



Introduction

The term "casual" refers to games that are typically inexpensive to produce, straightforward in concept, easy to learn, and simple to play. Casual games span game genres with casual game titles occupying most, if not all, genre categories. Casual games are available across platforms, including PCs, video game consoles, handheld game consoles and mobile phones.

In Nielsen GamePlay Metrics data for March 2009, we tracked 847 PC casual game titles. Those 847 titles were played by over 43 million unique persons. On average, those 43 million players played around 30 minutes a day. Casual games account for 75 percent of the total number of minutes of PC video game play across all video game titles we track. Players of casual games are the dominant gaming group on the PC platform. This group has the vast majority of play minutes and a very high frequency of play.

Looking at the top twenty casual games in our May 2009 game play data, two genres are dominant—Card games, with 88% of casual game players playing a card game, and puzzle games, with 9.5% of casual game players playing a puzzle game.

Methodology

The analysis in this report is based on data from the Nielsen RDD/Online® sample of more than 185,000 US tracked PCs processed by the GamePlay Metrics syndicated service. This software-based metering technology identifies individual program executables. When a program runs on a PC, a Nielsen meter collects the program name, active window and demographics for the person(s) using the PC.

The primary source of information for this analysis comes from the Nielsen Game-Play Metrics product, a monthly syndicated reporting service. The GamePlay Metrics product gives you unparalleled insight into video game console usage and PC game play.

Key Takeaways

- The most popular casual game genres are card and puzzle.
- Casual games have a high recurring game play rate and can match or exceed the recurring play rate of other non-casual games with high recurring game play.
- Casual games for purchase can achieve similar recurring audience numbers to those for free casual games.
- The average length of play sessions for popular casual games is less than half that for non-casual games.
- Players of casual games predominantly are female and use less powerful computers when compared to players of shooter or RPG genres



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Results

Recurring Play

The first characteristic we examined was recurring play: Does a casual game title draw the same player back month after month? To answer this question, we studied video game players for a 7-month period. Figure 1 shows the number of people who played the game in two or more months in the 7- month period. For example, 47 million unique gamers played Microsoft® Solitaire at least once in two separate months during the 7-month period. Just over 9.3 million individuals played Solitaire at least once in each of the 7 months measured.

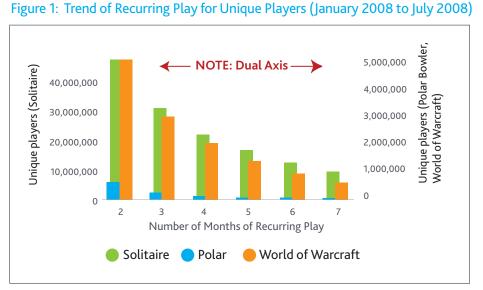
Data for World of Warcraft[®], the most popular role-playing game for the period measured, appears on the graph as a basis of comparison. Over 5 million people played World of Warcraft at least once in two separate months during the 7-month period, with more than 580,000 playing at least once every month.

Figure 1 also shows data on Wild Tangent® Polar Bowler™. More than 644,000 users played Polar Bowler at least once in two separate months during the measurement period. Less than half of those players, however, played the game at all for three or more separate months. World of Warcraft and Polar Bowler follow the same trend closely, though with lower amount of unique players (note dual axis on figure 1 graph).

Recurring Play and Paid Versus Free Games

Polar Bowler and Microsoft Solitaire are both considered casual games; however, they have some key differences. Solitaire is a free game and included in most PCs running the Windows® operating system. The retail cost of Polar Bowler is \$19.99 and is typically obtained by a web download. Polar Bowler does offer a free trial period for play.

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Source: The Nielsen Company – GamePlay Metrics

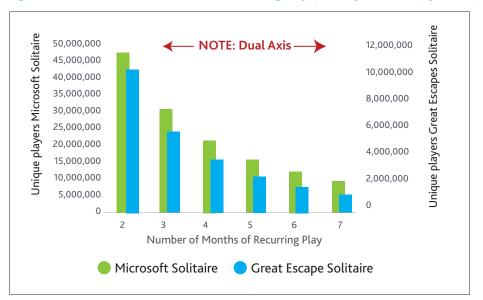


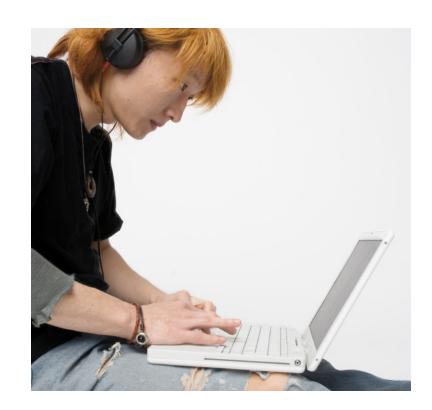
Figure 2 : Paid versus Free Games and Recurring Play (January 2008 to July 2008)

Source: The Nielsen Company – GamePlay Metrics

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As Polar Bowler and Solitaire have very different recurring play patterns, the question of cost and accessibility appear to be factors in recurring play. To analyze these factors, we looked at data for a different solitaire game which, like Polar Bowler, has a cost and is typically downloaded from the Web. The most popular solitaire game available for purchase that was tracked in GamePlay Metrics during the study period is Game Center Solutions[™] Great Escapes Solitaire.

Figure 2 shows the number of unique players against recurring play, similar to Figure 1, with results for Microsoft Solitaire and Great Escapes Solitaire. While Microsoft Solitaire has a distinctly larger base of users, no doubt helped by being preinstalled with the Microsoft Windows operating system, both games have a similar recurring play pattern.

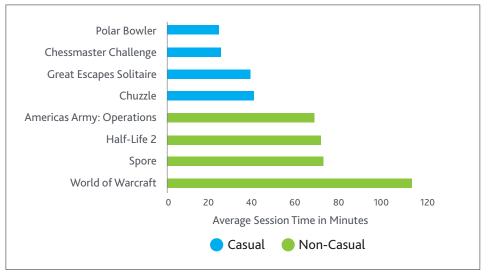


Duration of Play

Another question that arises is: Are casual and non-casual games played for the same duration per session? To answer this question, we looked at four popular casual games and four popular non-casual, core games. The popular casual games represent a cross-section of genres: sports, board, card, and puzzle games. The non-casual games include two first-person shooters, one simulation and one role-playing game. All games are among the highest-played ones measured in GamePlay Metrics by audience size. Average durations were calculated using data from October 2008 to April 2009.

Figure 3 shows the casual games evaluated had average play duration of 31 minutes, where the non-casual core games had significantly longer play duration of 80 minutes. Even if we were to exclude the very popular game World of Warcraft, which has an average session length of almost 2 hours, the average session duration for non-casual games drops to around 70 minutes, which is still double the session length of the casual games measured.





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Source: The Nielsen Company – GamePlay Metrics

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Characteristics of Casual Game Players

To understand and put into context the traits of casual game players, we compared the predominant characteristics of casual game players against those of players of the two most popular game genres, shooters and role-playing games (RPG). For all three groups examined, the primary race is white, and the dominant age break is persons 25 to 54.

Figure 4 compares user type (a tercile classification of game play time segmented into three buckets of heavy, medium, and light), gender, the memory configuration of the player's PC, and the player's top alternate gaming genre.

The data shows those who play casual games primarily fit into the light user category of gameplay. Conversely,

shooter and RPG video game players are predominately in the heavy-user tercile. In addition, the prevailing PC memory configurations in the shooter and RPG categories show these users have larger memory configurations than PCs typically used by casual game players.

Focusing on gender, Figure 4 shows females are the preponderant players of casual games. This raises the question, "Are the casual games that females play different from the casual games males play?" To answer this question, we looked at the 20 most popular casual games by gender and excluded casual games bundled with the Microsoft operating system. When comparing the list of the top twenty casual games for males and females, fourteen of the titles in those two lists are the same.



Casual	User Type:	Light	35%
	Gender:	Female	58%
	Memory	.5 - 1 GB	33%
	Top Alternate Genre	Role Playing	
Shooter	User Type:	Heavy	43%
	Gender:	Male	75%
	Memory	> 2 GB	36%
	Top Alternate Genre	Role Playing	
RPG	User Type:	Heavy	56%
	Gender:	Male	63%
	Memory	> 2 GB	39%
	Top Alternate Genre	Shooter	

Figure 4: Primary Characteristics of Groups (May 2009)

The dominant age break is 25–54

Source: The Nielsen Company – GamePlay Metrics

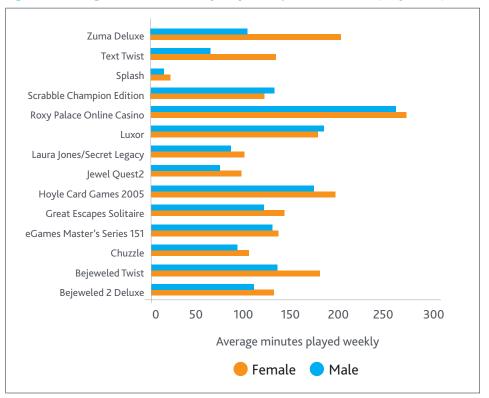
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Figure 5 shows these 14 games and the weekly average minutes played by each gender. The weekly averages are very similar for males and females. The data in Figure 5 reinforces the indication females tend to play casual games slightly longer than males. Also, for this group of 14 games, females played on average 3.7 times a week and males played 3.4 times a week.

Overall the data shows the top casual games have common appeal for both males and females, owing in part to shared attraction to card and puzzle genres. The top twenty non-casual games are more disparate for males compared to females with only 25% of the games being the same for May 2009.

Figure 5: Average Minutes of Weekly Play for Top Casual Games (May 2009)



Source: The Nielsen Company – GamePlay Metrics



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