



AHEAD OF WHAT'S NEXT.

P2P and Gaming Insights from Harris Interactive

P2P Summit at CES

January 6, 2010



Agenda

- Overview of Harris Interactive
- Where is gaming today? A Teen perspective
- Emerging platforms for gaming and P2P
- Conclusions and Implications
- Q & A



Harris Interactive: A full service market research firm...



...with Solutions designed to meet our clients' business needs





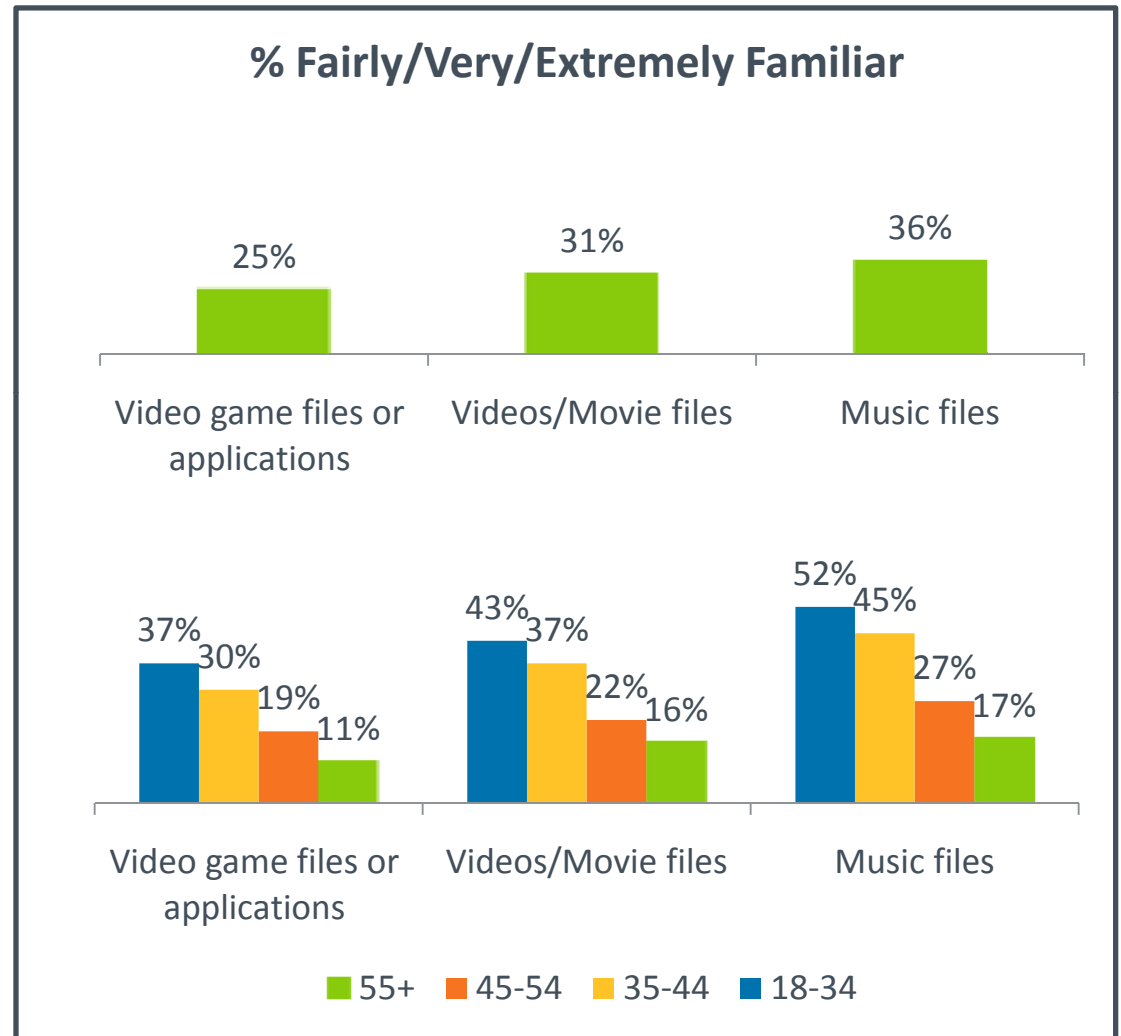
Research Methodology

- Harris Interactive® fielded a study from October 15-19, 2009 via its QuickQuerySM online omnibus service
- Interviewed a nationwide sample of 2,504 U.S. adults aged 18 years and older, 1,361 of which ever play video games.
- Data were weighted to be representative of the total U.S. adult population.
- Data for questions related to online use or behaviors were weighted specifically to the respective “online” populations..

Familiarity with P2P file exchange

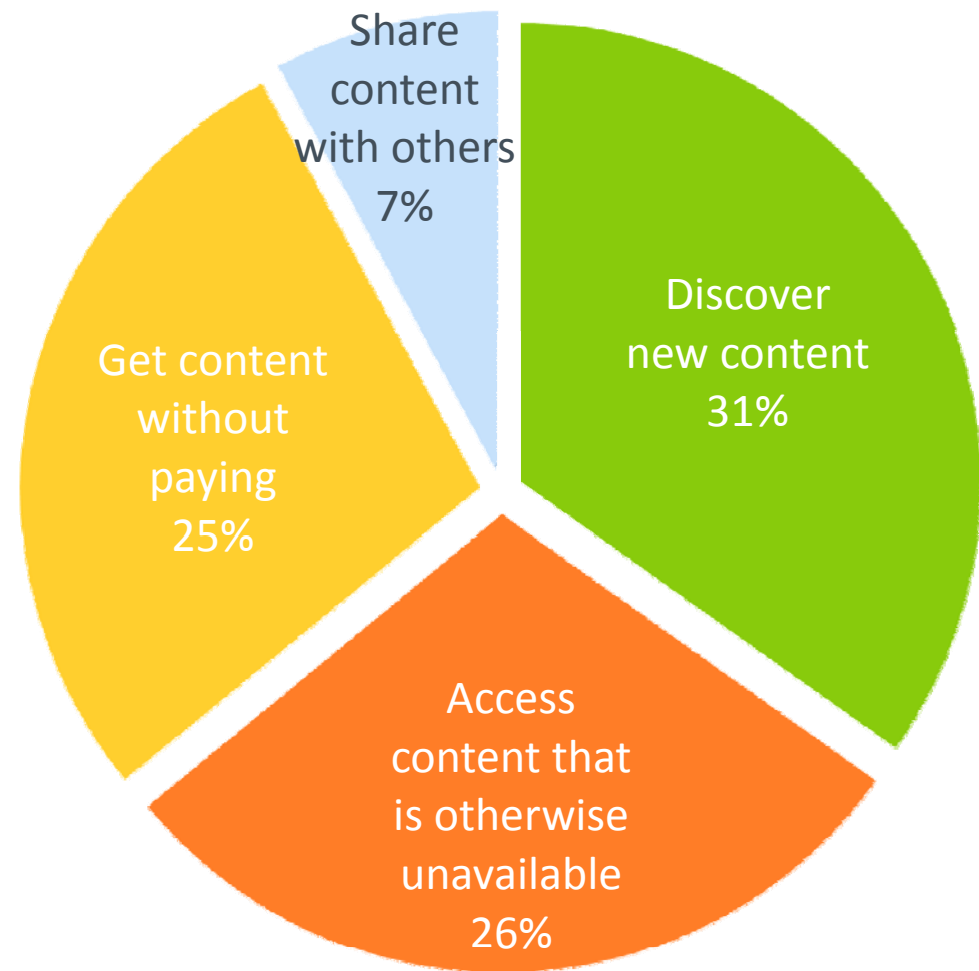
Overall familiarity of P2P is still low...but as with many new technologies adoption starts with the younger end of the market

Q5325 How familiar are you with uploading or downloading each of the following types of files online using P2P software (as described above)?
Base: U.S. Respondents (n=2504)



Reasons People Use P2P - content, content, content

Three quarters of P2P users are getting content they would otherwise have had to pay for



Q927

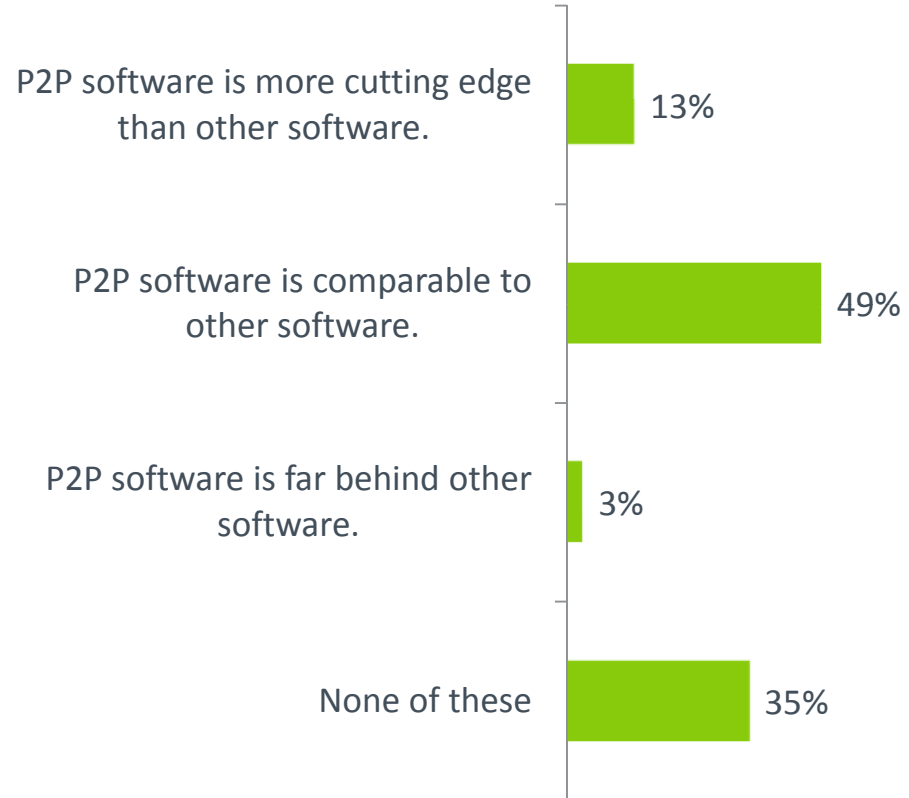
What would you say has been the main reason you used a P2P file sharing application?

Base: P2P (n=348)

Market sees potential in quality of P2P software

P2P Software is not seen as risky or crude...

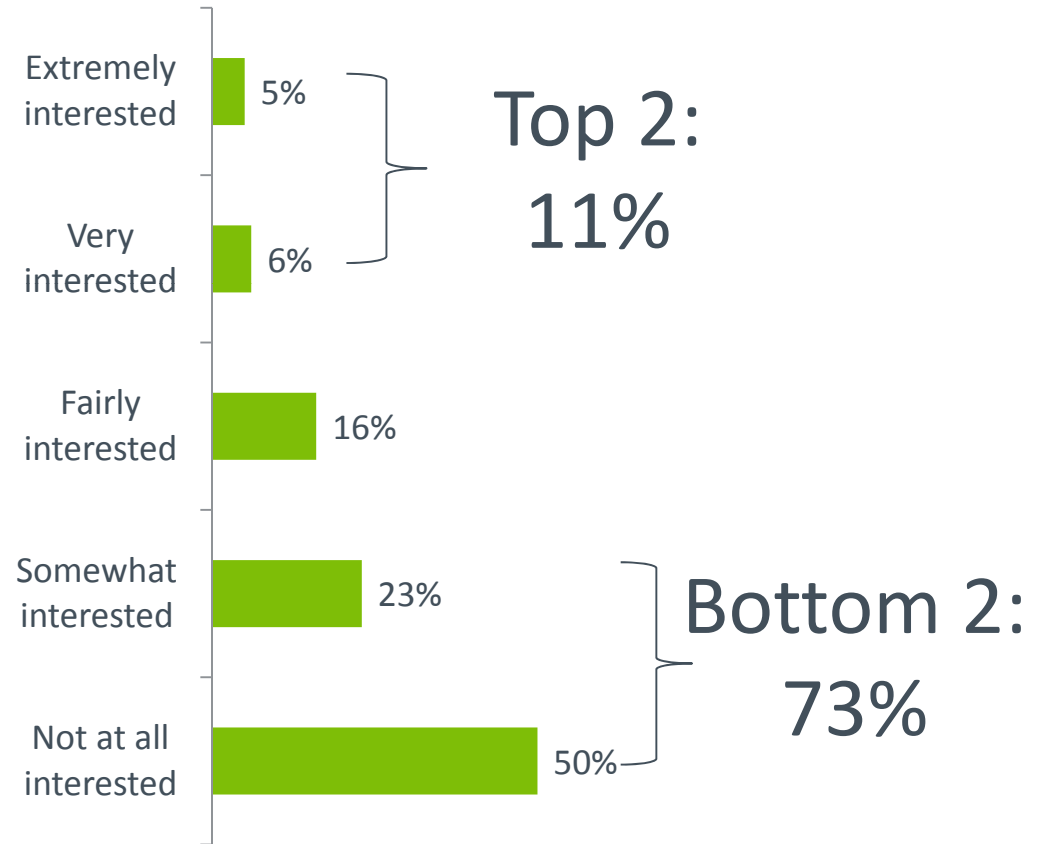
Q5330
Please indicate which of the following statements you feel best describes the state of P2P software.



Base: Familiar With Uploading/Downloading At Least Type Of File Online Using P2p Software (n=1450)

Market interest P2P cloud computing is still limited

Will stronger value propositions change this?



Q5320
How interested would you be in installing this application on your computer to play video games?

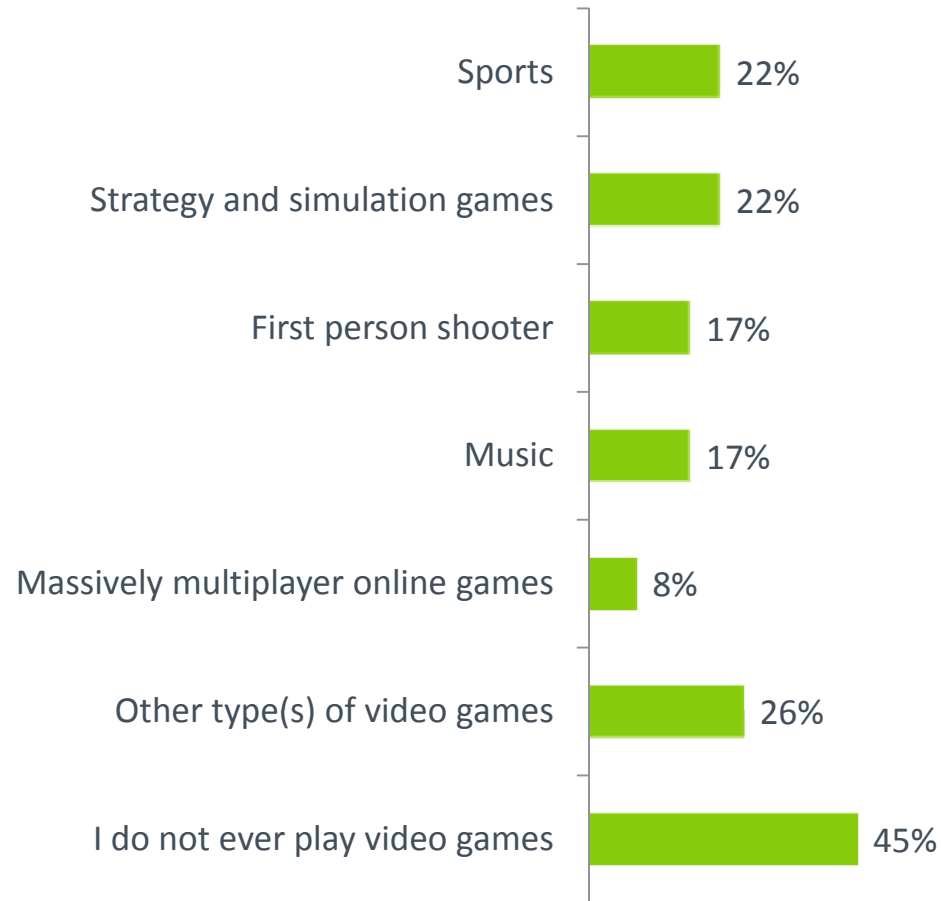
Base: Computer Gamer (n=1060)

Typical video games consumers play

Sports and Strategy/Simulation games continue to drive the market

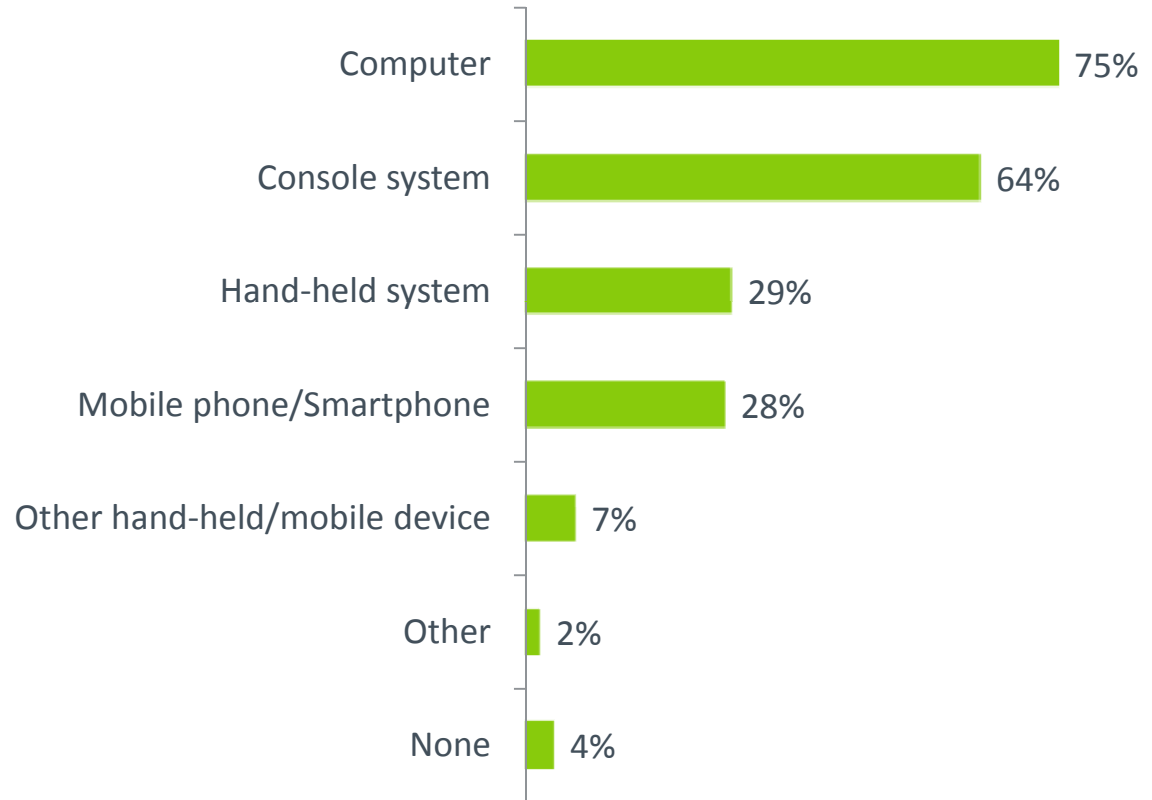
Q5305
On another subject...Which of the following types of video games, if any, do you typically play? Please select all that apply.

Base: U.S. Respondents (n=2504)



Top devices used for playing video games

Computer and console dominate the gaming market



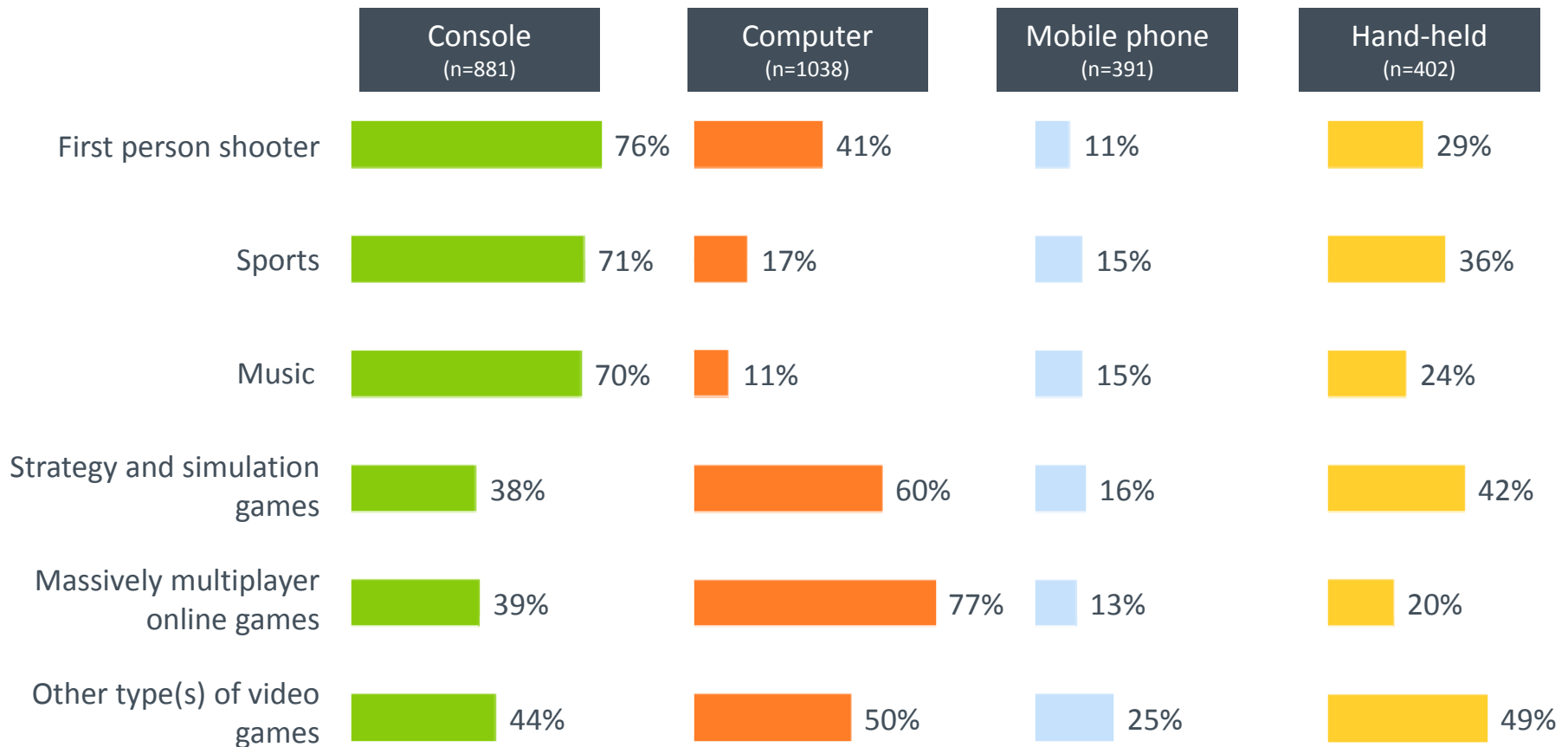
Q5310

Which of the following devices, if any, do you personally own and use to play video games?
Please select all that apply.

Base: Ever Play Video Games (n=1361)

Devices used for multi-player and online gaming

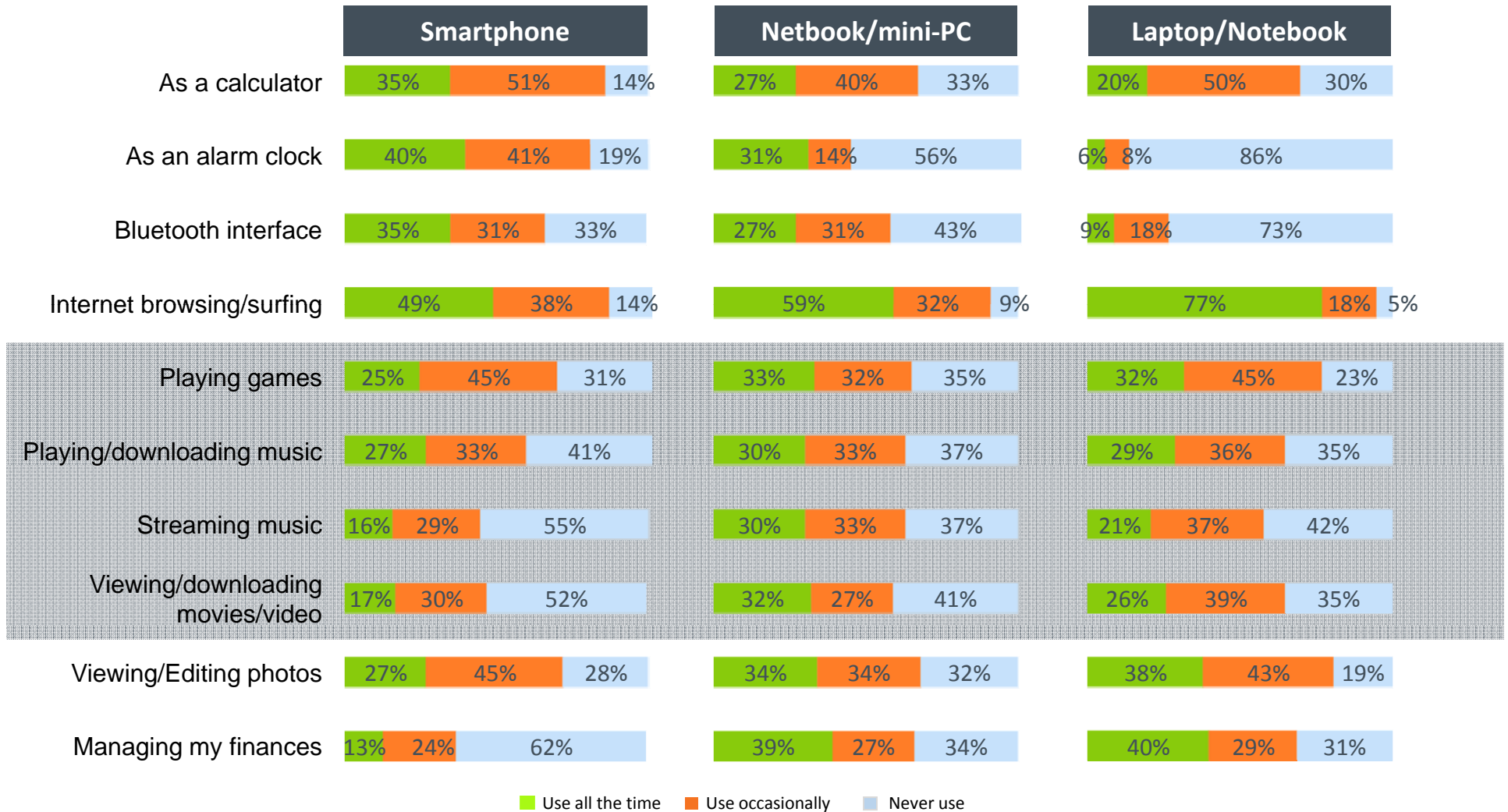
Computer dominates massively multiplayer online gaming



Q5315 In which of the following ways, if any, do you play the following type(s) of video games with or against others via an online or networked platform? Please select all that apply in each row.

Base: Ever Play Video Games And Own/Use Specified Device

Three platforms will generate growth for mobile gaming



Q720Q825/Q910 [Device] offer a wide variety of applications and functions.
 How often do you use your primary [device] for each of the following?

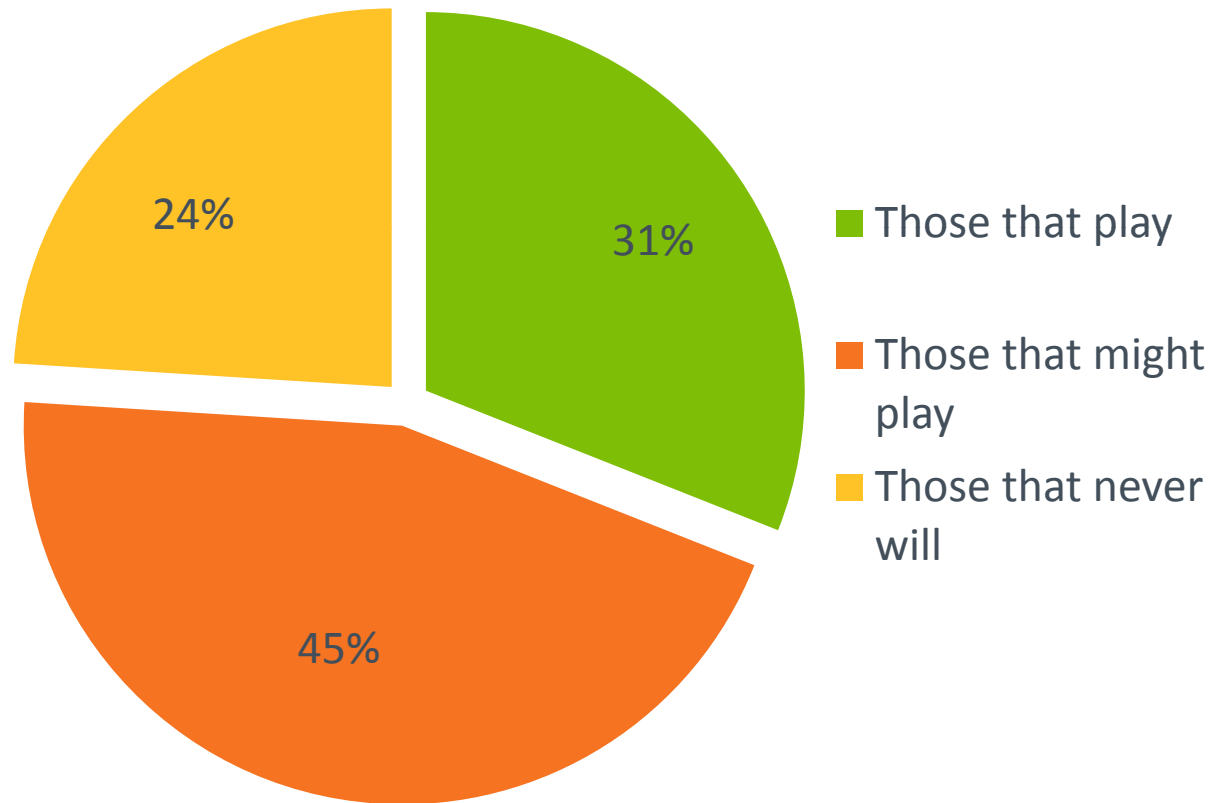
Base: Own Smartphone (n=583), Netbook/mini-PC (n=199), Laptop/Notebook (n=2047)

Today's teen segments for mobile phone gaming

A third of teens already play games on their phone...Half might play in the future...and a quarter never will

Q901
How many hours a week do you play games on your (cell phone/smartphone)?

Q915
If cost were not a factor, which of the following would influence you to play more games on your phone

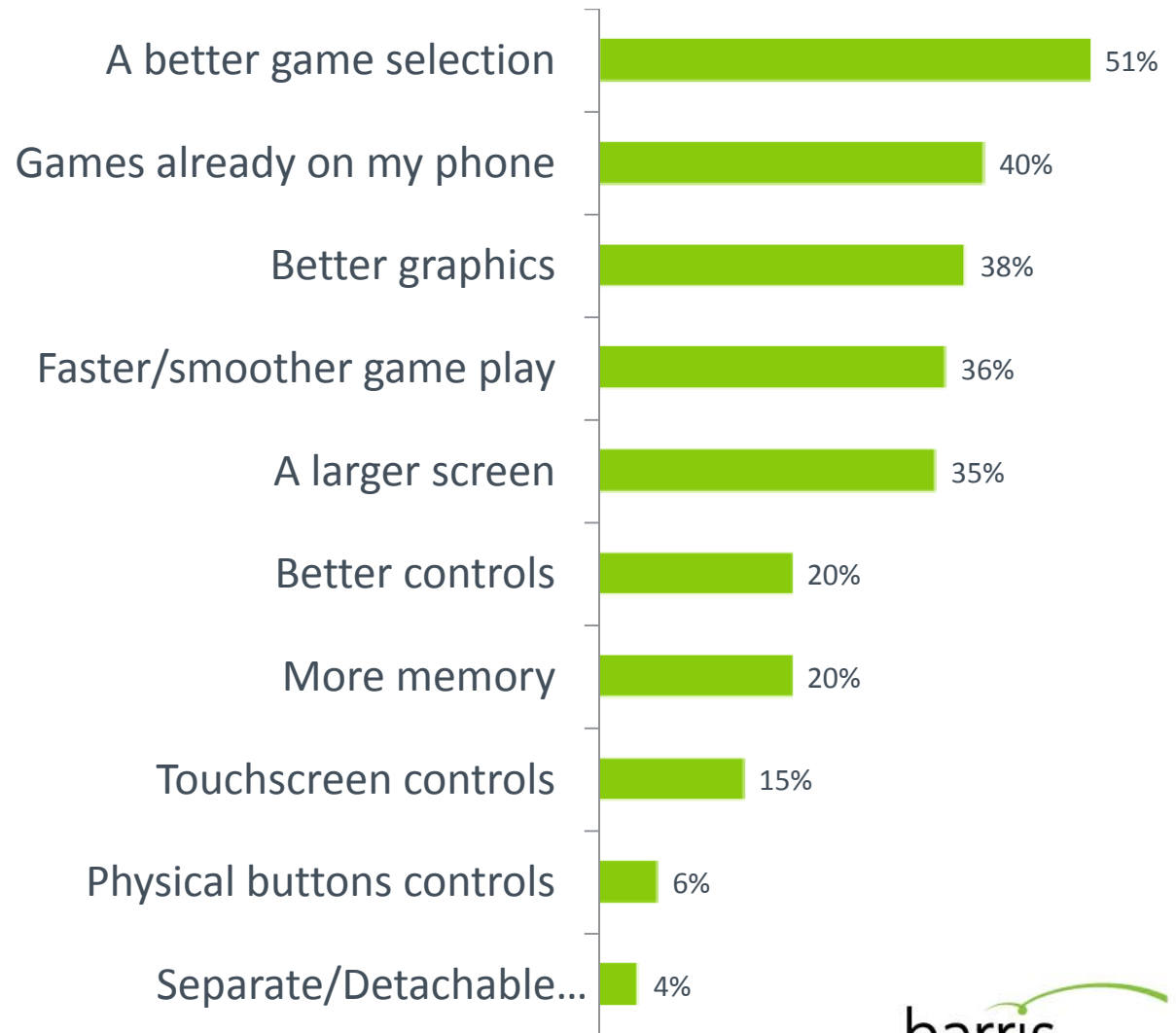


Factors that would influence teens to play more mobile games

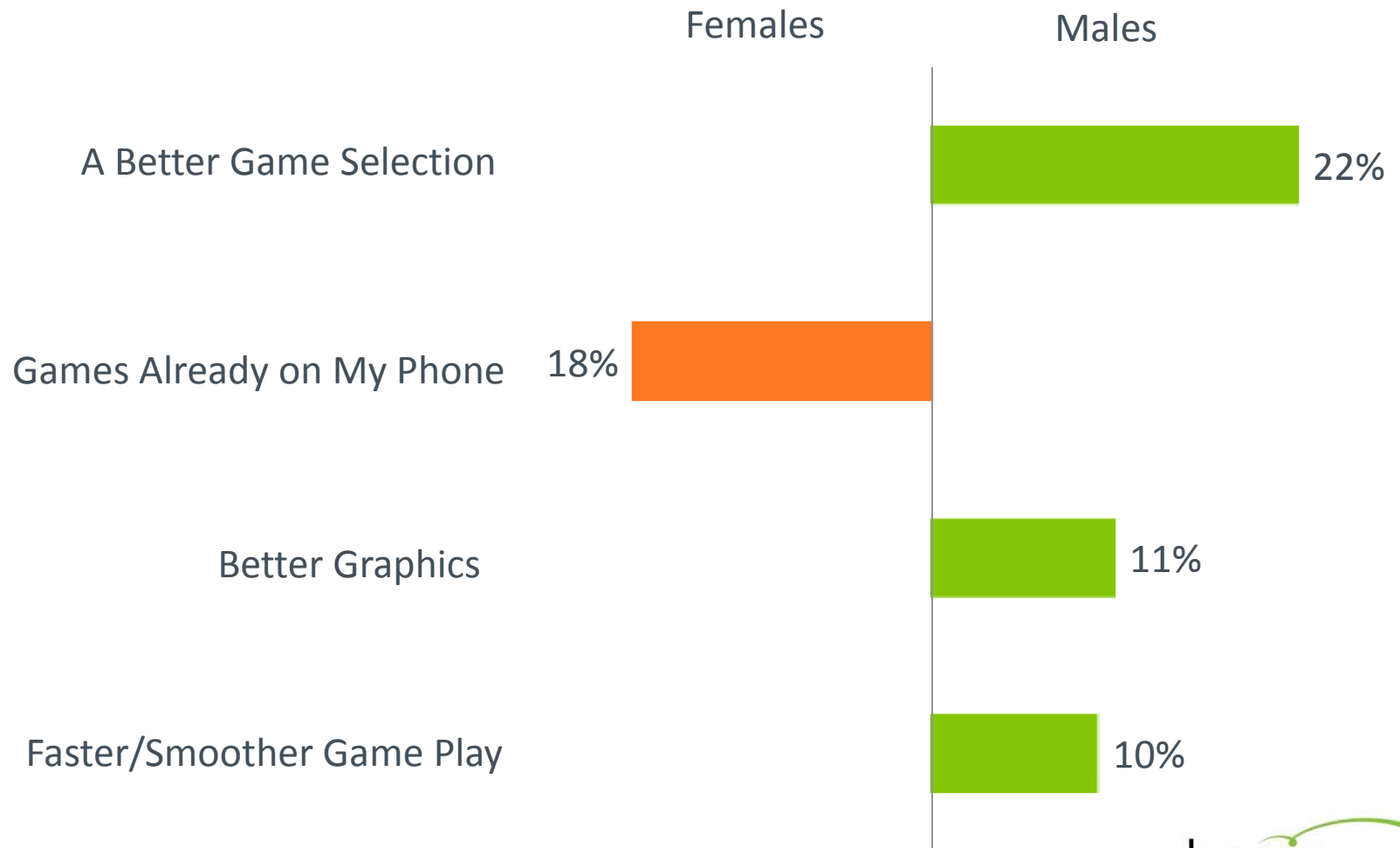
The key is game availability...but handset capabilities are a close second

Q915

If cost were not a factor, which of the following would influence you to play more games on your phone



Males value selection and performance – Females value convenience



Two Ideas to Jumpstart Teen Mobile Gaming Linking the living room vs. mobile Wii

47%

Almost half of teens who play video games now would love to be able to transfer games to their handheld

31%

Other ideas: Mobile gaming could tap other unique strengths linking games to location based services, social networking, cityscape and street gaming

I love it, 27%

Best idea ever,
20%

Ability to pause and transfer game to cell phone

I love it, 21%

Best idea ever,
10%

Ability to move phone for game interaction



Conclusions and Implications

- The future of P2P and gaming looks bright:
 - Three mobile platforms to grow on
 - Increasing network performance
 - Demand for new content and user experience
- Game developers must support multiple platforms with the user experience and game performance customized for each platform.
- P2P is well position to enable Massively Multi-player Online Gaming by eliminating limitations of the client server model-cost of server deployment, scalability, single point of failure.

Thanks for Attending Q & A

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