



2012 PopCap Games Mobile Gaming Research  
Information Solutions Group

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# Research Overview

## Research Objectives

- Determine the percentage of mobile phone and tablet owners who play mobile games and the growth of mobile gaming over the past year.
- Understand current mobile game play activity and preferences as well as changes, if any, due to the recent growth in tablet ownership.
- Gather past (2010 and 2011) and future (2012 and 2013) mobile gaming purchase trends.
- Benchmark to the 2009 and 2011 mobile gaming surveys.

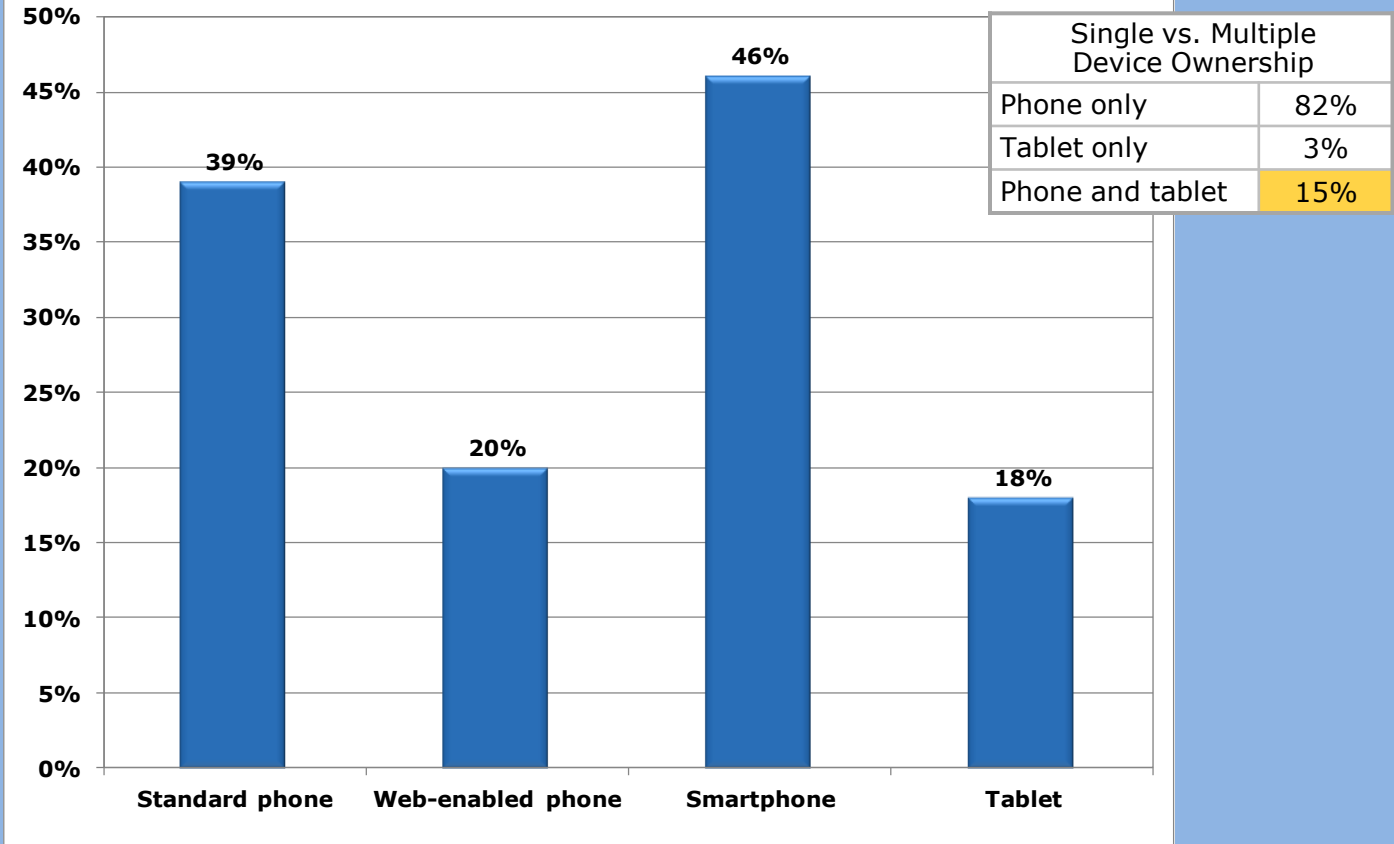
## Data Collection Overview

- Methodology: Web survey (ePanel).
- Audience (US and UK Internet users owning a mobile device).
- Survey length: 34 questions.
- Survey period: April 25, 2012 – May 1, 2012.
- 1,004 qualified responses (602 US, 402 UK).

## Survey Qualifications

- Live in the United States or United Kingdom.
- Own a mobile phone and/or or tablet.
- Played games on a mobile phone and/or tablet within the past month.

- Four out of ten (39%) mobile device owners in the US and UK continue to use a standard mobile phone; almost half (46%) have a smartphone, while 18% have a tablet (\*).
- Many own more than one mobile device, including 15% who own both a phone and a tablet (15%).



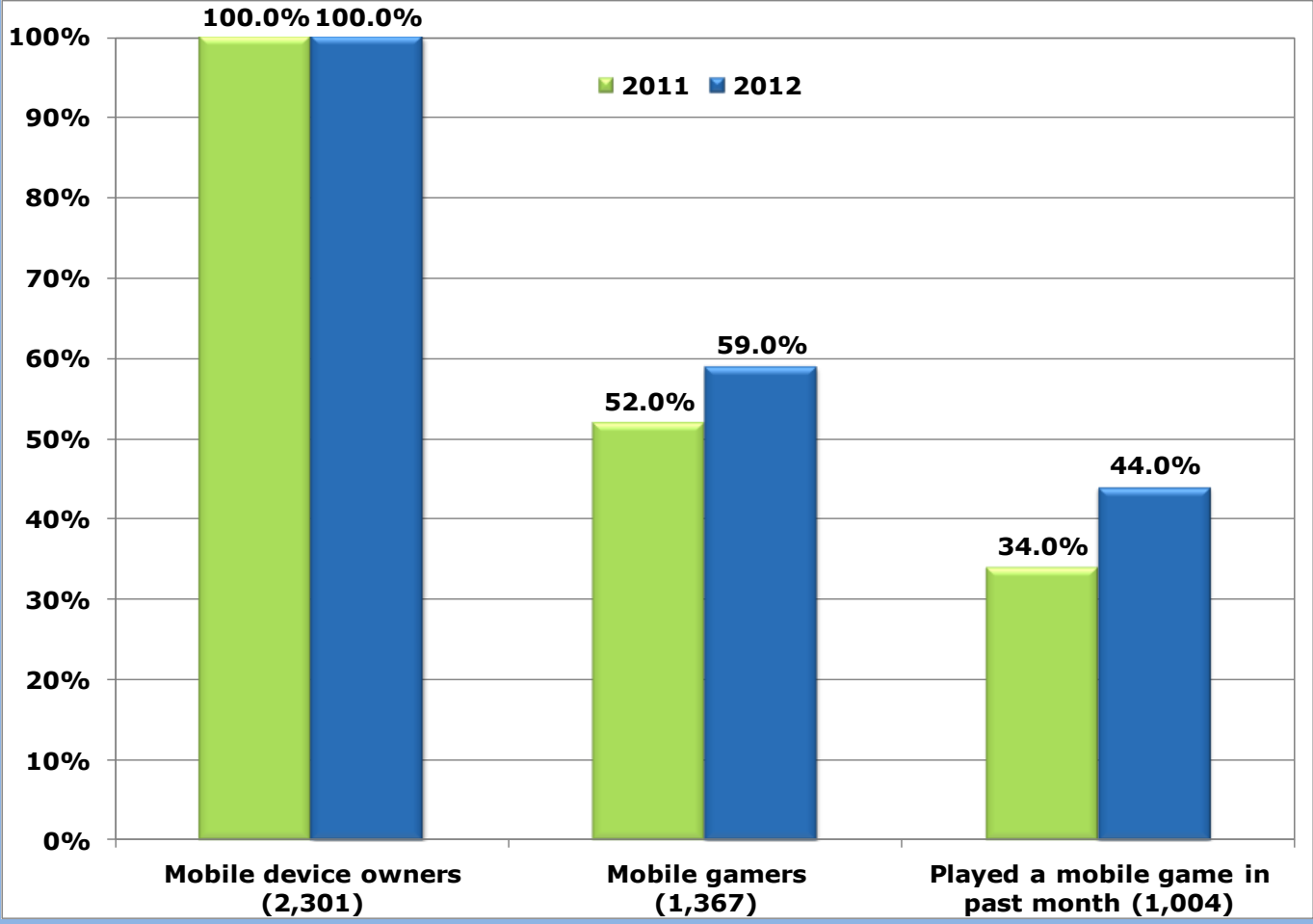
\* 2011 benchmark data based upon a select-only-one criteria and included mobile phone options only. 52% standard phone, 21% web-enabled phone, 27% smartphone.

Q3 What type of mobile device (phone or tablet) do you currently own and use?

# MARKET SIZING - MOBILE DEVICE OWNERS AND MOBILE GAMERS

Research Overview

- 59% of those who own a mobile device have played a game on either a mobile phone and/or a tablet. This reflects a 13% increase in the past year.
- 44% of the mobile gamers have played a mobile game in the past month and qualified to participate in the survey. This equates to a 29% increase in the past year.

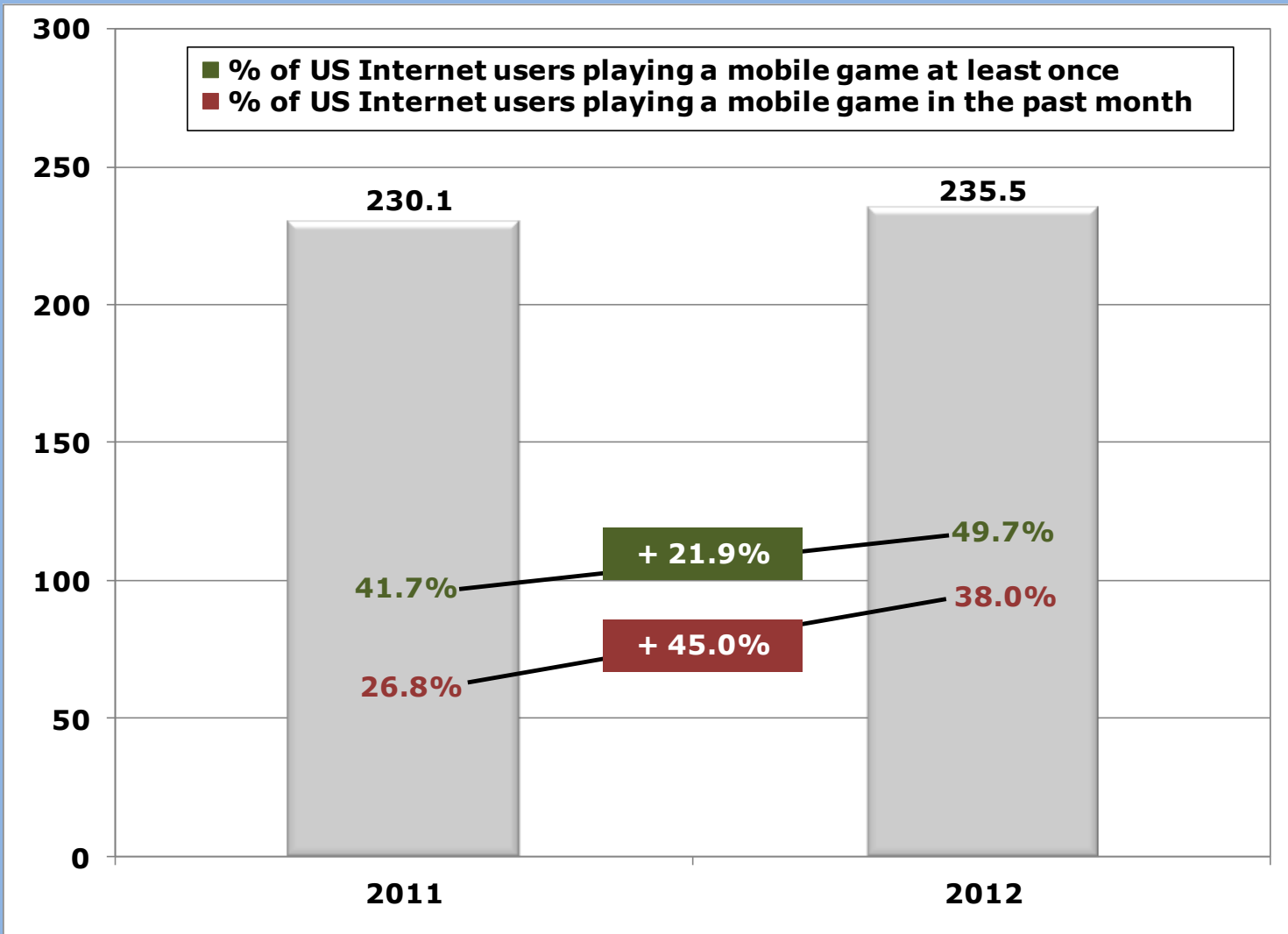


Note: 2011 data represent mobile phone owners, while 2012 data represent mobile device (phone and tablet) owners.

# MARKET SIZING – GROWTH IN MOBILE GAMING IN US (2012 vs. 2011)

- US Internet users who have played a mobile game in the past month increased 45% over the past year.

Research Overview



Note: 2011 data represent mobile phone owners, while 2012 data represent mobile device (phone and tablet) owners.



# Mobile Gamer Profile

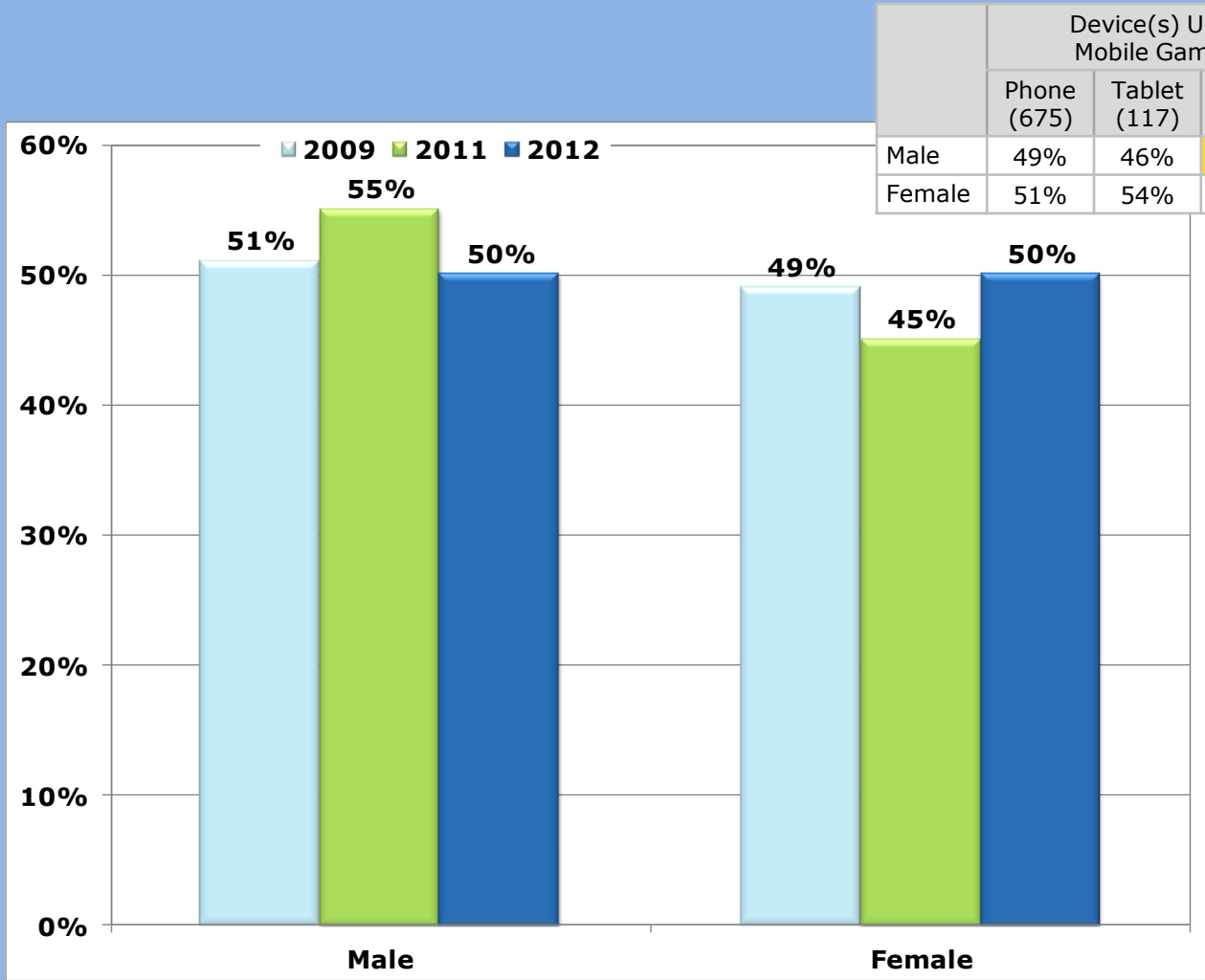
*For the purposes of this survey a mobile gamer is defined as someone who has played a game on his/her phone and/or tablet in the past month.*



# GENDER

Mobile Gamer Profile

- This year an equal number of males and females played a mobile game in the past month and as a result qualified to participate in the survey.
- Males are more likely to use both a phone and a tablet to play mobile games.

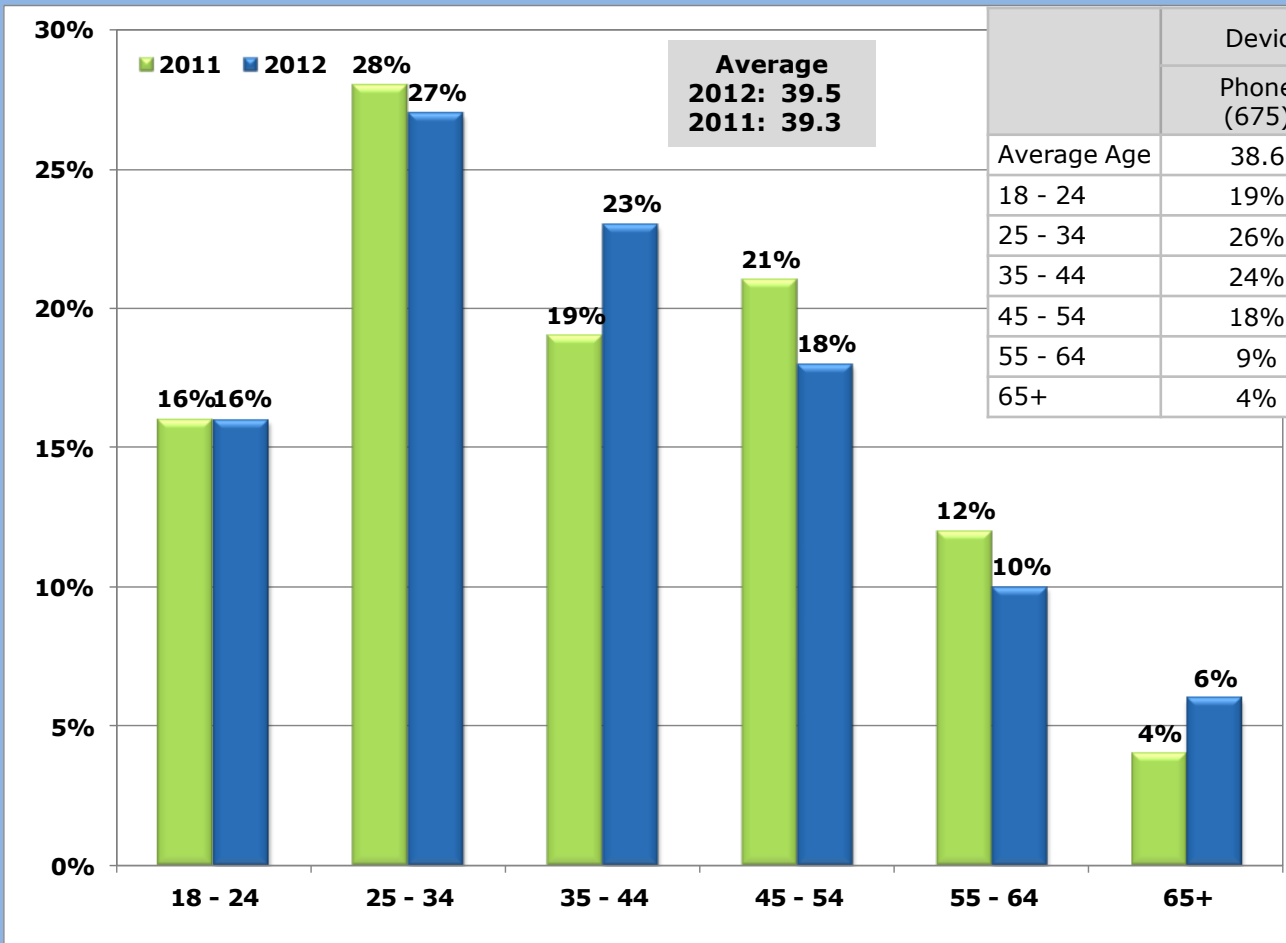


	Device(s) Used for Mobile Game Play			# Months/Years Mobile Gaming	
	Phone (675)	Tablet (117)	Phone/Tablet (212)	< One Year (442)	> One Year (562)
Male	49%	46%	56%	48%	52%
Female	51%	54%	44%	52%	48%

Q33 Gender

# AGE

- The average age of a mobile gamer is 39.5 years compared to 39.3 in 2011.
  - Two-thirds (66%) of mobile gamers are less than 45 years old, while 16% are 55 or older.
- The average age of those who only play mobile games on a tablet is 44.7.



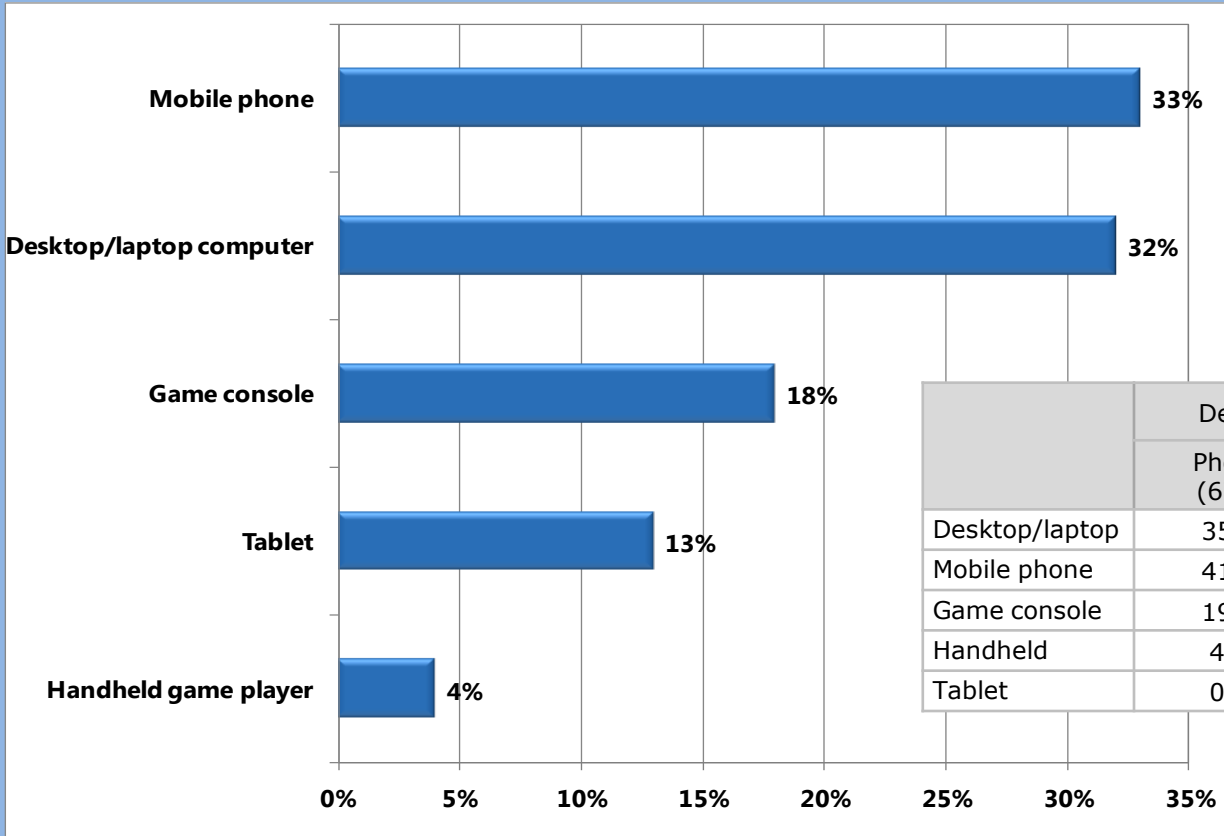
	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Q7 (212)
Average Age	38.6	44.7	35.2
18 - 24	19%	6%	14%
25 - 34	26%	14%	37%
35 - 44	24%	13%	24%
45 - 54	18%	19%	15%
55 - 64	9%	23%	7%
65+	4%	26%	4%

Q34 Age

# DEVICES USED WHEN PLAYING GAMES (ALL GAME PLAY)

Mobile Gamer Profile

- Half of all game play time is spent using a mobile device (phone, tablet and/or handheld).
- A mobile phone and desktop/laptop computer are the devices used most for playing games.
- Tablets represent 13% of total game play.

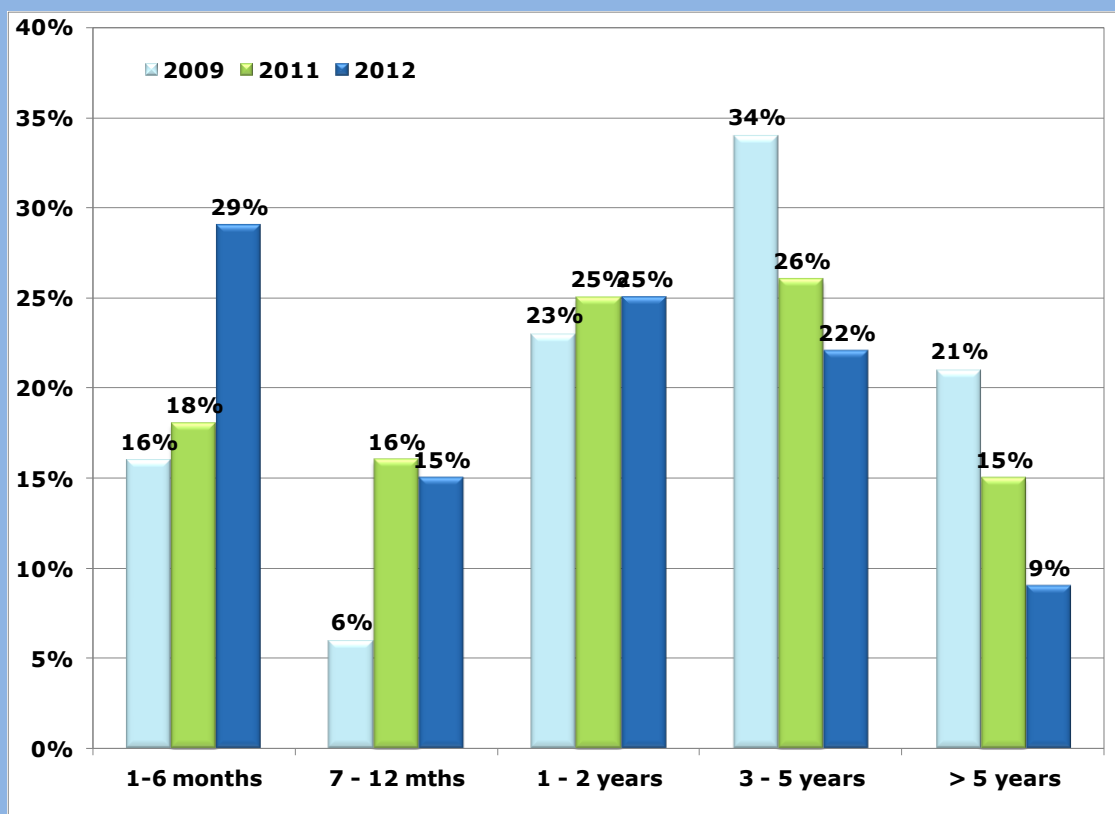


	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Phone/Tablet (212)
Desktop/laptop	35%	32%	22%
Mobile phone	41%	0%	24%
Game console	19%	12%	19%
Handheld	4%	2%	6%
Tablet	0%	54%	30%

Q17 Based upon your total game play, what percent of the time do you spend playing games on the following devices?

# LENGTH OF TIME PLAYING GAMES ON MOBILE DEVICE

Mobile Gamer Profile



- The number of new mobile gamers (playing for less than one year) continues to increase annually.
  - 44% are new to mobile gaming this year compared to 34% in 2011 and 22% in 2009.
  - Three-fourth (73%) of tablet only users are new to mobile gaming.
- Two-thirds of new mobile gamers started playing in the past six months.

	Device(s) Used for Mobile Game Play			# Months/Years Mobile Gaming	
	Phone (675)	Tablet (117)	Phone/Tablet (212)	< One Year (442)	> One Year (562)
1-6 months	27%	57%	22%	66%	0%
7 - 12 months	14%	16%	16%	33%	0%
1 - 2 years	26%	19%	25%	0%	44%
3 - 5 years	23%	5%	26%	0%	39%
> 5 years	10%	3%	11%	0%	17%

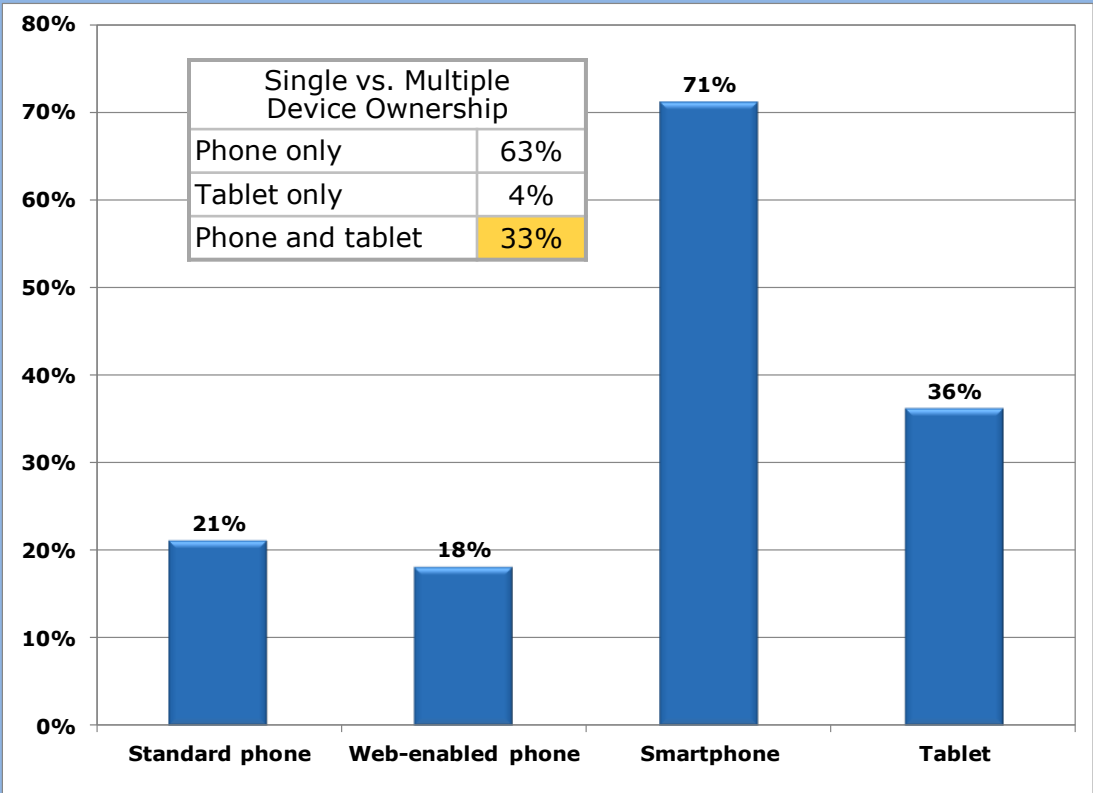
Q8 How long have you been playing games on a mobile phone and/or tablet?



# Mobile Game Play Device Usage

# MOBILE DEVICE OWNERSHIP (AMONG MOBILE GAMERS)

Mobile Game Play Device Usage



- Smartphone ownership among mobile gamers grew 16% over the past year with 71% currently owning a smartphone compared to 61% in 2011 (\*).
- Many mobile gamers own multiple mobile devices including 33% who own both a mobile phone and a tablet.

\* 2011 benchmark data based upon a select - only-one criteria and included mobile phone options only: 17% standard phone, 22% web-enabled phone, 61% smartphone.

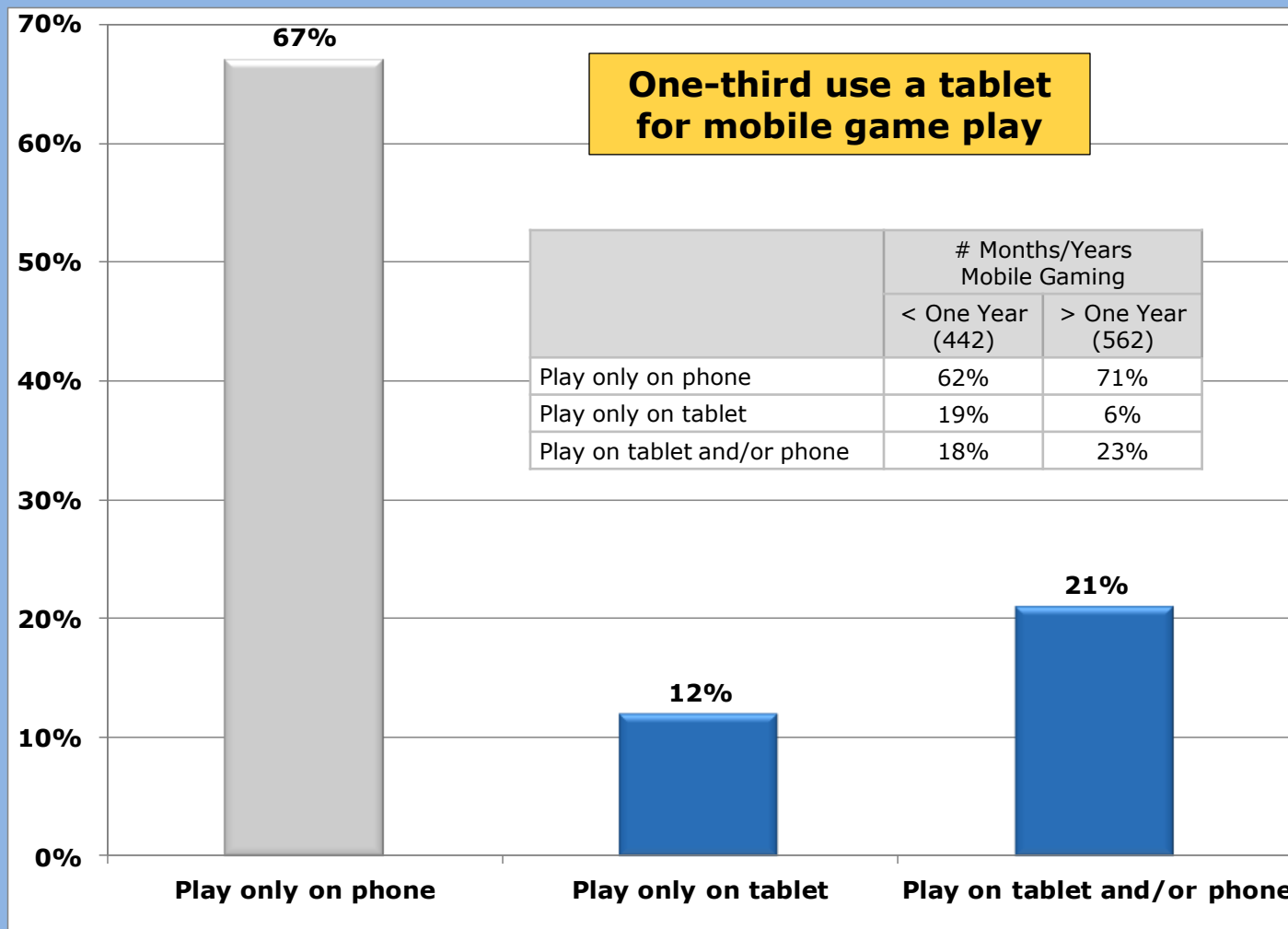
	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Phone/Tablet (212)
Standard phone	18%	44%	18%
Web-enabled phone	16%	15%	25%
Smartphone	75%	23%	86%
Tablet	5%	100%	100%

Q3 What type of mobile device (phone or tablet) do you currently own and use? (Mobile Game Players Only)

# TYPE OF MOBILE DEVICE USED WHEN PLAYING GAMES

- While the majority (67%) limit their mobile game play to a phone, one-third (33%) use a tablet for at least some of their mobile game play.
- Tablets are more popular among those new to mobile gaming.

Mobile Game Play  
Device Usage

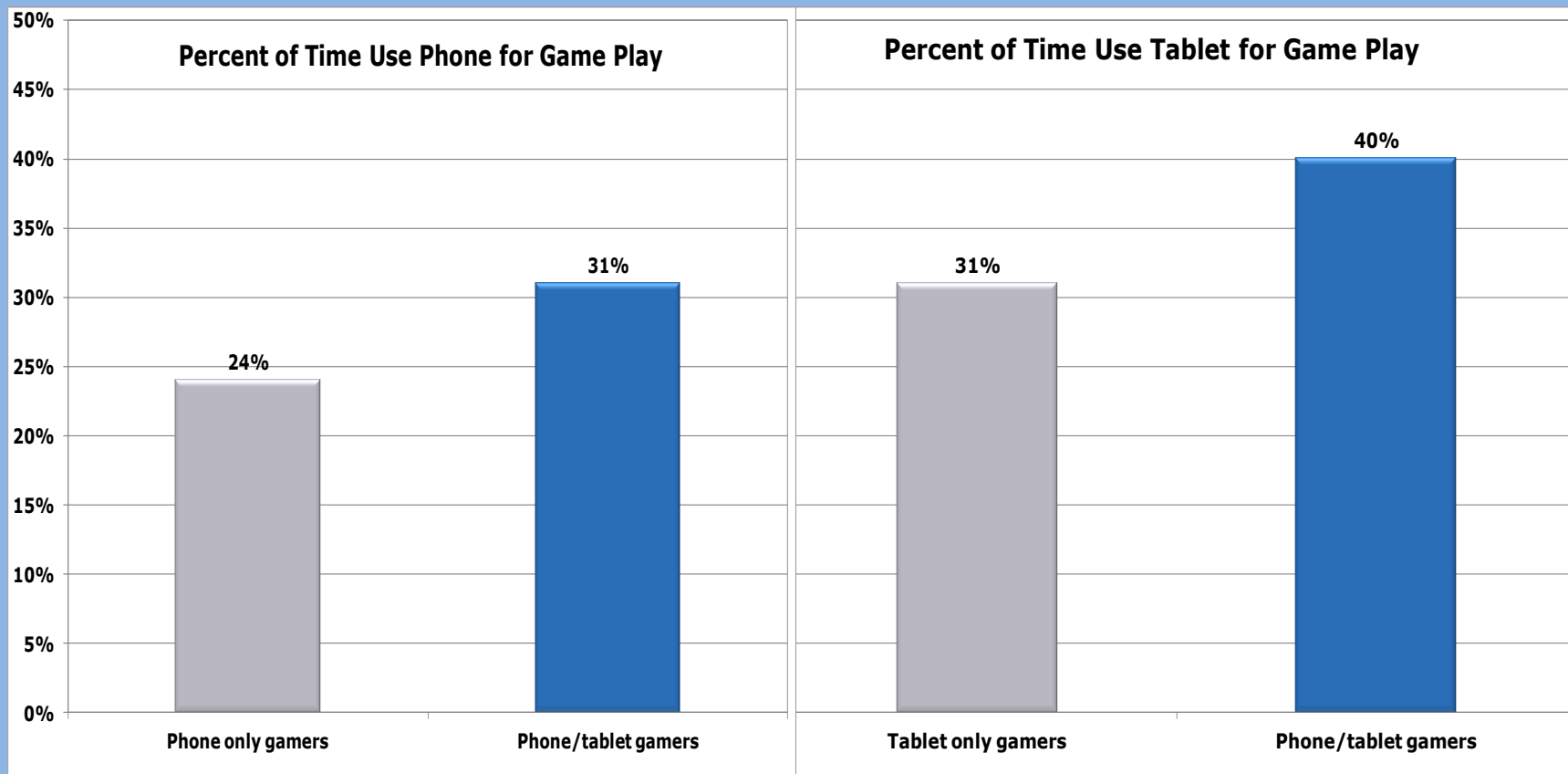


Q9 Which of the following best describes the type of mobile device you use when playing games?

# TIME SPENT PLAYING GAMES ON MOBILE DEVICES

- Those who play mobile games on a phone and a tablet log more game time on these devices than those who limit their mobile game play to only a phone or a tablet.

Mobile Game Play  
Device Usage

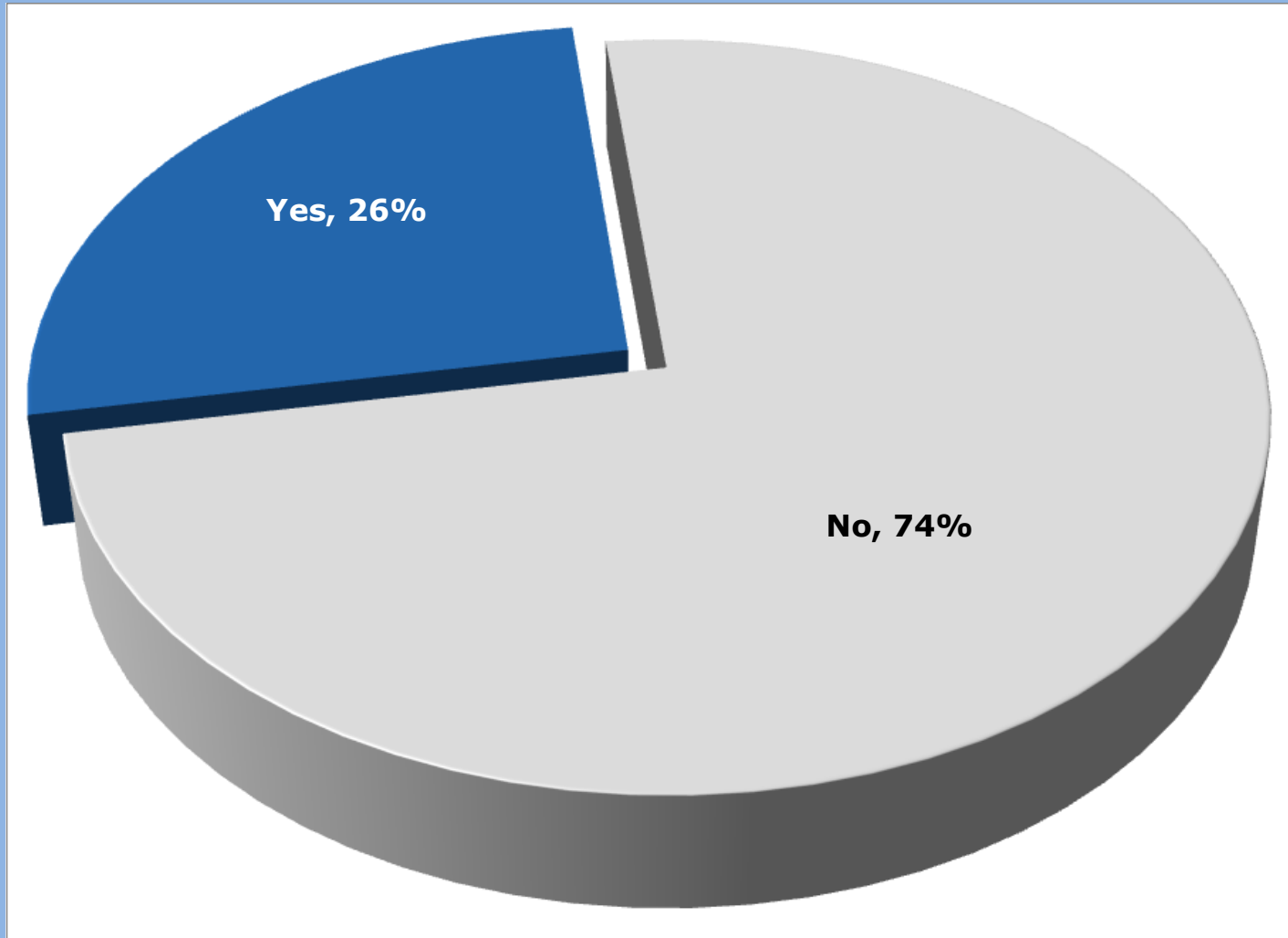


Q10/Q13 When using your mobile phone, what percent of the time do you spend playing games?  
Q12/Q14 When using your tablet, what percent of the time do you spend playing games?



# GAME PLAY ON PHONE PRIOR TO USING TABLET (TABLET ONLY USERS)

- One-fourth (26%) of those who limit their mobile game play to a tablet previously played games on a mobile phone.

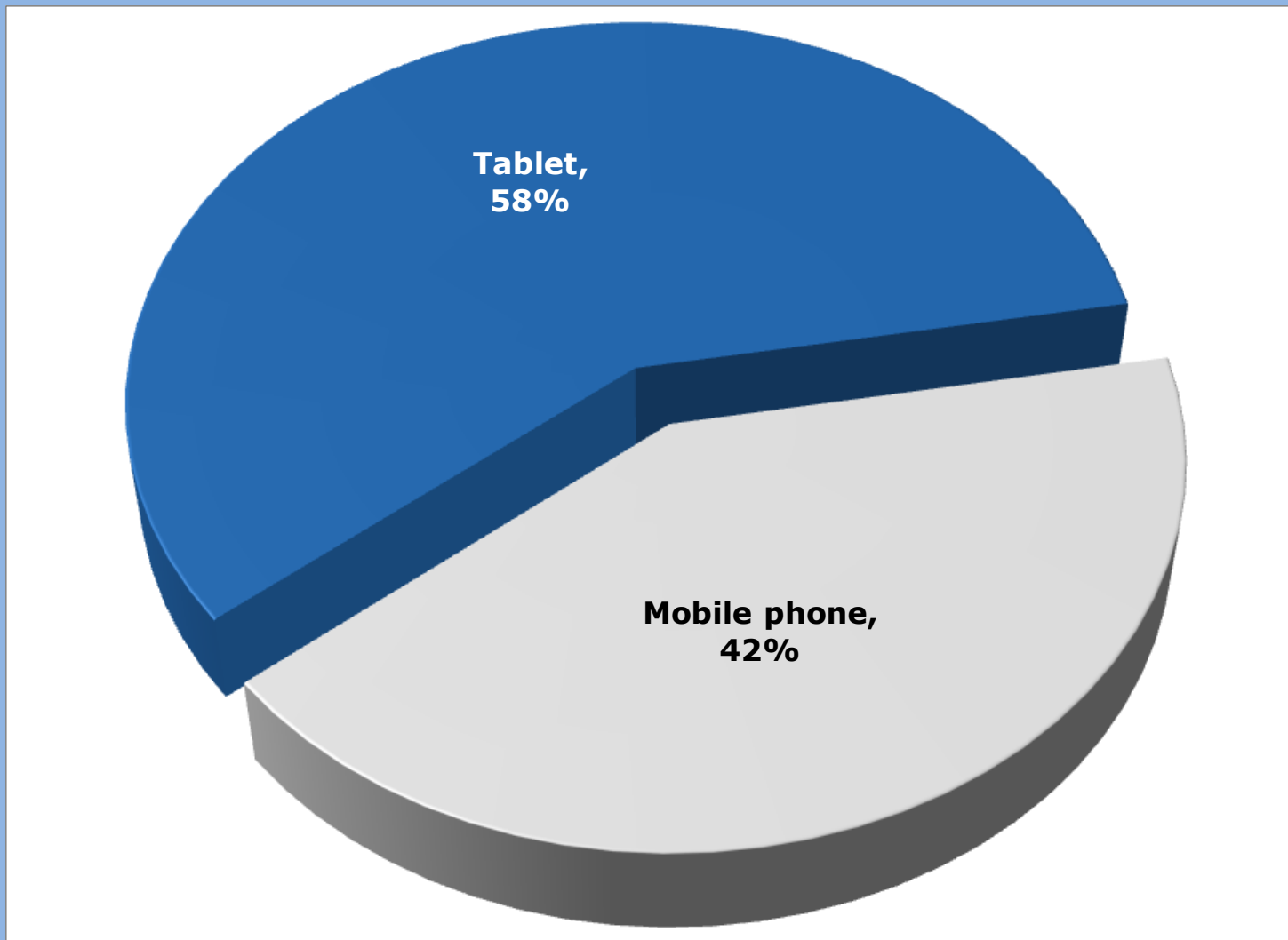


Q11 Did you play games on a mobile phone prior to acquiring your tablet?

# PERCENT OF MOBILE GAME PLAY PHONE VS. TABLET (PHONE/TABLET USERS)

- Those using both a phone and tablet for their mobile gaming entertainment play on a tablet more than on a phone.

Mobile Game Play  
Device Usage

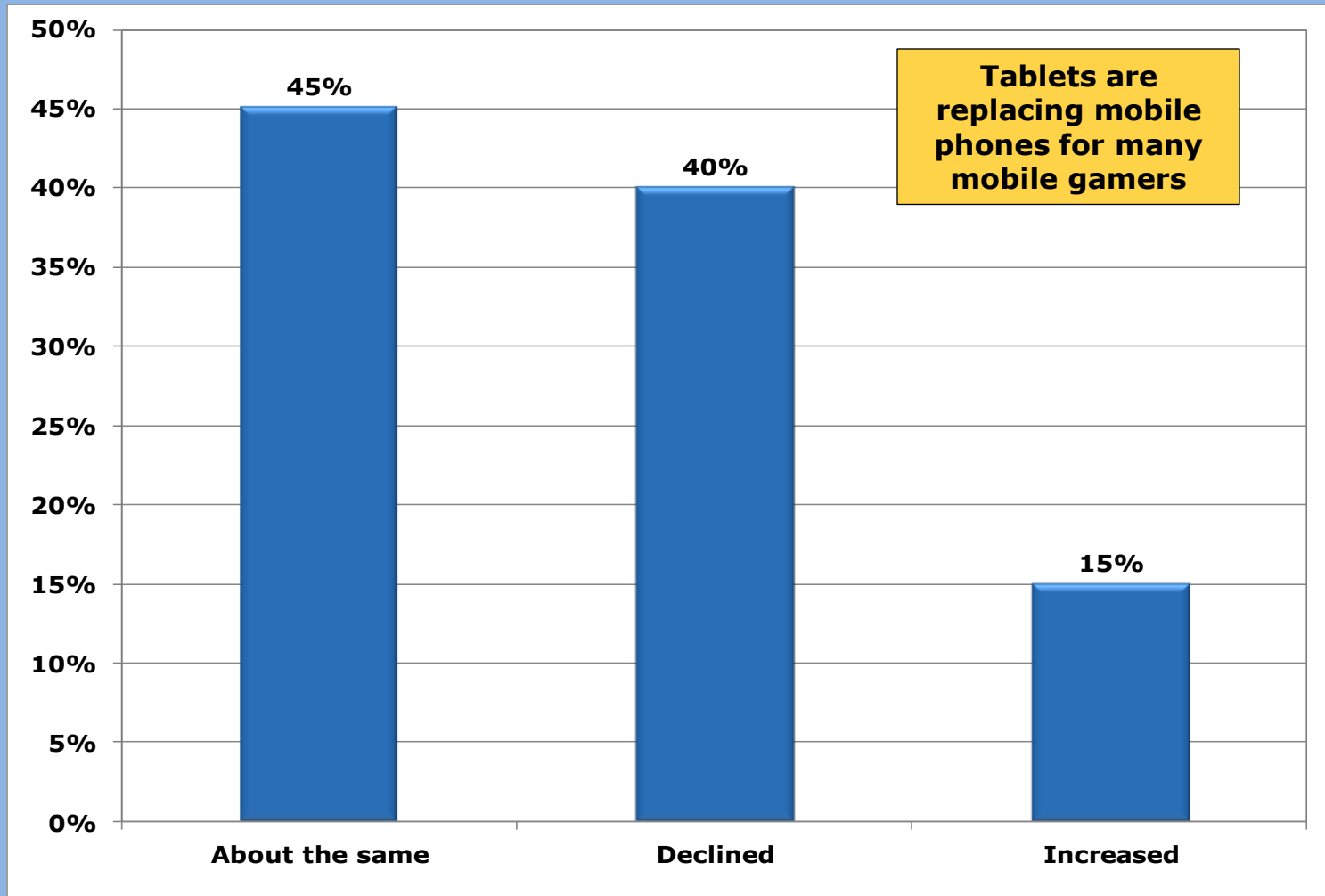


Q15 What percent of your mobile game play time is spent playing on a phone versus a tablet?

# CHANGES IN MOBILE GAME PLAY SINCE TABLET ACQUISITION

- Mobile game play is shifting away from the phone towards the tablet.
- 40% of those who play mobile games on both a phone and a tablet said their game play on their phone has declined and shifted towards their recently purchased tablet.

Mobile Game Play  
Device Usage



Q16 Since you acquired a tablet, how has your mobile game play on a phone changed?

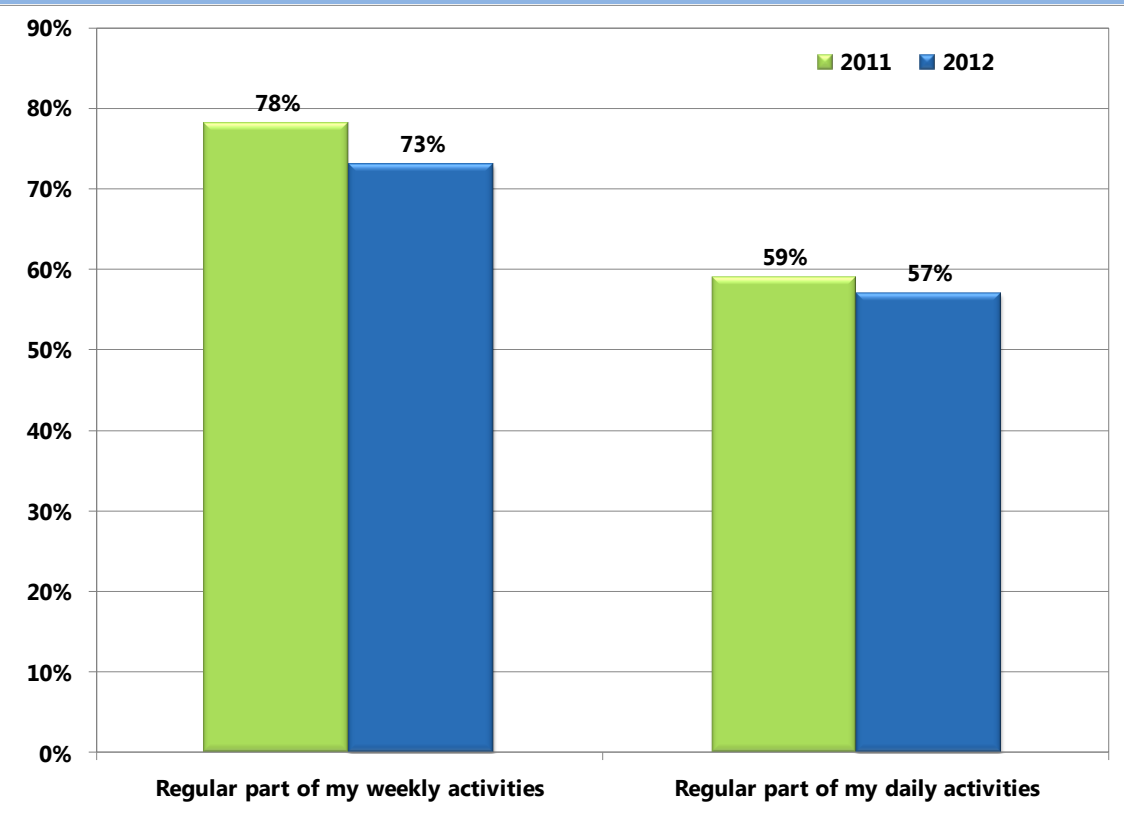


# Mobile Game Play Activity

# MOBILE GAMING A REGULAR PART OF DAILY/WEEKLY ACTIVITIES

Mobile Game Play Activity

**Percent Strongly/Somewhat Agree That Mobile Gaming Has Become A ...**



- Almost three-fourths (73%) Agree (Strongly and Somewhat) that mobile gaming has become a regular part of their *weekly* activities. This is slightly lower than one year ago.
- 57% Agree (Strongly and Somewhat) that mobile gaming has become a regular part of their *daily* activities compared to 59% in 2011.

% Strongly/Somewhat Agree	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Phone/Tablet (212)
Weekly activities	71%	77%	81%
Daily activities	55%	51%	67%

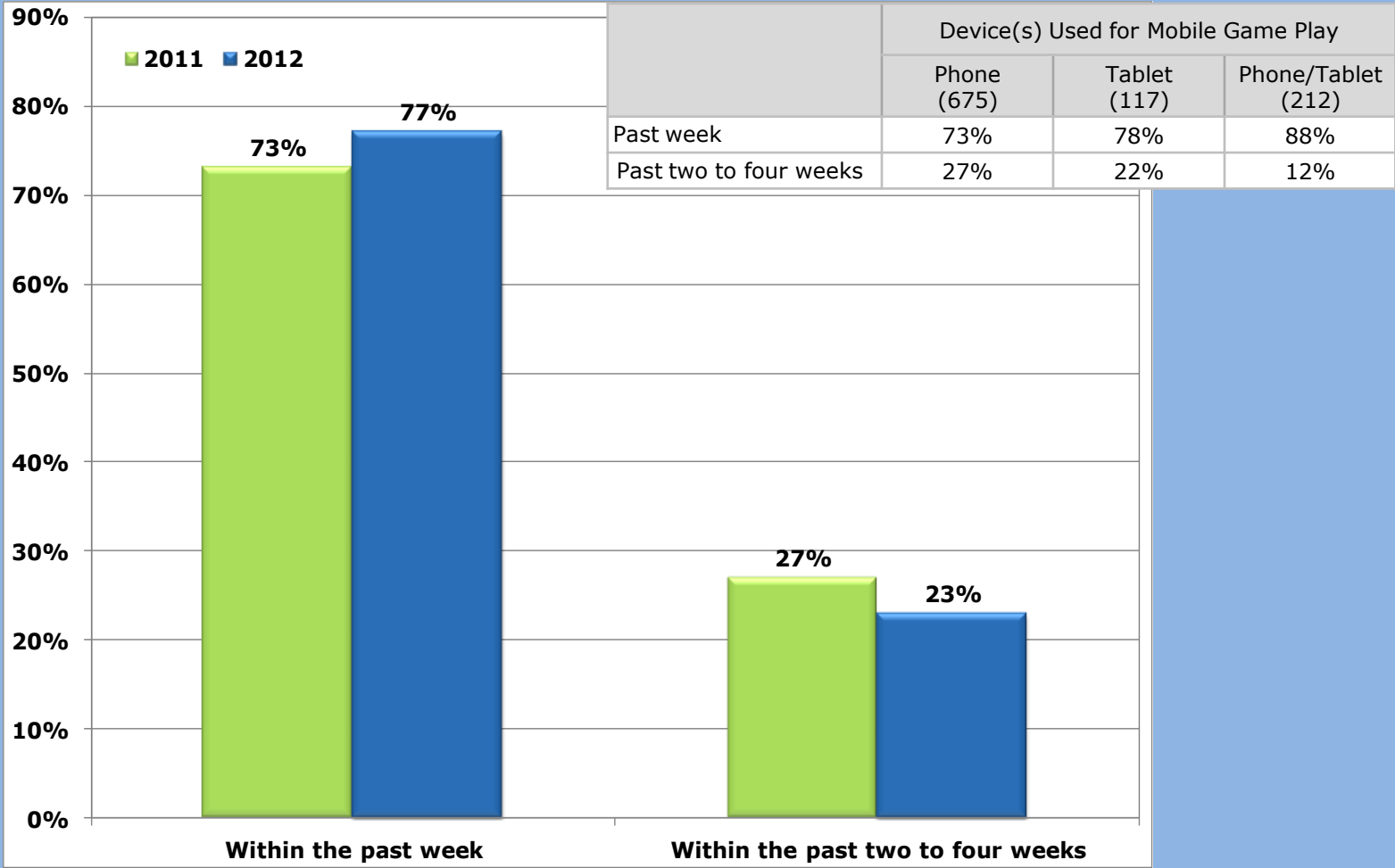
Q20 How much do you agree or disagree with the following:

20A – Mobile gaming has become a regular part of my weekly activities. 20B – Mobile gaming has become a regular part of my daily activities.

# MOST RECENT MOBILE GAME PLAY

Mobile Game Play Activity

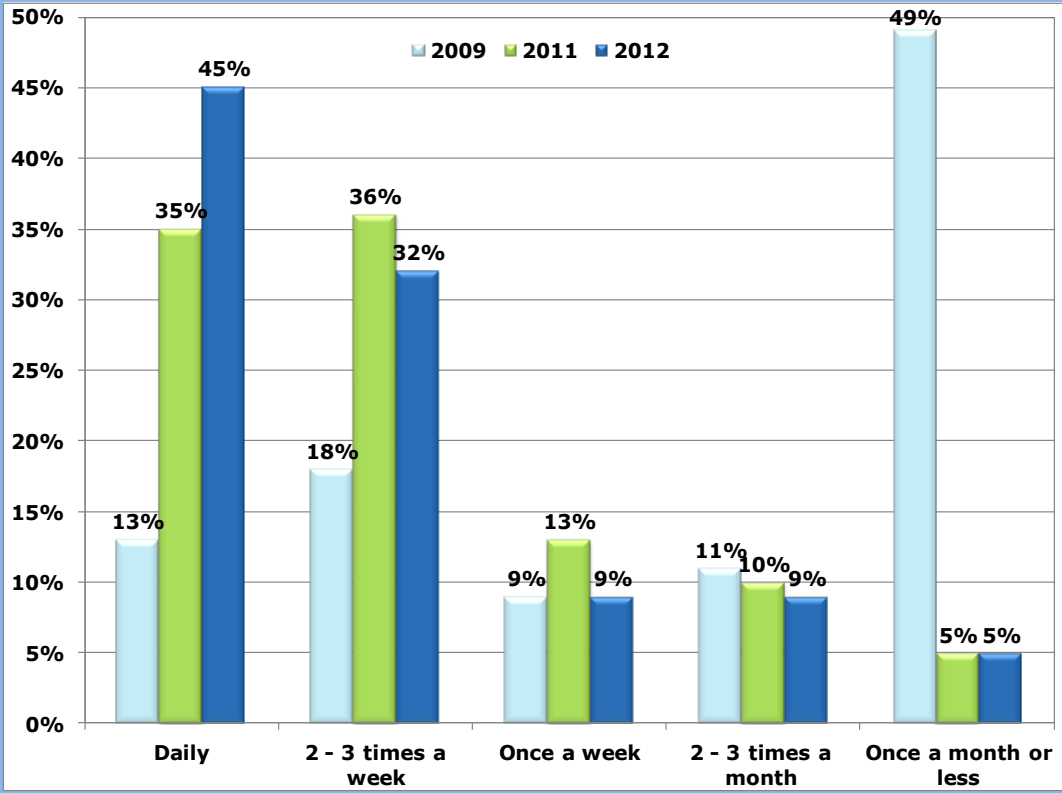
- Three fourths (77%) played a mobile game in the past week, which is slightly higher than the 2011 results of 73%.
- Those playing games on both a phone and a tablet are more active mobile gamers, with 88% playing in the past week.



Q5 When was the last time you played a game on a mobile phone or tablet?

# FREQUENCY OF MOBILE GAME PLAY

Mobile Game Play Activity



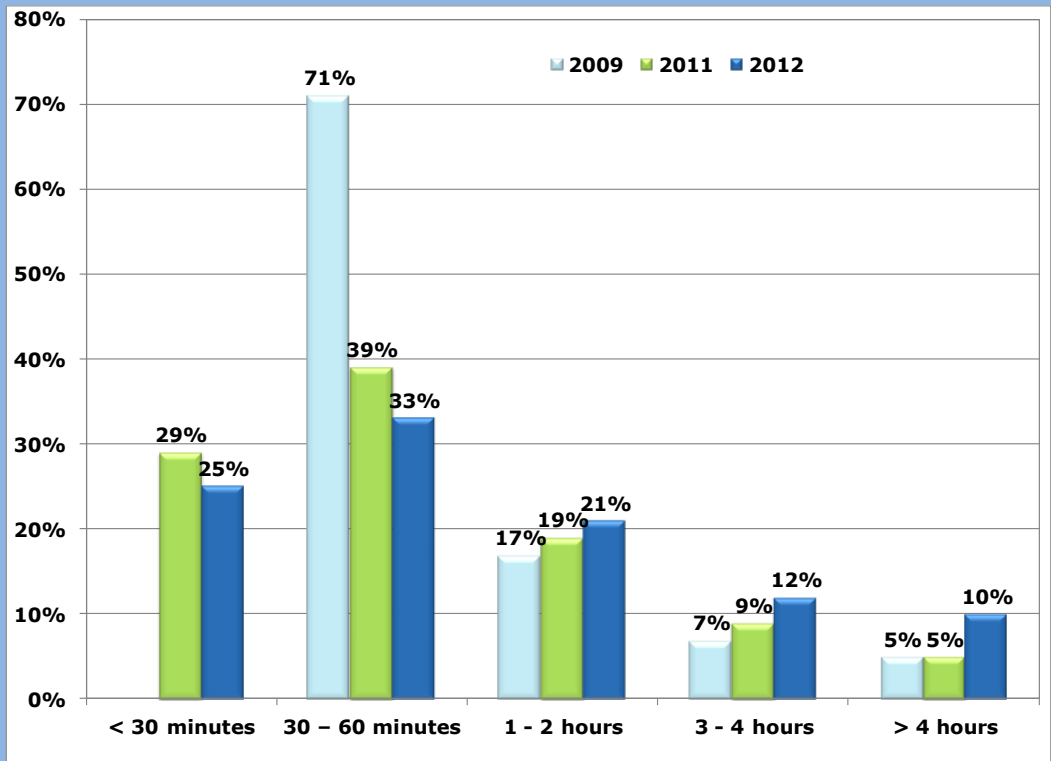
- The frequency of mobile game play increase slightly this year, with a total of 86% playing mobile games weekly compared to 84% in 2011.
- Daily mobile game play also increased from 35% in 2011 to the current 45%.
  - Those who play on both a mobile phone and tablet are more active, with 57% playing daily.

	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Phone/Tablet (212)
Daily	42%	40%	57%
2 - 3 times a week	32%	31%	32%
Once a week	9%	16%	4%
2 - 3 times a month	11%	5%	5%
Once a month or less	6%	8%	2%

Q6 How often do you typically play games on your mobile phone and/or tablet?

# NUMBER OF HOURS PER WEEK GAMES PLAYED MOBILE GAMES

Mobile Game Play Activity



\* The 2009 AT&T/PopCap survey only captured < 1 hour.

- The number of total hours per week dedicated to mobile gaming increased over the past year, with a total of 22% playing for three or more hours a week compared to 14% in 2011.
- Those playing on both a phone and tablet spend more hours per week playing mobile games.
- New mobile gamers (playing less than one year) play fewer hours per week, with 65% playing one hour or less.

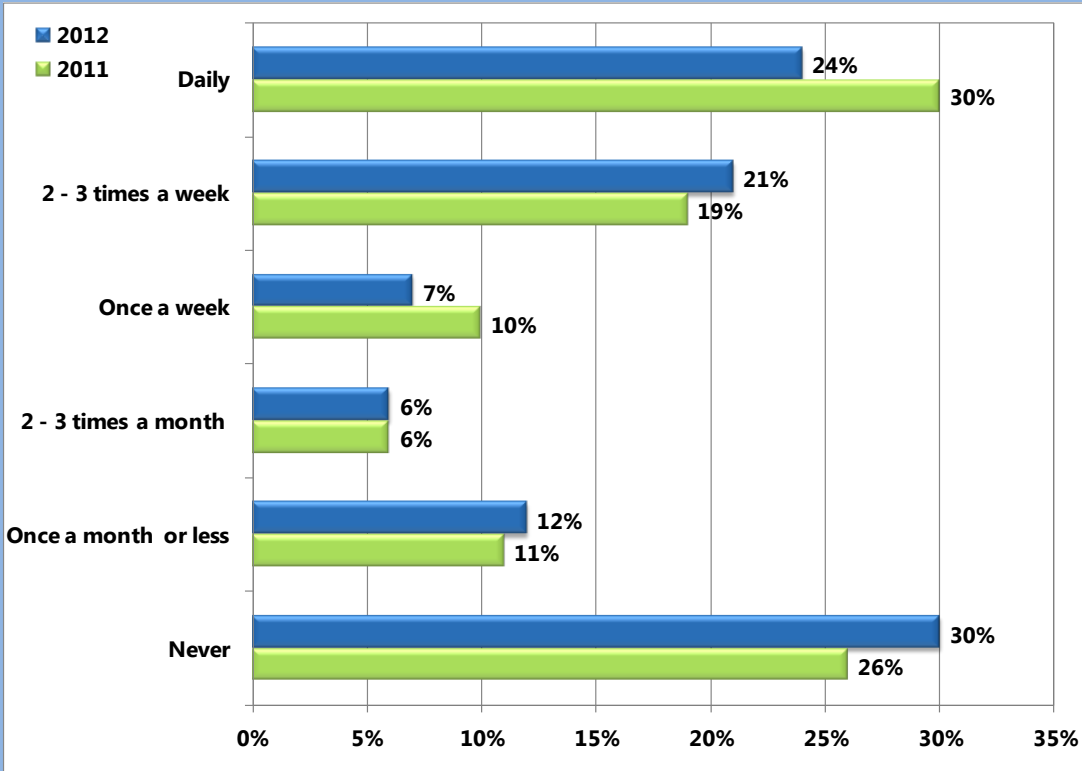
	Device(s) Used for Mobile Game Play			# Months/Years Mobile Gaming	
	Phone (675)	Tablet (117)	Phone/Tablet (212)	< One Year (442)	> One Year (562)
< 30 minutes	28%	22%	17%	27%	23%
30 - 60 minutes	33%	38%	30%	38%	29%
1 - 2 hours	20%	20%	24%	19%	22%
3 - 4 hours	12%	9%	14%	10%	14%
> 4 hours	8%	11%	16%	7%	12%

Q7 How many total hours per week do you play games on a mobile phone and/or tablet?



# FREQUENCY OF SOCIAL GAME PLAY ON MOBILE DEVICE

Mobile Game Play Activity



- Social game play on a mobile device declined slightly over the past year.
  - 30% said they Never play social games on a mobile device compared to 26% in 2011.
  - Fewer mobile gamers play social games at least once a week on a mobile device.

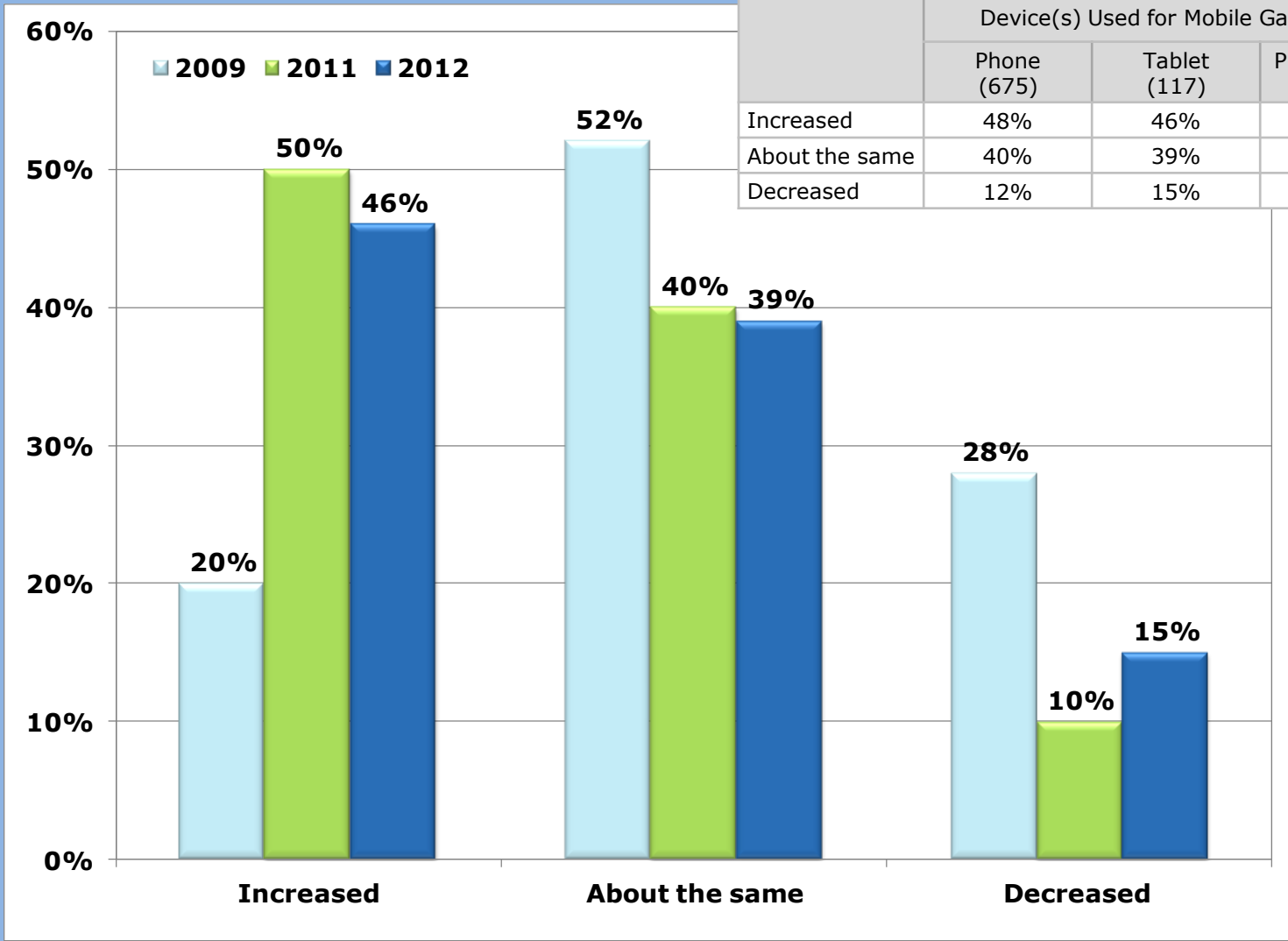
	Device(s) Used for Mobile Game Play			# Months/Years Mobile Gaming	
	Phone (675)	Tablet (117)	Phone/Tablet (212)	< One Year (442)	> One Year (562)
Daily	23%	15%	33%	25%	23%
2 - 3 times a week	20%	20%	25%	21%	21%
Once a week	6%	11%	7%	6%	7%
2 - 3 times a month	6%	8%	5%	5%	6%
Once a month or less	12%	8%	14%	11%	14%
Never	32%	38%	16%	32%	28%

Q21 How often do you play social games on a mobile device?

# CHANGE IN MOBILE GAME PLAY ACTIVITY OVER PAST YEAR

- Almost half (46%) said their mobile gaming activity has increased over the past year, while 39% said it is about the same.

Mobile Game Play Activity



Q18 In terms of time spent, how has your mobile game play activity changed over the past year?

# FACTORS INFLUENCING INCREASED MOBILE GAME PLAY

- The availability of more free games (70%) is the number one factor driving increased mobile game play, followed by the acquisition of a phone with better game play at 47%.
- One-fourth (28%) also said they have increased their mobile game play because more of their friends are playing, while 25% said the purchase of a tablet influenced their increased game play.

	2009 Overall (659)	2011 Overall (814)	2012 Overall (1,004)	Device(s) Used for Mobile Game Play		
				Phone (326)	Tablet (54)	Phone/Tablet (80)
More free games available	60%	79%	70%	75%	30%	78%
New phone more memory/better game play	59%	59%	47%	53%	4%	50%
The graphics have improved	36%	48%	32%	29%	22%	49%
The quality of game play has improved	34%	35%	31%	29%	22%	44%
The number of game titles has increased	36%	38%	28%	29%	7%	38%
More of my friends playing mobile games	N/A	N/A	28%	31%	6%	35%
Purchased a tablet	N/A	N/A	25%	8%	87%	53%
The games are a good value for the price	21%	36%	23%	19%	20%	40%

Q19 What has influenced the increase in your mobile game play?



# Mobile Gaming Purchase Behavior

# MOBILE GAMING PURCHASE ACTIVITIES (PAST YEAR)

- Half (51%) of mobile gamers have spent real money to purchase a mobile game, game currency and/or game content in the past year.
  - The majority (37%) have upgraded from a free game trial or game app to a paid version.
  - Those playing games on both a tablet and a phone are more active purchasers of games, game currency and/or game content.
- Individuals who spend money on mobile gaming are ...
  - Younger - almost half (48%) less than 35 years old.
  - Slightly more are males (56%).
  - More active mobile game players (86% play multiple times a week).
  - More tablet owners (45%).

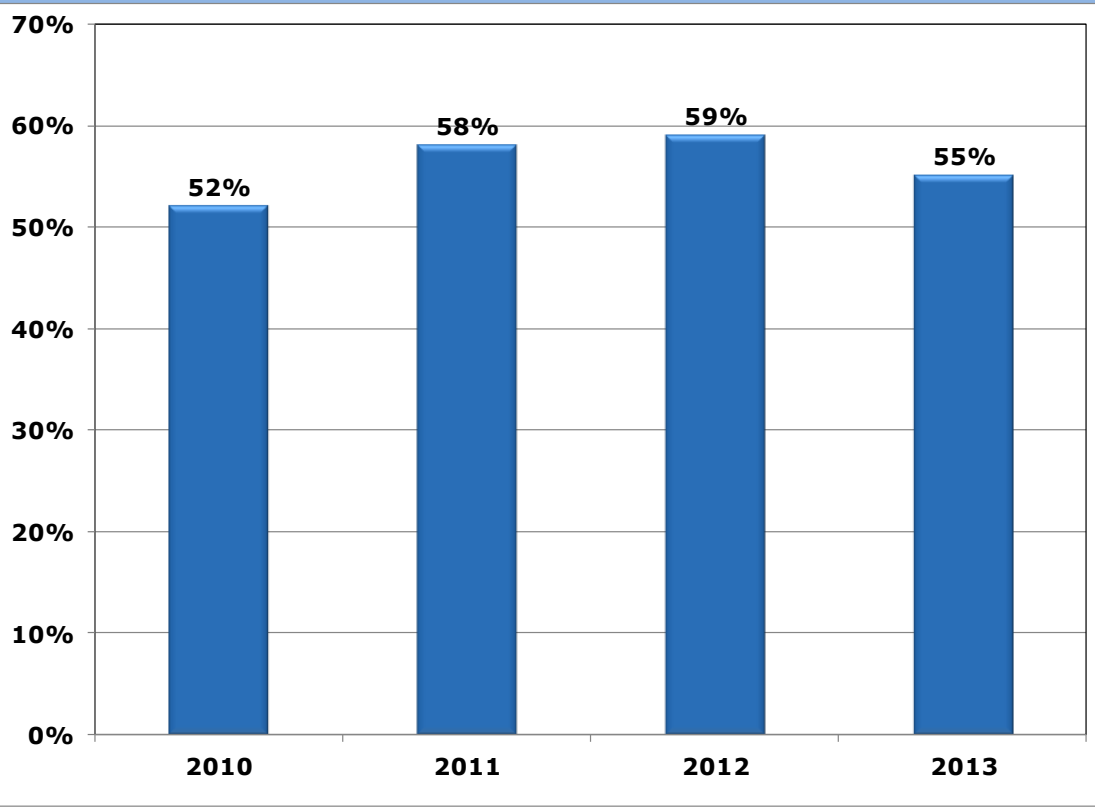
	2012	Device(s) Used for Mobile Game Play		
	Overall (1,004)	Phone (675)	Tablet (117)	Phone/Tablet (212)
Upgraded a free game trial or free game app to a paid version	37%	32%	38%	53%
Upgraded a free ad-supported game to an ad-free paid version	18%	14%	15%	31%
Purchased game content for a mobile game that you originally obtained for free	16%	13%	12%	28%
Purchased game content for a mobile game that you originally purchased	11%	7%	6%	25%
Purchased in-game currency with actual (real world) money to acquire items or services for a mobile game that you originally obtained for free	10%	7%	12%	21%
Purchased in-game currency with actual (real world) money to acquire items or services for a mobile game that you originally purchased	5%	3%	3%	15%
None of the above	49%	56%	48%	30%

Note: Game content includes power-ups, new levels/modes/features.

Q26 Which of the following mobile gaming purchase activities have you performed in the past year?

# MOBILE GAMERS WHO PURCHASED OR PLAN TO PURCHASE

Mobile Gaming Purchase Behavior



- There was a slight increase in the number of individuals who spent money on mobile games between 2010 and 2011, although this upward trend does not appear to continue in 2012 and 2013.
  - Following the introduction of the iPad in 2010, the number of mobile gamers spending money on mobile gaming began to increase.
  - Those using both a phone and tablet for their mobile game play are more likely to spend money on mobile gaming.

	Device(s) Used for Mobile Game Play		
	Phone (675)	Tablet (117)	Phone/Tablet (212)
2010	47%	48%	70%
2011	51%	70%	74%
2012	52%	66%	75%
2013	49%	63%	71%

Q27 How much did you spend on mobile gaming for your phone and/or tablet in each of the past two years?

# AMOUNT SPENT ON MOBILE GAMING IN PAST TWO YEARS

- The average dollar amount spent on mobile gaming declined from \$29.21 in 2010 to \$21.24 in 2011, although mobile gaming expenditures increased among tablet only players.
- One-third spent more than \$10 in 2010 and 2011.
- Those who play on both a phone and a tablet spent significantly more than phone only and tablet only players.
- New mobile game players spent less than the more seasoned players.

	Overall		Device(s) Used for Mobile Game Play						Length of Mobile Game Play		
			Phone (675)		Tablet (117)		Phone/Tablet (212)		< 1 Year (442)	> 1 Year (562)	
	2010	2011	2010	2011	2010	2011	2010	2011	2011	2010	2011
Avg. \$	\$29.21	\$21.24	\$23.15	\$16.68	\$20.37	\$25.47	\$42.77	\$34.59	\$18.38	\$29.21	\$22.01
\$1 - \$5	14%	14%	14%	13%	10%	18%	14%	13%	13%	14%	14%
\$6 - \$10	9%	10%	10%	12%	3%	14%	6%	5%	8%	9%	11%
\$11 - \$15	5%	5%	5%	6%	6%	4%	3%	5%	8%	5%	5%
\$16 - \$25	8%	11%	6%	8%	19%	10%	11%	18%	8%	8%	12%
\$26 - \$50	7%	6%	6%	5%	6%	14%	11%	9%	7%	7%	6%
\$51 - \$75	4%	4%	3%	3%	3%	2%	9%	8%	3%	4%	4%
\$76 - \$100	2%	3%	1%	2%	0%	4%	7%	7%	2%	2%	3%
> \$100	4%	4%	2%	2%	0%	4%	8%	9%	3%	4%	4%
Nothing	48%	42%	53%	49%	52%	30%	30%	26%	49%	48%	41%

Q27 How much did you spend on mobile gaming for your phone and/or tablet in each of the past two years?

# AMOUNT PLANNING TO SPEND ON MOBILE GAMING IN 2012 & 2013

Mobile Gaming Purchase Behavior

- The average dollar amount mobile gamers plan to spend this year (2012) and next year (2013) is projected to increase slightly.
  - More than one-third (37%) will spend more than \$10 this year and next, with almost 20% planning to spend more than \$25.
  - Spending will increase among those who play on a tablet or on both a tablet and phone.
  - Spending among new mobile gamers will increase slightly more than seasoned players.

	Overall		Device(s) Used for Mobile Game Play						Length of Mobile Game Play			
			Phone (675)		Tablet (117)		Phone/Tablet (212)		< 1 Year (442)		> 1 Year (562)	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Avg. \$	\$29.04	\$30.60	\$25.32	\$26.64	\$26.19	\$28.20	\$38.72	\$40.39	\$26.97	\$28.81	\$30.54	\$31.85
\$1 - \$5	12%	11%	12%	11%	12%	10%	12%	10%	11%	9%	14%	13%
\$6 - \$10	10%	7%	11%	7%	12%	9%	7%	8%	10%	7%	10%	8%
\$11 - \$15	7%	7%	6%	7%	6%	8%	8%	8%	7%	7%	7%	7%
\$16 - \$25	11%	11%	9%	10%	14%	14%	16%	12%	11%	10%	11%	12%
\$26 - \$50	9%	9%	7%	7%	15%	12%	13%	14%	10%	11%	8%	7%
\$51 - \$75	4%	4%	3%	3%	3%	5%	6%	6%	3%	4%	4%	3%
\$76 - \$100	2%	2%	1%	1%	3%	3%	4%	4%	2%	1%	2%	3%
> \$100	4%	4%	3%	3%	2%	2%	9%	9%	3%	2%	5%	6%
Nothing	41%	45%	48%	51%	34%	37%	25%	29%	44%	48%	39%	42%

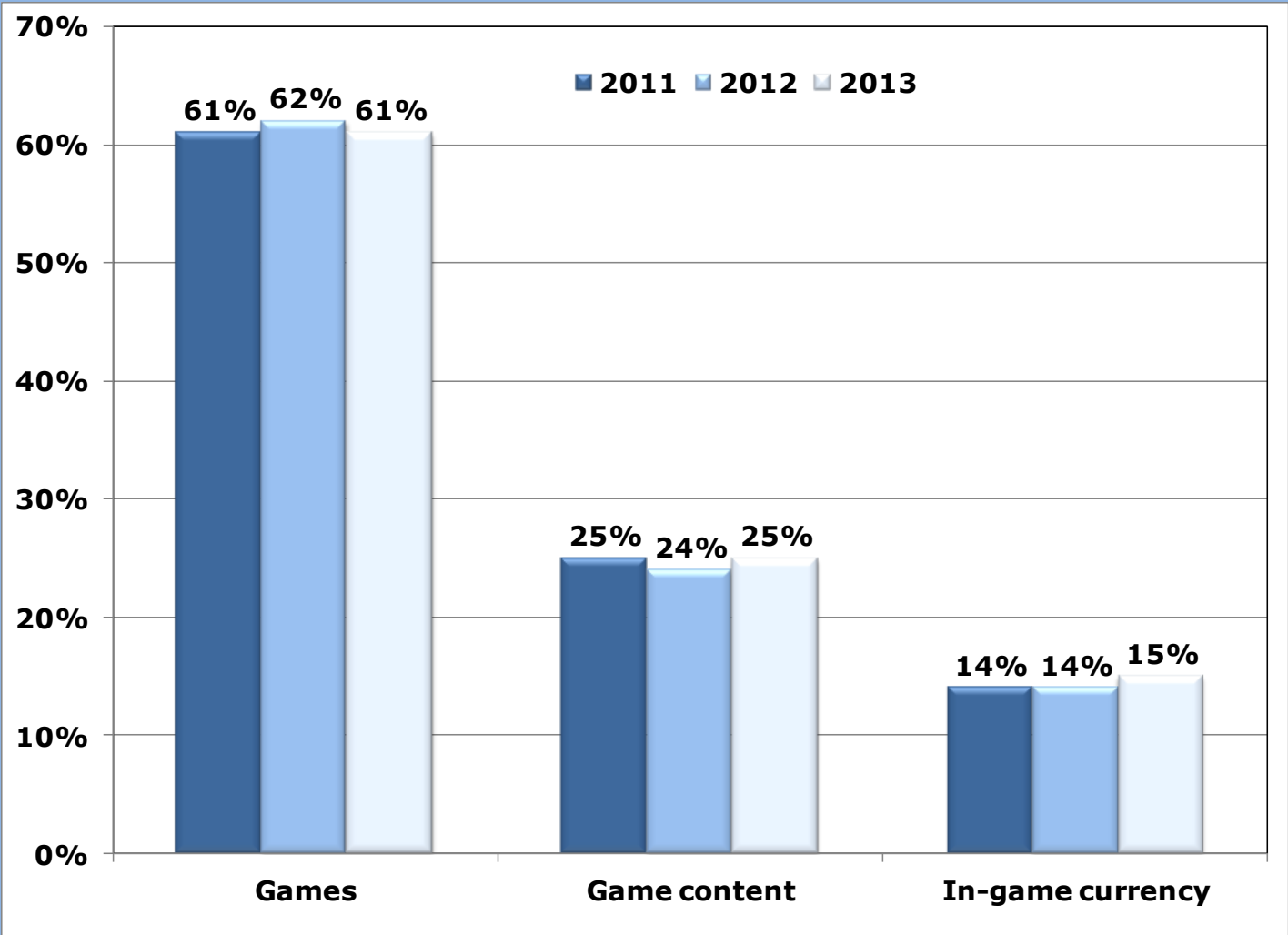
Q27 How much did you spend on mobile gaming for your phone and/or tablet in each of the past two years?



# PERCENT OF MOBILE GAMING EXPENDITURES (GAMES VS. CONTENT)

▪ The majority of the money spent on mobile gaming is for game purchases.

Mobile Gaming Purchase Behavior



Q28 What percent of last year's (2011) mobile game expenditures were for games, game content or in-game currency?  
Q30/Q32 What percent of this year's (2012) and next year's (2013) mobile game expenditures do you anticipate being for games, game content or in-game currency?

# PERCENT OF MOBILE GAMING EXPENDITURES (GAMES VS. CONTENT)

- Tablet owners purchase more in-game currency.
- New mobile game players purchase more game content.

Mobile Gaming  
Purchase Behavior

	Overall	Device(s) Used for Mobile Game Play			Length of Mobile Game Play	
		Phone (675)	Tablet (117)	Phone/Tablet (212)	< 1 Year (442)	> 1 Year (562)
2011						
Games	61%	62%	58%	58%	56%	62%
Game content	25%	26%	23%	24%	30%	24%
In-game currency	14%	12%	19%	17%	14%	14%
2012						
Games	62%	64%	62%	57%	60%	64%
Game content	24%	23%	21%	25%	27%	22%
In-game currency	14%	12%	17%	17%	14%	15%
2013						
Games	61%	62%	62%	57%	56%	63%
Game content	25%	25%	21%	25%	28%	22%
In-game currency	15%	13%	17%	18%	13%	14%

Game content includes power-ups, new levels/modes/features.



# Key Takeaways

# KEY TAKEAWAYS

## Key Takeaways

- Over the past year the population of mobile gamers in the US and UK who have played a game in the past month increased 29%.
  - In the US the number of individuals who have played a mobile game in the past month increased 45% over the past year.
- The average age of a mobile gamer is 39.5 years.
  - Those who limit their mobile game play to a tablet are older with an average age of 44.7 years.
- Smartphone ownership among mobile gamers grew 16% over the past year.
- 36% of mobile game players own a tablet.
- One-third use a tablet for at least some of their mobile game play, while two-thirds limit their mobile game play to a phone.
- Tablets are more popular among those new to mobile gaming.
- Males are more likely to use both a phone and a tablet for their mobile game play.
- Mobile game play is shifting away from the phone towards the tablet, with 40% of those playing on both a phone and a tablet, indicating their game play on their phone has declined.
- Those who play on both a phone and a tablet log more game time on these devices than those who limit their mobile game play to only a phone or a tablet.

# KEY TAKEAWAYS

## Key Takeaways

- The number of new mobile gamers (playing for less than one year) has steadily increased since 2009 from 22% to 44%.
- The frequency of mobile game play continues to increase each year, with 96% playing mobile games weekly compared to 84% in 2011.
- The percentage playing daily also increased from 35% in 2011 to 45% over the past year.
- The availability of more free games continues to be the driving force behind increased mobile game play, followed by the acquisition of a phone with better game play capabilities.
  - The purchase of a tablet also positively influenced the increase in mobile game play.
- Social game play on a mobile device declined slightly over the past year.
- Half (51%) of mobile gamers have spent real money to purchase a mobile game, game currency and/or game content in the past year, with upgrading from a free game trial or game app to a paid version being the most common purchase.
- More than one-third (37%) will spend more than \$10 this year and next, and almost 20% plan to spend more than \$50.



# Research Methodology

This international research was conducted by Information Solutions Group (ISG; [www.infosolutionsgroup.com](http://www.infosolutionsgroup.com)) exclusively for PopCap Games. The results are based on 2,301 online surveys completed by members of the world's largest online ePanel (Toluna) in the United States and United Kingdom between April 25 and May 1, 2012.

To qualify for participation in the survey, individuals had to own and use a mobile device (phone and/or tablet). Among these mobile device owners, 1,004 were identified as mobile gamers (those who played a game on their mobile device in the past month). In theory, in 19 cases out of 20, the results will differ by no more than 2.3 percentage points from what would have been obtained by seeking out and polling all US and UK mobile phone owners age 18 and over. Smaller subgroups reflect larger margins of sampling error. Other sources of error, such as variations in the order of questions or the wording within the questionnaire, may also contribute to different results.



# About ISG



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

# About Toluna



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