

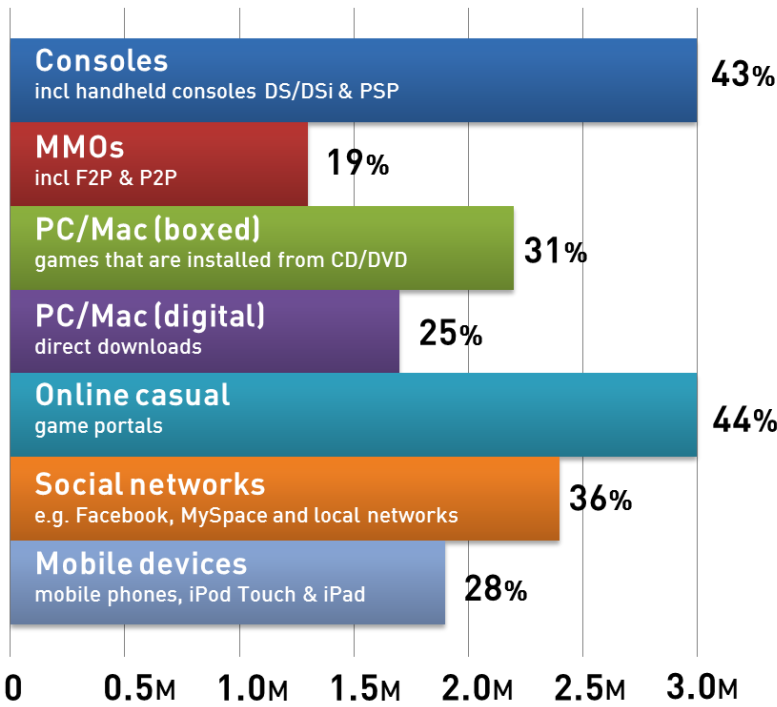


National Gamers Survey 2010 | Belgium

Summary Data

Gamers per Platform

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



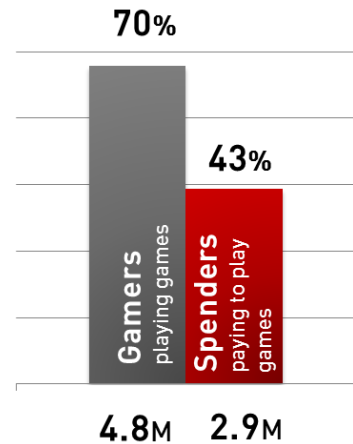
*Base: total population of 10yrs and up (with internet access)

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. Online casual
4. PC/Mac (digital)
5. MMOs
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.



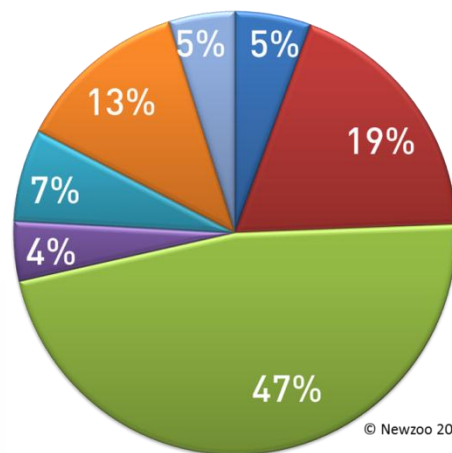
Total Consumer Spend & Specific Topics

Belgium

Total spend on games is down dramatically in Belgium. The number of gamers and time spent has not. A large increase in the number of players on "free-to-play" platforms gives us an indication that consumers are enjoying mobile, MMO and social games but are not yet willing to spend money. One can expect this to be different next year, also because online game publishers are only now starting to focus their attention on the smaller EU countries. Although PC and Mac games are relatively popular only 5% of money spent is on direct downloads.

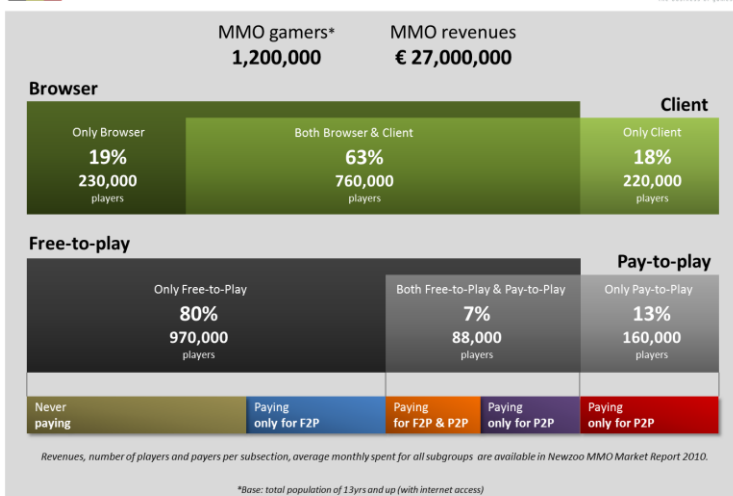
Total games spend 2010 - Belgium

€ 410,000,000 | -27% (vs '09)



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

The Belgian MMO Market | F2P vs P2P | Browser vs Client



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

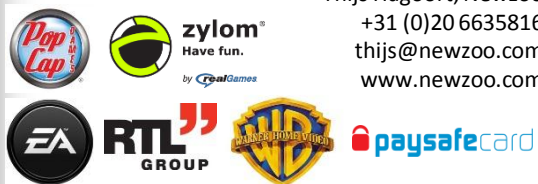
2011 National Gamers Surveys



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:

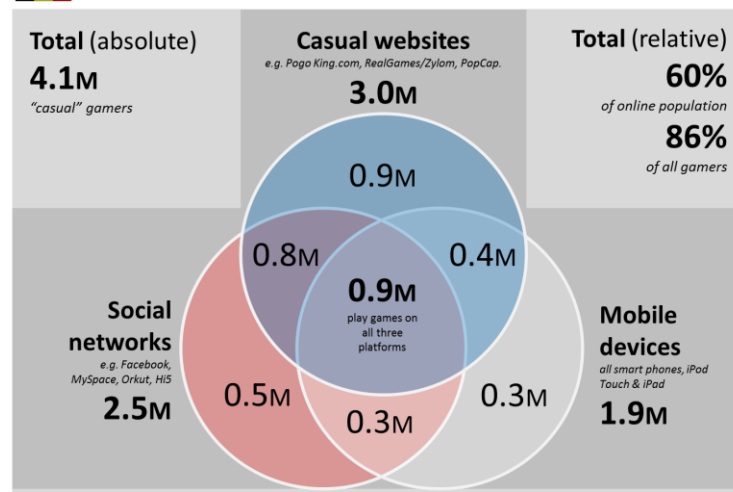


Launch sponsor of the 2011 surveys in BR, MEX, SP, RUS, US, KOR, CHIN:



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

"Casual" Gamers | Platform Reach & Overlap | Belgium



Belgian National Gamers Survey 2010 | International Gamers Survey 2010 © Newzoo 2010/2011 | www.newzoo.com