

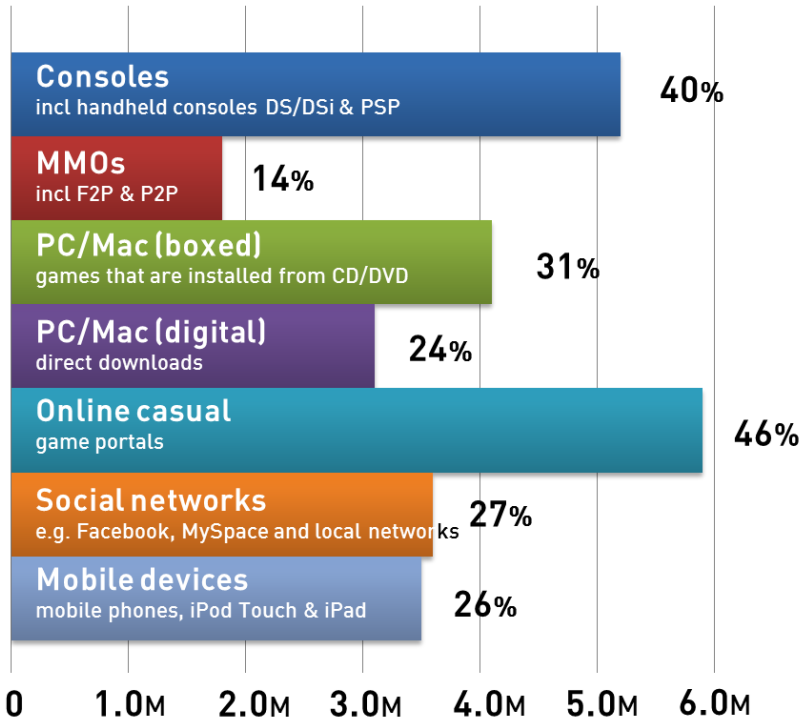


National Gamers Survey 2010 | Netherlands

Summary Data

Gamers per Platform

absolute and as share [%] of the (online) population*



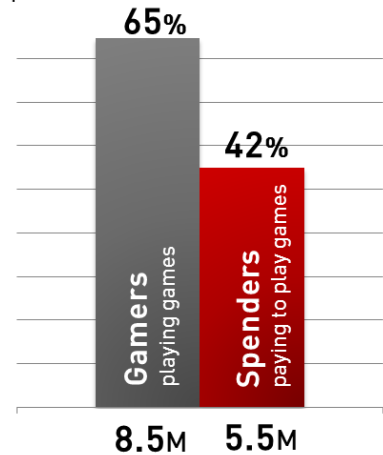
*Base: total population of 10yrs and up (with internet access)

Definitions / scope

- **Hardware:** no hardware included, only games spending.
- **Consoles:** includes pre-owned and rental markets, downloadable content (DLC) revenues as well as portable console devices such as PSP, NDS(i).
- **PC/Mac boxed:** includes pre-owned and rental markets.
- **Casual game portals:** online casual gaming destinations such as pogo, miniclip, zylom, gameduell, king.com.
- **PC/Mac downloads:** does not include paid MMO client downloads or paid premium downloads from casual game portals. These revenues are attributed to the individual categories.

All Gamers and Spenders

absolute and share [%] of the (online) population*



Conversion Gamers to Spenders

Ranking of platforms on ratio spenders/gamers

1. PC/Mac (boxed)
2. Consoles
3. PC/Mac (digital)
4. MMOs
5. Online casual
6. Mobile devices
7. Social networks

- **Mobile devices:** all mobile phones plus iPod Touch & iPad
- **MMOs:** Massively Multiplayer Online games played on PC or Mac, browser or client-based. Includes virtual worlds.
- **Social networks:** games played within social networks such as Facebook, MySpace, Hi5, VZ Networks, Orkut.

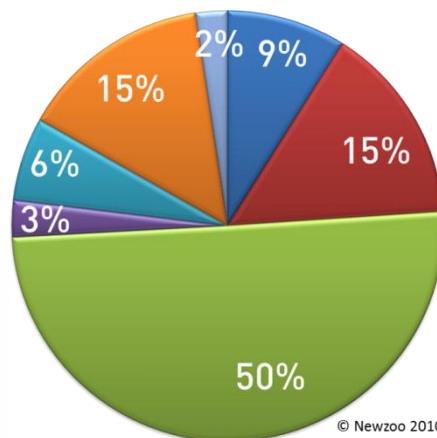


Total Consumer Spend & Specific Topics

Netherlands

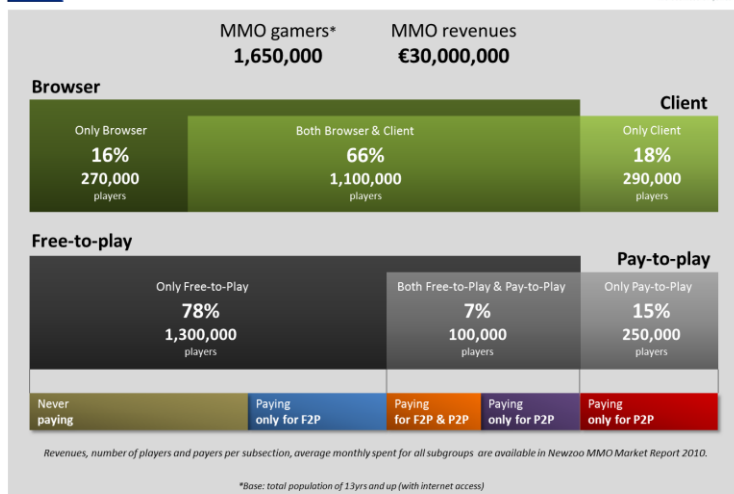
Total spend in the Netherlands is down 11% from 2009. This is not as dramatic as in Belgium but the drivers for this decrease are largely the same. The Dutch have always been very creative in finding ways to play games for free. The enormous growth in number of free-to-play games on social networks, mobile devices and MMO portals suits the Dutch very well. The number of mobile device gamers is up more than 250%. Even with the lowest share (14%) of people paying compared to other countries, this results in a growth of mobile games spend of over 40%.

Total games spend 2010 - Netherlands € 530,000,000 | -11% (vs '09)



- PC Games downloads
- PC Games boxed
- Console games
- Mobile games
- MMO games
- Game portals
- Social networks

The Dutch MMO Games Market | F2P vs P2P | Browser vs Client



Newzoo MMO Games Market Report 2010 | International Gamers Survey 2010 | November 2010 © 2010 Newzoo | www.newzoo.com

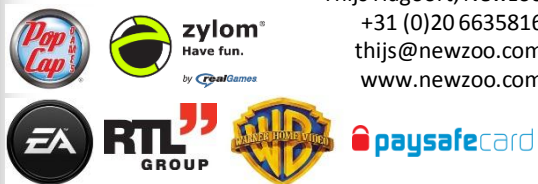
2011 National Gamers Surveys



Newzoo National Surveys 2011:

Beginning of 2011 Newzoo will perform National Gamers Surveys in Russia, Brazil, Mexico, Spain, China and Korea in addition to the current portfolio of Western countries. Our free data is just the top of the iceberg. Our clients enjoy access to detailed data and analyses across all platforms, business models and hottest topics. Our Newzoo Data Explorer makes sure our data is accessible and actionable. More info on: <http://www.newzoo.com/2011>

2011 launch clients include:

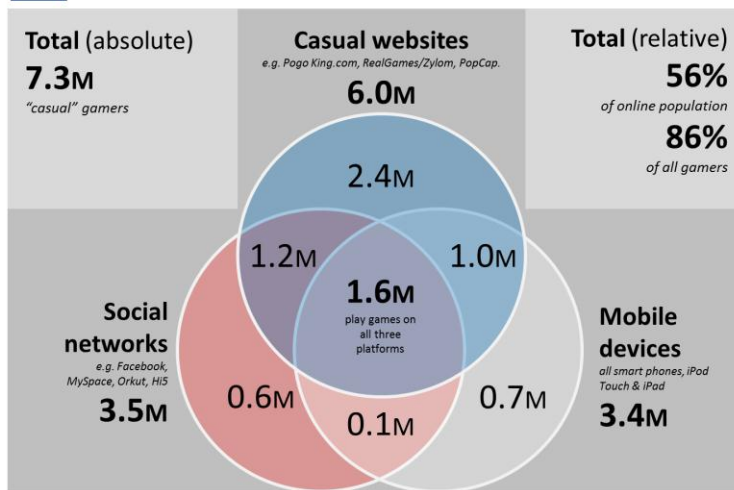


Launch sponsor of the 2011 surveys in BR, MEX, SP, RUS, US, KOR, CHIN:



more market insights, data and whitepapers to be found at <http://www.globalcollect.com/online-payments-gaming>

"Casual" Gamers | Platform Reach & Overlap | Netherlands



Dutch National Gamers Survey 2010 | Nationaal Gaming Onderzoek 2010 © Newzoo 2010/2011 | www.newzoo.com