

CURRENT AND NEXT GENERATION GAME CONSOLE FEATURE STUDY



Ipsos-Insight

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Executive Summary

Background

Study goals were to survey active gamers over 18 years of age to:

1. Develop a profile of video game players including
 - a. Current console ownership and usage
 - b. Trend in popularity of video console gaming vs. other forms of game play
 - c. Types of games played and the frequency, including demographic breakdowns
 - d. Estimated purchase of games over the next year
2. Determine current use, or non-use, of rumble technology on existing video gaming platforms and attitudes about its impact on game play for various game genre. Related, the research will solicit examples of its best uses in order to provide “the voice of the gamer” on this feature
3. Determine the current penetration of Microsoft Xbox 360 consoles plus the purchase intentions for Sony PS3, Nintendo Wii, and Microsoft Xbox 360 over the next year
 - a. Quantify the potential market share shift among consoles
 - b. Estimate how many consoles people expect to buy
4. Determine the preferred mode of video game user control and feedback
 - a. Importance of backward compatibility in next generation consoles
 - b. Previous experience with motion/tilt sensing
 - c. Expectations of rumble inclusion in next generation consoles, the reaction to the possible loss of the feature among gamers, and the potential impact on purchasing behavior

Methodology

The study included 1,075 respondents aged 18 and older who both own a video game console and play games for more than 4 hours each week. The game players were drawn from a statistical sampling of the Ipsos North America online panel of over 800,000 U.S. households. Data were collected between August 21st and 28th, 2006. With a total sample size of 1,075, one can say with 95 percent certainty that the results are accurate to within +/- 3.0 percentage points.

Survey questions are shown in Appendix A.

Key Findings

Vibration Feedback is a Popular Feature with a Majority of Gamers

Almost 3 in 4 respondents (72 percent) agree that rumble/vibration feedback enhances their game experience in one or more of these ways “most of the time”: makes the game more fun, involves the player more in the game, makes the game seem more real, helps the gamer play better. Players of a wide range of console game genre affirm vibration feedback as a very positive part of the gaming experience.

Backward Compatibility is Expected in Next-Generation Consoles

More than 8 in 10 respondents reported backward compatibility in next generation video game consoles as being important, and two-thirds of these gamers include the vibration/rumble feature in the definition of backward compatibility.

Lack of Current DUALSHOCK Rumble in Sony’s PS3 is a Disappointment to Most Gamers

The majority of respondents, 3 out of 4, were not aware of Sony’s May 2006 announcement that the PS3 would not support the current DUALSHOCK rumble technology. Of all respondents (regardless of pre-survey announcement awareness), nearly 6 in 10 were disappointed by the news.

This disappointment (for 82 percent of respondents) may have been tempered by the belief that if rumble is completely removed from the PS3, there will be, or probably will be, third-party gamepad controllers that will support vibration feedback for the PS3 console system within the first year after its launch.

Implications

- Gamers will be disappointed with next generation game consoles that do not offer backward compatibility, including the rumble feature. As the Xbox 360 and soon-to-launch Wii both include rumble, if Sony’s does not include the feature, it will be the lone next-generation console without rumble. At the very least, if Sony does not allow for third-party support of the rumble feature, most gamers will be disappointed with the PS3’s lack of rumble technology.
- The study indicates that ultimately Sony may possibly lose unit share among the next-generation console market. In this study, gamers’ intent to purchase future consoles showed a potential large drop for Sony, while Microsoft stands to potentially make gains. Specifically, assuming all three next-generation consoles are on the U.S. market by December 1, 2006, respondent purchase plans indicate a possible decrease from 61 percent to 48 percent share of next-generation

consoles for PS3 by summer 2007, compared to an increase to 37 percent (up from 20 percent) for Xbox 360, and a decrease to 15 percent (down from 19 percent) for Wii.

- Among those who indicated they were planning to buy a PS3 in the next year, the desire to purchase is clearly affected by the lack of vibration feedback. If the PS3 does not support rumble in the console (for either existing PS2 or new PS3 games), 5 percent of people indicate that they will definitely not buy the PS3 and 32 percent are somewhat less likely to purchase, with 14 percent unsure how it might affect their purchase decision. Fewer than half (46 percent) reported they would definitely still buy or even be more likely to buy a PS3.

Findings – Positive Rumble

Overview

Almost 3 in 4 respondents (72 percent) agree that rumble/vibration feedback enhances their game experience in one or more of these ways "most of the time": makes the game more fun, involves the player more in the game, makes the game seem more real, helps the gamer play better. Only 5 percent agree with the statement, "The rumble feature should be totally removed from all video console games."

Respondents also believe that the rumble feature is essential in many types of games. Approximately one-third of respondents who play specific types of games believe that rumble is "essential to the fun, realism, and overall experience" of the game. And approximately another one-third "like it and want it in the game."

Game category titles and examples provided to respondents are listed in Appendix B.

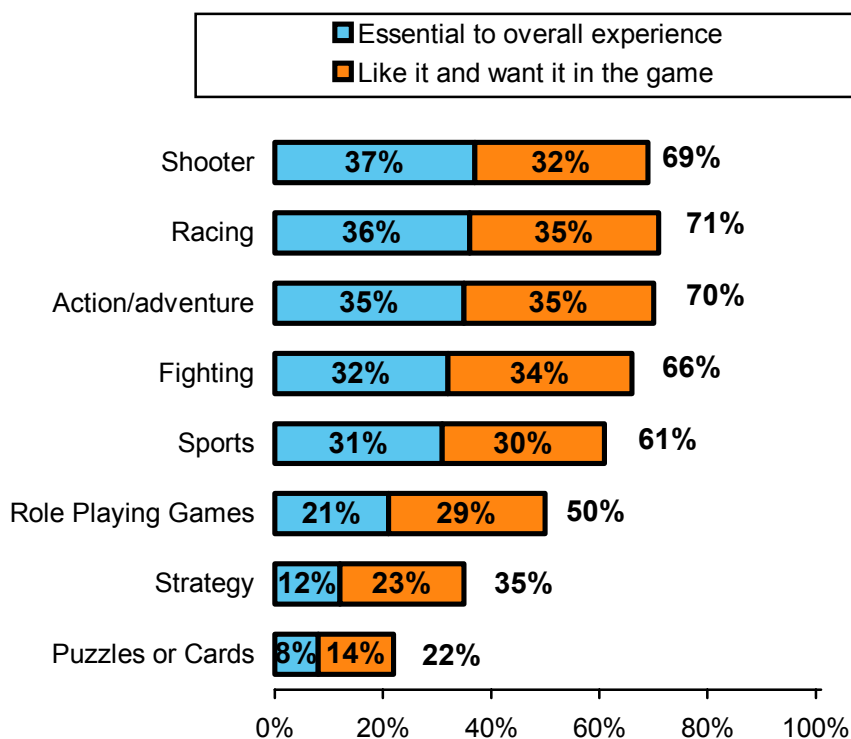


Fig. 1 – Base: Total Respondents (n=1075), Q.3 How do you feel about the presence of rumble/vibration feedback in particular types of video console games?

Gamers were able to indicate types of games in which rumble generally enhanced game play vs. those types that usually did not benefit from vibration feedback. For example, of those playing puzzle and card games, half reported that they didn't want rumble for this genre (26 percent) or that this type of game doesn't generally benefit from it (23 percent).

— *“Best in shooter type games, keep it out of card games.”*

— *“In action games it gives you the feeling that you're really part of the action. In puzzle or card games it is more of a distraction.”*

Gamers often wrote enthusiastic and passionate comments when asked to describe the best use of rumble/vibration feedback in a specific video console game, such as these comments on top-selling games:

— *“It is good in games like Madden because it seems so life-like when guys get hit. I also think that without it Madden would be just an ordinary game.”*

— *“On Madden it makes it feel more real like I'm not just watching a game but actually playing.”*

— *“In Madden Football...when the kicker has a crucial field goal....feeling the heartbeat through the control makes the anxiety and pressure real.”*

— *“Well, like in Gran Turismo when you are racing in rally races, the rumble lets you know how much your car is sliding so that you know how much gas to give it.”*

— *“For PS2, Gran Turismo 4 needs the rumble feature to connect you to the car so you can more adequately feel how the car is handling.”*

There is a small core segment that actively dislikes the rumble feature. Answers to five questions across the survey were analyzed to identify the possibility of a consistent negative reaction to rumble technology. Based on this analysis, approximately 9 percent of the surveyed population has strong negative attitudes toward rumble technology.

There were some key differences in demographics of those considering rumble to be positive versus those who endorsed negative sentiment regarding rumble. Respondents who were positive toward rumble were significantly more likely to be less than 50 years old, male, and spend more than 20 hours per week gaming. In addition, those who endorsed positive rumble statements play significantly more shooter, racing, fighting, and action/adventure games.

Console Gaming Remains Popular Across Broad Demographic

Despite many other entertainment options (growing massive multiplayer online role playing games [MMORPG], handheld games, and mobile games), people are still playing console games. Three-quarters of respondents reported playing the same or even more than they did one year ago. Only 24 percent reported playing console games less than they did one year ago. Of those playing less, two-thirds (66 percent) reported lack of time as the reason.

More than three-quarters of all respondents play action/adventure console games occasionally, frequently, or most often. This is by far the most common type of game played overall. Half or more play racing (63 percent), shooter (60 percent), role-playing (59 percent), sports (56 percent), puzzle (51 percent), and fighting (50 percent) games. According to the NPD Group's point-of-sale information as reported recently by the Entertainment Software Association (ESA), these game genre account for more than 80 percent of all video game units sold in the United States in 2005.

Males play significantly more shooter, sports, and action/adventure games than females. Females play significantly more puzzle/card games than males. Regardless of gender, strategy games were the least commonly played of the categories surveyed (see Appendix B).

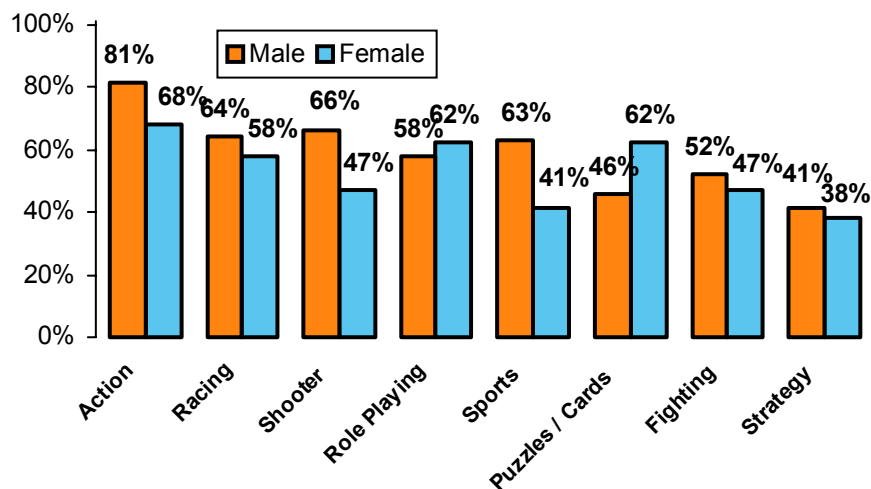


Fig. 2 – Base: Total Respondents (n=1075), Q.2 How often do you play each of these types of video console games?

Although there were some gender differences in types of games played, as described above, the gamers in this study were nationally representative of console game owners.

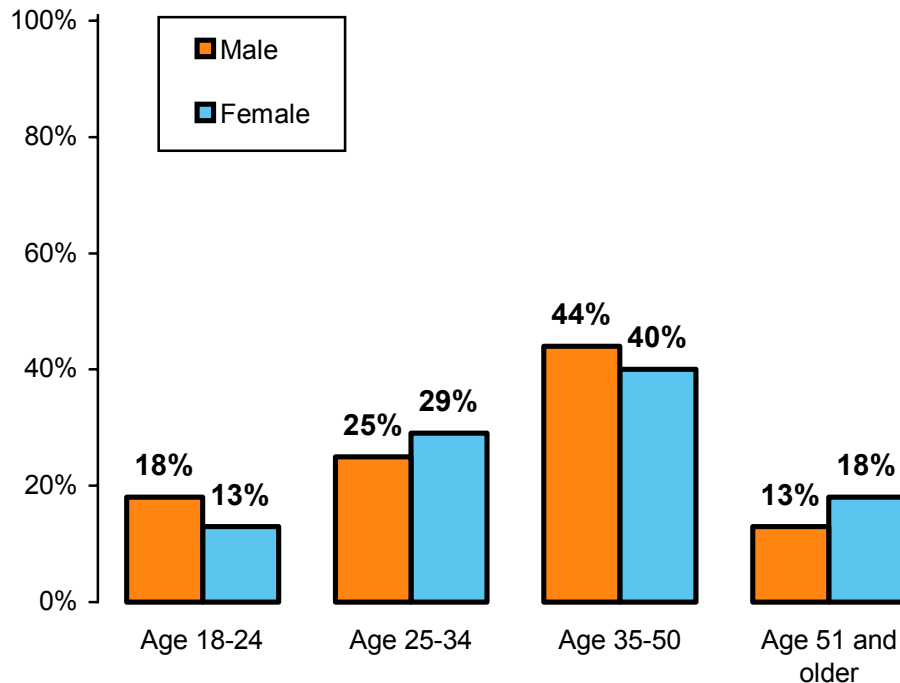


Fig. 3 – Base: Total Respondents (n=1075), S3. What is your age?

This nationally representative console gamer sample did not focus exclusively on young, male, avid gamers. Some of the open-end comments about gaming reflect this broad demographic of video console game players:

— “We (with my 11 year old son) play a ton of hockey and football games.” (male, 35 – 50)

— “I love to play Mario Party with my family. The rumble feature lets you know when it is your turn, and also is good throughout the game like when you explode, etc.” (female, 35 – 50)

— “I enjoy the rumble feeling in my Gran Turismo game, especially when it goes around the curves.” (female, 50+)

— “Call of Duty, Xbox it makes you feel more in the action because you feel hits and shots fired by various weapons. Such as heavy weapons have stronger vibration.” (male, 50+)

— “The rumble feature in *Command and Conquer 3: Tiberium Wars* provides awesome combat battle background sound and feel.” (male, 50+)

— “When playing golf the vibration comes on when you make a good putt or when you are winning a match play.” (male, 50+)

— “Adds to the excitement for me and my grandkids.” (female, 35 – 50)

Regardless of age or gender, gamers use a variety of consoles. When asked which consoles they use frequently or occasionally, an overwhelming majority of gamers reported using a PlayStation console. Interestingly, more females play GameCube console games than males, which is unique among all reported console usage.

	Male	Female	18-24	25-34	35-50	51+
PlayStation (any model)	79%	77%	85%	79%	79%	68%
PSOne	22%	30%	24%	25%	24%	25%
PS2	73%	67%	79%	73%	71%	69%
Xbox (any model)	44%	36%	49%	41%	42%	35%
Xbox	38%	32%	41%	35%	37%	30%
Xbox 360	18%	13%	22%	21%	15%	10%
GameCube	29%	37%	33%	34%	31%	27%

Fig. 4 – Base: Total Respondents (n=1075), S2. Which video game consoles do you use for playing games?

While many gamers own multiple consoles, most report using only one frequently. More than half use PS2 frequently, and another one-quarter use Xbox frequently. Owners of the newest-to-market console, the Xbox 360, show the most frequent use, as compared to other console owners' usage.

	Own	Frequently Use
PSOne	34%	10%
PS2	73%	57%
Xbox	35%	24%
Xbox 360	14%	12%
GameCube	33%	19%

Fig. 5 – Base: Total Respondents (n=1075), S1. Which video game consoles do you have in your household?
AND S2. Which video game consoles do you use for playing games?

A majority of gamers in this study reported playing 5 – 9 hours per week, while almost one-third more reported playing 10 –19 hours per week. Note that people playing 0 – 4 hours per week were not allowed to complete the survey and are not included in the results.

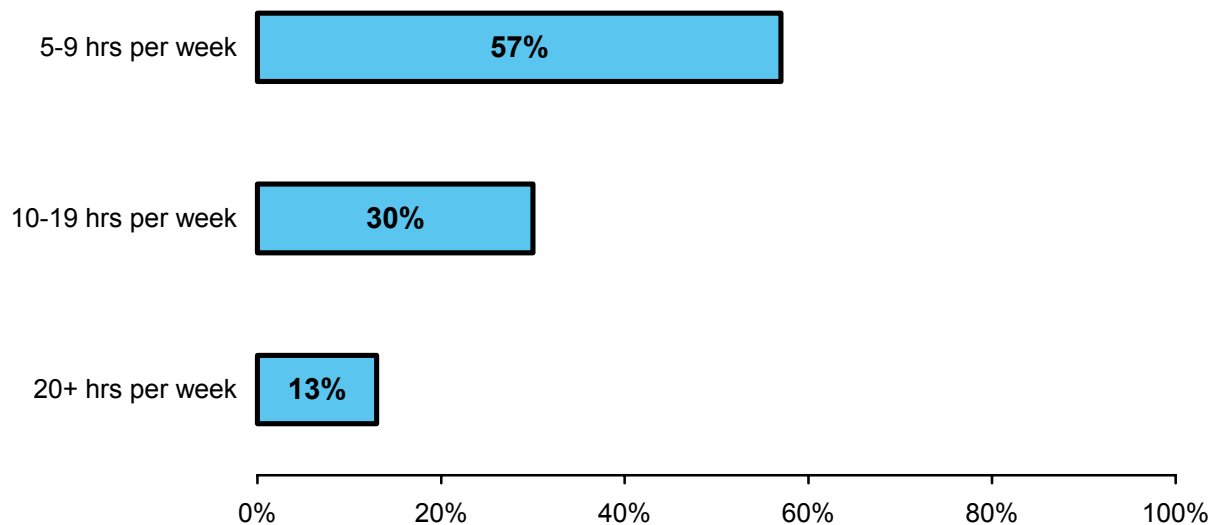


Fig. 6 – Base: Total Respondents (n=1075), S4. Approximately how many hours per week do you spend playing video console games?

As would be expected, gamers who play the most are young males, aged 18 – 24, 13 percent of which reported playing 20 or more hours per week, as compared to only 9 percent of females reporting this same level of play. Twice as many in this age group played 20 or more hours per week than those aged 35 and older.

Improvements to Rumble Feature Implementation

More than half of all respondents (55 percent) report that they “never” or “rarely” turn off rumble while playing, while only 11 percent report that they “always” do.

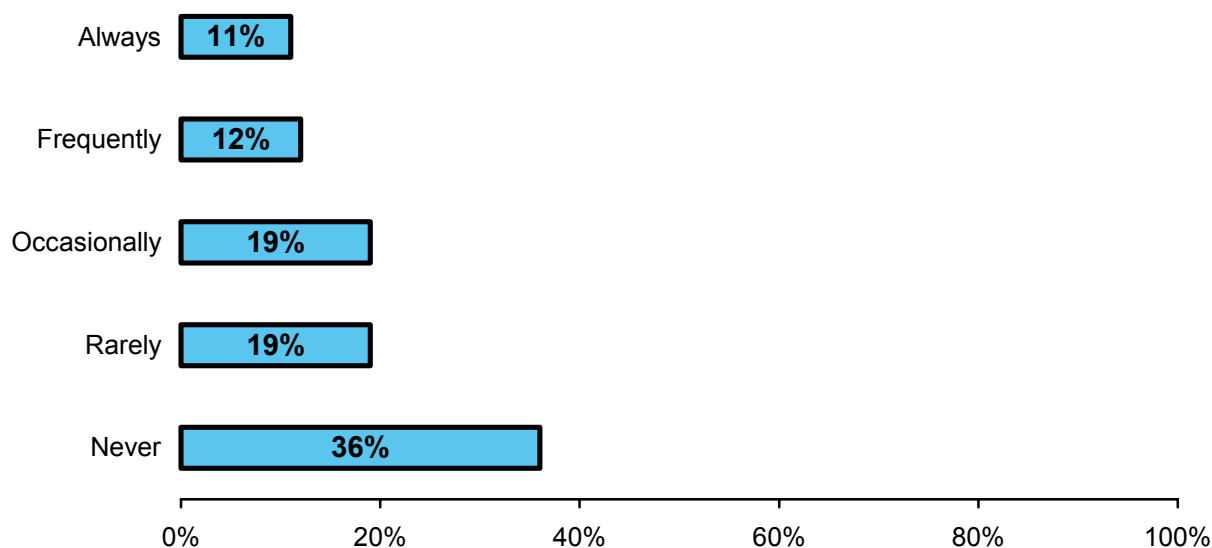


Fig. 7 – Base: Total Respondents (n=1075), Q4. When playing video console games, how often do you play with the rumble/vibration feature turned off?

The respondents who reported turning off rumble did so for a variety of reasons, mostly related to poor or inappropriate implementation of rumble.

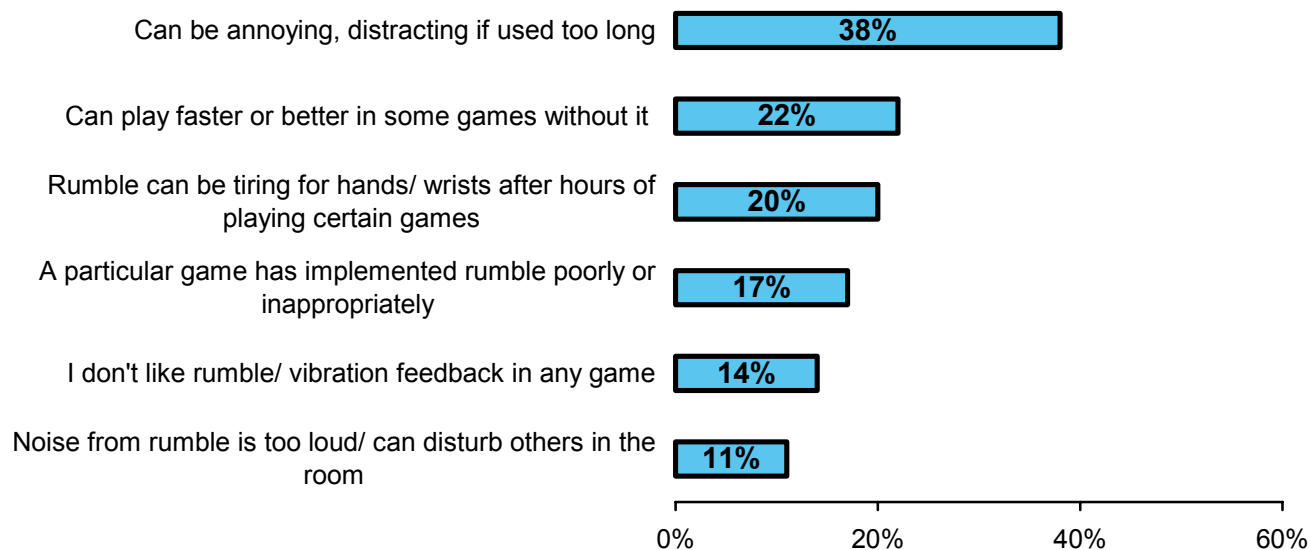


Fig. 8 – Base: Respondents who play sometimes with the rumble/vibration feature turned off (n=659), Q6.
Why do you play video console games with the rumble/vibration feature turned off?

More than half (54 percent) of those turning rumble off do so because: “A particular game has implemented rumble poorly or inappropriately “ or “It can be annoying, irritating, or distracting if rumble is used too often or for too long.” Respondent comments show that gamers can differentiate between a good implementation of rumble and a poor one, and that they would welcome improvement in implementation.

— *“It’s good on some games, and others it is not.”*

— *“The game I am playing does not make good use of the feature.”*

— *“Rumble quality varies greatly in different types of games. I would have to say that Halo 2 has a very good responsive rumble feature when taking damage.”*

— *“When characters are hit or cars are going over rough terrain it makes it more real. The Sims 2 for instance, it helps to warn you when there are fires or deaths with the gameplay. Star Wars is another that HAS to have that feature. Without it you wouldn’t know whether or not you are getting hit when it happens; it is vital in these types of games and should stay there and maybe even be improved somehow.”*

Nearly one-quarter (22 percent) of those who sometimes play with rumble off believe “I can play faster or better in some games without rumble/vibration feedback.” This may imply that implementation of rumble could be better synchronized to game action. Also, 20 percent report that rumble can be tiring for hands and wrists after long hours of play, which could possibly be avoided through a more selective use of the rumble feature.

This finding implies that developers could implement rumble in a better or different way in some games. For gamers to actively note inappropriate use of rumble implies that there is an opportunity for developers to use the feature in unique ways for the benefit of most gamers.

Findings – Attitudes Toward Next Generation Consoles & Features

Overview

Most respondents (83 percent) believe that backward compatibility is “somewhat” or “very” important in purchasing next generation consoles.

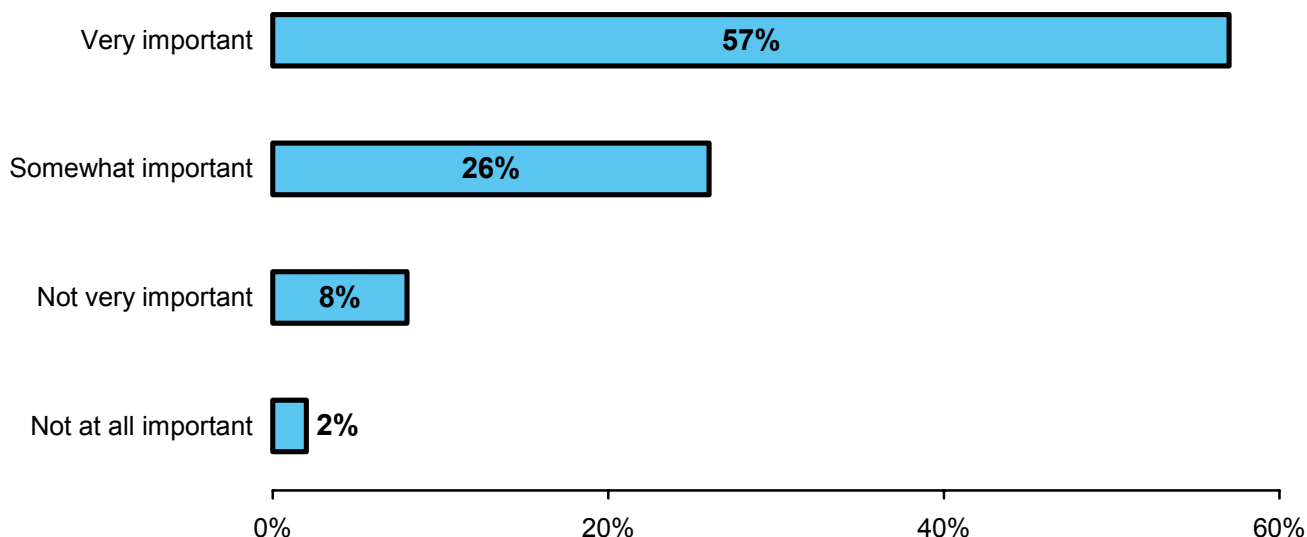


Fig. 9 – Base: Total Respondents (n=1075), Q13. How important is it to you that the new version of a video game console offers backward compatibility for video games made for the previous console version?

More than two-thirds believe that the rumble feature is included in the definition of backward compatibility.

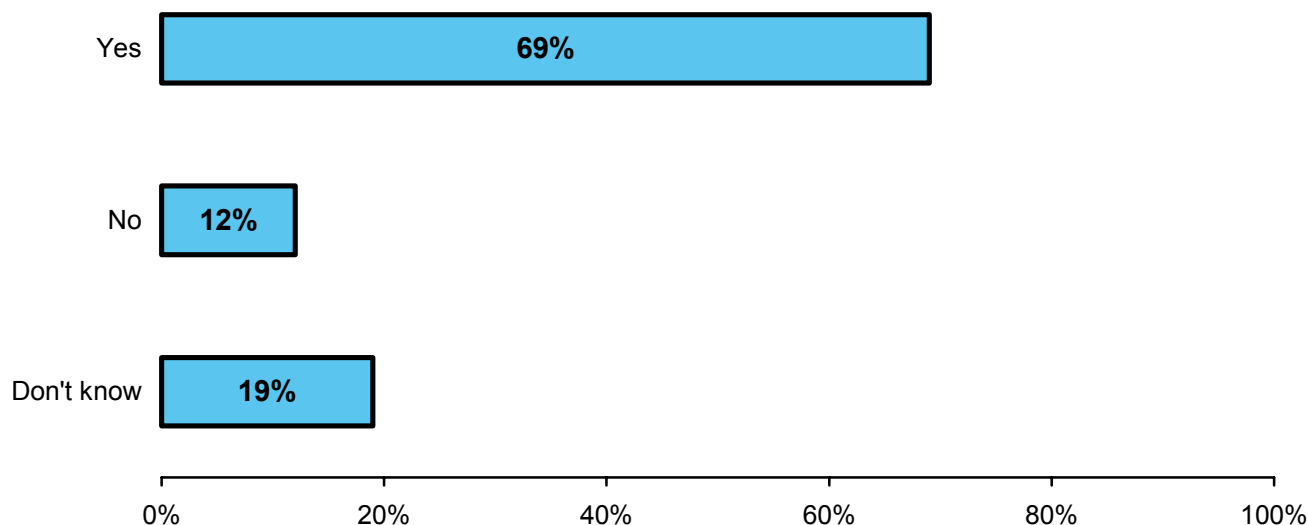


Fig. 10 – Base: Total Respondents (n=1075), Q13b. Do you consider the rumble/vibration feature to be included in the definition of “backward compatible”? In other words, if the original game had vibration feedback, should vibration feedback be included when playing that game on the new console if it were advertised as backward compatible with the previous console version?

Of those who like the rumble feature, 77 percent include it in their definition of backward compatible, while only 44 percent of other gamers consider it part of the definition. Backward compatibility of the feature was important to 84 percent of pro-rumble respondents, while only 79 percent of rumble dislikers felt that the feature should be supported by next-generation consoles.

In previous gaming experiences, less than 20 percent have used a gamepad controller with motion/tilt sensing. When asked what their preferred feature or feature combinations would be for the next generation consoles, most gamers indicated a preference for both rumble and motion/tilt sensing. This finding existed for all next generation consoles, regardless of specific manufacturer or platform. Further, 60 percent of people who indicated their intent to purchase PlayStation 3 (“PS3 intenders”) preferred *both* rumble and motion/tilt. Only 8 percent of PS3 intenders preferred motion/tilt exclusively.

More than one-quarter of all respondents did not mention any specific preferred combination, likely reflecting the previous low usage of motion/tilt technology.

Nearly three-quarters (74 percent) were not aware of Sony's announcement in May 2006 that the rumble/vibration feature currently available on DUALSHOCK and DUALSHOCK2 controllers for PlayStation and PS2 will be removed from the new PS3 controller.

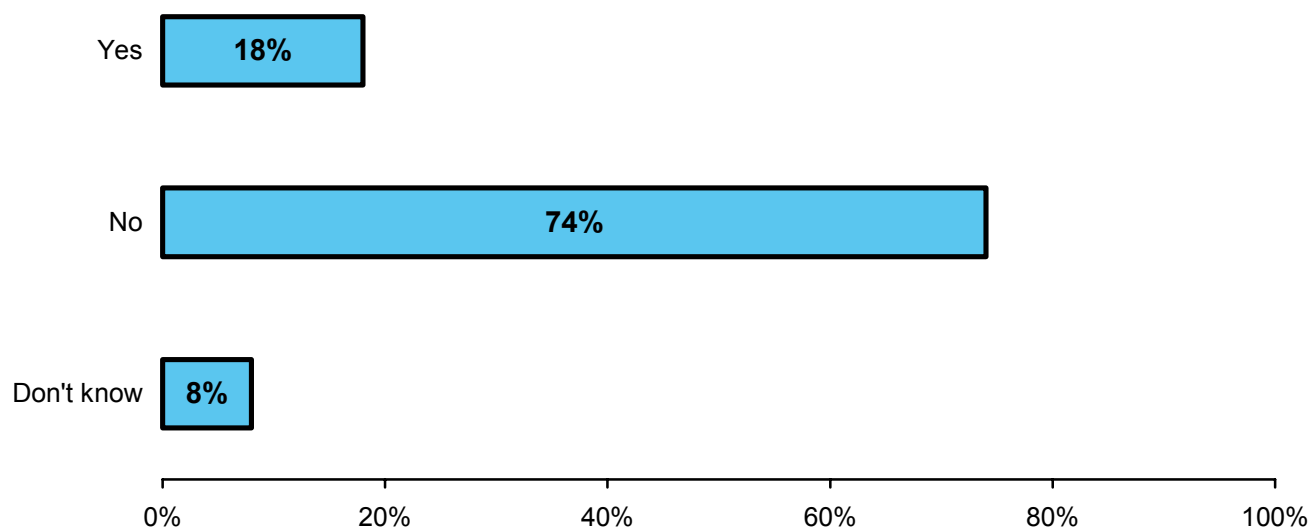


Fig. 11 – Base: Total Respondents (n=1075), Q9. Are you aware of Sony's announcement in May that the rumble/vibration feature currently available on DUALSHOCK and DUALSHOCK2 controllers for PlayStation and PS2 will be removed from the new PS3 controller?

Regardless of awareness, 58 percent reported being “a little” or “very” disappointed that the PS3 controller will not have the current DUALSHOCK rumble capabilities. And those planning to purchase a PS3 reported more disappointment with this news than others.

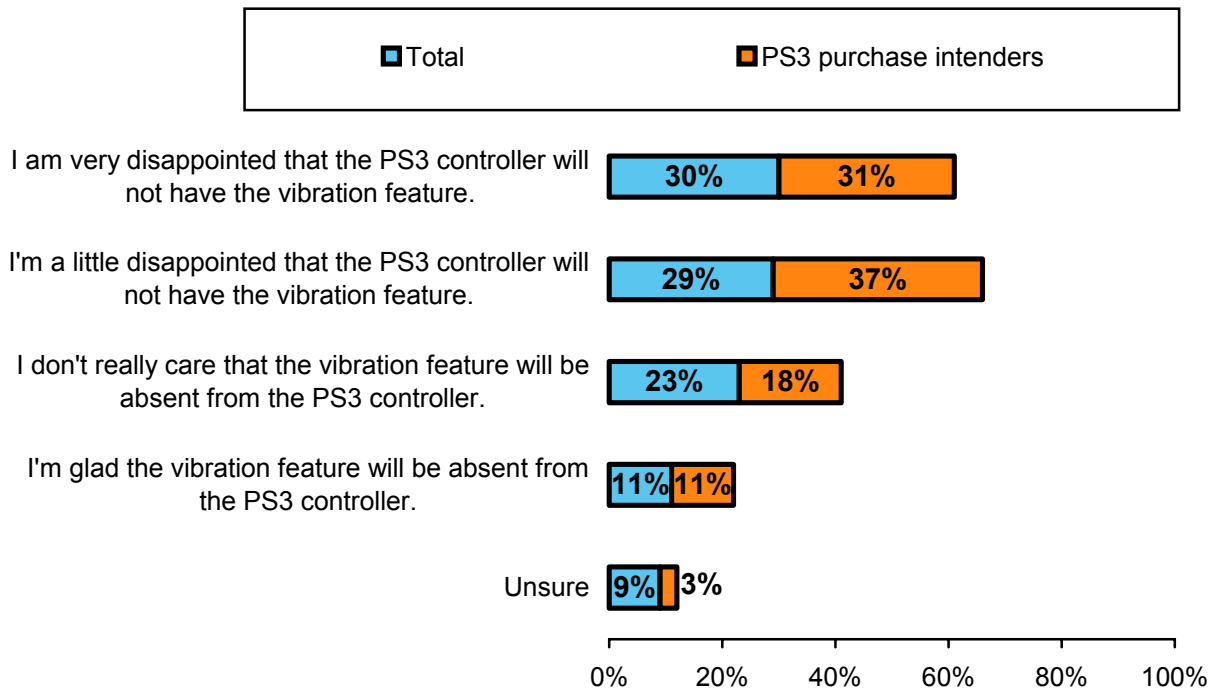


Fig. 12 – Base: Total Respondents (n=1075) and PS3 purchase intenders (n=458), Q.9a/9ax. Since you became aware that Sony announced the PS3 controller will not have the vibration feature used in previous DUALSHOCK controllers, which of the following statements best describes your feelings?

In addition, respondent disappointment may have been tempered by the fact that 82 percent believe that there will be, or probably will be, third-party gamepad controllers that will support vibration feedback for the PS3 console system within the first year after its launch. Respondents who endorsed positive rumble statements (pro-rumble) in this survey are significantly more optimistic that a third party solution will probably or absolutely be introduced (84 percent for pro-rumble vs. 77 percent for others). However, thus far Sony has not announced capability in the PS3 console for vibration feedback, and it is believed that many console gamers are unaware that this capability must be present in the console to experience vibration feedback with any gamepad controller, first- or third-party.

Among those who indicated they were planning to buy a PS3 in the next year, the desire to purchase is clearly affected by the lack of vibration feedback. If the PS3 does not support rumble in the console (for either existing PS2 or

new PS3 games), 5 percent of people indicate that they will definitely not buy the PS3, and 32 percent are somewhat less likely to purchase, with 15 percent unsure how it might affect their purchase decision. Fewer than half (46 percent) reported they would definitely still buy or even be more likely to buy a PS3.

Among pro-rumble respondents, a full 42 percent reported that they would “definitely not” or be “somewhat less likely” to purchase a PS3.

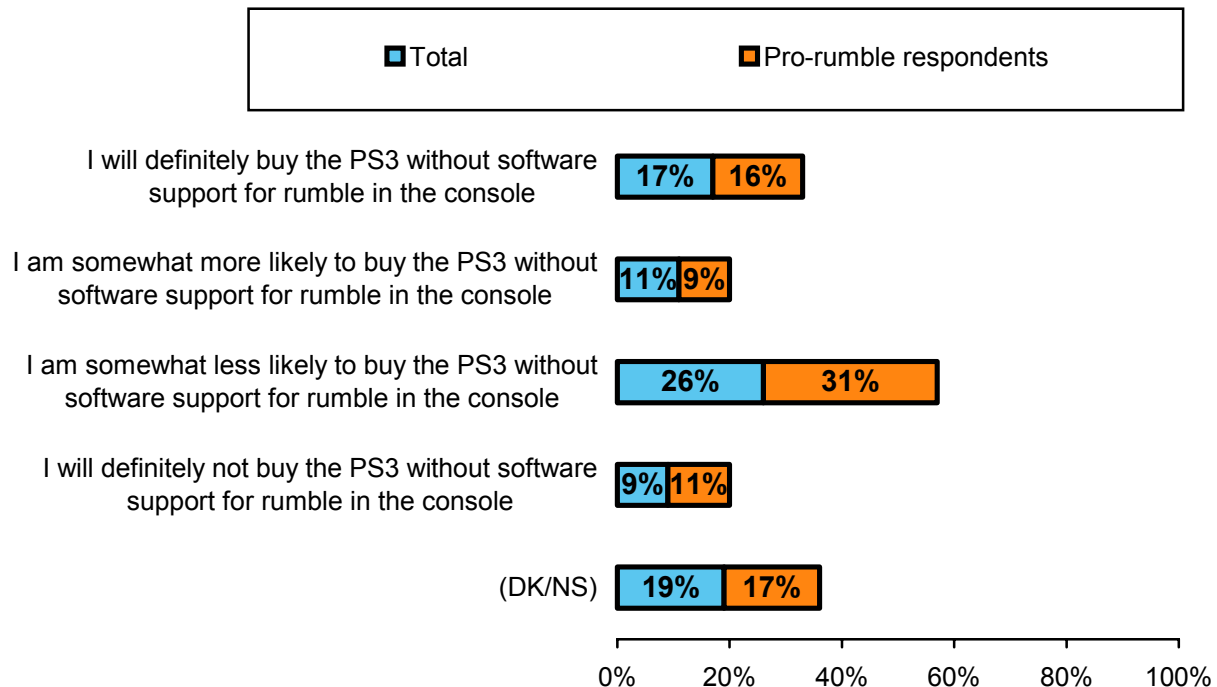


Fig. 13 – Base: Total Respondents (n=1075) and pro-rumble respondents (n=777), Q11. If Sony removes software support for rumble from the PS3 console in addition to their controller, the PlayStation and PS2 games also may not have vibration when played on the PS3. How would the lack of rumble in PS3, PS2, and PS games played on a PS3 console affect your decision to buy the PS3 console?

Implications for Console Market Share

Overview

Two-thirds (65 percent) of gamers surveyed have already purchased, or plan to purchase, one or more of the next generation consoles in the upcoming year. The anticipated average number of next generation console purchases by these gamers was 1.4 per household (this includes current Xbox 360 owners). Nearly half (48 percent) of all respondents reported an intent to purchase between 1 and 5 video console games in the next year.

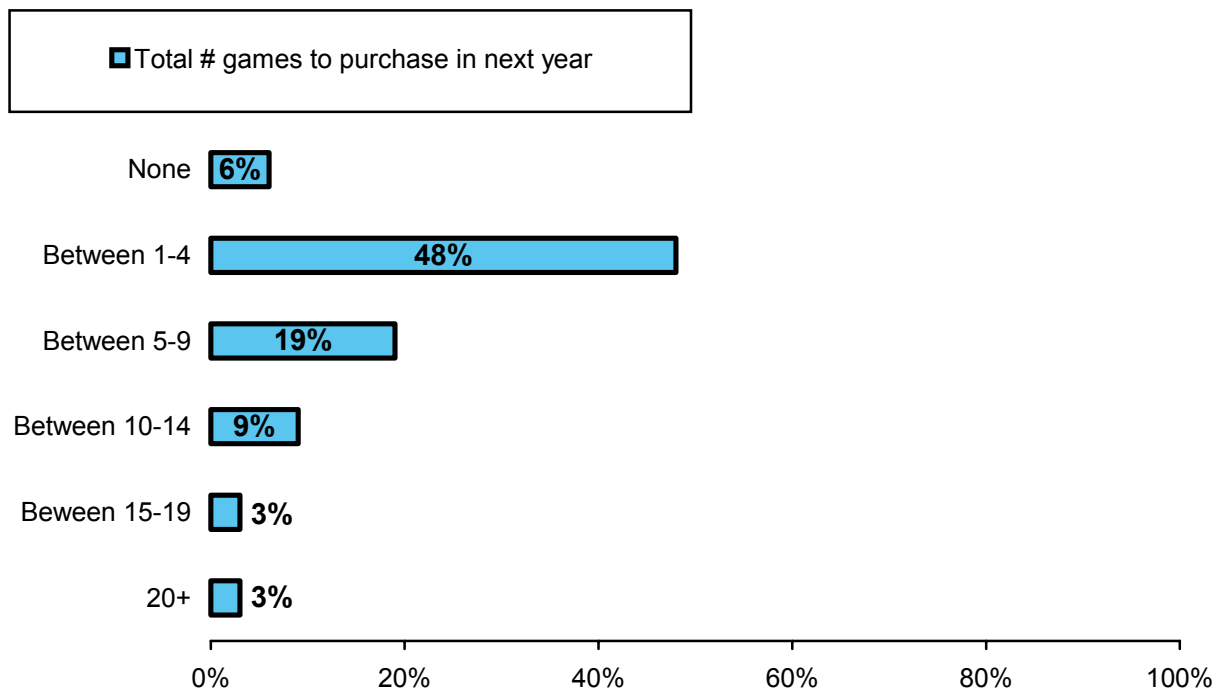


Fig. 14 – Base: Total Respondents (n=1075), Q8. How many video console games do you expect to buy in the next 12 months? Note: the question did not differentiate between new and used video games or games for existing platforms versus games for next generation platforms.

Household ownership of previous-generation game consoles was obtained: 82 percent of households surveyed have a PlayStation product, 35 percent have an Xbox, and 33 percent have a GameCube.

In order to compute market share for previous-generation console ownership (PlayStation, PlayStation 2, Xbox, and GameCube), individual manufacturer

units were divided by the total number of console units. In this case, the total previous-generation console units owned by all respondents is 1,879 units. Sony has 61 percent of this unit share (with a total of 1,146 units), followed by Microsoft at 20 percent (381 units) and Nintendo at 19 percent (352 units).

Next-generation market share can also be calculated based on respondent intent to purchase next-generation consoles *and* current ownership of the only available next-generation console, Xbox 360.

Specifically, assuming all three next-generation consoles are on the U.S. market by December 1, 2006, respondent purchase plans for next-generation consoles reflect a total of 956 units currently owned and/or to be purchased in the next 12 months. Sony comprised 459 (or a decrease to 48 percent) of this total market share, while Microsoft comprised 356 units (an increase to 37 percent share), and Nintendo's Wii trailed with 141 units (a decrease to 15 percent share).

Respondents reported owning or planning to purchase the following combinations of next-generation consoles:

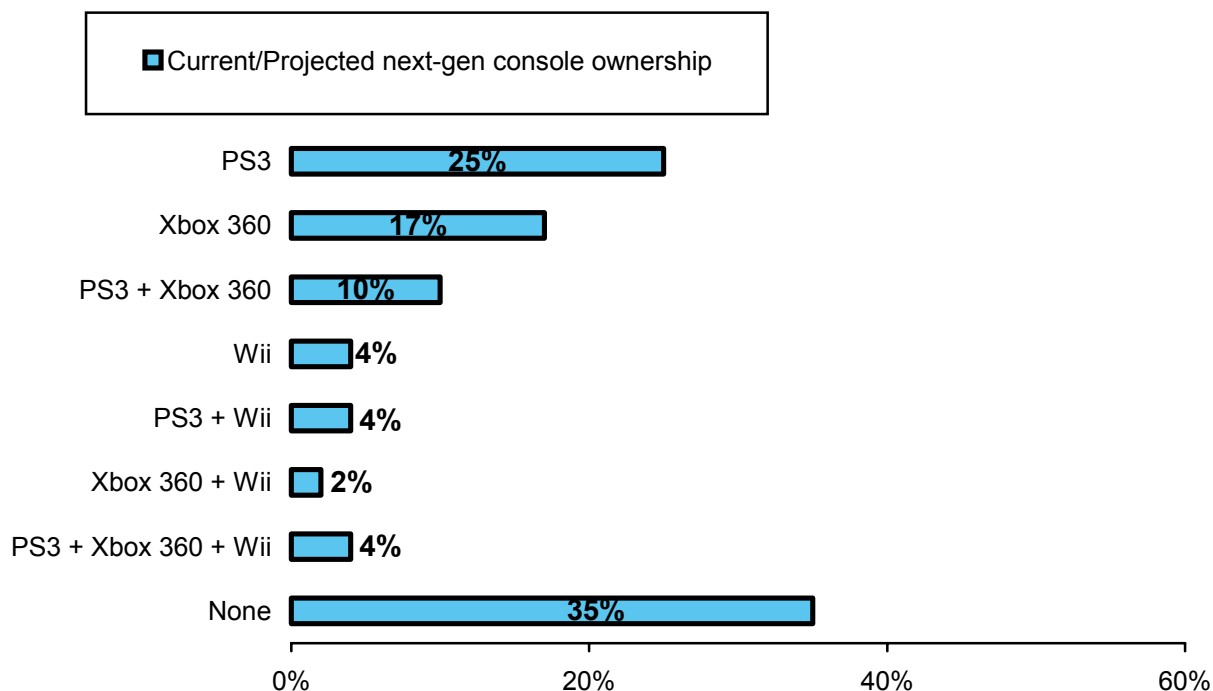
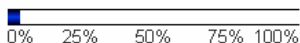


Fig. 15 – Base: Total Respondents (n=1075), S1. Which video game consoles do you have in your household? AND Q7. How many video game console(s) are you planning to buy sometime in the next 12 months? Assume the PS3 and Wii begin shipping by December 1, 2006.

Appendix A – Survey Questions

Ipsos Insight Internet Questionnaire



Thank you for your participation in our i-Say online surveys. Your opinions are very important to us. Please fill out the following survey, which should take approximately 15 minutes to complete.

Once we receive your completed survey, you will automatically be entered into our drawing for a chance to win one of five (5) prizes of \$100 each (see the sweepstakes rules page for more information).

Remember, all the information you provide us is kept strictly confidential. It is used for classification purposes only. Your specific information will never be given to anyone outside of Ipsos i-Say unless you authorize us to do so, and we absolutely promise never to try to sell you anything.

Please use the arrow keys at the bottom of the page to take the survey instead of using the browser back button.

Good luck and thanks again!

>>

S1. (terminate if 'None')

Which video game consoles do you have in your household?

PLEASE SELECT ALL THAT APPLY

- ☐ PlayStation (PS one)
- ☐ GameCube
- ☐ Xbox 360
- ☐ PlayStation 2 (PS2)
- ☐ Xbox
- ☐ None

>>

S2.

Which video game consoles do you use for playing games?

PLEASE SELECT ONE RESPONSE FOR EACH VIDEO GAME CONSOLE

	Frequently Use	Occasionally Use	Rarely	Never Use
PlayStation (PS one)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GameCube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Xbox 360	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PlayStation 2 (PS2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Xbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

>>

S3. (terminate if 'Under 18')

What is your age?

PLEASE MARK ONE RESPONSE

- ☐ Under 18
- ☐ 18 - 24
- ☐ 25 - 34
- ☐ 35 - 50
- ☐ 51 and older

>>

S4. (terminate if '0 – 4')

Approximately how many hours per week do you spend playing **video console** games?

PLEASE MARK ONE RESPONSE

- ☐ 0-4
- ☐ 5-9
- ☐ 10-19
- ☐ 20+

>>

Q1.

Are you spending more or less time playing **video console** games (both online or offline) than a year ago?

PLEASE MARK ONE RESPONSE

- ☐ More
- ☐ About the same
- ☐ Less
- ☐ Don't know/not sure

>>

Q1b. (if answer to Q1 = Less)

What is the main reason you are spending less time playing **video console** games?

PLEASE MARK ONE RESPONSE

- ☐ I play more PC-based games, including online games like MMORPGs (massive multiplayer online role playing games)
- ☐ I have less time to play games
- ☐ I am less interested in playing electronic games of all kinds
- ☐ I play more games on handheld devices (such as PSP, DS, cell phone)
- ☐ Other (Specify)
- ☐ Don't know/not sure

>>

Q2.

How often do you play each of these types of **video console** games?

Please note: If you click 'more titles' the additional titles will appear in a pop-up window

PLEASE SELECT ONE RESPONSE FOR EACH TYPE OF GAME

	Most Often	Frequently	Occasionally	Rarely	Never	Don't know/ not sure
Strategy (Kessen 3, Worms 3D, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Racing (Gran Turismo 4, Need for Speed, Moto GP 2, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Role Playing Games (The Sims 2, Final Fantasy, Baldur's Gate: Dark Alliance, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Action/Adventure (Resident Evil 4, Grand Theft Auto III, Metal Gear Solid, Splinter Cell, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shooter (Medal of Honor, Black, Halo, Ghost Recon 2, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fighting (Tekken 5, Dead or Alive, Mortal Kombat, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Puzzles or Cards (Tetris Worlds, World Series of Poker, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports (Madden Football, WWE Smackdown!, Rockstar Table Tennis, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

>>

Example of “If you click ‘more titles’ the additional titles will appear in a pop-up window”

Action/Adventure (Jak 3, X-Men: The Official Games, The Lord of the Rings: The Fellowship of the Ring, Prince of Persia: Warrior Within, God of War, Devil May Cry 3, Legend of Zelda, Lego Star Wars, Silent Hill 4: The Room, Fatal Frame, Tomb Raider: Legend)

Q2x.

Which of these statements do you agree with regarding rumble/vibration feedback in video console games?

PLEASE SELECT ALL THAT APPLY

- ☐ Most of the time the rumble feature could be better implemented in the game
- ☐ Most of the time the rumble feature is distracting or annoying
- ☐ Most of the time the rumble feature adds nothing to the experience
- ☐ The rumble feature should be totally removed from all video console games
- ☐ Most of the time the rumble feature helps me play better (provides warnings, alerts, guidance)
- ☐ Most of the time the rumble feature involves me more in the game
- ☐ Most of the time the rumble feature makes the game more fun
- ☐ Most of the time the rumble feature makes the game seem more real
- ☐ Other (specify)

>>

Q3. (only the games the respondent chose in Q2 as 'Most Often', 'Frequently', 'Occasionally', or 'Rarely' were given as choices here)

How do you feel about the presence of rumble/vibration feedback in particular types of video console games?

Please note: If you click 'more titles' the additional titles will appear in a pop-up window

PLEASE SELECT ONE RESPONSE FOR EACH TYPE OF GAME

	I think it's essential to the fun, realism and overall experience	I like it and I want it in the game	It neither adds to nor detracts from the experience	This type of game doesn't generally benefit from it	I don't want it when I play this type of game	Don't know/not sure
Strategy (Kessen 3, Worms 3D, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Racing (Gran Turismo 4, Need for Speed, Moto GP 2, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Role Playing Games (The Sims 2, Final Fantasy, Baldur's Gate: Dark Alliance, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Action/Adventure (Resident Evil 4, Grand Theft Auto III, Metal Gear Solid, Splinter Cell, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shooter (Medal of Honor, Black, Halo, Ghost Recon 2, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fighting (Tekken 5, Dead or Alive, Mortal Kombat, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Puzzles or Cards (Tetris Worlds, World Series of Poker, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports (Madden Football, WWE Smackdown!, Rockstar Table Tennis, more titles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

>>

Q4.

When playing video console games, how often do you play with the rumble/vibration feature turned **off**?

PLEASE MARK ONE RESPONSE

- ☐ Always
- ☐ Frequently
- ☐ Occasionally
- ☐ Rarely
- ☐ Never
- ☐ Don't know/not sure

>>

Q5.

Tell us about the best use of rumble/vibration feedback in a specific video console game and what makes it good. Please use as much detail as possible.

>>

Q6. (if answer to Q4 = 'Never' or 'Don't know/not sure', skip to Q7)

Why do you play video console games with the rumble/vibration feature turned off?

SELECT ALL THAT APPLY

- ☐ A particular game has implemented rumble poorly or inappropriately
- ☐ I don't like rumble/vibration feedback in any game
- ☐ Rumble can be tiring for hands/wrists after hours of playing certain games
- ☐ Noise from rumble is too loud/can disturb others in the room
- ☐ My controller does not have rumble capability (for example, Wavebird or certain other wireless controllers)
- ☐ It can be annoying, irritating, or distracting if rumble is used too often or for too long
- ☐ I can play faster or better in some games without rumble/vibration feedback
- ☐ I want to save the controller's battery life
- ☐ Other (specify)
- ☐ Don't know/not sure

>>

Q7.

Which video game console(s) are you planning to buy sometime in the next 12 months? Assume the PS3 and Wii begin shipping by December 1, 2006.

SELECT ALL THAT APPLY

- ☐ Microsoft Xbox 360
- ☐ Nintendo GameCube
- ☐ Sony PS2
- ☐ Sony PlayStation 3
- ☐ Nintendo Wii
- ☐ Microsoft Xbox
- ☐ None
- ☐ Don't know/not sure

>>

Q8.

How many video console games do you expect to buy in the next 12 months?

PLEASE MARK ONE RESPONSE

- ☐ 0
- ☐ 1-4
- ☐ 5-9
- ☐ 10-14
- ☐ 15-19
- ☐ 20+
- ☐ Don't know/not sure

>>

Q13.

How important is it to you that the new version of a video game console offers **backward compatibility** for video games made for the previous console version?

PLEASE MARK ONE RESPONSE

- ☐ Not at all important
- ☐ Not very important
- ☐ Important
- ☐ Very important
- ☐ Don't know/not sure

>>

Q13b.

Do you consider the rumble/vibration feature to be included in the definition of "backward compatible"?

In other words, if the original game had vibration feedback, should vibration feedback be included when playing that game on the new console if it were advertised as "backward compatible" with the previous console version?

PLEASE MARK ONE RESPONSE

- ☐ No
- ☐ Yes
- ☐ Don't know/not sure

>>

Q14.

Have you ever used a gamepad controller with motion or tilt sensing to control action in a PC or video console game in the past? Examples include the Microsoft SideWinder Freestyle Pro released in 1998 and the Pelican TiltForce2 controller.

PLEASE MARK ONE RESPONSE

- ☐ No
- ☐ Yes
- ☐ Don't know/not sure

>>

Q15.

Assuming it is technically possible to implement both motion/tilt sensing and rumble in a controller for the console systems below, which of the following feature combinations would you prefer for each console?

Your response may or may not vary by console, depending on the types of games and features you'd expect to play and use on each console.

PLEASE MARK ONE RESPONSE PER CONSOLE SYSTEM

	<u>neither</u> motion/tilt sensing nor rumble	rumble only	motion/tilt sensing only	both motion/tilt sensing <u>and</u> rumble	Don't know/ not sure
Sony PlayStation 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nintendo Wii	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Microsoft Xbox 360	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

>>

Q9.

Are you aware of Sony's announcement in May that the rumble/vibration feature currently available on DUALSHOCK and DUALSHOCK2 controllers for PlayStation and PS2 will be removed from the new PS3 controller?

PLEASE MARK ONE RESPONSE

- ☐ No
- ☐ Yes
- ☐ Don't know/not sure

>>

Q9a. (if answer to Q9 = 'No' or 'Don't know/not sure')

Now that you are aware that Sony announced the PS3 controller will not have the vibration feature used in previous DUALSHOCK controllers, which of the following statements best describes your feelings?

PLEASE MARK ONE RESPONSE

- ☐ I'm glad the vibration feature will be absent from the PS3 controller.
- ☐ I don't really care that the vibration feature will be absent from the PS3 controller.
- ☐ I'm a little disappointed that the PS3 controller will not have the vibration feature.
- ☐ I am very disappointed that the PS3 controller will not have the vibration feature.
- ☐ Don't know/not sure

>>

Q9ax. (if answer to Q9 = 'Yes')

Since you became aware that Sony announced the PS3 controller will not have the vibration feature used in previous DUALSHOCK controllers, which of the following statements best describes your feelings?

PLEASE MARK ONE RESPONSE

- ☐ I'm glad the vibration feature will be absent from the PS3 controller.
- ☐ I don't really care that the vibration feature will be absent from the PS3 controller.
- ☐ I'm a little disappointed that the PS3 controller will not have the vibration feature.
- ☐ I am very disappointed that the PS3 controller will not have the vibration feature.
- ☐ Don't know/not sure

>>

Q10.

How likely do you think it is that third party gamepad controllers with rumble will be available for the PS3 system within the first year after its launch?

PLEASE MARK ONE RESPONSE

- ☐ No, it absolutely won't happen
- ☐ It probably won't happen
- ☐ It probably will happen
- ☐ Yes, it absolutely will happen

>>

Q11.

If Sony removes software support for rumble from the PS3 console in addition to their controller, the PlayStation and PS2 games also may not have vibration when played on the PS3.

How would the lack of rumble in PS3, PS2, and PS games played on a PS3 console affect your decision to buy the PS3 console?

PLEASE MARK ONE RESPONSE

- ☐ I am not planning to buy a PS3 regardless of whether or not it supports the rumble/vibration feature
- ☐ I will definitely not buy the PS3 without software support for rumble in the console
- ☐ I am somewhat less likely to buy the PS3 without software support for rumble in the console
- ☐ I am somewhat more likely to buy the PS3 without software support for rumble in the console
- ☐ I will definitely buy the PS3 without software support for rumble in the console
- ☐ Don't know/not sure

>>

Q16.

What is your gender?

PLEASE MARK ONE RESPONSE

- ☐ Male
- ☐ Female

>>

Q17.

Can we use your write-in comments in press activities related to this survey? Your comments would not be linked to you personally, and your responses are only analyzed in an anonymous context.

PLEASE MARK ONE RESPONSE

- ☐ Yes
- ☐ Don't know/not sure
- ☐ No

>>

Q18. (if answer to Q17 = 'Yes')

As a follow-up to this survey, a journalist will be conducting telephone interviews, chaperoned by Ipsos, with a select group of respondents. This interview should take no longer than 5 minutes and the topic of this interview will be limited to next generation gaming consoles and the use of rumble/vibration feedback technology.

Interview candidates will be chosen after the journalist reads your anonymous survey responses. Your responses will not be linked to you personally, unless you give your consent here to be contacted.

Please note that by selecting "yes" below, you agree that a journalist and an Ipsos representative may contact you within 2 months for an interview about your comments in this study.

Do you agree to be contacted via email or telephone for a follow-up survey? Please note, not everyone who agrees will be contacted.

PLEASE MARK ONE RESPONSE

- ☐ Don't know/not sure
- ☐ No
- ☐ Yes - I agree to be contacted for a follow-up interview

>>

So that the journalist can contact you, please provide us with your email address or phone number.

Email Address:

Phone Number:

>>

Those are all the questions we have for you today. Thank you for your time.

>>

Appendix B – Game Categories

Game Category (with specific game titles, provided to respondents as examples of game genre):

Shooter (Medal of Honor, Black, Halo, Ghost Recon 2, [more titles](#))

“more titles” - (SOCOM 3: U.S. Navy Seals, Half-Life, Call of Duty 2, Brothers in Arms, Hitman 2: Silent Assassin, Star Wars: Battlefront 2, Perfect Dark Zero, Killzone, Rainbow Six Lockdown, Metroid Prime)

Racing (Gran Turismo 4, Need for Speed, Moto GP 2, [more titles](#))

“more titles” - (Midnight Club 3, Project Gotham Racing 3, Mario Kart: Double Dash, Sonic Riders)

Sports (Madden Football, WWE Smackdown!, Rockstar Table Tennis, [more titles](#))

“more titles” - (NBA Live 06, FIFA World Cup, ESPN NHL Hockey, MVP Baseball 2005, Tony Hawk’s American Wasteland)

Strategy (Kessen 3, Worms 3D, [more titles](#))

“more titles” - (Full Spectrum Warrior: Ten Hammers)

Fighting (Tekken 5, Dead or Alive, Mortal Kombat, [more titles](#))

“more titles” – (War of Monsters, Soul Caliber II, The King of Fighters, Guilty Gear X2, Super Smash Bros. Melee)

Action/Adventure (Resident Evil 4, Grand Theft Auto III, Metal Gear Solid, Splinter Cell, [more titles](#))

“more titles” - (Jak 3, X-Men: The Official Games, The Lord of the Rings: The Fellowship of the Ring, Prince of Persia: Warrior Within, God of War, Devil May Cry 3, Legend of Zelda, Lego Star Wars, Silent Hill 4: The Room, Fatal Frame, Tomb Raider: Legend)

Role Playing Games (The Sims 2, Final Fantasy, Baldur’s Gate: Dark Alliance, [more titles](#))

“more titles” - (Lord of the Rings: The Third Age, Elder Scrolls IV: Oblivion, Kingdom Hearts, Dark Cloud, X-Men Legends, Harvest Moon)

Puzzles or Cards (Tetris Worlds, World Series of Poker, [more titles](#))

“more titles” - (Duel Masters, Wheel of Fortune)

About Ipsos

Overview

Ipsos Insight is a member of the Ipsos Group, the third largest survey-based marketing research company in the world. Ipsos was founded 1975 in Paris, is present in 35 countries, and conducts research in more than 100 countries with a staff of more than 3,700. More than 6 million consumer and B2B interviews are completed annually.

As the company's flagship marketing research division, Ipsos Insight provides custom and tracking research to domestic clients as well as U.S.-based multinationals. It also acts as the portal to Ipsos specializations in advertising research; forecasting, modeling and consulting; global research; public opinion research; and customer satisfaction research.

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- Brazil
- Chile
- Columbia
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- Lebanon
- Saudi Arabia
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- Japan
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- Focus groups, depth interviews
- Integrate with quant information
- Global and domestic project management



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- 400K+ multi-method U.S. access panel
- 100K+ online European panelists



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- Yahoo!



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