



ACTIVE MOBILE GAMER RESEARCH STUDY

DETAILED FINDINGS

APRIL 2022

About Zynga

Zynga is a global leader in interactive entertainment with a mission to connect the world through games and a wholly-owned subsidiary of Take-Two Interactive Software, Inc.

With massive global reach in more than 175 countries and regions, the combined diverse portfolio of popular game franchises has been downloaded more than 5 billion times on mobile, including CSR Racing™, Dragon City, Empires & Puzzles™, FarmVille™, Golf Rival™, Hair Challenge™, Harry Potter: Puzzles & Spells™, High Heels!™, Merge Dragons!™, Merge Magic!™, Monster Legends, Toon Blast™, Top Eleven, Toy Blast™, Two Dots, Words With Friends™ and Zynga Poker™.

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

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

40M
MOBILE DAUs*

209M
MOBILE MAUs*

zynga.

BossAlien
a naturalmotion studio



peak

follic

ECHTRA

Chartboost



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.

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

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

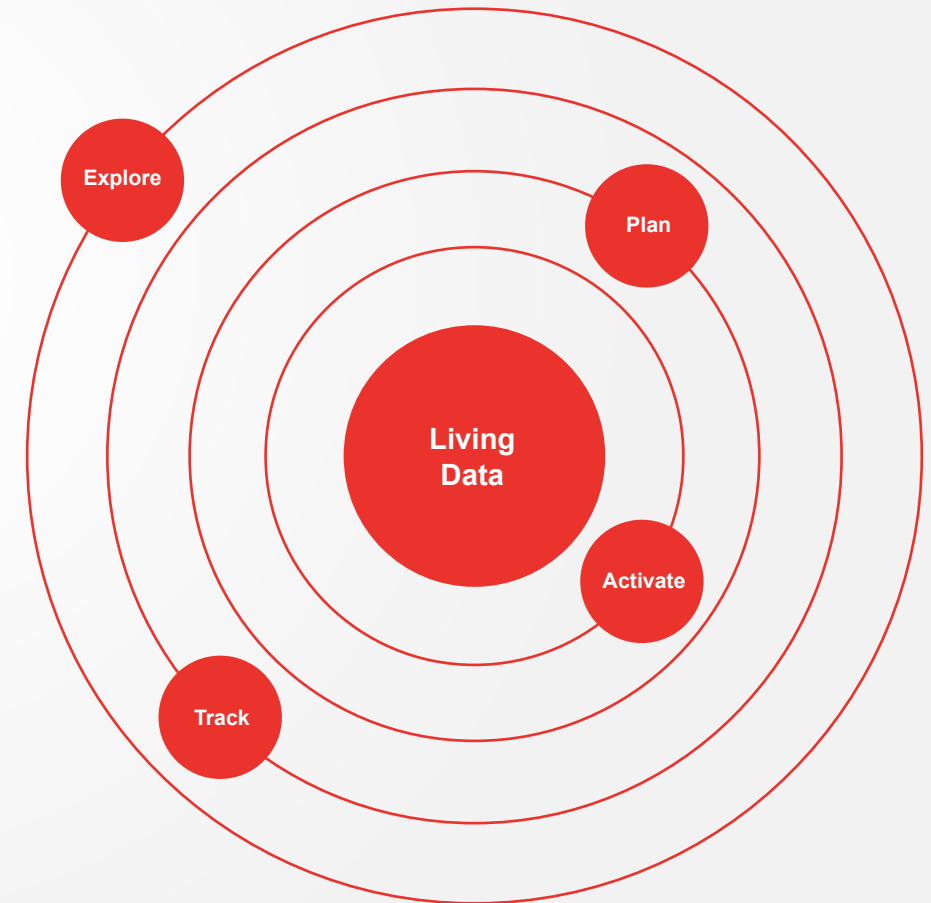
Supercharge campaigns with precision targeting and unmissable advertising.

TRACK

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

Living Data

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



Methodology

OBJECTIVE

Explore mobile gamer perception and engagement with in-game advertising

METHODOLOGY

Online survey among n=1,212 18-55 year olds in the U.S.

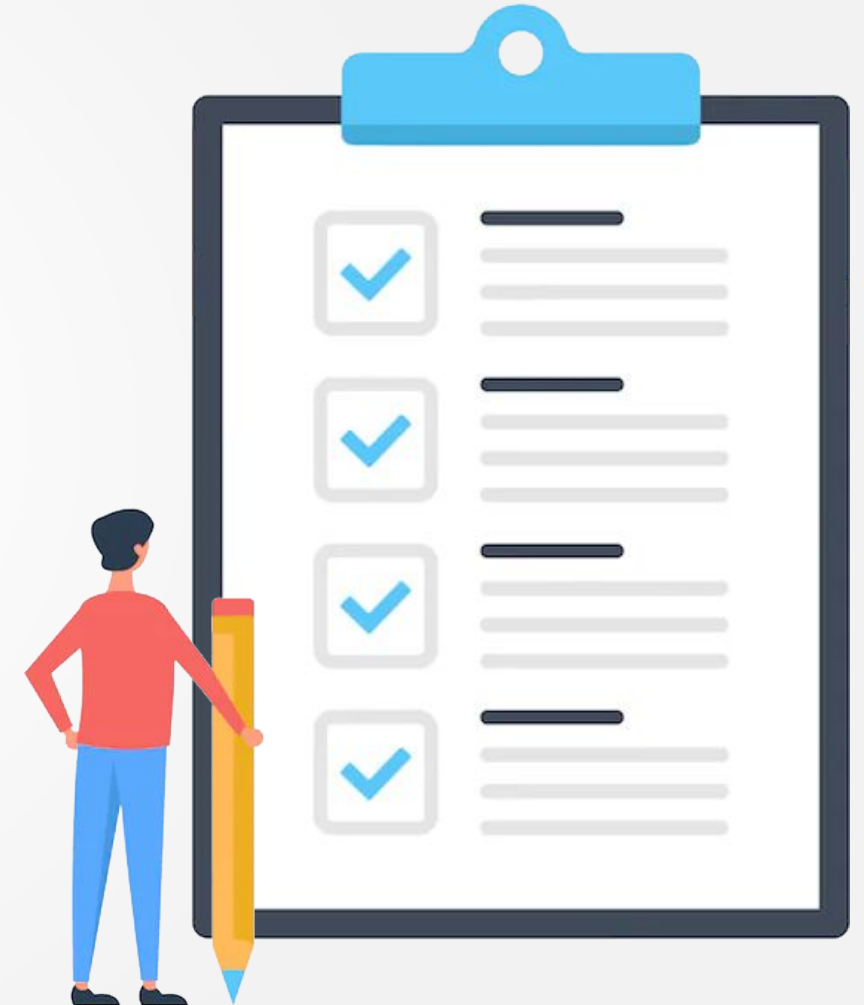
- n=963 Active Mobile (iOS/Android) Gamers and n=249 Non-Gamers
- n=433 Zynga Gamers and n=530 Non-Zynga Gamers
- n=336 Hyper-casual Gamers and n=627 Non-Hyper-casual Gamers

Survey conducted February 25 – March 7, 2022

Definitions of key subgroups

- Active Mobile Gamers: Play iOS/Android games 1+ hours/week
- Hyper-casual Gamers: Active Mobile Gamers who are currently playing Hyper-casual games
- Zynga Gamers: Played 1+ Zynga title within the past 30 days

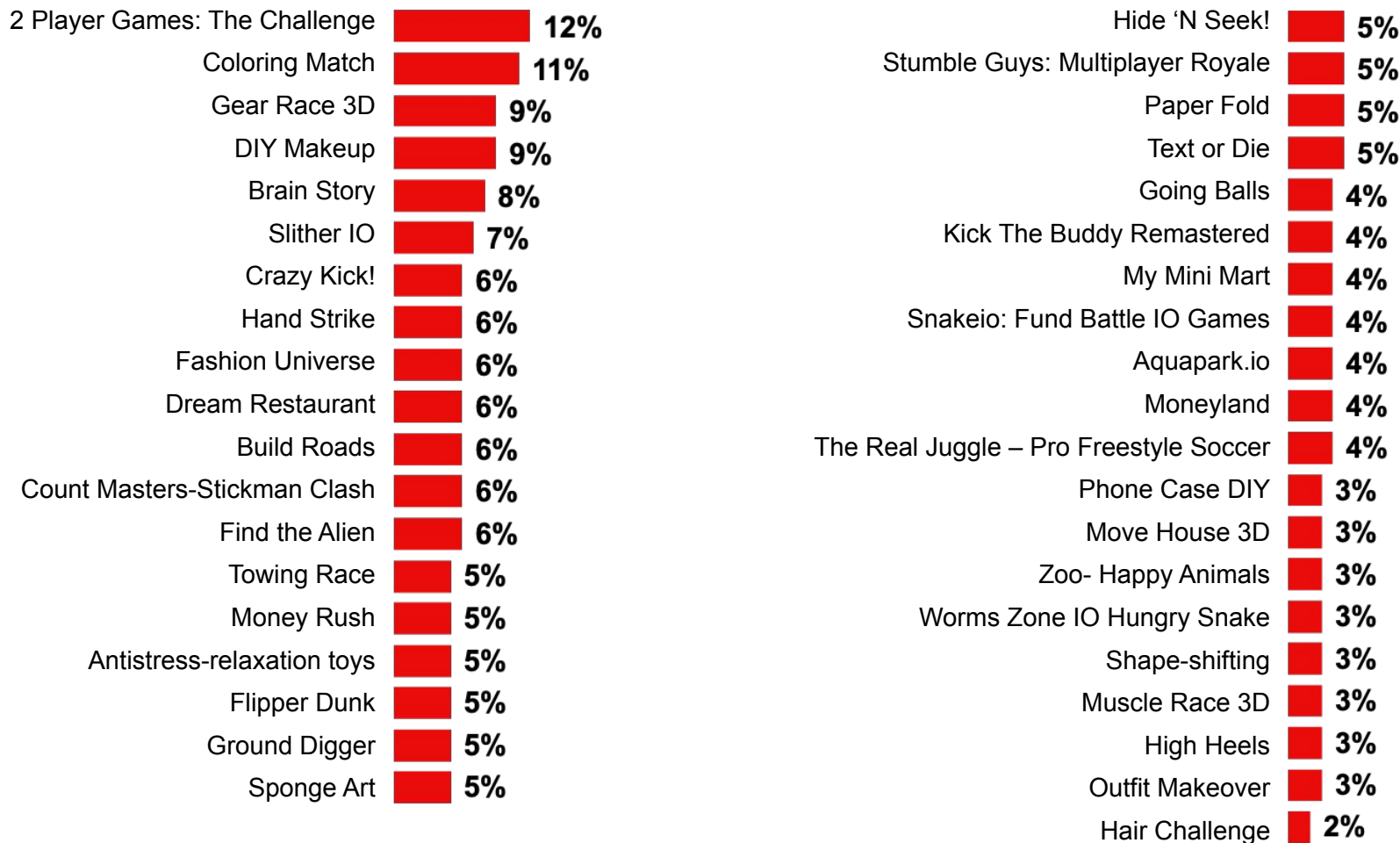
The data in this research study reflects this sample size and survey methodology



Hyper-casual Defined

Hyper-casual games are defined as mobile games that are very easy to pick up and play with generally simple mechanics.

For the purposes of this research, Hyper-casual Gamers are defined as currently playing at least 1 of the following 39 titles (self-reported)

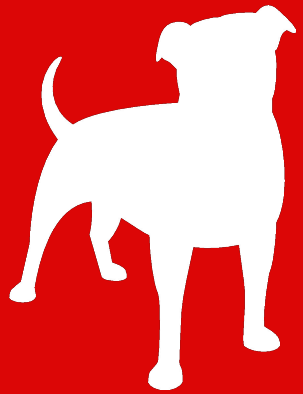




Key Takeaways

Key Takeaways

- 1 Mobile gamers are **everyone**, spanning a broad demographic profile
- 2 They are tuned in, **high value**, avid entertainment consumers
- 3 In-game ads are **effective**, encouraging further research on non-gaming products, and even eventual purchase



Mobile gamers are everyone

85% Play Mobile Games with their Children Weekly

A large proportion are 18-34, and close to half are parents - most of whom play games with their children.



59% ↑
Hypercasual
Gamers

40% ↓
Non-Gamers

45%
are
PARENTS



56% ↑
Hypercasual
Gamers

35% ↓
Non-Gamers

85%

Play mobile
games with
their children
at least weekly

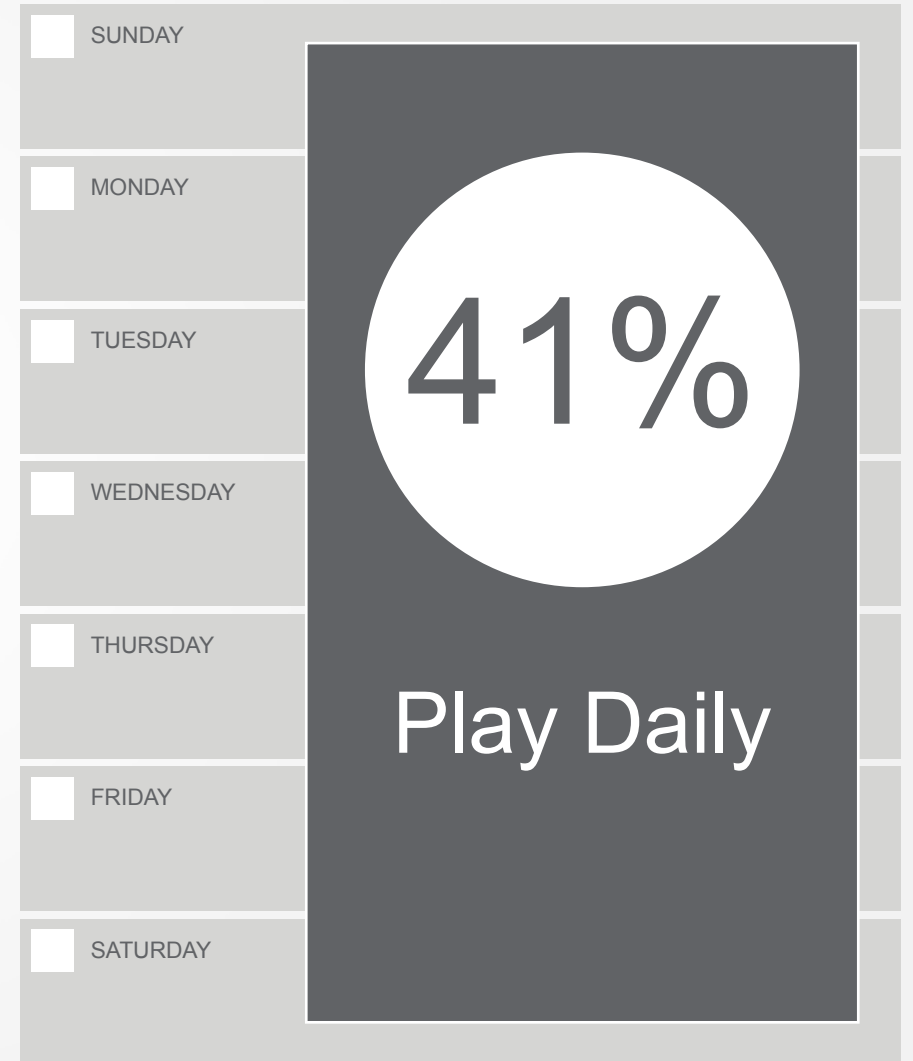


They are highly engaged

They Play 5.5 Days a Week, 41% Play Daily

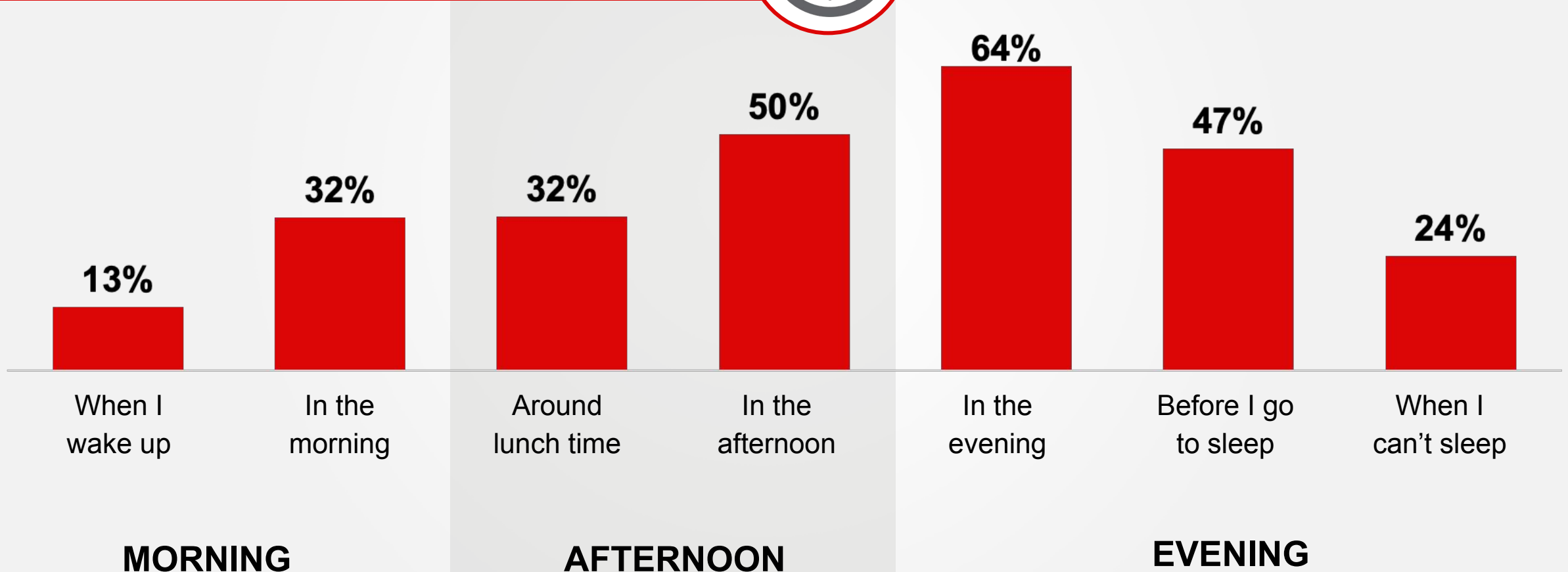


Average days played each week



And they are engaged throughout the entire day

They play morning, noon and night



They are Likely to Multitask while Tuned into Gaming



Play Games While Watching TV/Movies

76%
Average Gamers

77%
Hypercasual Gamers



Listening to Music

72%
Average Gamers

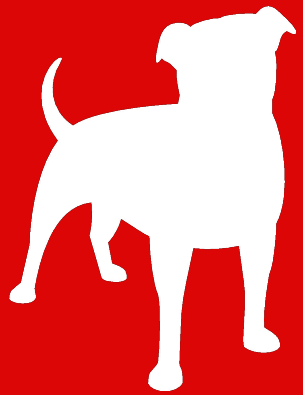
84%
Hypercasual Gamers



Passing time, Waiting

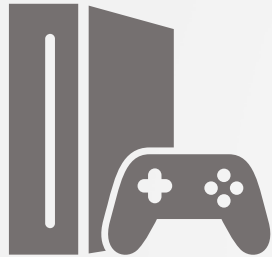
74%
Average Gamers

84%
Hypercasual Gamers



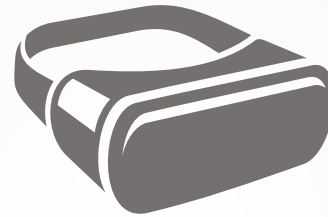
They are high value

They Are High Value Consumers + Early Tech Adopters



Own a Game Console

74% Average Gamers vs. 43% Non-Gamers	83% Hypercasual Gamers
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Own a VR Headset

22% Average Gamers vs. 10% Non-Gamers	36% Hypercasual Gamers
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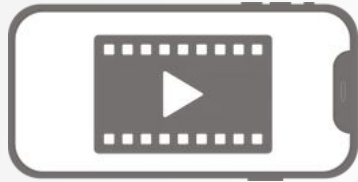


Trade Crypto or NFTs

25% Average Gamers vs. 8% Non-Gamers	38% Hypercasual Gamers
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They consume more entertainment than Non-Gamers

Those who are Hypercasual gamers consume more entertainment overall



Use a Mobile App for paid Streaming Services

52%

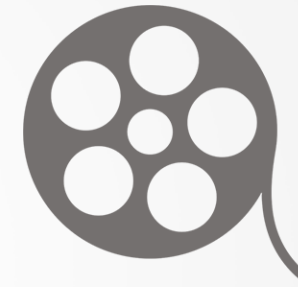
Average Gamers

vs. 41%

Non-Gamers

56%

Hypercasual Gamers



Likely to go to a Movie Theater

67%

Average Gamers

vs. 50%

Non-Gamers

85%

Hypercasual Gamers

Ads Mobile Gamers are Most Interested in Seeing

Ads that Gamers are interested in seeing:

- TV/Movies
- Gaming Devices
- PC/Console Gaming



TV/Movies

45%
Average Gamers

46%
Hypercasual Gamers

51%
Zynga Players



Gaming Devices

36%
Average Gamers

45%
Hypercasual Gamers

43%
Zynga Players

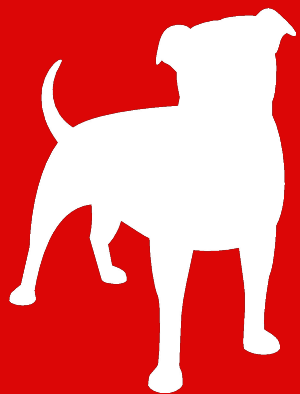


PC/ Consoles

35%
Average Gamers

42%
Hypercasual Gamers

41%
Zynga Players



In-game ads are effective

Most gamers don't mind seeing in-game ads

When gamers see ads in free to play games...

56%
Average Gamers

63%
Hypercasual Gamers

62%
Zynga Players

Don't mind ads, especially hyper-casual or Zynga gamers.

They encourage research and purchase

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



63%
Average Gamers

77%
Hypercasual Gamers

are likely to look into the product to learn more about it



32%
Average Gamers

54%
Hypercasual Gamers

have purchased a non-gaming product as a result of seeing a mobile in-game ad

Key Takeaways

- Mobile gamers play 5.5 days a week, 41% **play daily**
- 85% of Mobile Gamers **play games with their children** weekly
- Over **75%** of mobile gamers **play games while watching TV**
- **85% of hypercasual** gamers are likely to see a **movie in theaters**
- **77% of hypercasual** gamers are likely to **seek more info** on a product **advertised in-game**
- **54% of hypercasual** gamers have purchased a non-gaming product as a result of seeing a mobile in-game ad
- More than **60% of hypercasual** players say they **don't mind in-game ads**



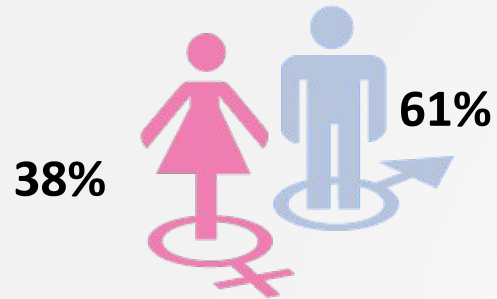
Appendix



Audience Profiles

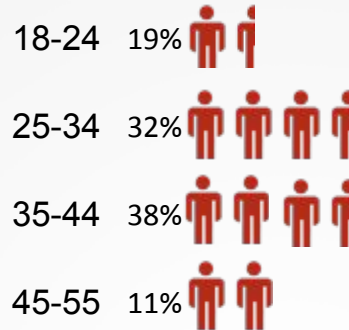
Audience Profile - Active Mobile Gamers

GENDER



AGE

34
years
Avg. Age



GAMING BEHAVIOR

HOURS PER WEEK

12

PAST MONTH



ETHNICITY



Caucasian **74%**
Hispanic **9%**
African American **8%**
Asian **6%**
Other **2%**

REGION

Urban **44%**
Suburban **40%**
Rural **15%**
Not sure **1%**

\$ SPENT IN PAST MONTH	SPENT ON PURCHASED GAME	DLC ON PURCHASED GAME	DLC ON FREE GAME
	18	14	15



HOUSEHOLD INCOME

< \$25K **13%** | \$25K-\$49K **23%** | \$50K-\$99K **32%** | \$100K+ **28%**

PARENTS

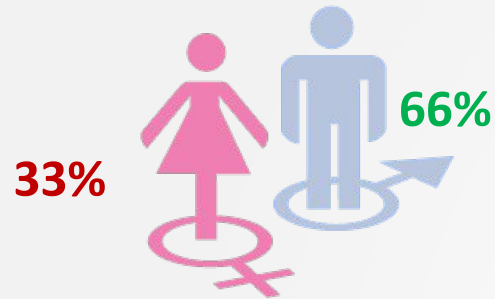
Parent **45%**
Parent of mobile gamer **38%**

Items Owned

PC or laptop	85%
Video game console	74%
HDTV used for streaming	51%
Smart Speaker	48%
Smart Watch	46%
At home workout equipment	39%
VR headset	22%

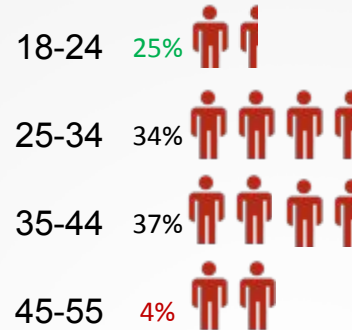
Audience Profile - Active Hyper-casual Gamers

GENDER



AGE

32
years
Avg. Age



GAMING BEHAVIOR

HOURS PER WEEK

12

PAST MONTH



ETHNICITY



Caucasian	71%
Hispanic	10%
African American	11%
Asian	7%
Other	0%

REGION

Urban	65%
Suburban	30%
Rural	6%
Not sure	0%

\$ SPENT IN PAST MONTH	SPENT ON PURCHASED GAME	DLC ON PURCHASED GAME	DLC ON FREE GAME
	36	29	26

Items Owned

PC or laptop	89%
Videogame console	83%
Smart Watch	67%
Smart Speaker	60%
HDTV used for streaming	48%
At home workout equipment	41%
VR headset	36%



HOUSEHOLD INCOME

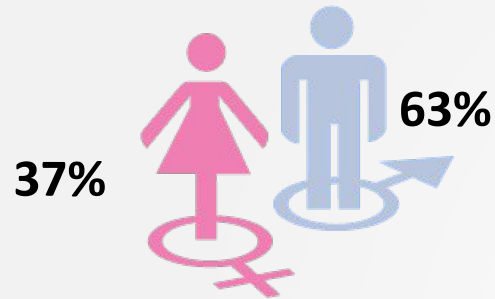
< \$25K	\$25K-\$49K	\$50K-\$99K	\$100K+
7%	20%	34%	38%

PARENTS

Parent	56%
Parent of mobile gamer	52%

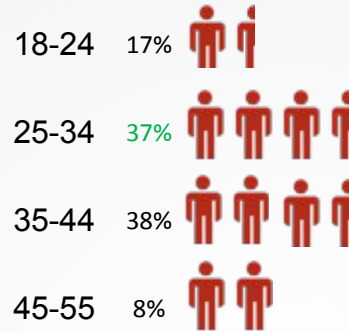
Audience Profile - Active Zynga Gamers

GENDER



AGE

33
years
Avg. Age



GAMING BEHAVIOR

HOURS PER WEEK

12

PAST MONTH



ETHNICITY



Caucasian	74%
Hispanic	9%
African American	10%
Asian	6%
Other	1%

REGION

Urban	53%
Suburban	35%
Rural	13%
Not sure	0%

\$ SPENT IN PAST MONTH	SPENT ON PURCHASED GAME	DLC ON PURCHASED GAME	DLC ON FREE GAME
	28	22	22



HOUSEHOLD INCOME

< \$25K	\$25K-\$49K	\$50K-\$99K	\$100K+
11%	24%	32%	31%

PARENTS

Parent	53%
Parent of mobile gamer	48%

Items Owned

PC or laptop	89%
Videogame console	83%
Smart Speaker	60%
Smart Watch	58%
HDTV used for streaming	53%
At home workout equipment	45%
VR headset	32%