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New Survey Exposes Social Gaming Phenomenon Preferences in U.S. and UK

Nearly a Quarter of All Consumers Now Play Social Games Regularly; Women Drive Latest Video Game Trend Ahead of Men

SEATTLE and DUBLIN, Feb. 17, 2010 - PopCap Games, maker of some of the world's most popular video games, today unveiled the results of a survey targeting "social gamers": Consumers in the U.S. and UK who play games on social networking platforms such as Facebook® and MySpace®. More than 24% of respondents said they play social games regularly, indicating a total social gamer population of approximately 100 million in America and the United Kingdom alone. And contrary to prevailing stereotypes, the average social gamer is a 43-year old woman.

The survey identified a number of differences between U.S. and UK social gamers, and revealed trends and tendencies which establish the social gamer audience as unique from traditional video game playing audiences. While still in its infancy compared to the traditional video game industry, the social games sector represents a huge opportunity to reach hundreds of millions of consumers who historically have not played video games. The social games sector is projected by industry analysts and researchers to generate revenues of more than US\$1 billion in 2010.

Among the nearly 5,000 consumers who responded to the survey, more than 1,200 play games on social networking sites and platforms at least once a week, qualifying them as "social gamers" for the purposes of the survey. Two-thirds of all qualified survey respondents are U.S.-based. 55% of all social gamers are female and 45% are male — with the disparity being even larger among UK consumers (58% vs. 42%). The average age of social gamers is 43, with U.S.-based social gamers averaging 48 years of age compared to 38 for those based in the UK. Further, 46% of American social gamers are 50 or older, compared to just 23% in the UK. Only 6% of all social gamers are age 21 or younger.

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Gender Differences

As with most forms of video games, men and women differ in their consumption of, and attitudes towards, social games:

- Among the most avid social gamers, women make up the majority; 38% of female social gamers say they play social games several times a day, vs. 29% of males.
- Women are more apt to play social games with real-world friends than men are (68% vs. 56%).
- Men are more inclined than women to play with strangers (41% vs. 33%); nearly twice as many women as men say they play social games with relatives (46% vs. 29%).

Frequent Play

- The vast majority (95%) of social gamers play multiple times per week; nearly two-thirds (64%) play at least once a day.
- U.S. players tend to play more frequently, with 68% saying they play daily compared to 55% of U.K.-based social gamers.
- 61% of social gamers say their average social gaming session lasts more than half an hour; one in ten say their average session lasts 3 hours or more!
- More than half (56%) of social gamers have been playing social games for more than a year.
- About one quarter (26%) are new to social gaming, having started playing in the last six months.
- About a third (35%) of social gamers say their consumption of social games has increased over the past three months, compared to 10% who said it has decreased.

Playing Preferences

- Facebook is far and away the most popular destination for social gamers; 83% of social gamers cite Facebook as a place where they play social games, compared to 24% who play on MySpace, 7% on Bebo and 5% who play on Friendster.
- Social gamers spend 39% of all their time on social networking sites/services playing games. The second and third most popular social networking activities among social gamers are chatting with/messaging friends (17%) and playing non-social (solo) games (15%).
- When asked to choose as many reasons as they wanted for playing social games from a lengthy list, social gamers cited "fun and excitement" as the most popular motivation (53%). Stress relief (45%) and "competitive spirit" (43%) were next most popular respectively, followed by "mental workout" (32%) and "connect with others" (24%).
- Only 17% of UK-based social gamers chose "connect with others" as a reason for playing, compared to 28% of their U.S. counterparts.
- Nearly half (49%) of the times when they log into social networks, social gamers do so specifically to play social games.

Viral Growth/Consumption

- Social gamers tend to play their favorite games with great frequency; the most popular games for weekly or more frequent play are Farmville (69% of all social gamers who play Farmville say they play once a week or more), Bejeweled® Blitz (65%), Texas Hold'em Poker (63%), Cafe World (61%) and Mafia Wars (59%).
- Word-of-mouth is the most common way that social gamers hear about new social games; 57% of social gamers rely on a recommendation or in-game alert from a friend while 38% said they learn about new games from ads on social networking sites and 27% cited standard Web searches as a source of information on new social games.
- Social gamers have played an average of 6.1 different social games; 39% have played between three and five social games and 13% say they've played more than 10.

Virtual Currencies

- Slightly more than half (53%) of social gamers say they've earned and/or spent virtual currency in a social game, but only 28% have purchased virtual currency with real-world money and only 32% have purchased a virtual gift.
- Nearly a third (32%) of social gamers say they're likely to purchase virtual items with real-world currency.
- Fully a quarter (25%) of social gamers say they've been misled by an ad or other "special offer" tied to a social game they've played.

Social Gaming Relationships

- 62% of qualified survey respondents say they play social games with real-world friends, while 56% play with friends they've made online and 37% say they play with strangers.
- U.S.-based social gamers are far more likely to play with strangers than their UK counterparts (41% vs. 29%).
- Nearly half (43%) of social gamers say they also play social games with their parents, children, and/or other relatives.
- 62% of social gamers agree that social games allowed them to reconnect with "old friends, colleagues, classmates etc."; a similar percentage (63%) say that social games have been a source of new friendships and 70% say that social games make them feel more connected to other members of their social networks.
- When asked to choose aspects of social gaming that appeal to them — other than "social interaction" — social gamers cite "friendly competition" (59%), "interactive gameplay" (49%) and "opportunity to win prizes" (35%) as the primary reasons; only 24% of UK-based social gamers chose the latter as a reason for playing, compared to 40% of their American counterparts.

***More detailed survey results available at**

http://www.infosolutionsgroup.com/2010_PopCap_Social_Gaming_Research_Results.pdf

"This study establishes social games as a fast-growing and quickly maturing pastime for an enormous portion of the population," noted Robin Boyar, founder and principal at Thinktank Research, a market research consultancy specializing in gaming and the digital consumer.

"And with more than 80% of social gamers stating that playing social games strengthens their relationship with friends, family and colleagues, social gaming reinforces the core appeal of social networks."

Survey Methodology

This international research was conducted by Information Solutions Group (ISG; www.infosolutionsgroup.com) exclusively for PopCap Games. The results are based on 1,202 online surveys completed by Toluna/Greenfield Online panel members 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. Toluna/Greenfield Online is an independent, global provider of online panel intelligence to the market research industry from its 17 offices in Europe, North America and Asia Pacific.

About PopCap

PopCap Games (www.popcap.com) is the leading multi-platform provider of fun, easy-to-learn, captivating video games that appeal to everyone from age 6 to 106. Based in Seattle, Washington, PopCap was founded in 2000 and has a worldwide staff of over 260 people in Seattle, San Francisco, Chicago, Vancouver, B.C., Dublin, and Shanghai. Its games have been downloaded more than 1 billion times by consumers worldwide, and its flagship title, Bejeweled®, has sold more than 50 million units across all platforms. Constantly acclaimed by consumers and critics, PopCap's games are played on the Web, social platforms, desktop computers, myriad mobile devices (cell phones, smartphones, PDAs, Pocket PCs, iPod, iPhone and more), popular game consoles (such as Xbox and DS), and in-flight entertainment systems. PopCap is the only "casual games" developer with leading market share across all major sales channels, including social, Web portals, retail stores, mobile phones, MP3 players, and game devices.

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