

Total Consumer Spend 2010

including year-on-year comparison with 2009

Based on industry benchmarking and analysis
of data from the 2009 & 2010 National Gamers Surveys in



Introduction

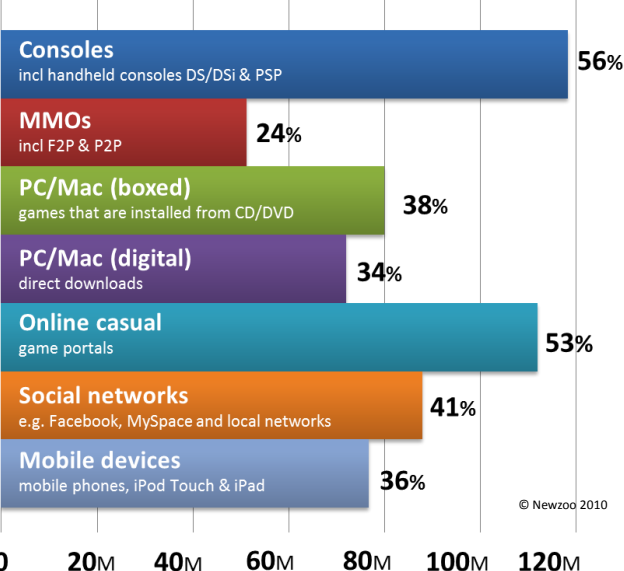
The games market is changing at an enormous pace, driven by the simultaneous introduction and uptake of several new game platforms and business models. Mobile and social gaming as well as massively-multiplayer-online-games are enjoying mass-appeal and taking major chunks out of the "total gamers' wallet". As new game formats move across multiple game platforms and genres, it will become a challenge to view (and report on) this field in terms of separate platforms or game types. As a market research completely focused on this exciting industry we are looking forward to meet this challenge and providing you with actionable and up-to-date data and insights.

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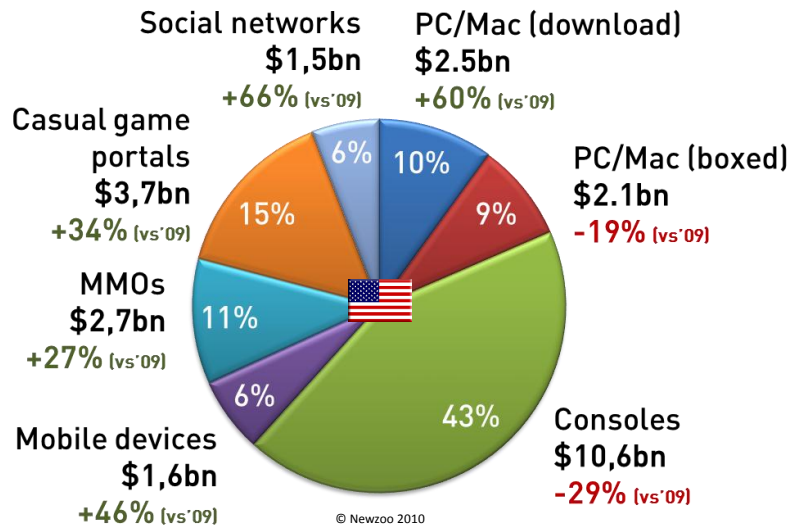
Gamers per "platform"

absolutes and share (%) of the (online) population aged 10yrs and up



Total games spend 2010 – US

\$ 24,700,000,000 | -2% (vs '09)



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.
- **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.

Europe, players versus payers

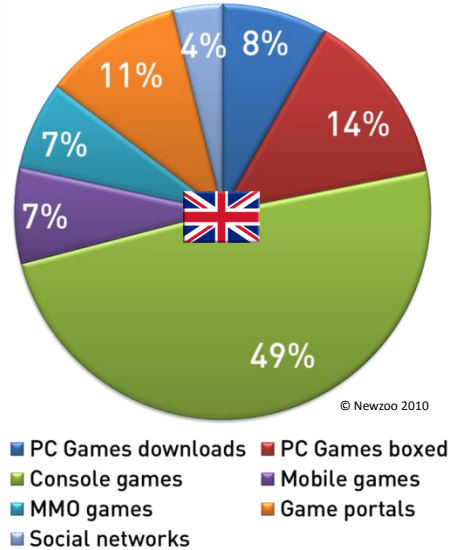
Naturally, the US leads the western world as a single games market. With the introduction of new game genres, platforms and online business models, large European countries seem to be catching up. The free-to-play business model (often leading to a pay-to-play commitment of players) specifically appeals to Europeans as well as large emerging markets across the globe. As conversion becomes the key success factor for game companies, analysis of changes in number of players, payers and average monthly spent is crucial. This will be part of our next report to be published in January 2011 together with an outlook on 2011.



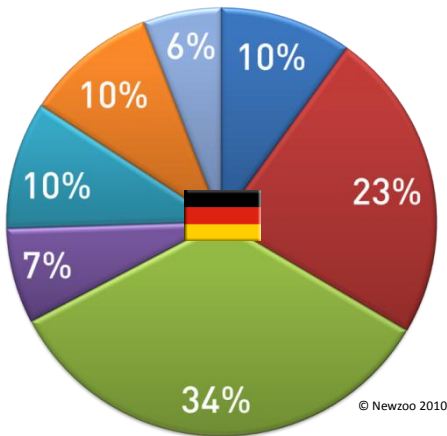
MMO Games Market Report 2010. \$990.

Full Newzoo Games Market Report including Outlook 2011 to be released in January 2011

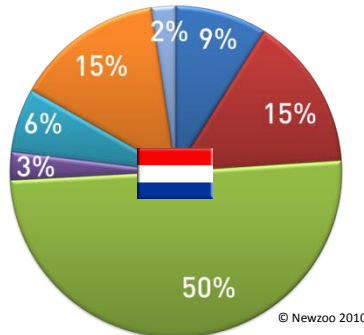
Total games spend 2010- UK
£ 3,700,000,000 | -3% (vs '09)



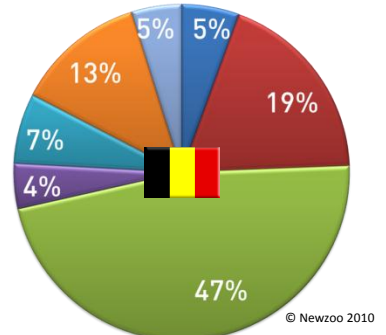
Total games spend 2010 - Germany
€ 4,900,000,000 | +33% (vs '09)



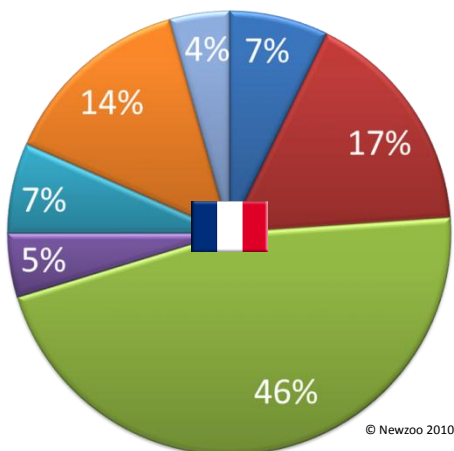
Total games spend 2010 - Netherlands
€ 530,000,000 | -11% (vs '09)



Total games spend 2010 - Belgium
€ 410,000,000 | -27% (vs '09)



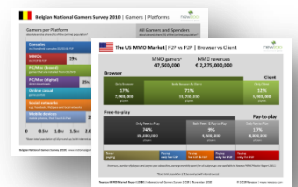
Total games spend 2010 - France
€ 4,000,000,000 | +13% (vs '09)



Newzoo National Surveys 2011:

Expanding with New Markets

Beginning of 2011 Newzoo will perform National Gamers Surveys in Russia, Brazil, Mexico, Spain, China in addition to the current portfolio of Western countries. GlobalCollect is launch sponsor of the new survey series.



Launch clients enjoy several early-bird benefits. *More info and free graphs at www.newzoo.com.*

