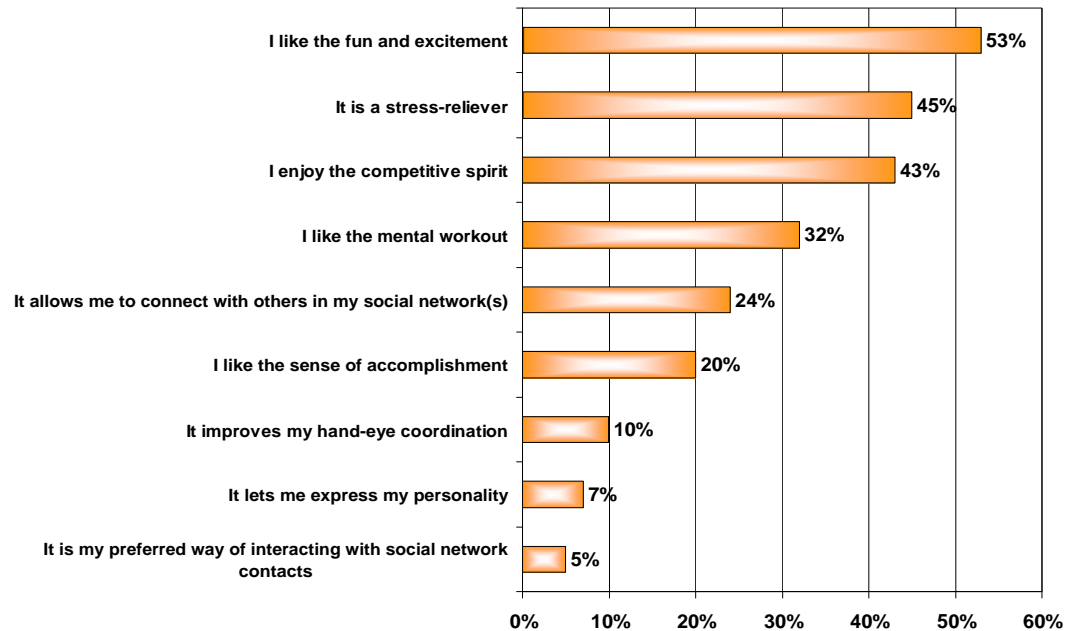
## Social Game Play Behavior - Length of Typical Social Game Play Session

- The session length of social gamers varies widely with 23% playing 16 to 30 minutes at a time, 27% playing for 31 to 60 minutes and another 22% playing for 1 to 2 hours.
  - The session length of those in the US is slightly longer than those in the UK.



Q3 How long is your typical social game play session?

## Social Game Play Behavior - Why Play Social Games



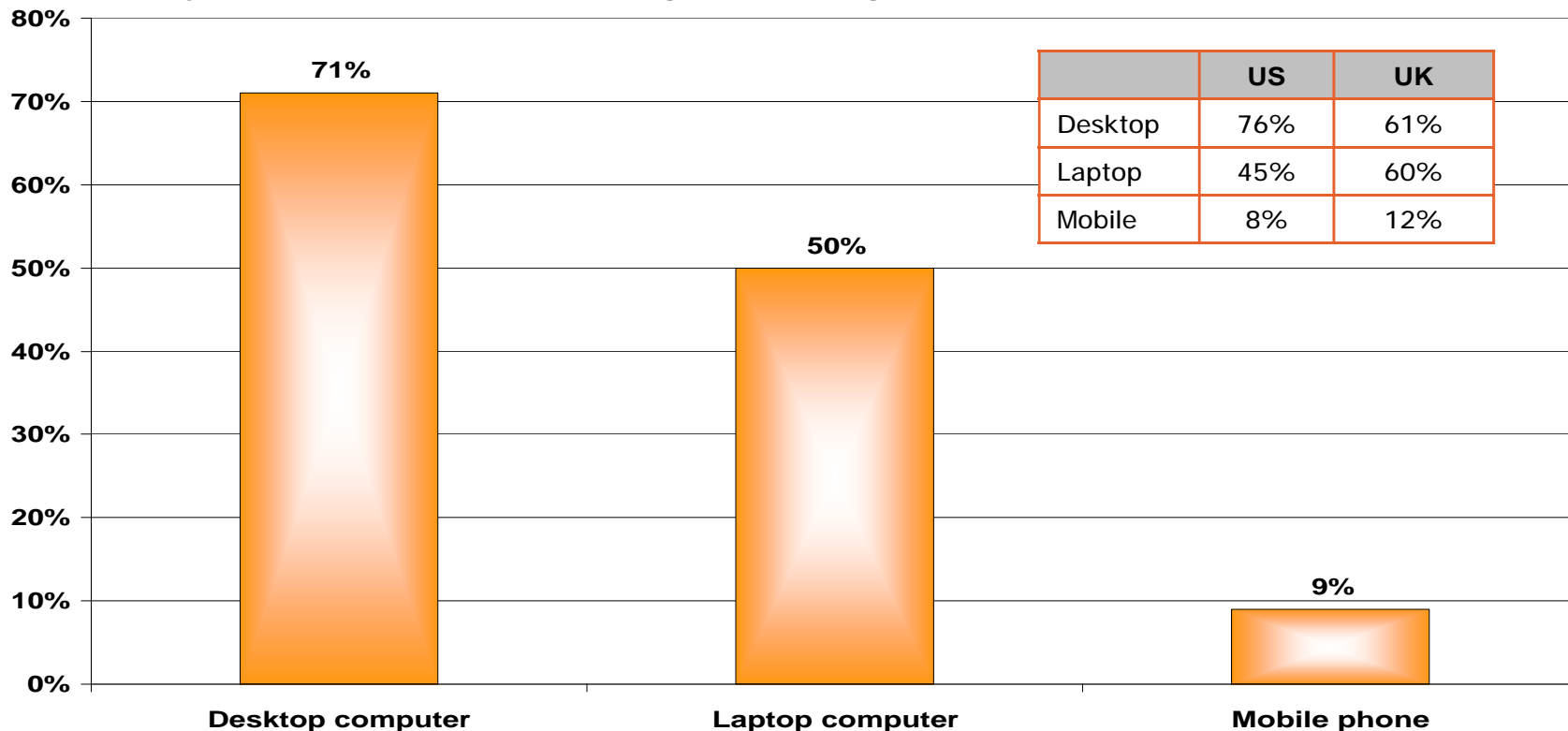
- Fun and excitement (53%), stress relief (45%) and competitive spirit (43%) are the top three reasons people play social games.
- One-third (32%) like the mental workout, while 24% play so they can connect with others in their social network.

	US	UK
I like the fun and excitement	53%	53%
It is a stress-reliever	47%	43%
I enjoy the competitive spirit	43%	43%
I like the mental workout	33%	31%
It allows me to connect w/others in social network(s)	28%	17%
I like the sense of accomplishment	18%	23%
It improves my hand-eye coordination	10%	10%
It lets me express my personality	8%	6%

Q21 Why do you play social games?

## Social Game Play Behavior - Devices Used to Access Social Games

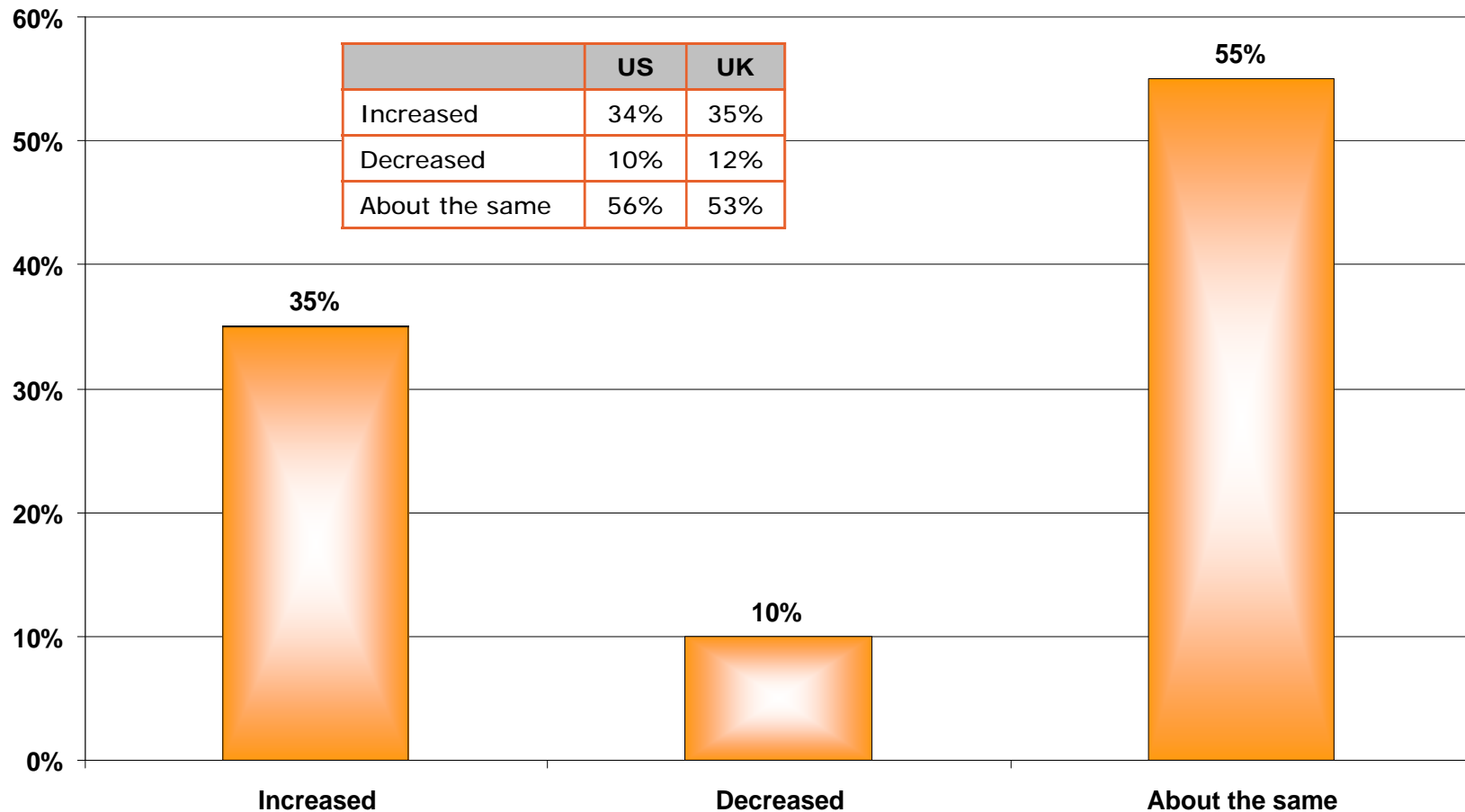
- 71% play social games on a desktop computer, 50% play on a laptop computer, while 9% play on a mobile phone.
- 71% of the social gamers use only one device to play social games with a desktop computer being the most popular, 21% play on two devices, while only 5% play on all three devices.
  - Desktop computers are more popular among US social gamers, while use of desktops and laptops are equal among UK players
  - Game play on a mobile phone is higher among those in the UK.



Q17 Which devices do you use to access games on social networking sites?

## Social Game Play Behavior - Changes in Game Play Over Past 3 Months

- Just over one-third (35%) of social game players said their game play has increased over the past three months, followed by 10% who said it has decreased. More than half (55%) indicated that their game play on social networks is about the same.

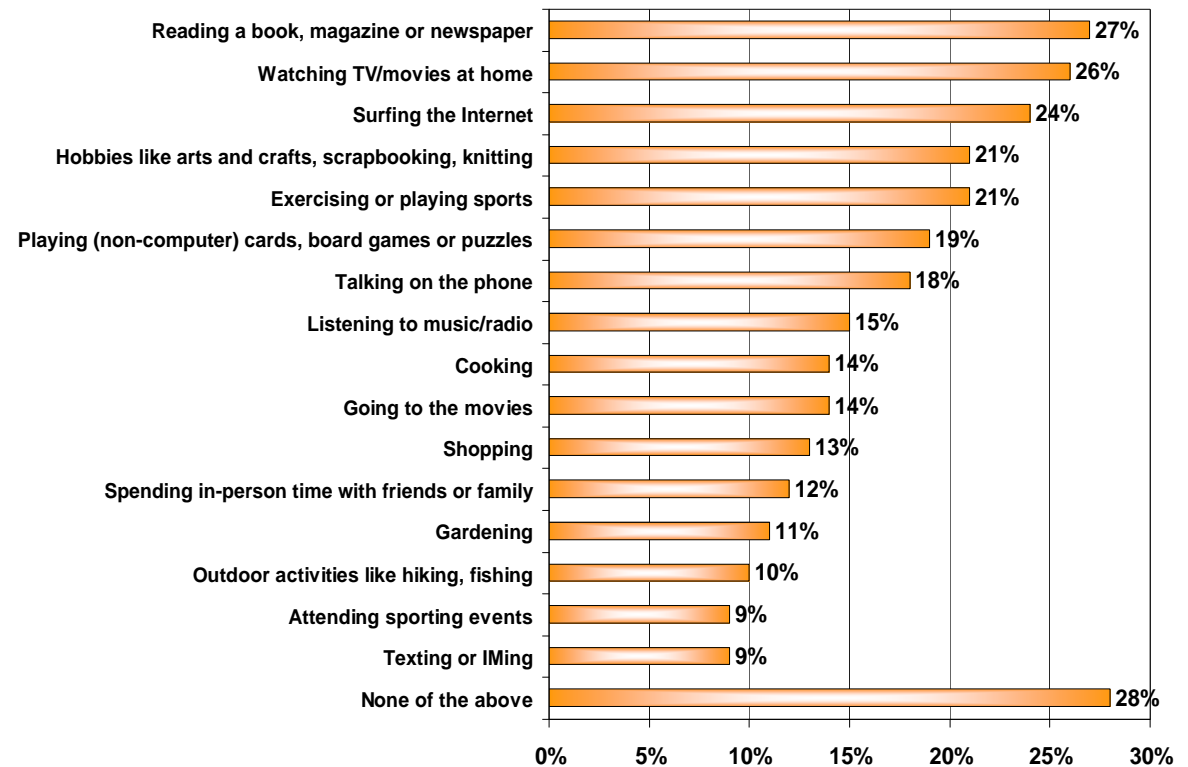


Q11 How has your game play on social networking sites changed over the past three months?

## Social Game Play Behavior - Decline in Activities Due to Social Game Play

- About one-fourth (27%) of social game players said they read less since they began playing social games, followed by 26% who watch TV/movies at home less and 24% who surf the Internet less.
- One out of five (21%) said they spend less time doing hobbies, while another 21% exercise less.
- 28% said their involvement in social games has not affected their involvement in other leisure time activities.

	US	UK
Reading (book, mag, newspaper)	27%	27%
Watching TV/movies at home	27%	25%
Surfing the Internet	24%	24%
Hobbies (scrapbooking, knitting)	21%	20%
Exercising or playing sports	22%	20%
Playing (non-computer) games	20%	18%
Talking on the phone	19%	17%
Listening to music/radio	15%	15%
Cooking	14%	14%
Going to the movies	16%	12%
Shopping	13%	12%
Spending time with friends/family	13%	11%
Gardening	10%	13%
Outdoor activities	10%	9%
Attending sporting events	9%	9%
None of the above	29%	27%



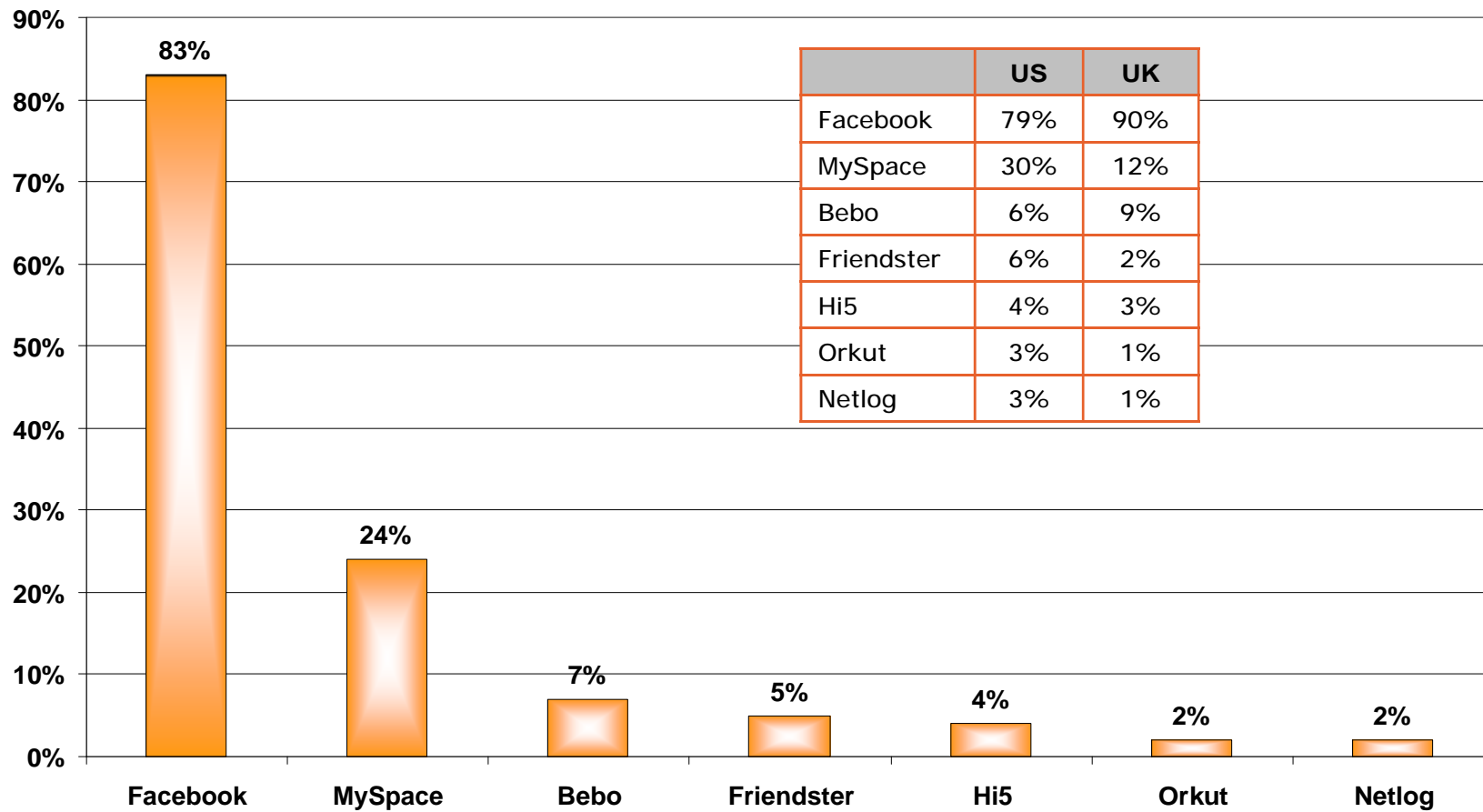
Q31 As a result of playing social games, which of the following other activities do you spend less time doing?



# Social Networking Site Use and Activities

## Sites Used and Activities - Social Networking Sites Where Social Games Are Played

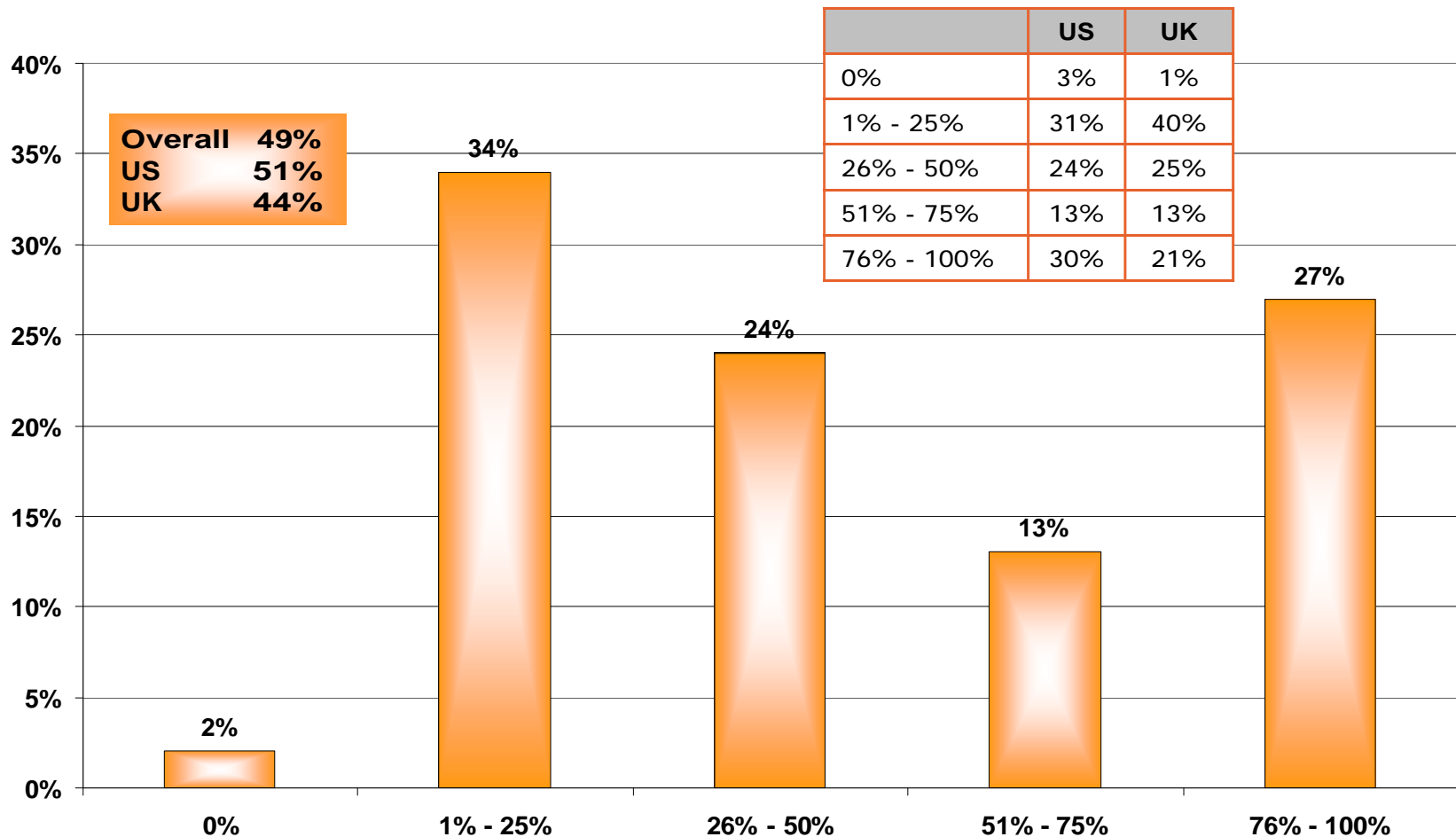
- At 83%, Facebook is the primary social networking site social gamers go to play social games, followed by MySpace (24%) and Bebo (7%).
  - Within the UK, Facebook is the predominate social networking site for game play at 90%, while Facebook (79%) and MySpace (30%) are used more often by US gamers.



Q5 Which social networking website(s) do you visit to play social games?

## Sites Used and Activities - Logging in Specifically to Play Games

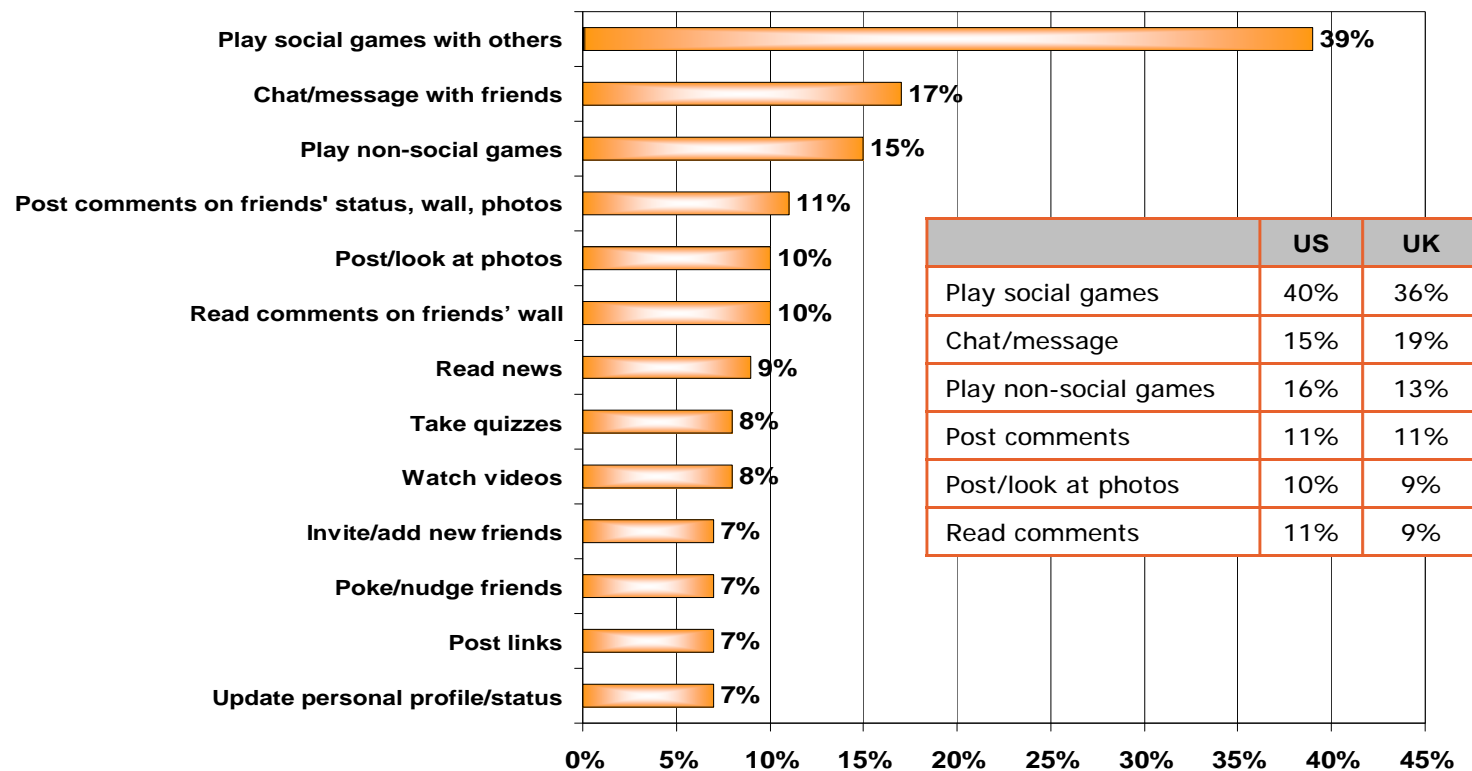
- About half (49%) of the time social game players login to Facebook or to other sites specifically to play games.
  - Those in the US are more likely to log in to a social networking site just to play games than those in the UK.



Q6 When logging into a social networking site, what percent of the time do you log in with the specific intention of playing games?

## Sites Used and Activities - Top Social Networking Activities

- Social gamers spend more than half (54%) their time on social networking sites playing games.
  - In addition to playing social games (39%), social gamers also spend 15% of their time playing other non-social games.
  - Chatting/messaging with friends (17%), posting comments/photos (11%), posting/looking at photos (10%) and reading comments (10%) are the other top activities performed on social networking sites.
  - Those in the UK tend to chat/message slightly more than those in the US.

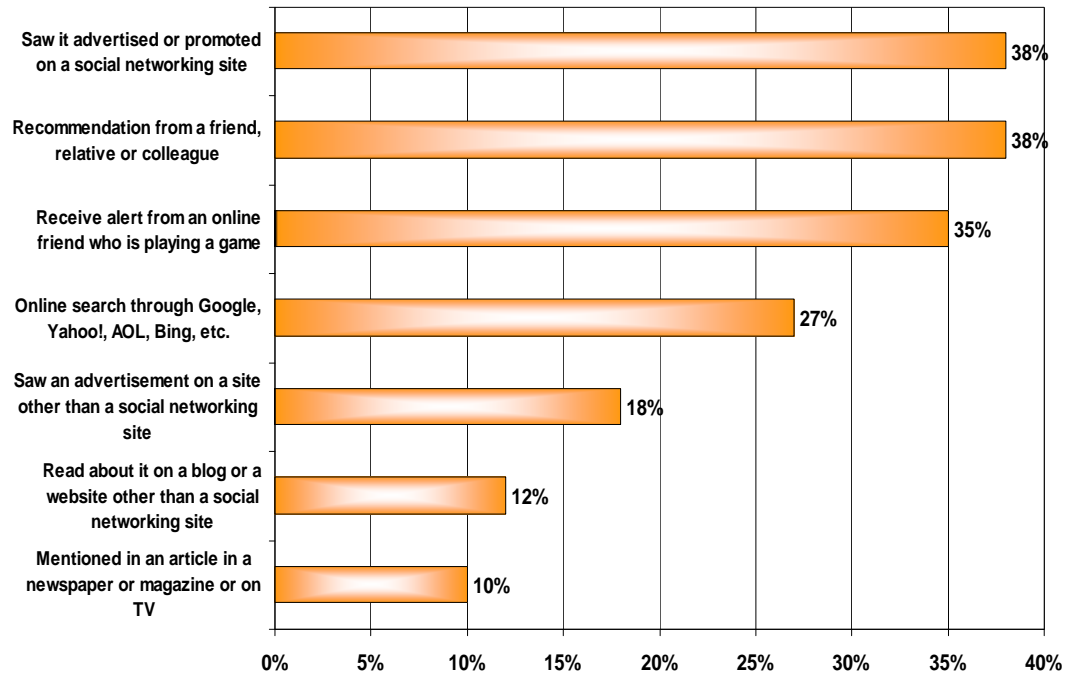


Q7 When on social networking sites, what percent of your time do you spend participating in the following activities?



# Social Games Played

## Social Games Played - Where Hear About New Social Games



- Ads promoting games on social networking sites (38%), and word of mouth are the primary ways Internet users hear about new social games.

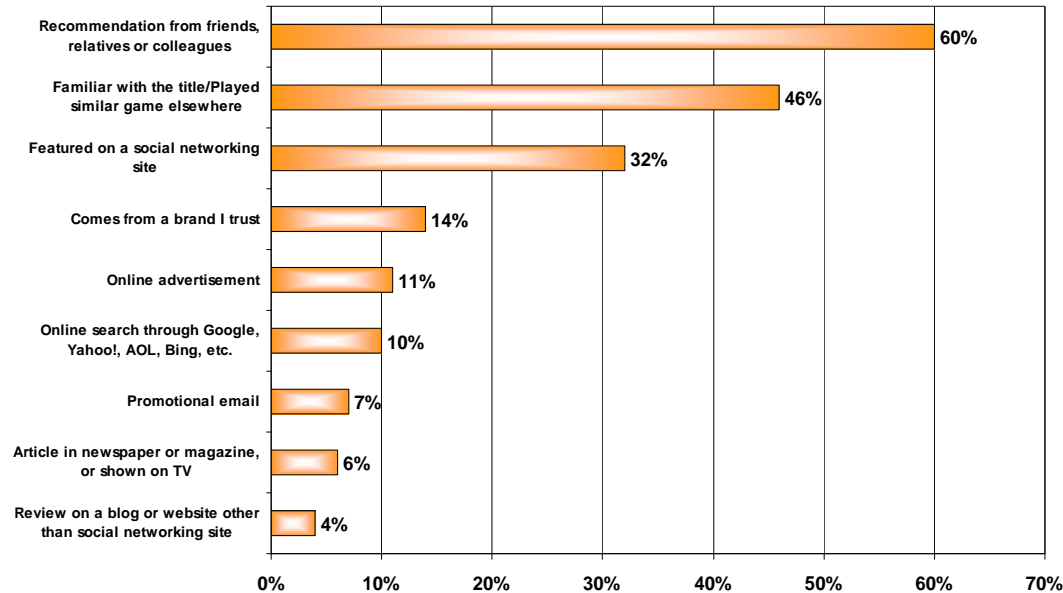
- A combined 57% rely on word of mouth which includes either a recommendation from a friend, relative or colleague or receipt of an alert from online friend to hear about new games, while 27% hear about new games from online searches.

- Social gamers in the US receive recommendations more often than those in the UK (40% vs. 33%), while those in the UK see more ads on social networking sites (44% vs. 36%).

	US	UK
Saw it advertised or promoted on a social networking site	36%	44%
Recommendation from a friend, relative or colleague	40%	33%
Receive alert from an online friend who is playing a game	36%	33%
Online search through Google, Yahoo!, AOL, Bing, etc.	27%	26%
Saw an ad on a site other than a social networking site	20%	14%
Read about it on a blog or a website	12%	11%
Mentioned in newspaper or magazine or on TV	11%	8%

Q4 How do you typically hear about new social games?

## Social Games Played - Factors Influencing Social Game Selection



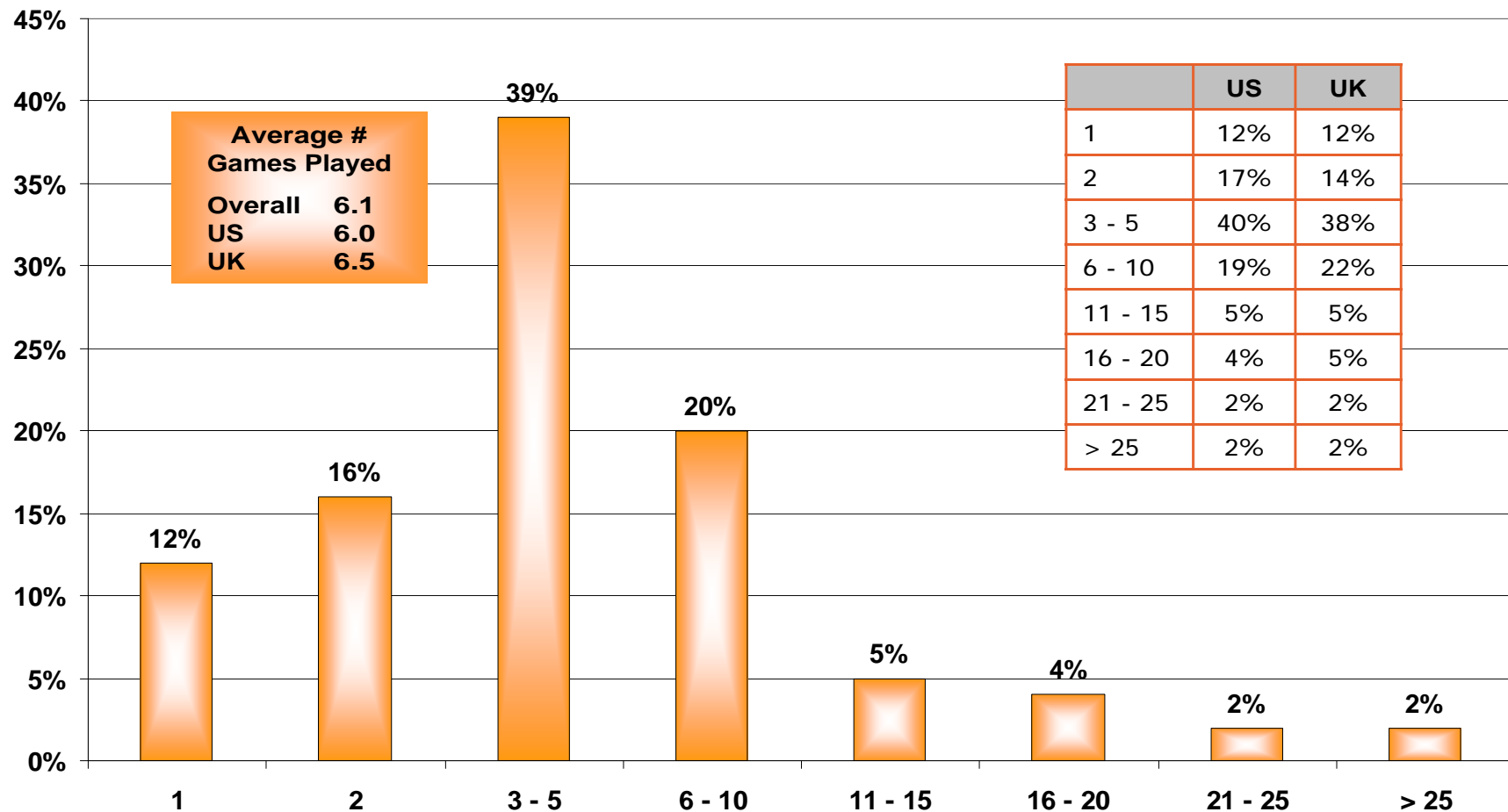
- A recommendation from a friend, relative or colleague (60%) is the number one factor influencing the selection of social games, followed by the familiarity with the title/played a similar game elsewhere (46%).
- One-third (32%) said they often try a game because it is featured on a social networking site.
  - Social gamers in the US rely more on recommendations (62% vs. 57%) and familiarity with the games (48% vs. 43%), while those in the UK are influenced more by ads on social networking sites (37% vs. 30%).

	US	UK
Recommendation from friends, relatives or colleagues	62%	57%
Familiar with the title/Played similar game elsewhere	48%	43%
Featured on a social networking site	30%	37%
Comes from a brand I trust	12%	16%
Online advertisement	12%	10%
Online search through Google, Yahoo!, AOL, Bing, etc.	9%	11%
Promotional email	9%	4%
Article in newspaper or magazine, or shown on TV	6%	6%
Review on a blog or website	5%	3%

Q16 When selecting which social games to try, which factors most influence your decision?

## Social Games Played - Number of Different Social Games Played

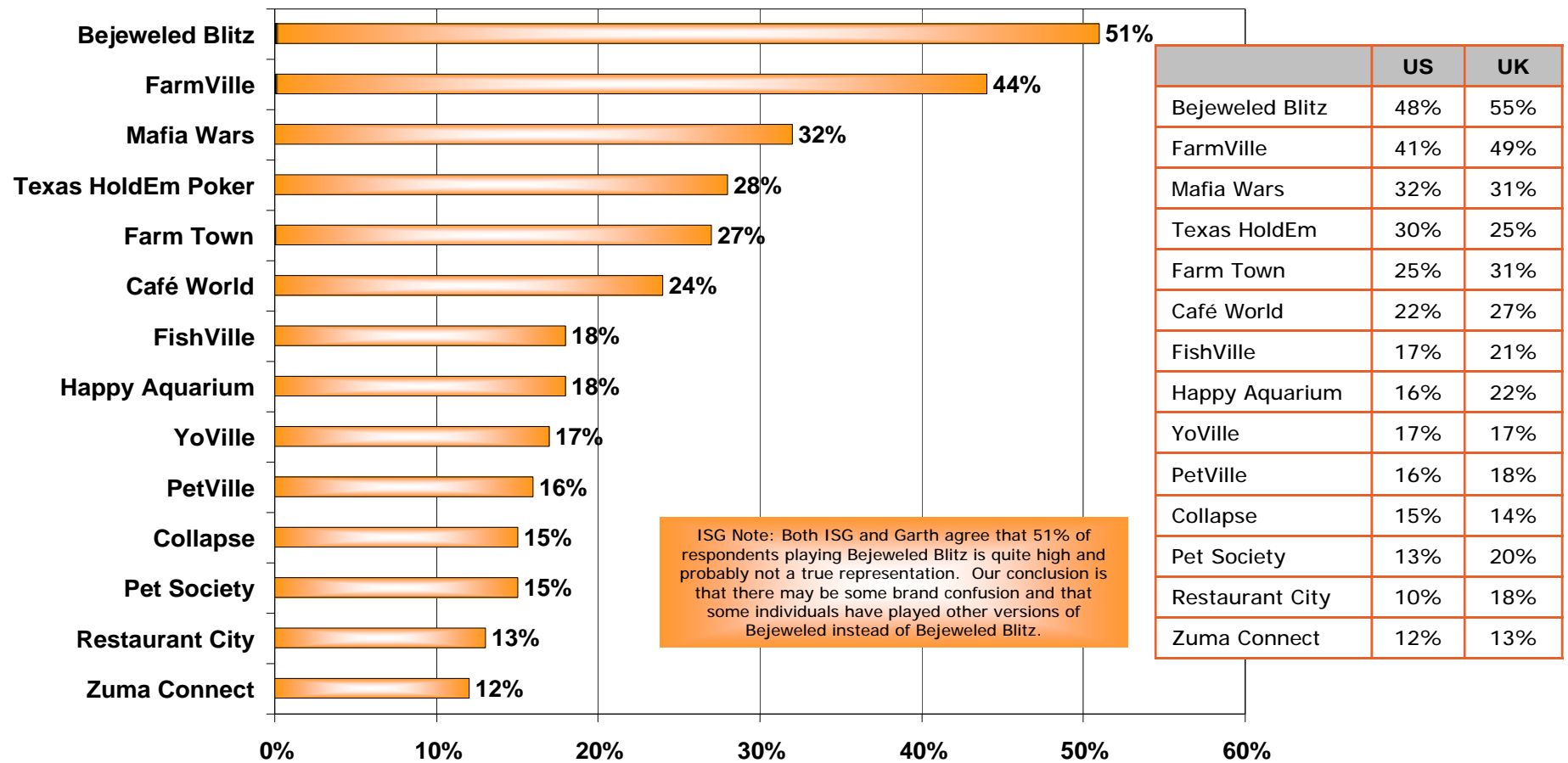
- Social gamers have played an average of 6.1 different social games, with those in the UK playing slightly more than those in the US.
- The majority (39%) of social gamers have played between three and five games.



Q12 How many different social games have you played?

## Social Games Played - Specific Games Played

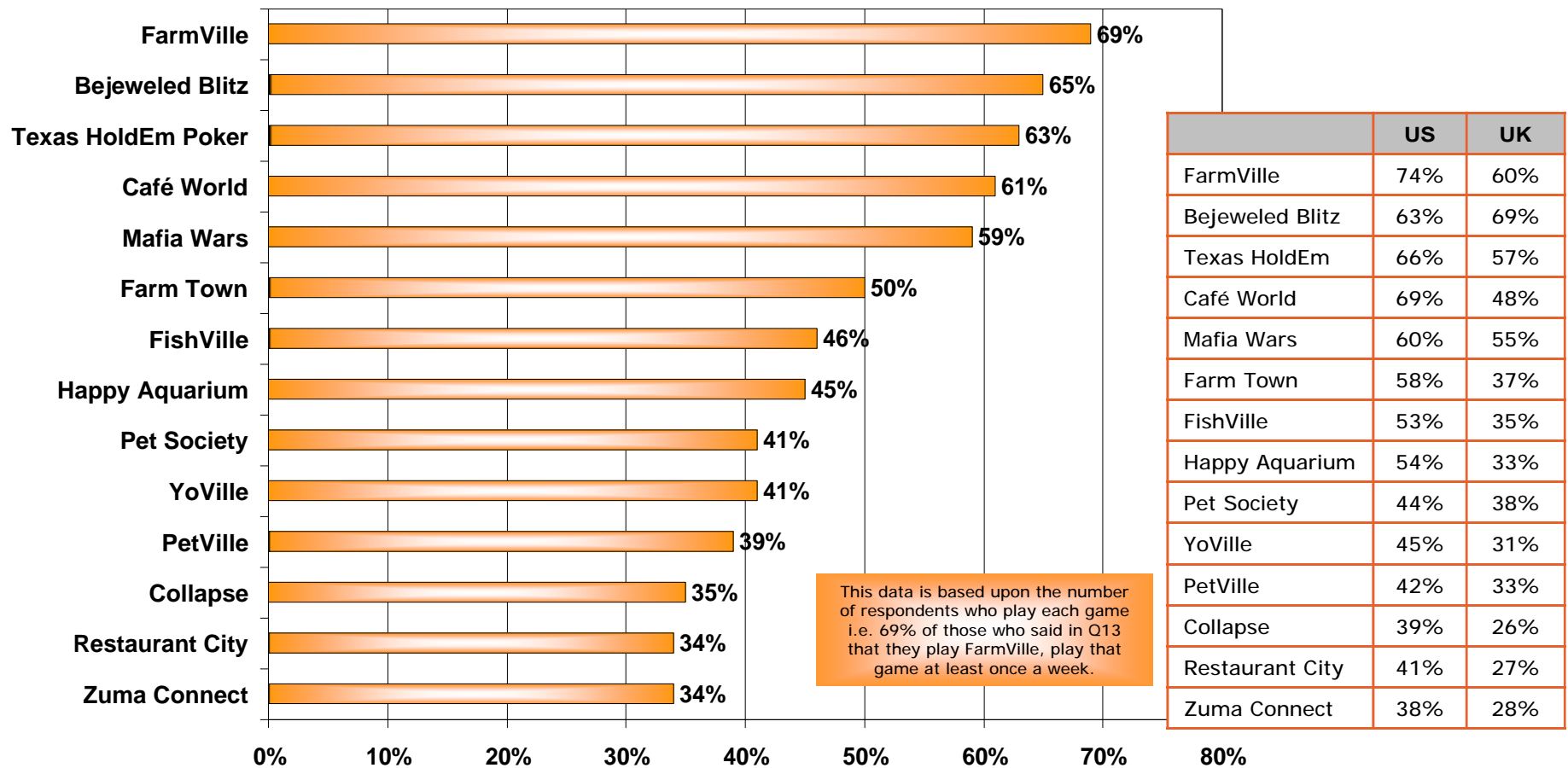
- At 51%, PopCap's Bejeweled Blitz is the most popular game among social gamers, followed by FarmVille (44%) and Mafia Wars at 32%.
- Texas HoldEm (28%), Farm Town (27%) and Café World (24%) are also quite popular.
- A wide variety of "other" social games played were provided by respondents. Refer to the Comments Report for a complete listing.



Q13 Which of the following social games have you played on a social networking site?

## Social Games Played - Games Played at Least Once a Week

- FarmVille (69%), Bejeweled Blitz (65%) and Texas HoldEm (63%) are the top three games that are played at least once a week, followed by Café World (59%) and Mafia Wars at 59%.
- With the exception of Bejeweled Blitz, social gamers in the US tend to play the various social games more often.



Q14 Which of these games are you currently playing at least once a week?

## Social Games Played - Weekly Game Play

- In terms of total hours of game play per week, Texas HoldEm topped the list with 54% of those who play weekly, playing at least one hour, followed by FarmVille, Café World and Restaurant City.
- Bejeweled Blitz, which is a different type of social game is typically played less than an hour each week.

Overall	< 15 min	15-30 min	31-60 min	1-2 hrs	3-4 hrs	5+ hrs		1+ hrs
Texas HoldEm	4%	16%	26%	30%	15%	9%		54%
FarmVille	9%	20%	21%	20%	17%	13%		50%
Café World	9%	18%	24%	19%	15%	14%		48%
Restaurant City	6%	25%	23%	21%	8%	19%		48%
Mafia Wars	9%	19%	26%	20%	12%	14%		46%
Farm Town	12%	15%	27%	25%	10%	10%		45%
PetVille	12%	18%	25%	25%	9%	11%		45%
YoVille	19%	20%	19%	20%	11%	11%		42%
Bejeweled Blitz	5%	25%	30%	21%	10%	10%		40%
Zuma Connect	6%	26%	28%	22%	10%	8%		40%
FishVille	16%	20%	26%	21%	5%	11%		37%
Happy Aquarium	13%	21%	31%	20%	8%	7%		35%
Pet Society	12%	20%	39%	11%	11%	8%		30%
Collapse	3%	38%	31%	11%	5%	11%		27%

Q15 Of the games you are currently playing at least once a week, how much time do you play each week?

## Social Games Played - Weekly Game Play by Country

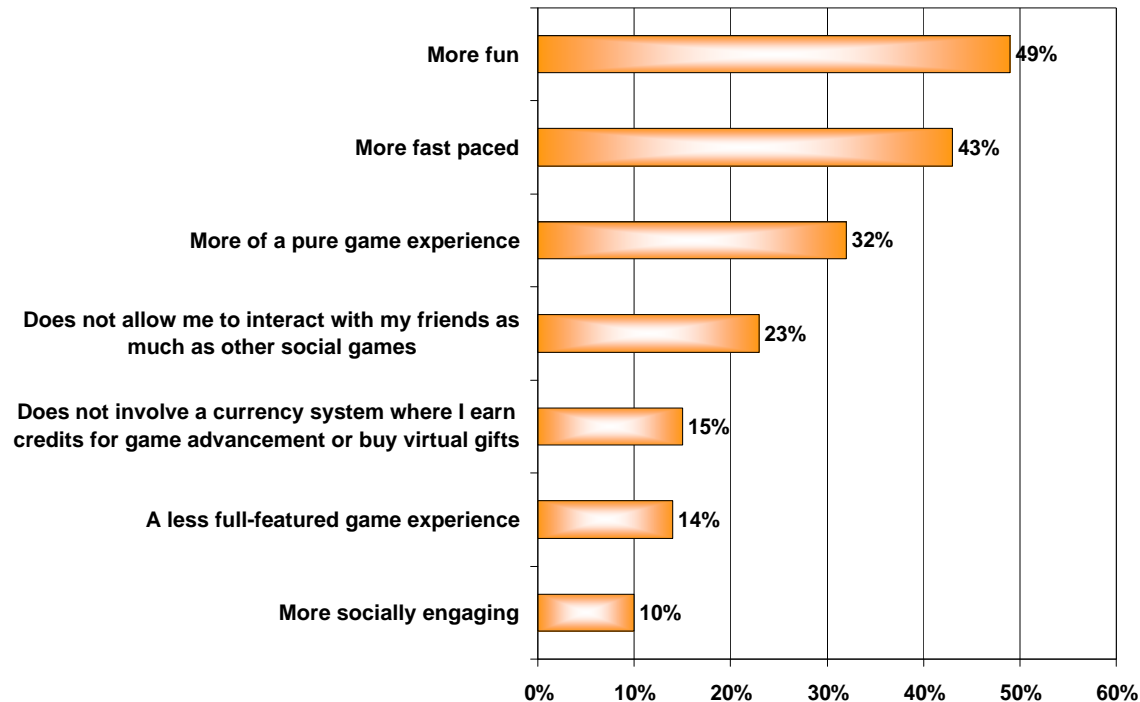
- UK social game players spend the most time playing YoVille, Texas HoldEm and Farm Town, while US social gamers spend more time playing Texas HoldEm, FarmVille and Café World.

US	< 15 min	15-30 min	31-60 min	1-2 hrs	3-4 hrs	5+ hrs		1+ hrs
Texas HoldEm	4%	15%	25%	30%	16%	9%		55%
FarmVille	8%	19%	20%	20%	19%	13%		52%
Café World	9%	15%	26%	21%	16%	13%		50%
PetVille	10%	21%	21%	33%	10%	6%		49%
Restaurant City	6%	24%	21%	21%	6%	21%		48%
Mafia Wars	7%	20%	27%	21%	13%	12%		46%
Farm Town	12%	15%	27%	26%	7%	12%		45%
FishVille	20%	17%	19%	29%	4%	10%		43%
Zuma Connect	9%	23%	26%	23%	11%	9%		43%
Bejeweled Blitz	5%	26%	28%	22%	11%	8%		41%
Happy Aquarium	13%	21%	24%	25%	9%	7%		41%
YoVille	18%	22%	20%	20%	10%	10%		40%
Collapse	2%	37%	33%	11%	7%	11%		29%
Pet Society	11%	18%	42%	7%	13%	9%		29%

UK	< 15 min	15-30 min	31-60 min	1-2 hrs	3-4 hrs	5+ hrs		1+ hrs
YoVille	20%	15%	15%	20%	15%	15%		50%
Texas HoldEm	3%	21%	28%	28%	12%	9%		49%
Farm Town	13%	15%	26%	22%	17%	7%		46%
Café World	9%	25%	21%	15%	13%	17%		45%
Restaurant City	5%	25%	25%	20%	10%	15%		45%
Mafia Wars	13%	18%	24%	18%	9%	18%		45%
FarmVille	11%	24%	22%	20%	12%	12%		44%
Bejeweled Blitz	5%	22%	32%	19%	8%	13%		40%
PetVille	17%	13%	33%	8%	8%	21%		37%
Zuma Connect	0%	33%	33%	20%	7%	7%		34%
Pet Society	13%	23%	35%	16%	6%	6%		28%
Collapse	7%	40%	27%	13%	0%	13%		26%
FishVille	7%	28%	41%	3%	7%	14%		24%
Happy Aquarium	10%	21%	48%	7%	7%	7%		21%

Q15 Of the games you are currently playing at least once a week, how much time do you play each week?

## Social Games Played - Bejeweled Blitz Game Play vs. Other Social Games



- Half (49%) of those who have played PopCap's Bejeweled Blitz said it is more fun than other social games, followed by 43% who said it is more fast paced and 32% who feel it is more of a pure game experience.
- On the negative side 23% said it does not allow them to interact with their friends as much as other social games, 15% noted that it does not involve a currency system, while 14% describe it as a less full-features game experience.

	US	UK
More fun	47%	54%
More fast paced	46%	38%
More of a pure game experience	37%	24%
Does not allow me to interact with my friends as much as other social games	22%	24%
Does not involve a currency system	13%	18%
A less full-featured game experience	14%	15%
More socially engaging	9%	10%

Q25 How would you describe the game play experience you have when playing Bejeweled Blitz compared to other social games like Mafia Wars or FarmVille, etc.?



# Virtual Currency and Special Offers

## Virtual Currency - Earning and Spending and Purchase of Virtual Currency

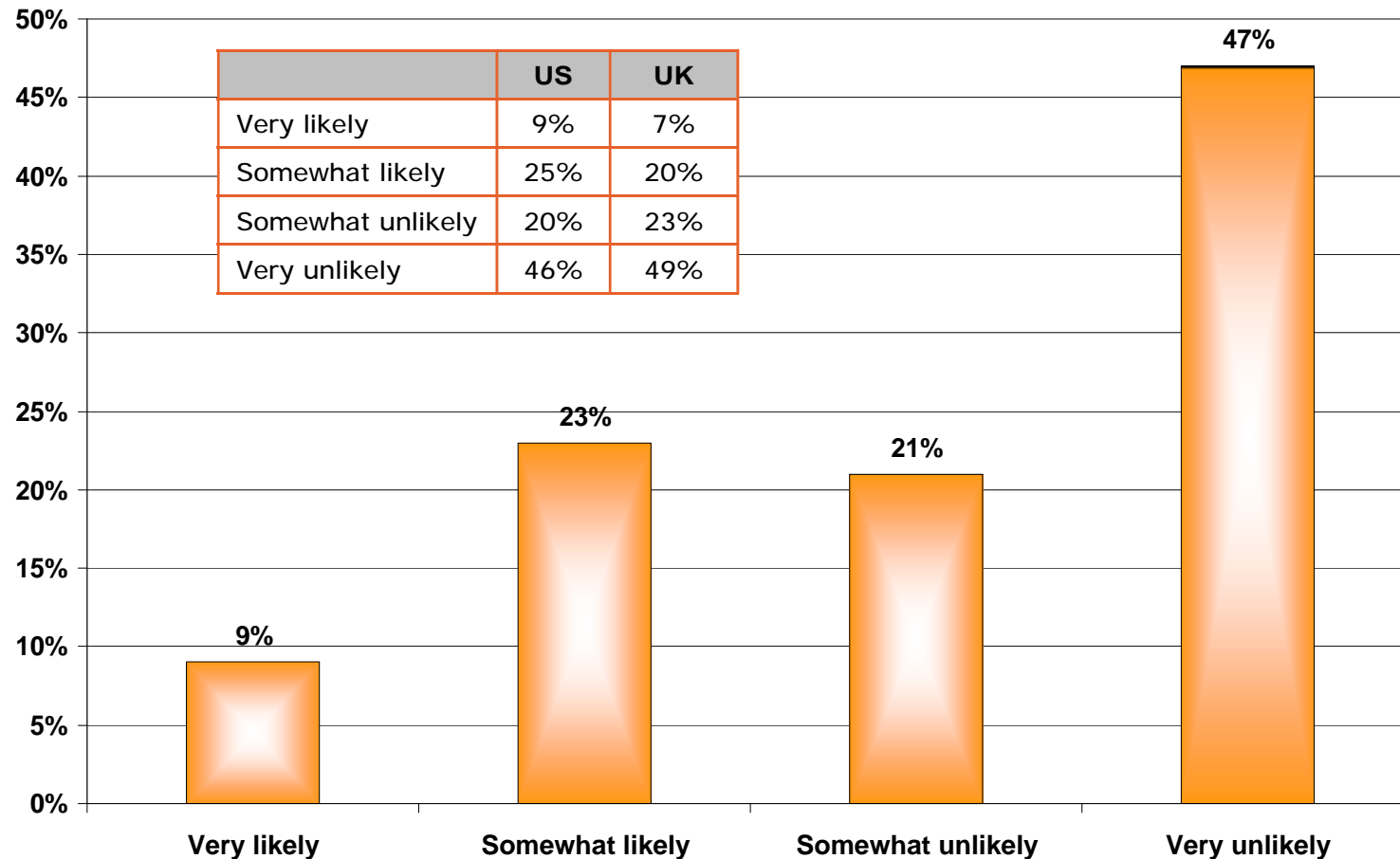
- Just over half (53%) of the social gamers have earned or spent virtual currently while playing social games, but only 28% have purchased virtual currency with real-world money and only 32% have purchased a virtual gift.
  - Those in the US are slightly more likely to earn, spend and purchase virtual currency.

<b>Earn/Spend</b>	<b>Overall</b>	<b>US</b>	<b>UK</b>
Yes	53%	55%	48%
No	47%	45%	52%
<b>Purchase with Real-World Money</b>			
Yes	28%	29%	25%
No	72%	71%	75%
<b>Purchase Virtual Gift</b>			
Yes	32%	35%	28%
No	68%	65%	72%

Q26 Do you earn or spend virtual currency when playing social games?  
 Q27 Have you ever purchased virtual currency with actual (real-world) money?  
 Q28 Have you ever purchased a virtual gift for someone when playing social games?

## Virtual Currency - Likelihood to Purchase Virtual Items with Real Money

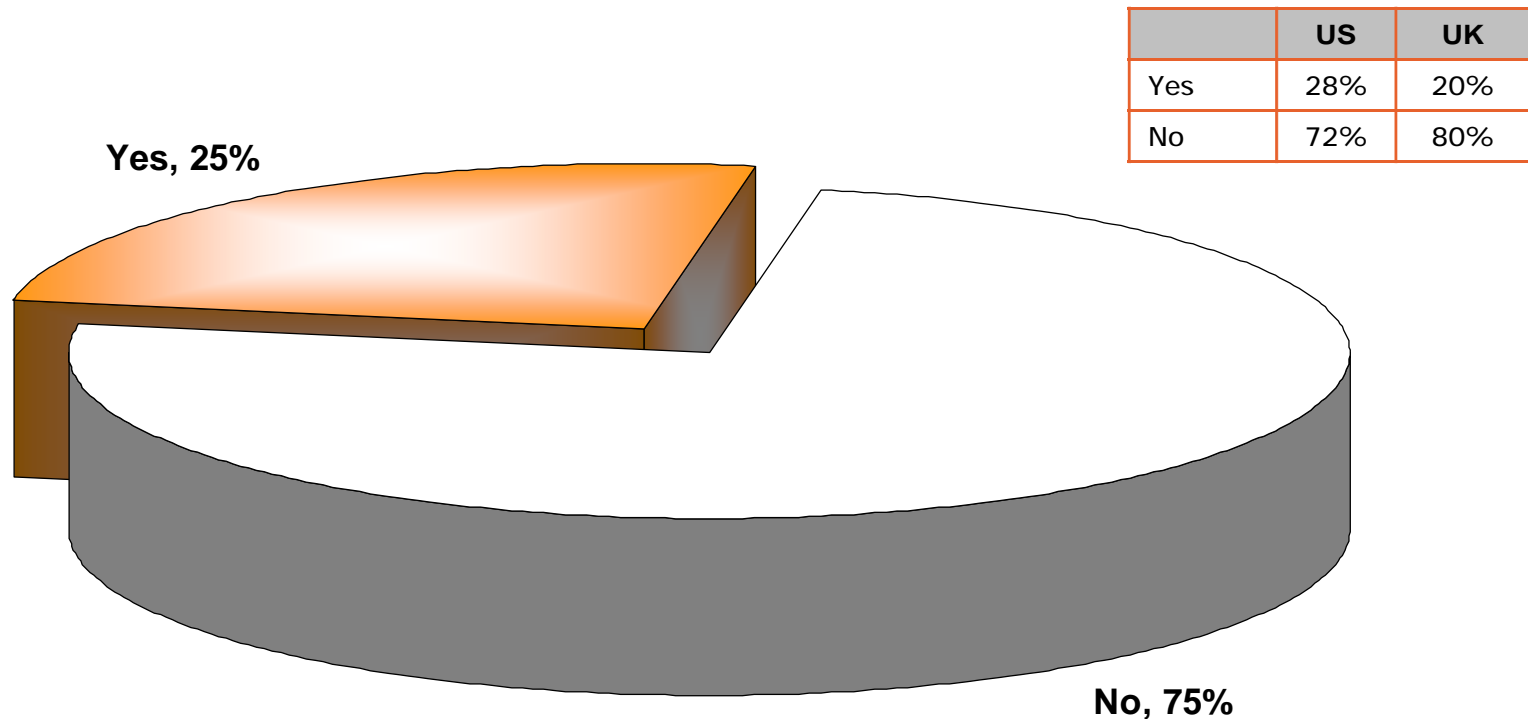
- Only one-third (32%) of social gamers are likely to purchase virtual items with real money with only 9% being Very Likely.
- Those in the US are slightly more likely to purchase virtual items than UK social gamers.



Q29 How likely would you be to purchase a virtual item with (real-world) money if it gave you a modest short-lived advantage in a game, e.g., power up special, bonus multiplier or special weapon or tool?

## Special Offers - Misled by an Ad or Other Special Offer

- One-fourth (25%) of social gamers have been misled by an ad or other special offer related to a social networking game, with slightly more of those in the US experiencing problems in this area.



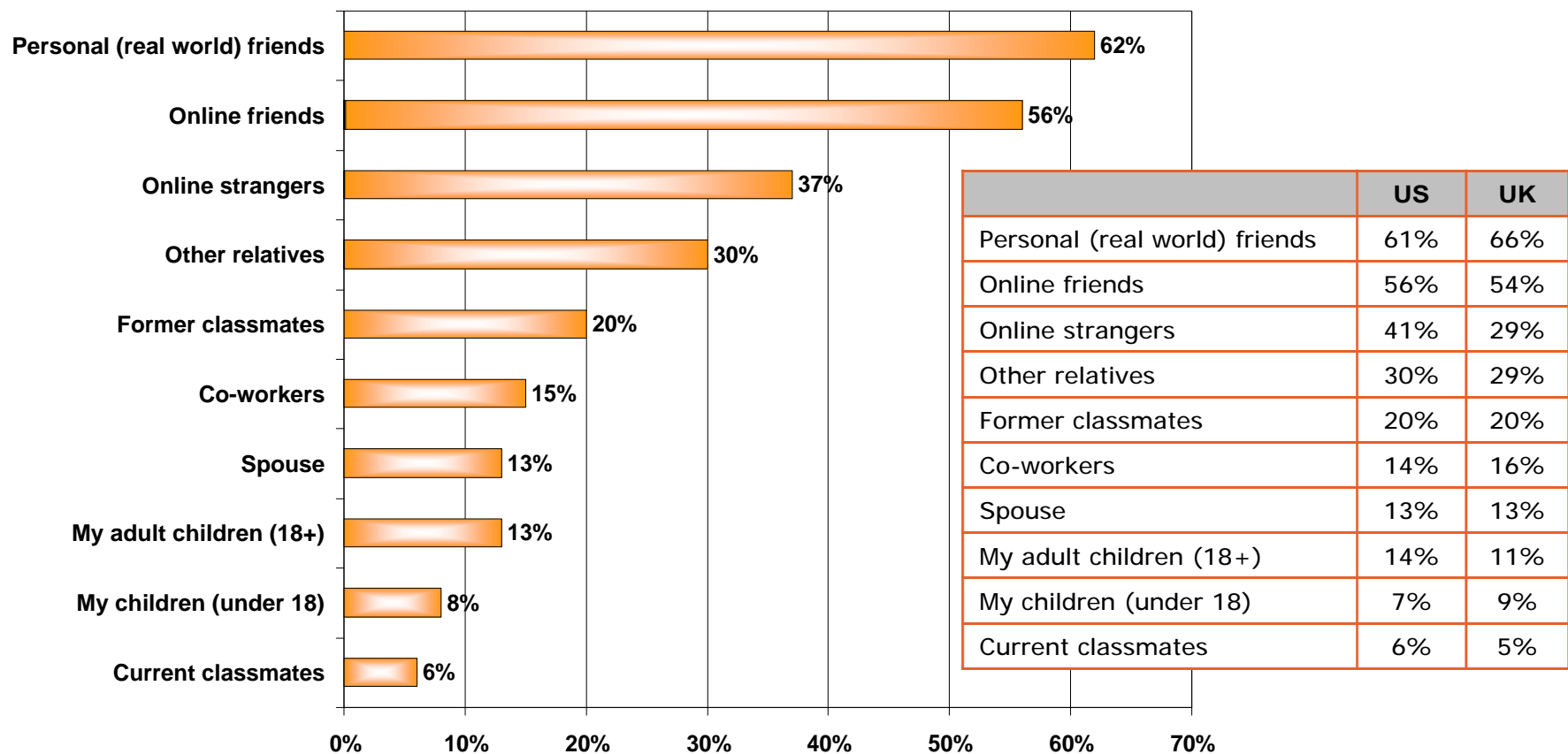
Q30 Have you ever been misled by an advertisement or other "special offer" related to a social networking game you have played?



# Social Gaming Relationships

## Social Gaming Relationships - Relationship to Fellow Social Game Players

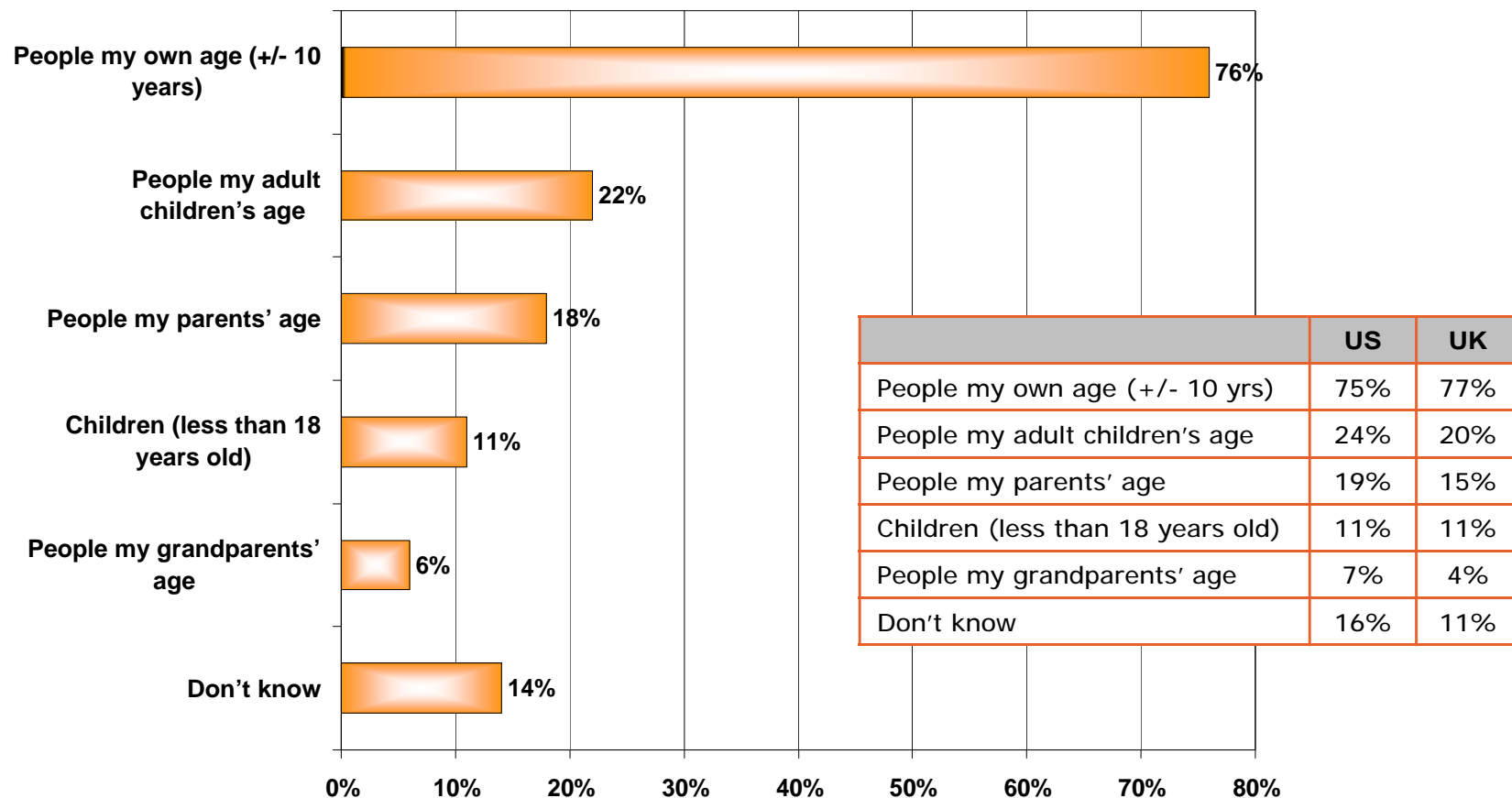
- 62% of social gamers play social games with personal (real world) friends, followed by 56% who play with online friends, and 37% who play with online strangers.
- A combined 43% play with someone who would be classified as a relative.
  - Social gamers in the US tend to play more with online strangers than those in the UK.



Q18 What is your relationship to the people you play social games with?

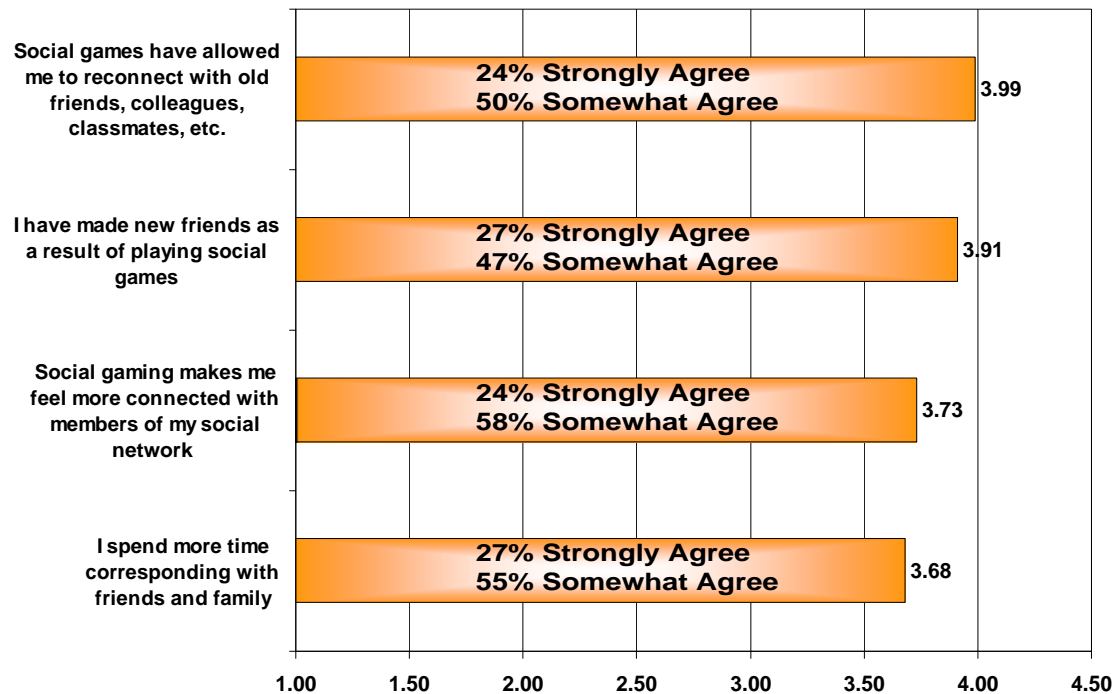
## Social Gaming Relationships - Age of Fellow Social Game Players

- The majority (76%) of social gamers play social games with people their own age (+/- 10 years).
  - More than half (53%) play with only one age group, while 20% play with two different age groups.



Q19 Which of the following represents the age group of the people that you play social games with?

## Social Gaming Relationships - Influence on Relationships

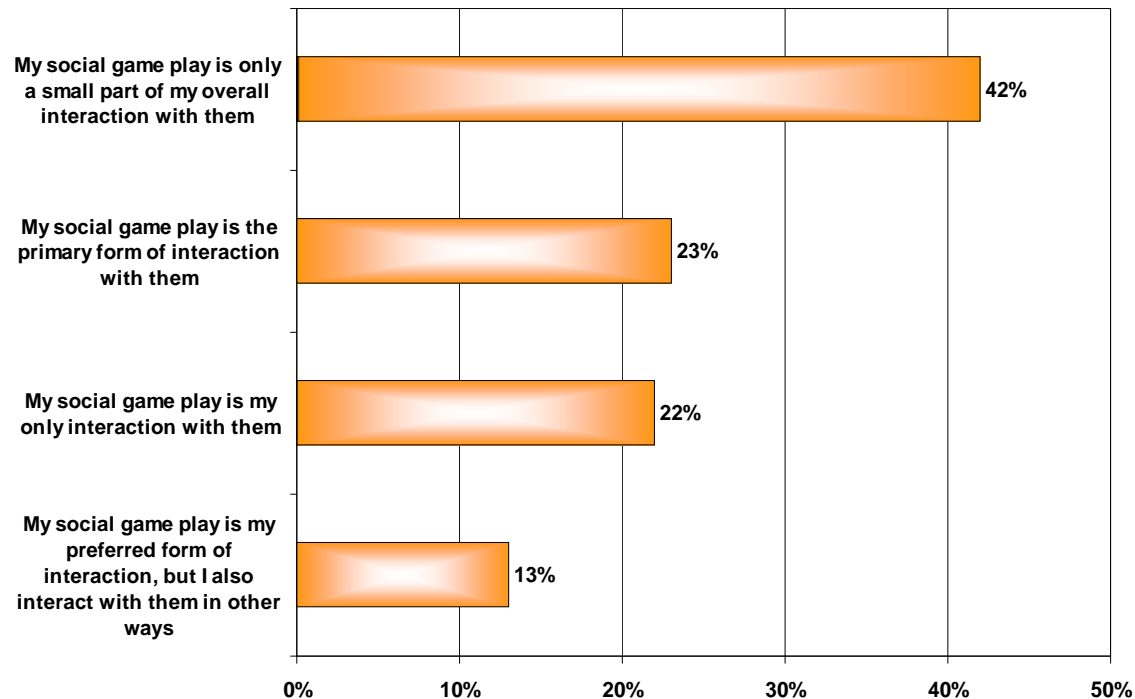


- On an overall basis only about one-fourth of social gamers Strongly Agree (6 or 7 rating) that social gaming has influenced their relationship with others.
  - Social game players in the US tend to Agree that social games have an influence on their relationships with others more than social gamers in the UK.

% Strongly Agree	US	UK
Allowed me to reconnect with old friends, colleagues, classmates	27%	18%
Made new friends as a result of playing social games	31%	19%
Makes me feel more connected with members of my social network	28%	19%
I spend more time corresponding with friends and family	29%	24%

Q20 How much do you agree or disagree with the following statements about how your involvement in social games has influenced your relationship with others?

## Social Gaming Relationships - Level of Interaction with Fellow Game Players

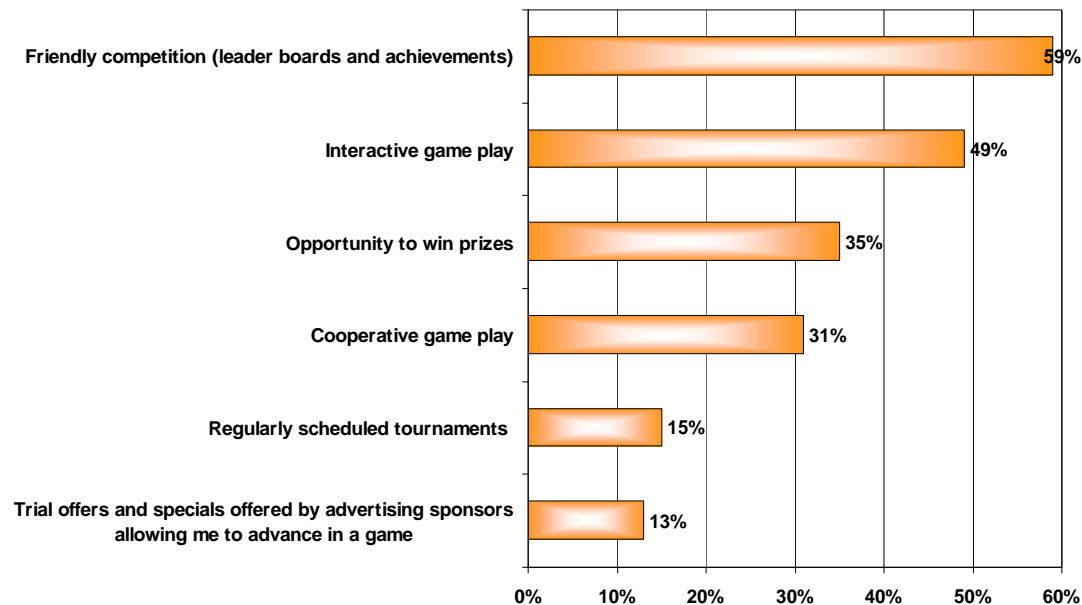


- Less than one-fourth (22%) said that social game play is the only interaction they have with their fellow game players, followed by 23% who said it is their primary form of interaction with these individuals.
- 42% said social games is only a small part of their overall interaction.
  - At 48%, social game players in the UK are more likely to interact with those they play games with in other ways in addition to playing games.

	US	UK
Social game play is only a small part of my overall interaction with them	38%	48%
Social game play is the primary form of interaction with them	22%	24%
Social game play is my only interaction with them	24%	19%
Social game play is my preferred form of interaction, but I also interact in other ways	15%	10%

Q22 How would you describe the level of interaction you have with the people you play games with on social networking sites?

## Social Gaming Relationships - Appeal of Social Games Beyond Social Interaction



- Beyond the social interaction, social game players like the friendly competition including leader boards and achievements (59%), followed by the interactive game play (49%) and the opportunity to win prizes (35%).
  - Social game players in the US are more attracted to the interactive game play, the opportunity to win prizes and the cooperative game play, while those in the UK are more interested in friendly competition.

	US	UK
Friendly competition (leader boards and achievements)	58%	61%
Interactive game play	53%	41%
Opportunity to win prizes	40%	24%
Cooperative game play	34%	25%
Regularly scheduled tournaments	15%	15%
Trial offers and specials offered by advertising sponsors allowing me to advance in a game	14%	12%

Q23 Beyond the social interaction and the camaraderie that social games offer, what features and functions of the games appeal to you most?



# Personal Experiences Where Social Game Play Resulted in Reconnecting with a Person or Created New Relationship

- About 30% of the survey participants provided a comment describing a personal experience where playing social games resulted in reconnecting with a person or creating a new relationship.
  - More than one-third of the comments described how social game play enabled them to reconnect with friend, classmate, co-worker, relative, etc, while the remaining third focus on how social games enable them to make new friends and in a few cases even develop a romantic relationship.

<b>% of all Survey Respondents</b>	
Met New People	10%
Reconnect with Classmates	9%
Reconnect with Friends	8%
Reconnect with Relatives	3%
Connect with People From Work	1%
Reconnect with Girlfriend/Boyfriend	<1%

## Met New People

- A guy I met through social gaming lives in Edinburgh and he offered us a small room when we visited Edinburgh at a very decent price. 819-UK
- I connected with someone by mistake while playing a game, and now we have been emailing ever since. 697-US
- I connected with two ladies from England who were very sociable and told me a lot about their hometown. It was a fun time and informative. 687-US
- I enjoy chatting with people from around the world as I play various games. We have exchanged recipes and learned about other areas of the world. 750-US
- I was currently leader on Bejeweled; it allowed me to connect with people. 1043-UK
- I was playing Bejeweled one night and started talking to a woman my age. Well that was 3 years ago, and we made friends and talk every day now. She is from New York and I am from Louisiana. We have never met, but we became good friends online. 230-US
- I have found a real woman I care about who cares about me, and we are together as a result of game playing. 176-US
- I have gained new friends because of networking in certain games online. 700-US
- I have met a woman from another part of the world, and we have grown into a loving relationship. She visits me, I visit her too. 764-US
- I have met people from all over the world and am in touch via email, phone, etc. 626-US
- I made some new friends by chatting with them on Farm Town. They added me to their friend's list, and we have chatted or emailed several times since. 19-US
- I met a lovely couple from Canada that I have since become great friends with. We have exchanged gifts, talk on the phone, and I have been invited to visit them. I have also found old friends from school that I have not spoken to in many years. 753-US
- I met my lover of 6+ years on an online game. 305-US
- I met one of my best online friends while playing on iPlay.net. 533-US
- I search for other players by their nickname and carry on conversations at same time. I have been invited to visit if ever in the area. 621-US
- It is a great way to meet people on the other end of the world. 511-US
- Playing social games helps me to find more friends. 535-US
- Some people joined my Mafia in Mafia Wars that I did not know. As a result of playing together, we learned we have similar interests and now talk outside of the game rooms. 304-US
- Through social gaming I have met new friends who will hopefully be my friends for life. 734-US
- When I play social games through Facebook, I have had the opportunity to connect with people from various countries, which has opened up a whole new spectrum for me. 1190-UK
- While playing I have met all kinds of people from all over the world. It is fun to play and talk and get to know them. 193-US

## Reconnect with Classmates

- A friend from high school and I stumbled upon one another, and we not only friended one another, but we have actually met in person. 28-US
- An old friend from high school found me, and we have been competing and renewing our old friendship. 676-US
- An old friend, who I had not talked to since high school became a member of my group. 538-US
- I connected with a friend from high school specifically because I knew he played a certain game online, and I knew I could approach him with that information. 76-US
- I discovered an old friend of mine from high school; she was the vice-president of our sorority when I was the president. We were quite close then, but grew apart when she moved away. But now, with the power of the Internet, we keep in touch regularly through playing games and by email as well. 671-US
- I found former classmates and friends as a result of social game play. 283-US
- I found one of my old school friends who was my best friend, and the games have helped us build up a new friendship. 1156-UK
- I found some old classmates that I have not heard from in over 35 years. It has been really fun to chat with them. 313-US
- I had a person who was a bully in primary school be my friend on Café World. 930-UK
- I had not seen or heard from a school friend in 25 years until playing social games. 1090-UK
- I have been able to reconnect with guys from my prep school that I have not seen in 35 years and we now meet 2 or 3 times a year. 406-US
- I live 250 miles away from where I grew up and have recently through these sites caught up with old school friends I have not seen for over 15 years. 874-UK
- I met an old classmate while playing online; now we are back in each others lives. 598-US
- I met up with an old friend I went to school with and have since met with and continued an old friendship. 423-US
- I reconnected with a classmate from about 10 years ago. We used to be good friends, but he was not really a gamer back then. I found out that he games more now and I was able to have friendly competition as part of renewing the friendship. 238-US
- I reconnected with an old school friend while playing Farm Town. She invited me to be her neighbor, so we regularly pick each other to harvest each other's farms and have a chat while we are doing it. 1118-UK
- I was playing a game with a girl once, and it turned out that she was my best friend from elementary school. We had not seen each in about 25 years, and now we stay connected. 763-US
- It has been almost forty years since I was in high school, and a broken relationship from school was left unresolved. I actually looked up this person's name, found him, reconnected and started playing Farmville on a regular basis with him. The game smoothed the way for us to resolve and reconnect as friends after all these years. 484-US
- When my score got posted, my best friend from school saw it on another friend's page and requested me. Now we chat and play games all the time together. 280-US

## Reconnect with Friends

- A friend moved abroad, and I reconnected with them while playing YoVille on Facebook. 941-UK
- A friend moved to another state, and this allows us to play and chat at the same time. 756-US
- A good friend who lives in another state invited me to play. We keep in contact more because of the game. 1-US
- An old friend of mine moved away a few years ago so we don't speak very often, but she also played the games, so we started to talk more as a result. 1067-UK
- An old friend of mine that I had not seen nor heard from in almost 12 years was listed. I was really happy to connect with her. 680-US
- An online game friend came to visit me at my home about 1000 miles away. 20-US
- Gaming is a good opportunity to chat with old friends. 881-UK
- I am a member of a forum and they play social games. They recommended I play, as I spend a lot of time at home, and I also can get in touch with them while playing the game. 1132-UK
- I connected with old friends because they play the same games as me. 739-US
- I don't usually get to see certain friends, but I am able to play interactive games with them, and we message each other in order to keep in touch. 868-UK
- I have connected with so many friends that I have lost contact with over the years through social networking and game play. 664-US
- I have met a few old friends, and we now meet up for play dates with our young children. 273-US
- I have reconnected with old friends that I have not spoken to in at least five years. 96-US
- I met one of my old friends through playing games on Facebook. We regularly keep in touch now due to the games on Facebook, which I think is excellent. 1124-UK
- I play regularly with an old friend I have known for 40 years. 684-US
- I reconnected with a few old friends that I have not spoken to in years playing Bejeweled. 285-US
- I used to play another online game with most of my friends; however, over the last couple of years, we went different ways. One of my previous online friends contacted me about Facebook and all the things to do on it. We have a lot of fun giving and receiving gifts from everyone. As I have played, I have become friends with their friends and so on. 291-US
- I was getting emails from someone I knew that I had not seen for a long time. I ended up meeting face-to-face with him later on and continued to play online games and tournaments with him as a partner. 726-US
- I was playing Bejeweled with a friend I lost touch with many years ago. But it took three weeks to realize it. 1098-UK
- It has enabled me to contact with people I have not heard from since my retirement. 482-US
- My friend moved to a different state a few years back, and a few months ago I found him on an online game. Now we have gotten to know each other again and I am very happy. 127-US
- Playing social games lets me reconnect with old friends and gives us an entertaining atmosphere. 278-US
- The games draw people in to them allowing all of us to see who is playing and sort through all of the people to find friends from the past. I have met a couple of old friends this way. 342-US

## Reconnect with Relatives

- A distant relative contacted me once when he recognized my name and we started talking. 457-US
- As a result of playing Farmville I spend more time with out-of-town siblings. 252-US
- Farmville has reconnected me with family members. 277-US
- I also play with my adult daughter in another state. 239-US
- I am closer with relatives who live far away and cannot visit often. 459-US
- I came across a cousin I had not seen or heard of in a long time, and we played a few games together. 378-US
- I chat with some family about social games. 137-US
- I connected with an aunt and uncle whom I have not seen in a very long time. This interaction has been a great way to reconnect. 90-US
- I found my cousin that I have not seen since we both were teens, reconnected, and to this day still play Pet Society together. 670-US
- I got to interact with family, as well as old and new friends. 748-US
- I have a family member that lives in another state, and we play together. 328-US
- I have family spread out all over the country, and we only get to see each other once a year, at Christmas. The gaming gave us something to connect over and helped begin discussions, even carrying over the Christmas period. It helped the older cousins interact more with the younger cousins. 1149-UK
- I have never had any regular, daily interaction with my brother in the past. We do not typically call or email each other. But lately we have been playing Word Twist several times a week, and I feel a newer, albeit small connection to him. 295-US
- I have not seen my sister in years. She plays Fish World, and invited me to play. I leave her messages by Fish Mail. 181-US
- I have played against my brother. We just talked, and one day we connected. 465-US
- I play against my daughter. 302-US
- I reconnect with family members whom I have not talked with in some time. 198-US
- I reconnected with my brother and his wife, and found out they were having another baby. 698-US
- I regularly speak to my ex sister-in-law whom I would not normally speak to. 405-US
- I talk to my sister again. 686-US
- Mostly connecting with cousins, aunts and uncles that I have never met in person or have not seen in 25 to 30 years because of distance. 361-US
- My children stay in touch more. 733-US
- My mother-in-law and I connected more while playing Farm Town. She would buy things for my daughter. Also, my mom would hire me to harvest her crops. This helped add to our relationship while living so far apart (4000 miles). 643-US

## Connect with People From Work

- A ex colleague saw my picture on one of their friend's sites while playing Bejeweled and sent me a message to connect with them. 1072-UK
- I can reconnect with several friends and colleagues on MySpace. 720-US
- I got in touch with former colleagues. 975-UK
- I have played games with people I work with. 82-US
- I have reconnected with a client from 10 years ago. 969-UK
- I played a game with a former employee, and that in turn led to me becoming friends with the children of this person, who are adults now. 731-US
- I started playing with a man I worked with in the late '90s. We had not seen or spoken to each other for seven years. The more we played, the more we instant messaged and e-mailed. After a few months we rekindled our friendship. 463-US
- It allowed me to reconnect with a co-worker I lost touch with when I went to school. 138-US
- It allowed me to reconnect with an old co-worker I lost touch with when I left for school. 197-US
- My ex boss helped to fertilize my farm in Farmville. 485-US
- One of my co-workers, whom I have not kept in touch with for a while, decided to accept my invite to play the game with me. Since she started playing, she has become very competitive, and it is a lot of fun trying to beat her now. She's almost the top scorer out of my other friends. Regardless, the game made us reconnect in a fun and exciting way. 216-US

## Reconnect with Girlfriend/Boyfriend

- Four days ago I was able to find a girlfriend that I have known since I was nine years old. I am now 62. We lost contact in 1966 after we both got married, and she moved to Alabama and I moved to Texas. It is sure good to have her back in my life. She is one of the best friends anyone could ask for. I have also met many other new friends. 751-US
- I found an old girlfriend whom I have not been in touch with for 26 years while playing Farmville. We are good friends and visit each other occasionally. 575-US
- I have played and renewed my friendship with my high school prom date and former girlfriend. 108-US
- I meet an old boyfriend from the 70's. This was exciting for me, and we still keep in touch. 118-US
- I met up with an old flame. 490-US
- I ran into a girl playing Bejeweled that I dated in high school. We got together even though we live in different states and had a real good time. 618-US
- I reconnected with a former girlfriend. 768-US



# Suggestions for Enhancing the Social Game Play Experience

- A variety of suggestions were provided regarding how game developers can enhance the social game playing experience. The comments were grouped into the below categories and are provided in detail in the Comments Report.

<b>% of all Survey Respondents</b>	
Improve the Selection	7%
Incentives/Prizes/Rewards	6%
Improve Game Play	5%
Improve the Quality of the Games	3%
Make Games More Interactive	2%
Improve Graphics	2%
Improve the Speed of the Games	1%
Improve Usability/Ease of Use	1%
Free Games	1%
More Real World Experience	1%
Virtual Gifts to Advance	1%
Chat -	1%
Improve the Level of Competition	1%
Advertising	1%
Security/Safety of Games	1%
Music	<1%
Player Comments/Input	<1%
Bejeweled Blitz	<1%



# Key Takeaways

## Key Takeaways

- Among the nearly 5,000 consumers who responded to the survey, more than 1,200 indicated they played games on social networking sites and platforms at least once a week
- Social game players average 43 years in age, with those in the US being significantly older (48) than those in the UK (38). Females are slightly more likely to play social games than males (55% vs. 45%).
- More than half (56%) have been playing social games for at least one year, with fun and excitement (53%), stress relief (45%) and competitive spirit (43%) being the primary reasons cited for playing social games.
- The majority (95%) play social games multiple times a week and log into Facebook or another site specifically to play social games about half of the time.
- 62% play social games with personal (real world) friends, while 43% play with a relative. The majority (76%) play with people their own age (+/- 10 years).
- Beyond the social interaction of social game playing people, like the competitive nature the most (59%), followed by the interactive game play (49%) and the opportunity to win prizes (35%).
- A combined 57% rely on word of mouth to learn about new games, followed by 38% who learn about new games from ads on the social networking sites. Those in the US rely more on recommendations, than those in the UK.
- Social gamers have played an average of 6.1 different social games. Half of those who have played PopCap's Bejeweled Blitz feel it is more fun than other social games, 43% said it is more fast paced and 32% said it feels more like a pure game experience.
- The majority of social game players have reconnected with old friends, classmates and relatives as a result of playing games on social networking sites, while others have met new people who they continue to play games with in addition to corresponding and in rare cases meet in person.



# Segmentation Analysis



## Gender Segmentation Analysis

The following 3 pages highlight key  
segmentation results based upon Question 32.

		Male (535)	Female (665)
Length of Social Game Play	< 4 months	10%	15%
	4 - 6 months	13%	14%
	7 - 12 months	17%	17%
	1 - 2 years	24%	17%
	2+ years	36%	38%
Frequency of Game Play	Several times a day	29%	38%
	Once a day	33%	28%
	2 - 3 times a week	32%	30%
	Once a week or less	7%	4%
Where Hear About New Games	Ad on a social networking site	36%	40%
	Recommendation (friend, relative or colleague)	38%	38%
	Alert from an online friend playing a game	31%	38%
	Online search through Google, Yahoo!, etc.	31%	23%
	Ad on site other than a social networking site	23%	14%
Play Other Video Games	Yes	75%	65%
Changes in Social Game Play in Past Three Months	Increased	33%	36%
	Decreased	10%	11%
	About the same	57%	53%

		Male (535)	Female (665)
Avg # of Social Games Played		5.7	6.5
Social Games Played	Bejeweled Blitz (maybe other Bejeweled play included)	43%	57%
Where Purchased Games	FarmVille	39%	47%
	Mafia Wars	42%	23%
	Texas HoldEm Poker	39%	20%
	Farm Town	26%	28%
	Café World	18%	28%
	FishVille	16%	19%
	Happy Aquarium	14%	20%
	YoVille	13%	20%
	PetVille	14%	18%
Factors Influencing Game Selection	Recommendation from friends, relatives or colleagues	54%	66%
	Familiar with the title/Played similar game elsewhere	45%	48%
	Featured on a social networking site	29%	35%
	Comes from a brand I trust	18%	10%
	Online advertisement	15%	8%
	Online search through Google, Yahoo!, AOL, Bing, etc.	11%	9%
Relationship of those Playing Social Games With	Personal (real world) friends	56%	68%
	Online friends	59%	53%
	Online strangers	41%	33%
	Other relatives, e.g., sister, brother, cousin, etc.	20%	38%

		Male (535)	Female (665)
Why Play Social Games	I like the fun and excitement	51%	55%
	It is a stress-reliever	41%	49%
	I enjoy the competitive spirit	48%	39%
Level of Interaction	Small part of interaction	34%	48%
	Primary form of interaction	27%	19%
	Only interaction	25%	20%
	Preferred form, but interact in other ways	14%	13%
Beyond Social Aspect what Appeals to You About Social Games	Friendly competition	54%	64%
	Interactive game play	47%	51%
	Opportunity to win prizes	36%	34%
	Cooperative game play	32%	30%
	Regularly scheduled tournaments	19%	12%
Purchased Virtual Currency with Real Money	Yes	35%	22%
Likelihood to Purchase Virtual Items with Real Money	Very likely	12%	5%
	Somewhat likely	26%	21%
	Somewhat unlikely	24%	19%
	Very unlikely	38%	54%
Mislead by Ad or Special Offer	Yes	30%	22%



## Age Segmentation Analysis

The following 3 pages highlight key segmentation results based upon Question 34.


		18 - 21 (61)	22 - 29 (170)	30 - 39 (257)	40 - 49 (242)	50 - 59 (267)	60+ (195)
Length of Social Game Play	< 4 months	14%	16%	10%	12%	11%	17%
	4 - 6 months	15%	16%	11%	13%	14%	15%
	7 - 12 months	16%	15%	21%	19%	16%	12%
	1 - 2 years	18%	19%	23%	23%	19%	11%
	2+ years	36%	33%	36%	34%	39%	45%
Frequency of Game Play	Several times a day	46%	31%	33%	31%	34%	36%
	Once a day	20%	29%	32%	30%	28%	34%
	2 - 3 times a week	31%	36%	29%	32%	33%	23%
	Once a week or less	3%	3%	5%	7%	5%	7%
Where Hear About New Games	Ad on social networking site	51%	50%	46%	38%	32%	24%
	Recommendation friend, relative, etc.	39%	36%	41%	40%	34%	37%
	Alert from an friend playing a game	36%	36%	33%	36%	36%	33%
	Search through Google, Yahoo!, etc.	33%	31%	31%	18%	31%	20%
	Ad on a site other than SNS	20%	24%	22%	14%	17%	14%
	Read on a blog or a website	13%	21%	17%	12%	6%	3%
Play Other Video Games	Yes	87%	81%	78%	69%	63%	51%
Changes in Social Game Play in Past Three Months	Increased	46%	43%	38%	36%	29%	26%
	Decreased	17%	13%	10%	8%	9%	11%
	About the same	37%	44%	52%	56%	61%	63%

		18 - 21 (61)	22 - 29 (170)	30 - 39 (257)	40 - 49 (242)	50 - 59 (267)	60+ (195)
Avg # Social Games Played		7.0	5.8	6.9	6.0	6.2	5.3
Social Games Played	FarmVille	69%	50%	49%	44%	38%	30%
	Bejeweled Blitz (maybe other Bejeweled play included)	52%	51%	56%	52%	49%	42%
	Mafia Wars	41%	39%	40%	33%	27%	16%
	Café World	36%	28%	28%	21%	21%	14%
	Happy Aquarium	33%	18%	23%	17%	15%	11%
	FishVille	28%	19%	21%	16%	19%	11%
	Farm Town	26%	26%	33%	31%	25%	17%
	YoVille	25%	17%	19%	20%	15%	9%
	Texas HoldEm Poker	21%	30%	26%	30%	31%	28%
PetVille	20%	17%	19%	19%	16%	9%	
Factors Influencing Game Selection	Recommendation from friends, relatives etc.	48%	61%	55%	66%	60%	65%
	Familiar with the title/Played similar game before	46%	44%	42%	52%	45%	50%
	Featured on a social networking site	46%	36%	39%	32%	24%	27%
	Comes from a brand I trust	21%	11%	19%	11%	13%	11%
	Online search through Google, Yahoo!, AOL, etc.	18%	12%	10%	6%	12%	6%
	Online advertisement	13%	13%	11%	11%	10%	10%
Relationship of those Playing Social Games With	Personal (real world) friends	74%	68%	68%	62%	57%	54%
	Online friends	54%	51%	56%	62%	54%	52%
	Other relatives, e.g., sister, brother, cousin, etc.	38%	26%	29%	33%	30%	28%
	Online strangers	31%	34%	34%	39%	40%	35%
	Former classmates	31%	31%	30%	16%	13%	6%
	Current classmates	28%	10%	8%	4%	1%	0%

		18 - 21 (61)	22 - 29 (170)	30 - 39 (257)	40 - 49 (242)	50 - 59 (267)	60+ (195)
Why Play Social Games	I like the fun and excitement	69%	61%	52%	53%	53%	44%
	I enjoy the competitive spirit	41%	42%	45%	43%	43%	43%
	It is a stress-reliever	36%	39%	46%	47%	51%	44%
	I like the sense of accomplishment	31%	25%	23%	14%	15%	18%
Level of Interaction	Small part of my overall interaction	51%	42%	40%	44%	39%	42%
	Only interaction	20%	15%	20%	20%	30%	27%
	Primary form of interaction	16%	29%	26%	22%	21%	17%
	Preferred form , but interact in other ways	13%	14%	15%	14%	10%	14%
Beyond Social Aspect what Appeals to You About Social Games	Interactive game play	59%	48%	47%	48%	46%	54%
	Friendly competition	57%	46%	60%	68%	66%	52%
	Opportunity to win prizes	46%	38%	36%	30%	40%	29%
	Cooperative game play	43%	30%	35%	27%	28%	29%
Purchased Virtual Currency with Real Money	Yes	34%	28%	36%	23%	28%	19%
Likelihood to Purchase Virtual Items with Real Money	Very likely	10%	14%	13%	7%	7%	2%
	Somewhat likely	31%	25%	25%	23%	23%	16%
	Somewhat unlikely	10%	21%	18%	25%	22%	24%
	Very unlikely	49%	40%	44%	45%	48%	58%
Mislead by Ad or Special Offer	Yes	26%	24%	30%	23%	28%	21%



# Research Methodology




This research was conducted by Information Solutions Group (ISG; [www.infosolutionsgroup.com](http://www.infosolutionsgroup.com)) exclusively for PopCap Games. The results are based on 1,202 online surveys completed by members of Toluna's Internet ePanel in the United States and United Kingdom between January 7 and January 12, 2010. Of the 1,202 respondents, 800 (67%) are from the US, while 402 (33%) are from the UK.

To qualify for participation, individuals must play social games for more than 15 minutes a week. This social game playing audience consisted of 535 men and 665 women. In theory, in 19 cases out of 20, the results will differ by no more than 2.5 percentage points from what would have been obtained by seeking out and polling all US and UK Internet users 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 marketing 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, 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](http://www.infosolutionsgroup.com)



# About Toluna/Greenfield

- Toluna/Greenfield 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/>



# Discussion