

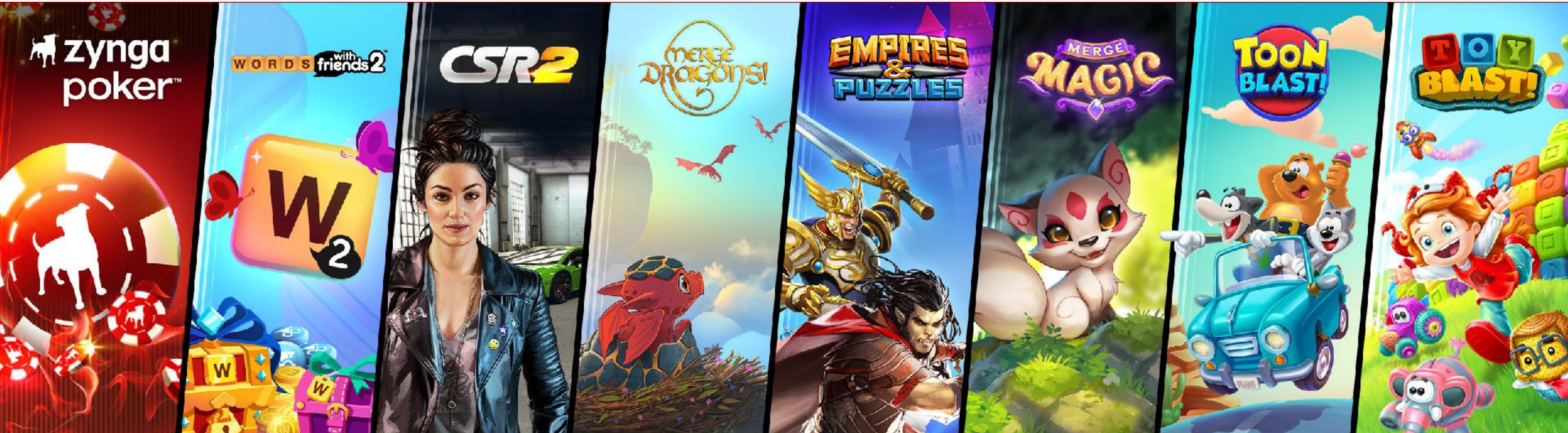


OCT
2020

Mobile Gaming Ad Study

Quantitative Insights for Mobile Advertising

We connect millions of people globally



through some of the most popular mobile games in the world

Market Opportunity - Mobile Gaming Highlights 2020

Mobile gaming is expected to be the **fastest growing** category within the industry with **26%** year-over-year revenue growth.

Mobile gaming is **mainstream**, with an anticipated 2.3 billion smartphone gamers that comprise approximately 65% of smartphone users.

Mobile gaming makes up **49%** of total gaming **market share**.

1,218 TOTAL PARTICIPANTS

MOBILE GAMERS

n=951

Played games on iOS/Android smartphone or tablet
1+ hours in the past week

NON-MOBILE GAMERS

n=267

Consumers who have **not played**
on their mobile devices in the past week

ZYNGA MOBILE GAMERS

n=380

Mobile Gamers who currently
play Zynga Games

*1+ titles (i.e. in the past 30 days)

AVG MOBILE GAMERS

n=571

Non-Zynga Mobile Gamers
Mobile Gamers who aren't
currently playing any Zynga title

20 min online survey
conducted in the US
in October 2020 by Zynga and the
National Research Group (NRG)

*1010!, Boggle With Friends, Crosswords With Friends, CSR Racing 2, Dawn of Titans, Empires and Allies, Empires & Puzzles, FarmVille 2, FarmVille Country Escape, FarmVille Tropic Escape, Game of Thrones Slots, Hit It Rich! Slots, Merge Dragons!, Merge Magic!, Puzzlescapes, Toon Blast, Toy Blast, Willy Wonka Slots, Wizard of Oz Magic Match, Wizard of Oz Slots, Wonka's World of Candy, Words With Friends, Zynga Poker

Consumers crave an engaging escape, paving the way for the continued growth in mobile gaming



MOBILE
AD STUDY
2020

Real world anxieties

Consumers describe news as a trigger for stress & frustration

- VS -

Reliable fantasy where we can be better versions of ourselves

Consumers turn to games to feel relaxed, but also challenged
in the best of ways; **engaged, competitive, and strategic**

Why Zynga Mobile Gamers play games in 2020

81% | say they play games to **escape** from reality

65% | say they play games to **accomplish** something

61% | say they play games to feel a sense of **control**

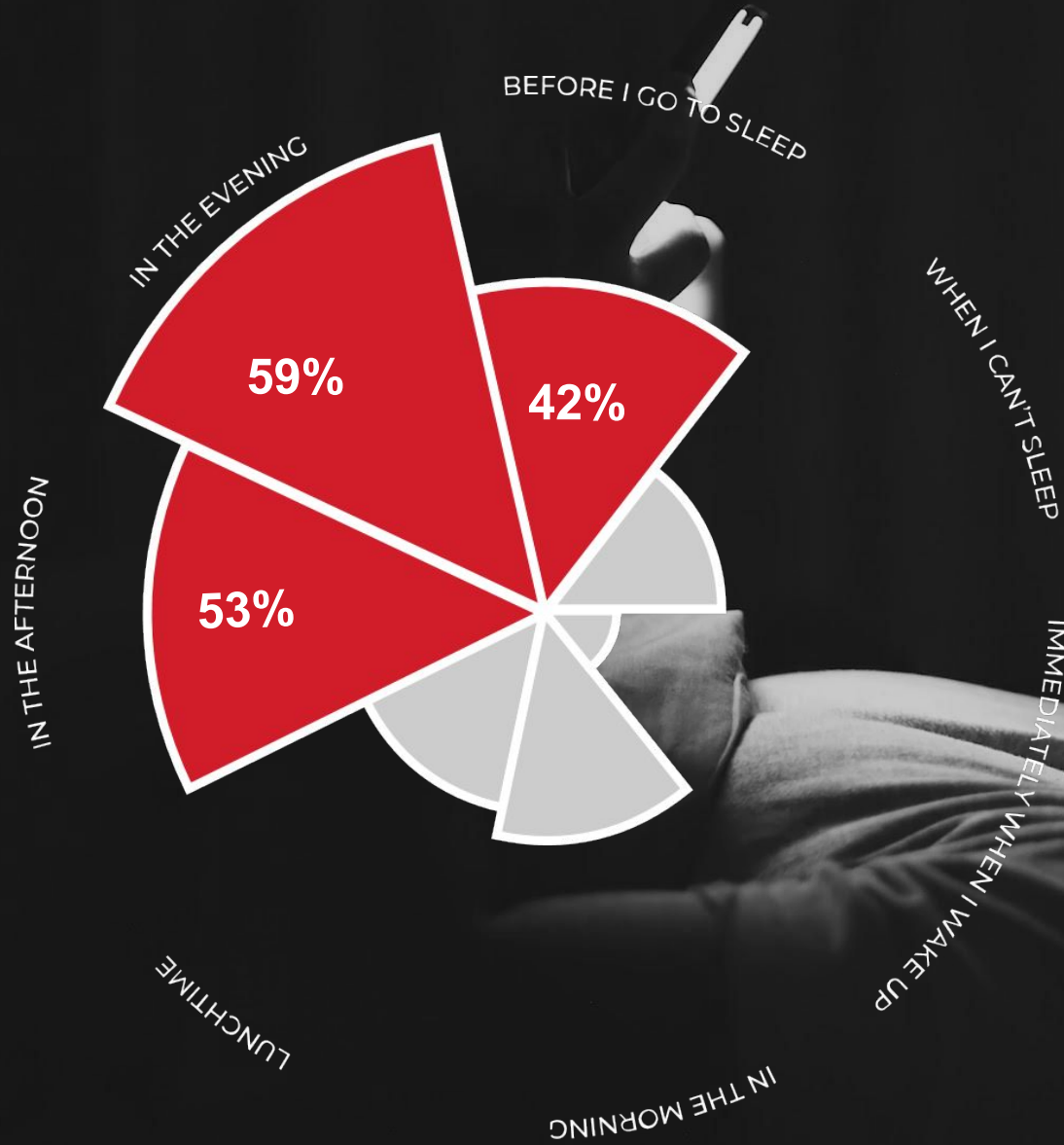


Mobile gaming sparks joy, especially among Zynga Mobile Gamers

3 in 4

vs. 58% of avg mobile gamer.

of them say playing mobile games makes them **happy**



PRIME TIME TO UNWIND
Zynga Mobile Gamers
turn to mobile games in
the evening and
afternoon

Craving escape across entertainment experiences

INCLUDING MOVIEGOING

- Zynga Mobile Gamers are **more likely** to have seen a movie in the theater regularly

(i.e. at least once a month, prior to theater closures as a result of COVID-19)

57% ZMG vs 39% NMGs

For a sense of community and social connection

56%

say they play more games in 2020
with or against other people

58%

also say they play games to **feel connected**
to friends & family in 2020

Zynga Mobile Gamers are more likely to be parents

56%

of ZMGs age 18+ say
they are parents

42% for non-mobile gamers
vs 45% avg. gamers

59%

of ZMGs have kids age **0-12** at home

42% for non-mobile gamers 43% for avg. gamers

35%

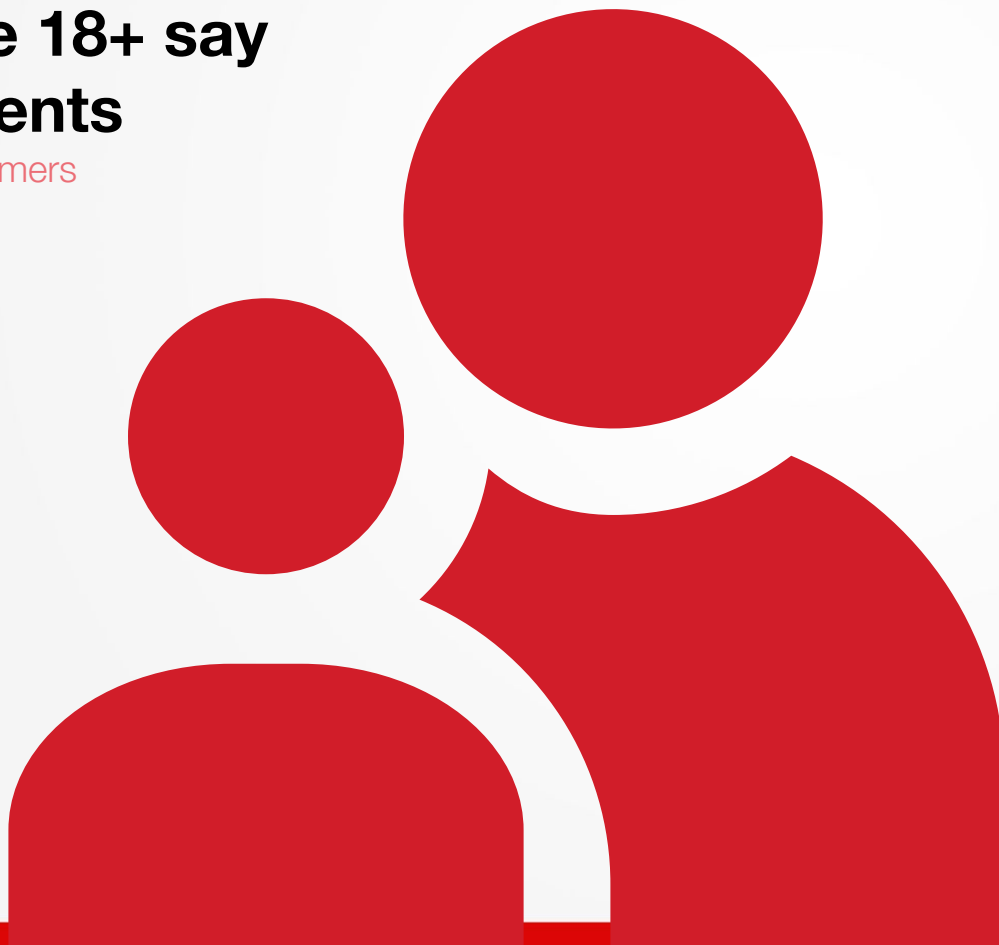
of ZMGs have kids age **13-17** at home

29% for non-mobile gamers 26% for avg. gamers

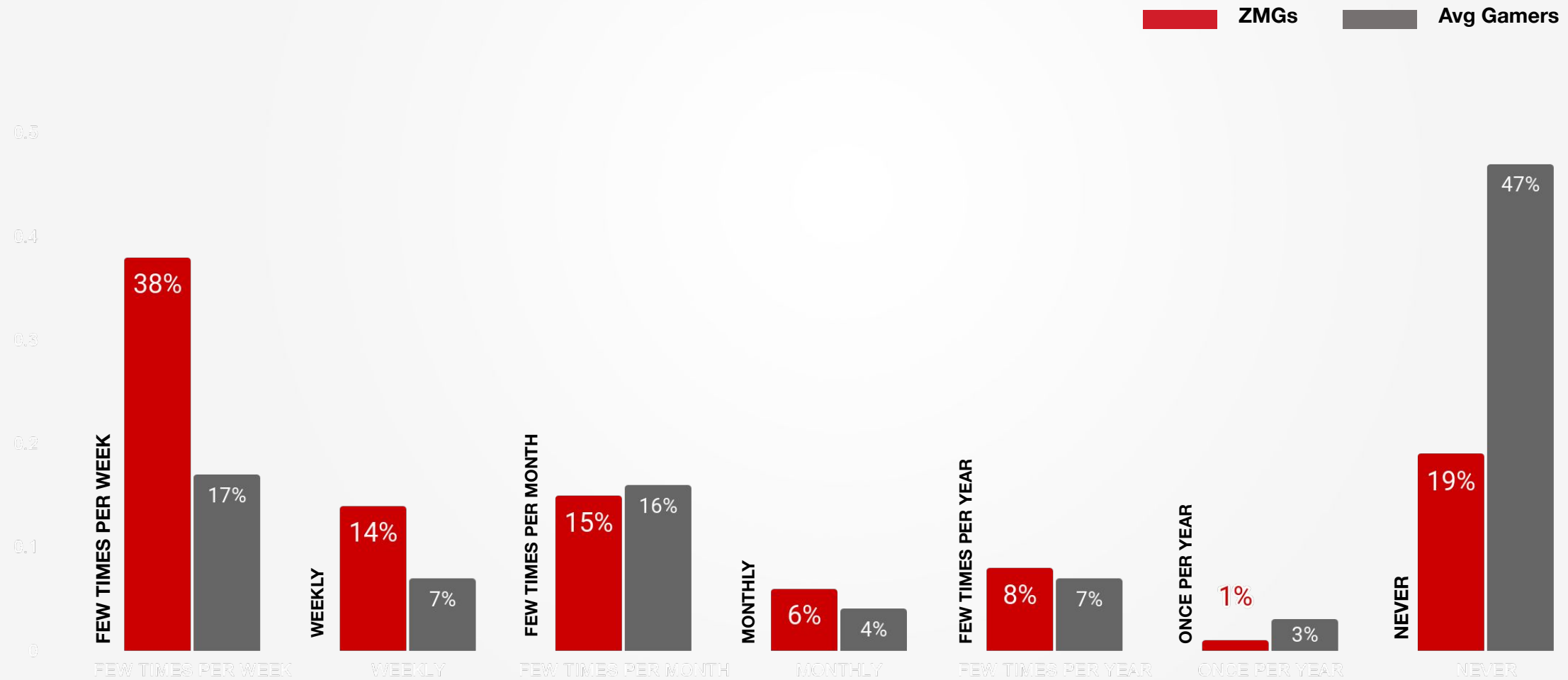
33%

of ZMGs have kids age **18+** at home

45% for non-mobile gamers 55% for avg. gamers



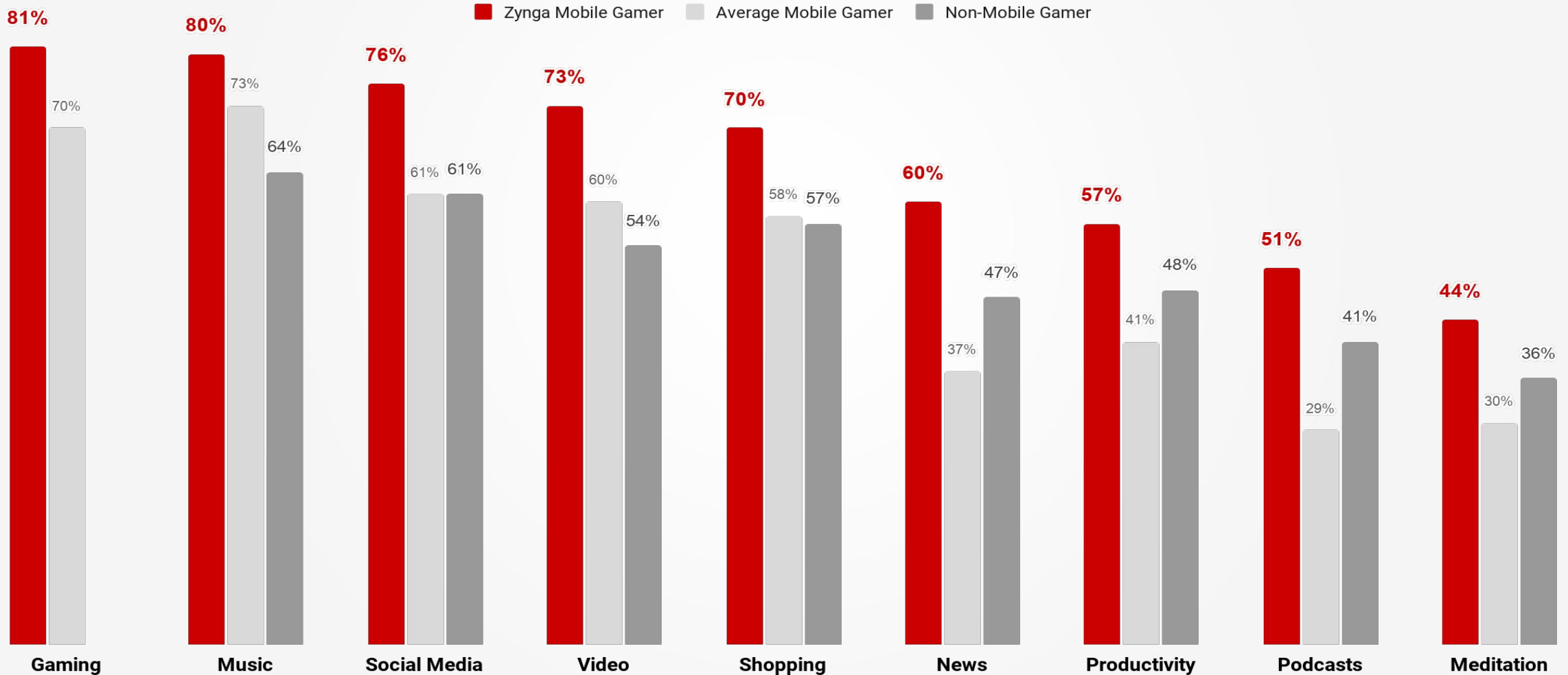
ZMGs are more apt to play mobile games with their kids



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**Mobile Gamers are more voracious
entertainment consumers than
Non-Mobile Gamers**

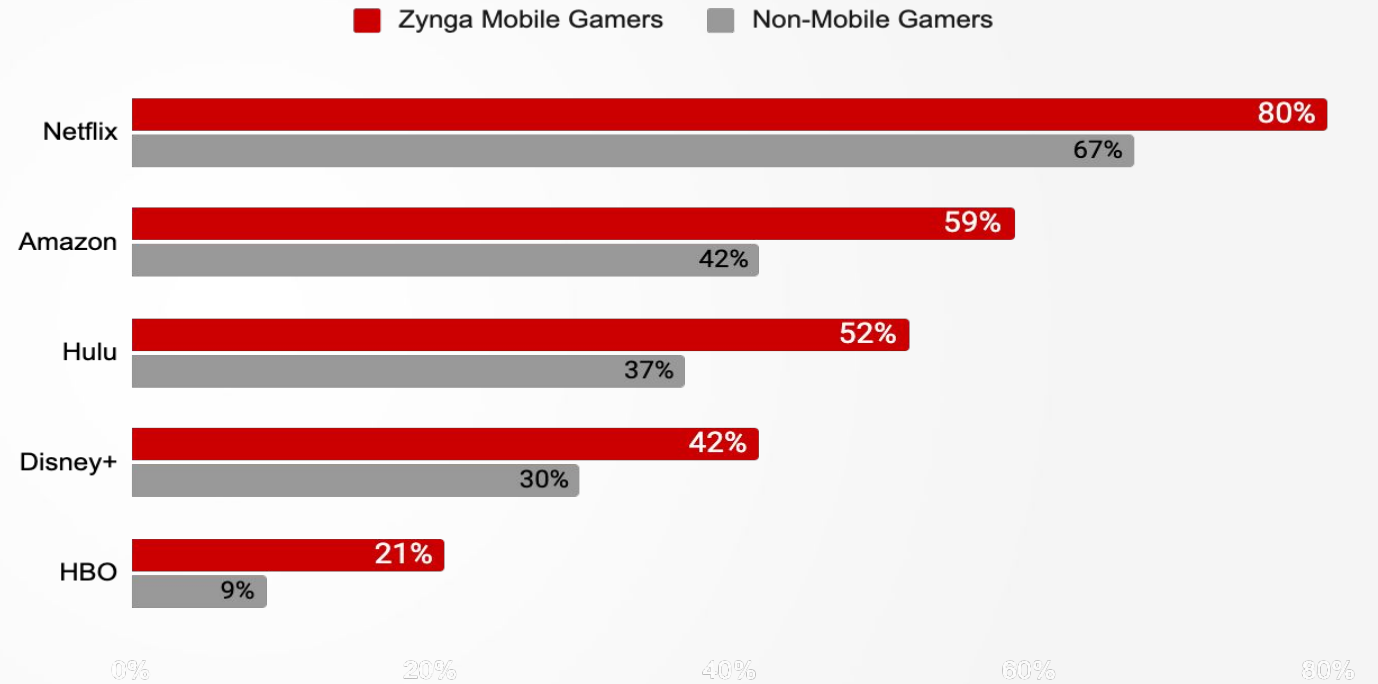
Zynga Mobile Gamers show more engagement across other apps



Tuning into multiple streaming services to round out their media diet



Zynga Mobile Gamers report having more paid subscriptions than Non-Mobile Gamers



zynga®

A highly **engaged audience** not only
with content, but also with ads



Zynga Mobile Gamers exhibit the 3 I's, making them a prime target for ads

INVOLVED

- ▲ Tuned into content

INTERESTED

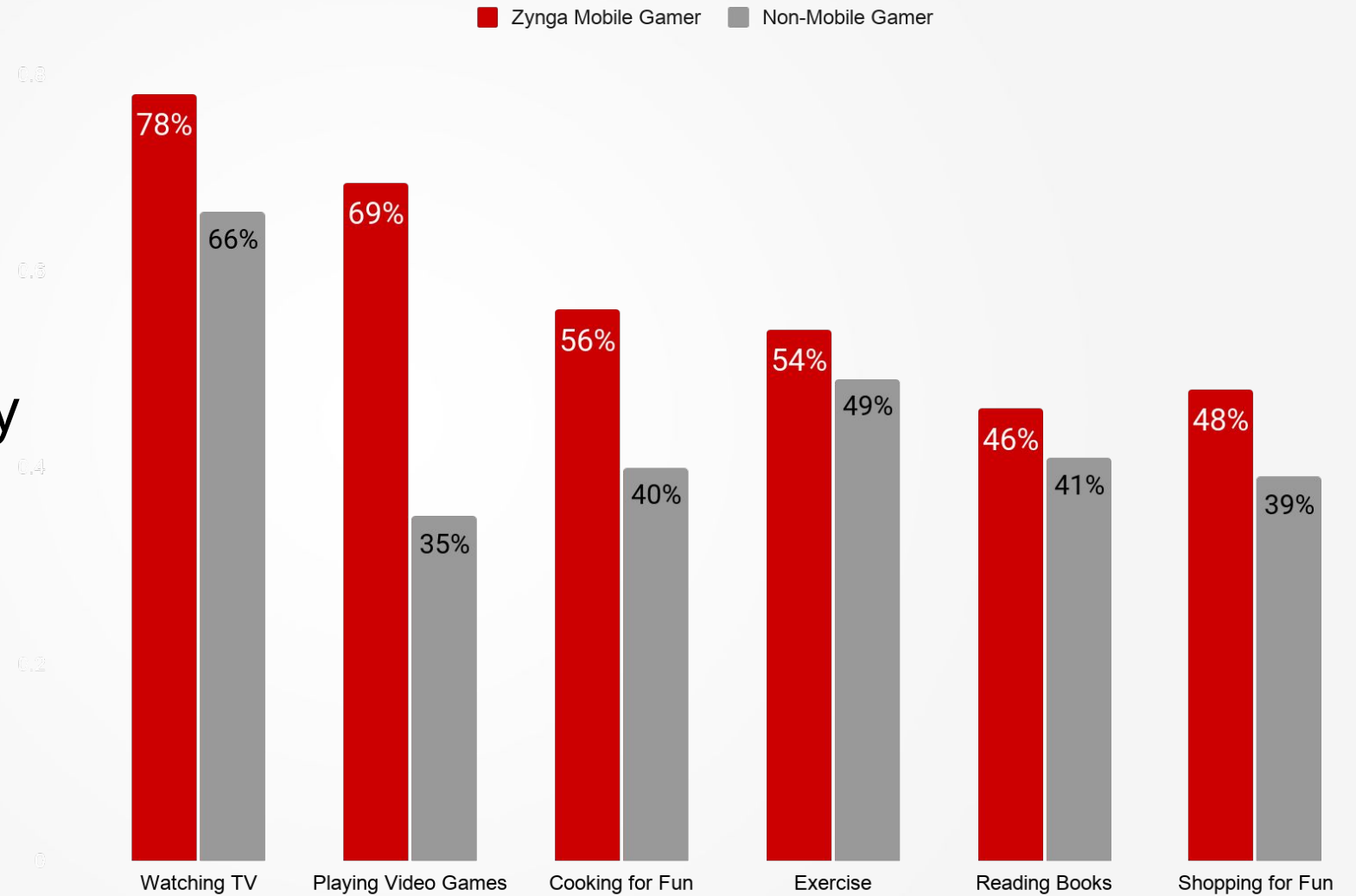
- ▲ Ads are more memorable

IMPACTED BY ADS

- ▲ They are more likely to take action upon seeing an ad

INVOLVED

More tuned into content = more readily reachable across multiple media experiences



INTERESTED

48%

of Zynga Mobile Gamers find
**mobile gaming ads more
interesting than social media ads**

vs. 31% avg. gamers

52%

of Zynga Mobile Gamers
say **mobile gaming ads
are memorable**

vs. 30% of avg. gamers

71%

of Zynga Mobile Gamers say
**mobile gaming ads are just
as or more interesting than
ads they saw on TV**

vs. 57% of avg. gamers

Discovery is likely to drive action

41%

vs. 23% of avg. gamers

Zynga Mobile Gamers **looked for more info** about the product from the ad upon seeing it while playing games

Nearly
1 in 3

31% of Zynga Mobile Gamers say they **purchased that product**

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Mobile Gamers know what they want
from in-game **ad experiences**

Willing to trade attention for rewards

- 2 in 3 like getting in-game rewards in exchange for watching an ad

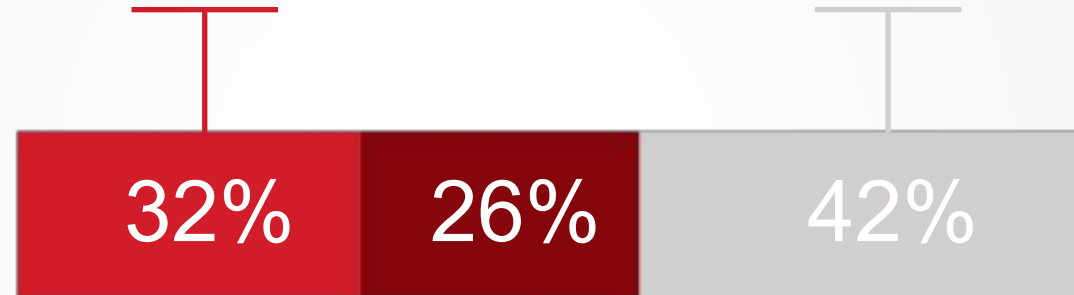


Zynga Mobile Gamers are open to a variety of ad formats, with a slight skew towards playables



Zynga Mobile Gamers prefer **Playable** ads
(i.e. ads that allow you to interact with what's being advertised on-screen)

Don't have a preference



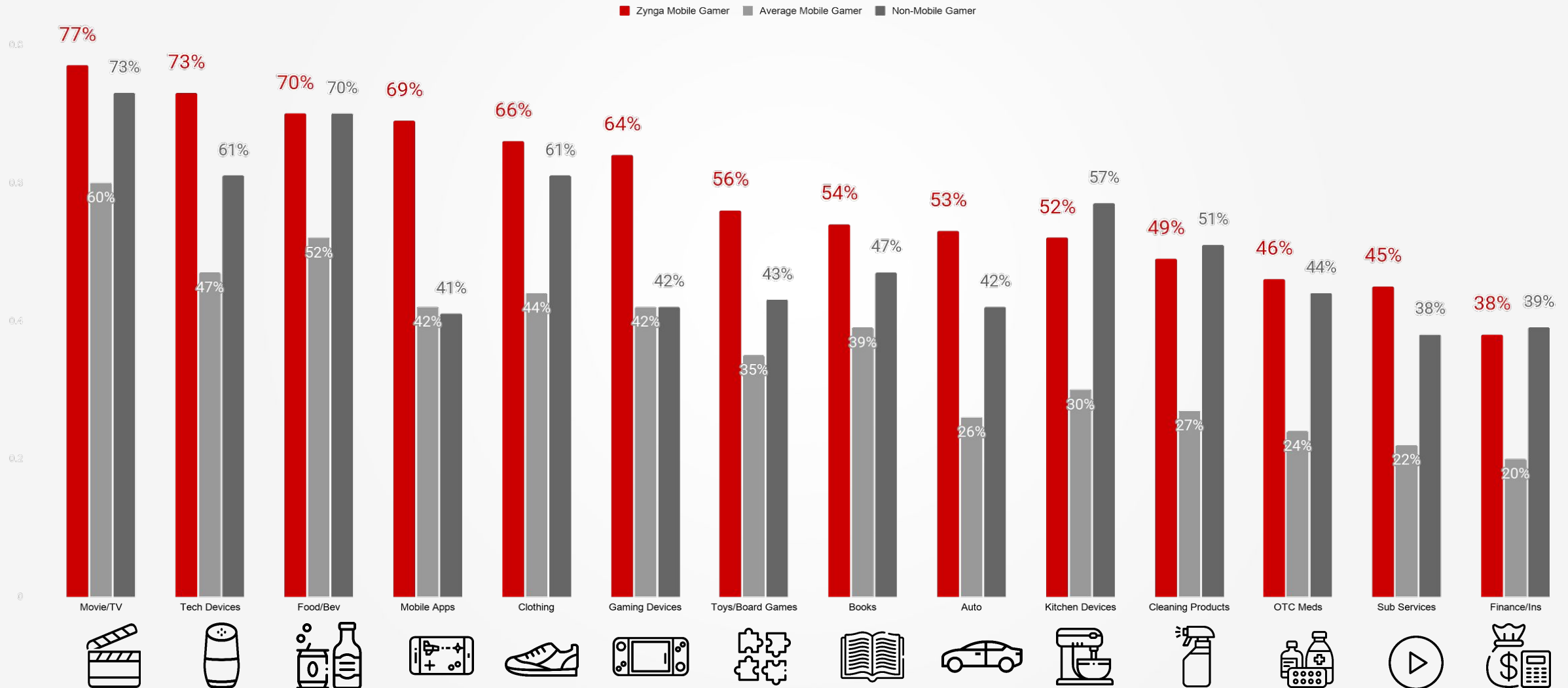
Zynga Mobile Gamers prefer **in-game video** ads
(i.e. ads that don't require my involvement)



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Mobile Gamers are a prime target for
brands

Interested in a range of products & services advertised in games



zynga[®] + YOU

**The destination where brands
connect with gamers**

Thank You

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