

Online Gaming: Global Outlook

By Pietro Macchiarella, Research Analyst, & Laura Allen Phillips, Research Analyst

4Q 2010

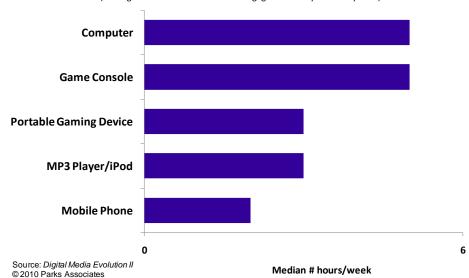
Synopsis

This report focuses on several key growth areas in the online gaming space, including online console games, casual games, subscription and microtransactionbased massively multiplayer online games (MMOGs), and Gaming 2.0, a new online gaming category which includes cloud-based gaming, user generated content, gamer social networks, social gaming, and offline games requiring online connectivity to play.

Hours Played per Week

Weekly Time Spent Playing Games

"Approximately how many hours per week do you spend playing games on...?"
(Among U.S. broadband households engaged in activity on weekly basis)



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"Because of increasing average Internet speeds and advances in technology, a large number of game genres are now playable online," said Pietro Macchiarella, Research Analyst, Parks Associates. "With these new online gaming options, people are spending a larger share of their online time playing games. Playing video games currently amounts to ten percent of the time spent online by American consumers."

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Gaming Feature Importance

Expenditures on Gaming Services

Computer Gaming Inhibitors

Subscriber Growth: World of Warcraft

NCSoft Revenues

Facebook ARPU (Source: Parks Associates Estimates)

U.S. MarketShare of Different MMORPGs

Growth of Xbox LIVE Registered User Accounts

Percentage of Game Consoles Connected to the Internet

Club Pogo Subscribers

Growth of Miniclip's Monthly Unique Visitors Casual Gaming Drivers and Inhibitors Social Games Developers Market Share Virtual Worlds: Independent Productions

Virtual Worlds Monthly Traffic

Virtual Worlds: Toy Company Productions

Virtual Worlds: Media and Entertainment Company Productions

Junior MMOs

Onlive MicroConsole

Pay-TV Gaming Services/Solutions User Generated Website Traffic MMORPG Global Revenue Forecast Casual Gaming Global Revenues Social Gaming Global Revenues

Attributes

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