RESEARCH STUDY

Highlights

IAB PLAYFRONTS

April 5, 2022

Full study to be published later this month.
About Zynga

Zynga is a global leader in interactive entertainment with a mission to connect the world through games. With massive global reach in more than 175 countries and regions.

Zynga has a diverse portfolio of popular game franchises that have been downloaded more than four billion times on mobile including CSR Racing™, Empires & Puzzles™, FarmVille™, Golf Rival™, Hair Challenge™, Harry Potter: Puzzles & Spells™, High Heels!™, Merge Dragons!™, Merge Magic!™, Toon Blast™, Toy Blast™, Words With Friends™ and Zynga Poker™.

With Chartboost, a leading mobile advertising and monetization platform, Zynga is an industry-leading next-generation platform with the ability to optimize programmatic advertising and yields at scale.

Founded in 2007, Zynga is headquartered in California with locations in North America, Europe and Asia.

For more information, visit www.zynga.com or follow Zynga on Twitter, Instagram, Facebook or the Zynga blog.
Highly Diversified Games Portfolio

4B+ Downloads

8 of the Top 100 U.S. Grossing Mobile Games\(^{(1)}\)

39M Mobile DAUs\(^{(2)}\)

184M Mobile MAUs\(^{(2)}\)

(1) SensorTower Q1’21 - Q3’21
(2) Zynga reported for 2021
About YouGov

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over 20 years, creating the richest and most complete understanding of your customers’ complex lives. We call it living data.

• 20 million+ registered panel members
• 55+ markets
• 40+ million surveys carried out yearly
• 1 million+ data points
• 15+ years of historical data

Explore, plan, activate and track marketing activity with certainty, at speed, every time

living data
An ever-growing source of constantly evolving, connected intelligence:
discover what your customers were thinking yesterday, 5 years ago, and today.

Explore
Answers you need from your audience – from syndicated data and in-depth custom research to quick surveys and polls.

Plan
Unlock the most complete profile of your audience, with over a million data points.

Activate
Supercharge campaigns with precision targeting and unmissable advertising.

Track
Continuously monitor what your audience thinks about brands, campaigns and your competition with daily updates.
Methodology

Objective:
• Explore mobile gamers' perceptions of and engagement with in-game advertising

Methodology:
• Online survey among n=1,212 18-55 year olds in the U.S.
  • n=963 Active Mobile (iOS/Android) Gamers and n=249 Non-Gamers
  • n=433 Zynga Gamers and n=530 Non-Zynga Gamers
  • n=336 Hyper Casual Gamers and n=627 Non-Hyper Casual Gamers
• Survey conducted February 25 – March 7, 2022
• Definitions of key subgroups:
  • Active Mobile Gamers: Play iOS/Android games 1+ hours/week
    Non-Gamers: Have not played games on their mobile device within the past week
  • Hyper Casual Gamers: Active Mobile Gamers who are currently playing Hypercasual games*
  • Non-Hypercasual Gamers: Active Mobile Gamers that are not currently playing Hypercasual games*
  • Zynga Gamers: Played 1+ Zynga title within the past 30 days
  • Non-Zynga Gamers: Have not played a Zynga title within the past 30 days

* List of games qualifying Hyper Casual can be provided upon request at zyngaads@zynga.com
Active Mobile Gamers are Everyone…

51% are 18-34

59%

45% are PARENTS

Play mobile games with their children at least weekly

56%

85%

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022
Gray bars indicate same statistic for hypercasual players
...They are **Highly Engaged**

Average days played each week:

- **5.3** days (18-24)
- **5.4** days (25-34)
- **5.5** days (35-44)
- **5.9** days (45-55)

**41%** Play Daily

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022
…They are **Highly Engaged**

They Play at Various Times of the Day

- When I wake up: 13%
- In the morning: 32%
- Around lunch time: 32%
- In the afternoon: 50%
- In the evening: 64%
- Before I go to sleep: 47%
- When I can’t sleep: 24%

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022
…They are **High Value Entertainment Consumers**

74% own a Game Console

83% are Hyper Casual Gamers vs. 43% Non-Gamer

**HYPER CASUAL GAMERS**

Are likely to go to a Movie theatre this year 67% vs. 50% of Non-Gamers

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022

Gray bars indicate same statistic for hypercasual players

**EARLY ADOPTERS**

22% own a VR Headset vs. 10% Non-Gamer

36% vs. 25% of Non-Gamer

25% Trade Crypto or NFTs vs. 8% Non-Gamer

38%
…They are High Value Mobile Consumers

Use a mobile app for paid Streaming services 52%

Use mobile Apps for...

49% Music Streaming
45% Shopping
29% Food Delivery

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022
Gray bars indicate same statistic for hypercasual players
Ads in Mobile Games are Effective

When they see an in-game ad for a non-gaming product that seems interesting...

- 63% are likely to look into the product to learn more about it
- 32% have purchased a non-gaming product as a result of seeing a mobile in-game ad

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022

Gray bars indicate same statistic for hypercasual players
Mobile Gamers Trust Gaming

Don’t mind sharing personal info within a mobile game

Trust that mobile games won’t misuse their personal data

Twice as likely to say they trust gaming companies with their personal data compared to social media or other non-gaming brands

Source: Zynga & YouGov Mobile Gaming Research Study, March 2022
Gray bars indicate same statistic for hypercasual players
Research Study highlighted presented at IAB Playfronts April 5th, 2022

Please stay tuned for the full study to be released later this month on ZyngaAds.com