

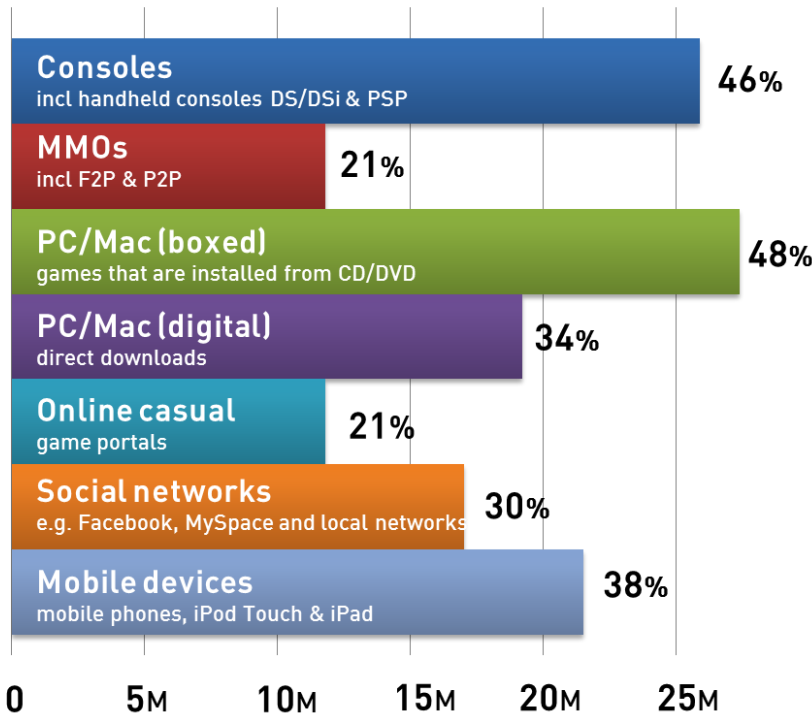


National Gamers Survey 2010 | Germany

Summary Data

Gamers per Platform

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



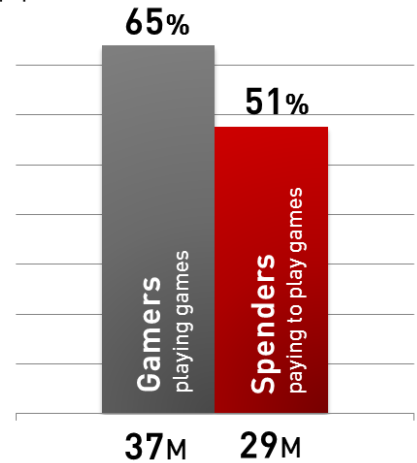
*Base: total population of 10yrs and up (with internet access)

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. Consoles
2. PC/Mac (boxed)
3. MMOs
4. PC/Mac (digital)
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.

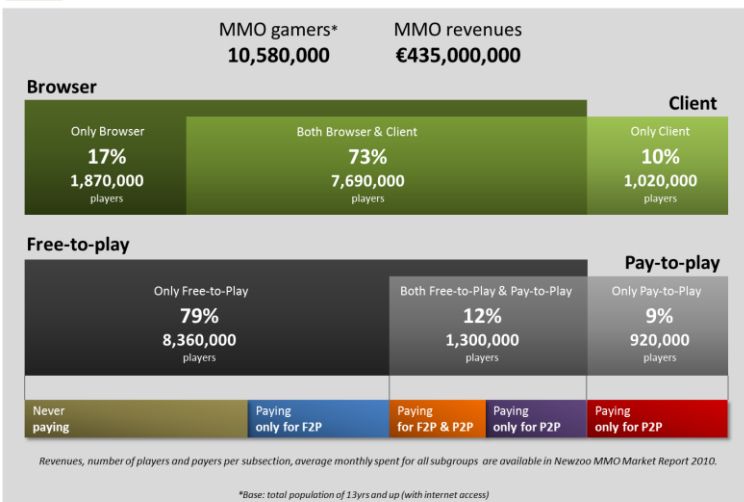


Total Consumer Spend & Specific Topics

Germany

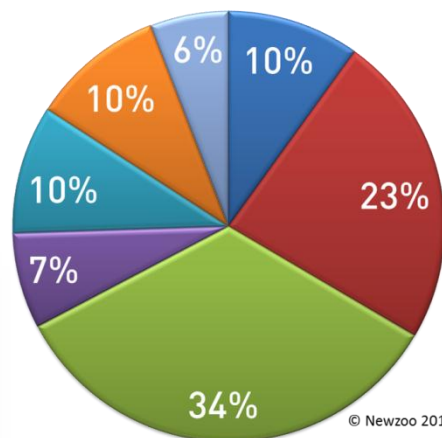
In 2010 Germany has jumped ahead of France and the UK in terms of total spend. Growth of the German market can be attributed to an array of strong local players, specifically in the field of online casual and MMO games as well as digital distribution. The uptake of online free-to-play business models has resulted in a dramatic increase in share of people paying for online games. When it comes to PC and Mac games, Germans make a more traditional choice. The majority still buys their games as boxed product. Social games already take 6% of the total gamers wallet.

The German 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

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



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

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:

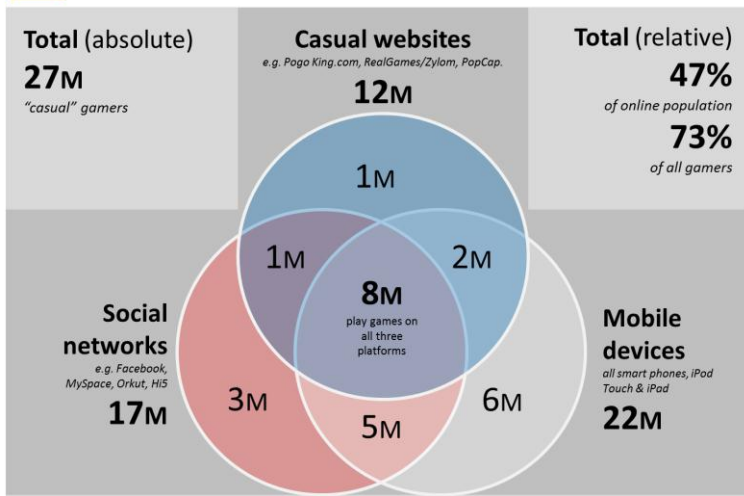


Launch sponsor of the 2011 surveys in BR, MEX, SP, RUS, US, KOR, CHIN:



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

"Casual" Gamers | Platform Reach & Overlap | Germany



German National Gamers Survey 2010 | Nationale Gamer Umfrage 2010 © Newzoo 2010/2011 | www.newzoo.com