

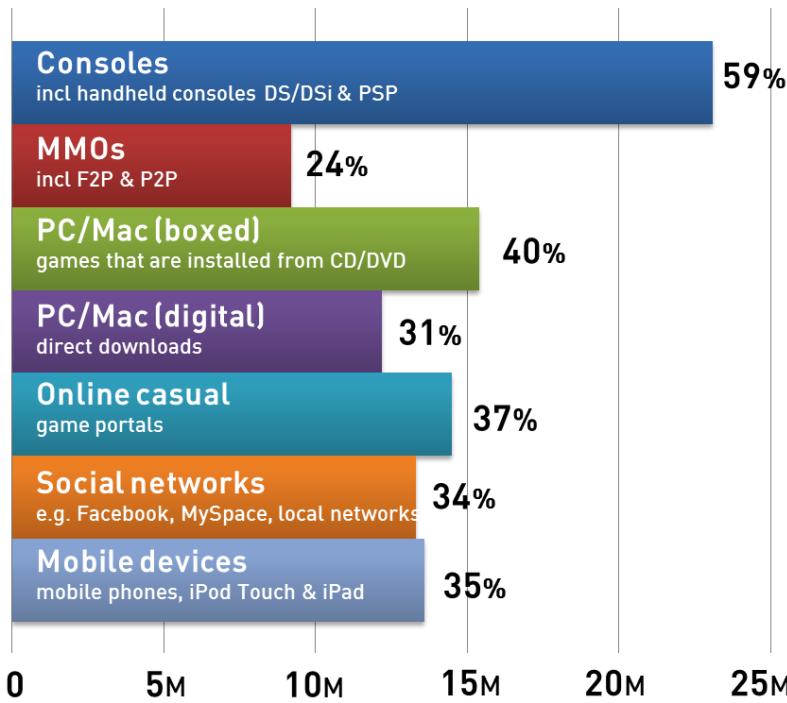


# National Gamers Survey 2010 | France

## Summary Data

### Gamers per Platform

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



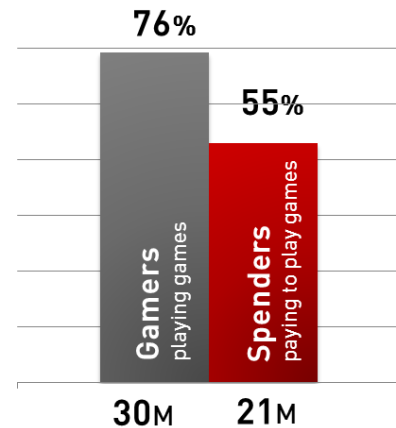
\*Base: total population of 10yrs and up (with internet access)

#### 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. Social networks
7. Mobile devices

- **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.

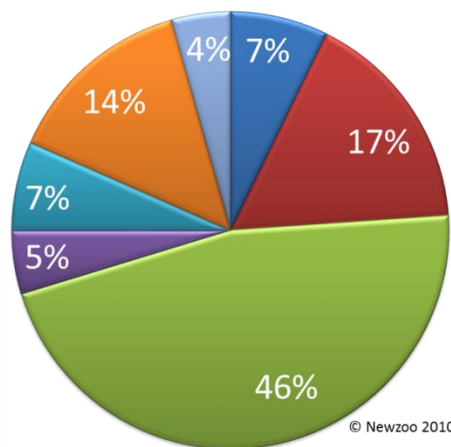


## Total Consumer Spend & Specific Topics

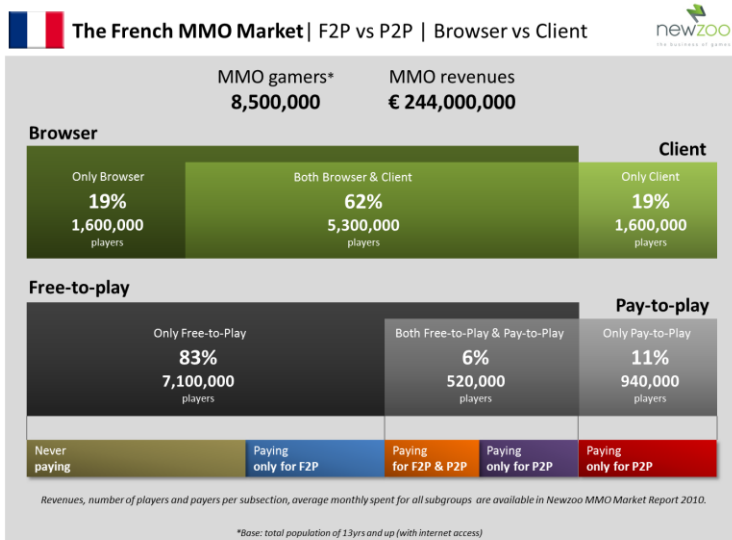
### France

The French have embraced the new online business models in 2010 driving a significant growth in total spend of approximately 13%. On the one hand the bulk of money is spent quite traditional on boxed and retail games. On the other hand, the young demographic is massively flocking to mobile, online casual and MMO games. Specifically the share of payers is on the rise when it comes to online casual and MMO games. During 2010 many online game companies have focused their attention on localised content for France. This seems to be paying off big time.

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



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



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

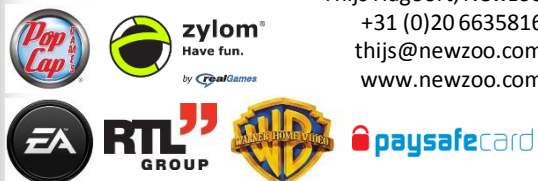
## 2011 National Gamers Surveys



### 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>

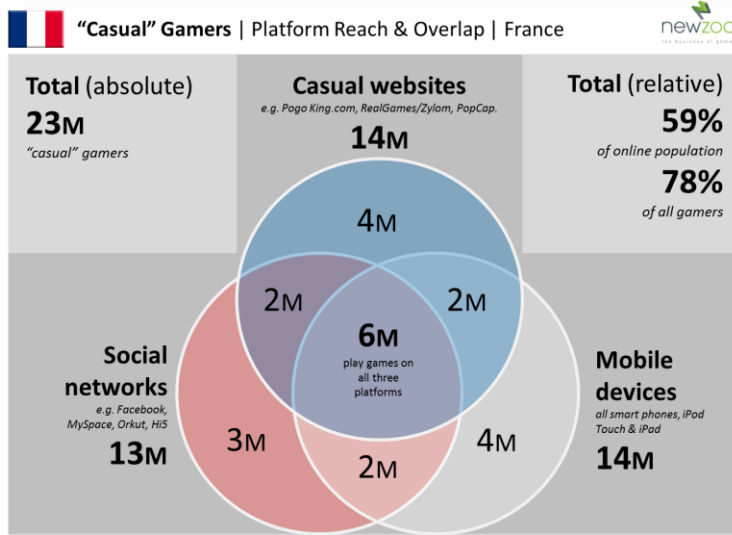
2011 launch clients include:



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>



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