

Fantasy Sport Consumers:

Mobile Technology, The Economy, and Gender

Dr. Kim Beason

The University of Mississippi

662-915-5555

hpbeason@olemiss.edu

This Iteration...

- **The data provided from two 2009 FSTA sources:**
 - **Former consumer behavior study respondents** (2003-2009) completed an online survey January 2010 (n=328). For a return rate of 66%. Administered immediately after the 2009 NFL regular season concluded.
 - 2009 randomly chosen consumer behavior survey respondents (n= 1388).
- Focused on Current Economy, Mobile Technology, and the 2009 Fantasy Football Consumer.

Presentation includes

- Comparisons of level of play 2008-09.
- Investigation into mobile technology use.
- Deeper investigation into why consumers begin their fantasy sport play with focus on Gender.

Comparisons Made With...

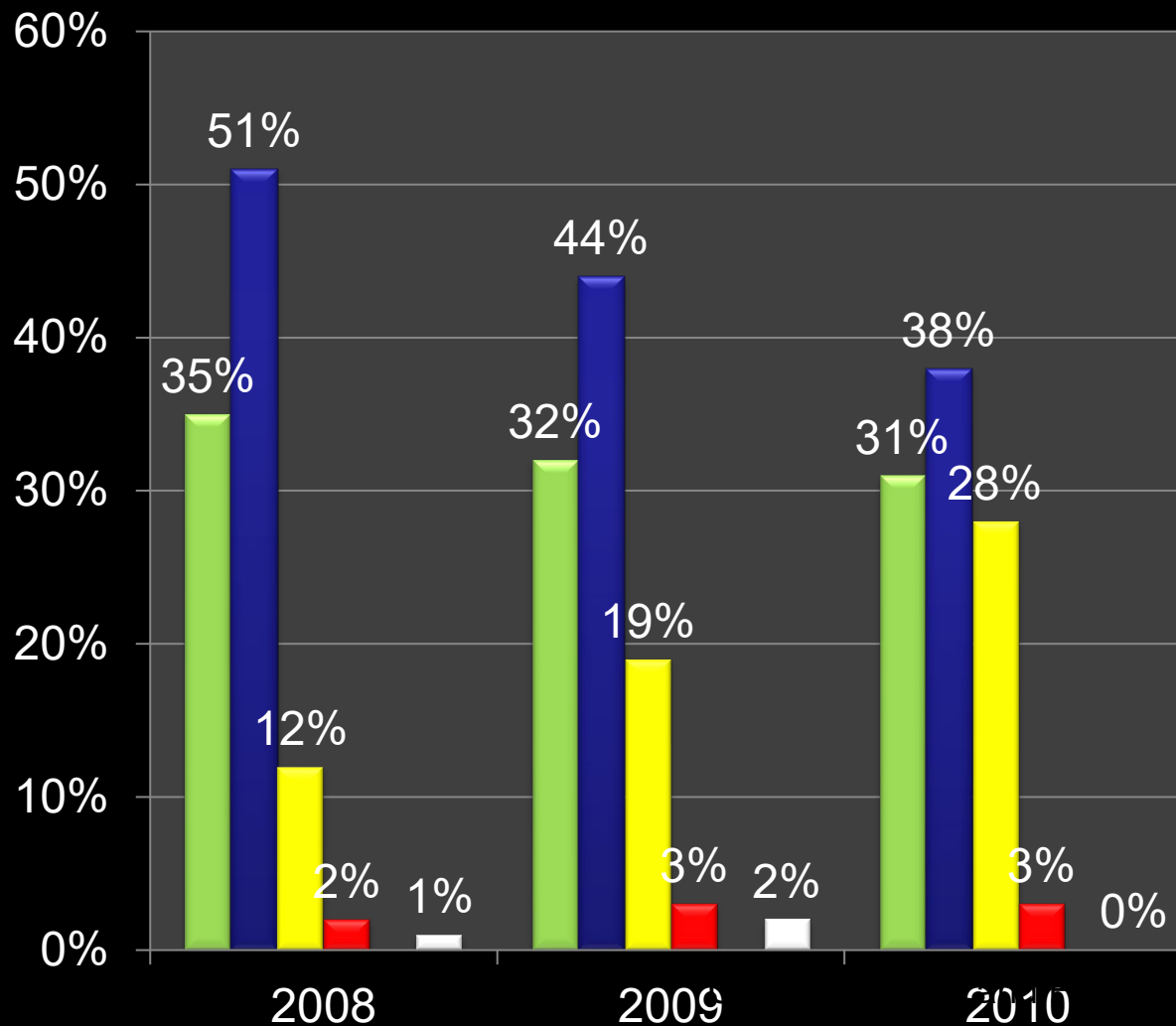
When possible the results include comparisons between the:

May 2009 Ipsos consumer responses

And

Jan 2010 FSTA consumer responses

Perceptions of Growth



Perceptions support data suggesting the market is maturing

- On fire
- Gaining Momentum
- About same as last 5 years
- Losing Steam
- Dead in the Water
- No opinion

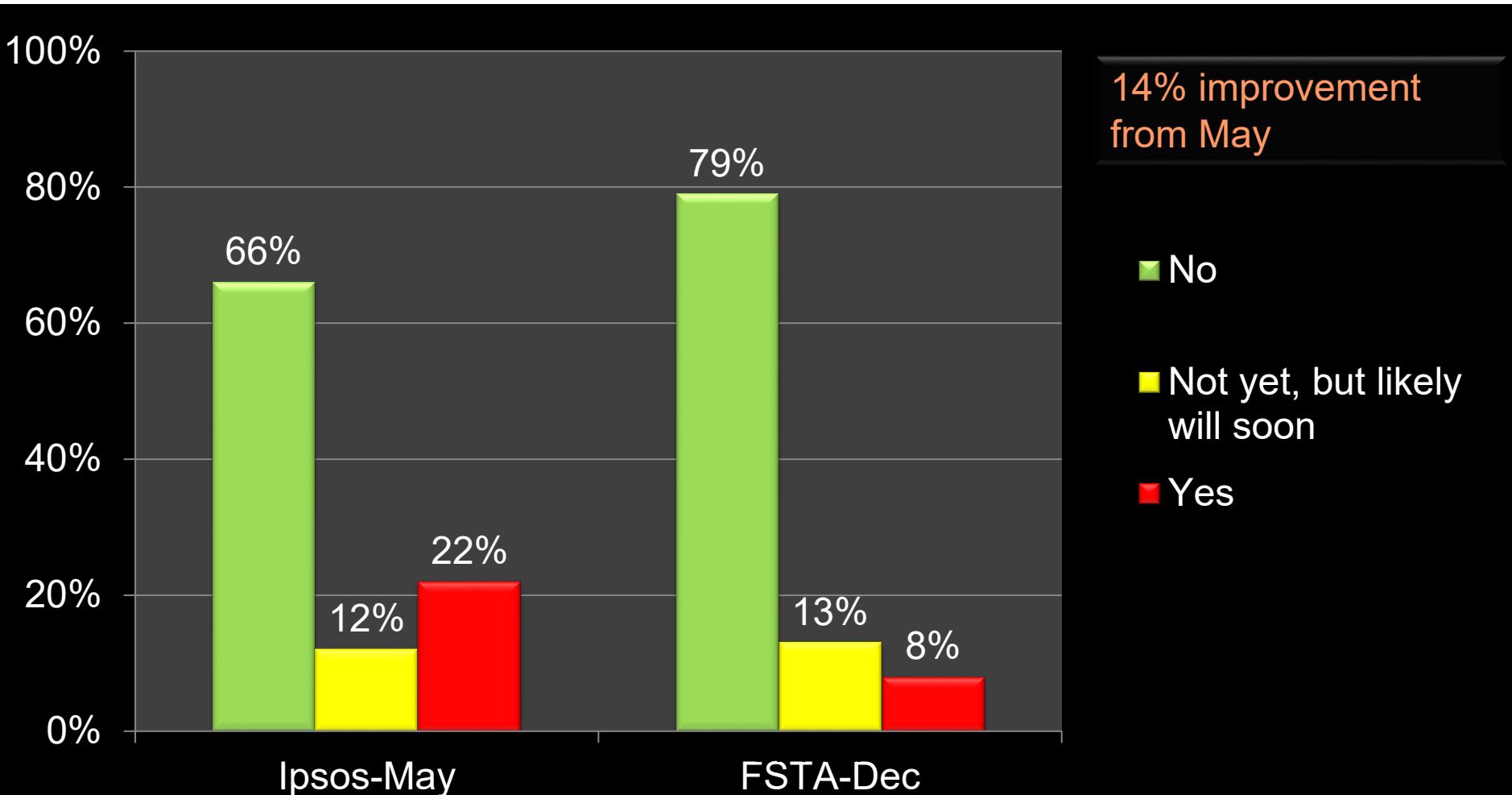
Level of Play 2008-2009

What has the Economy done to
fantasy sport consumers level of
play?

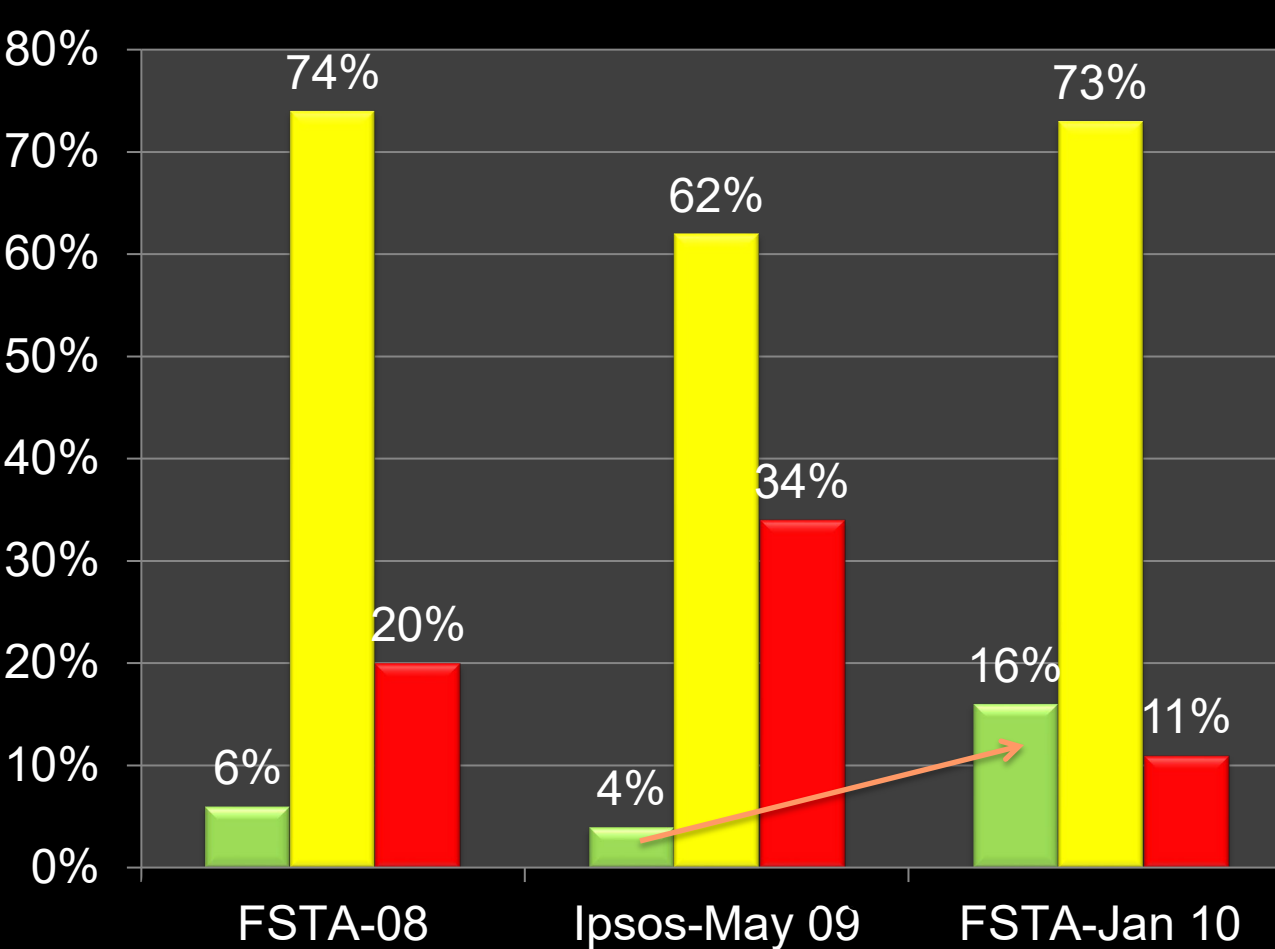
Pay -v- Free

- Research shows as Free play decreases, Pay-3-Play increases.
- For some consumers \$\$\$ more an issue than time.

Has the economy negatively impacted how much you play fantasy sports?



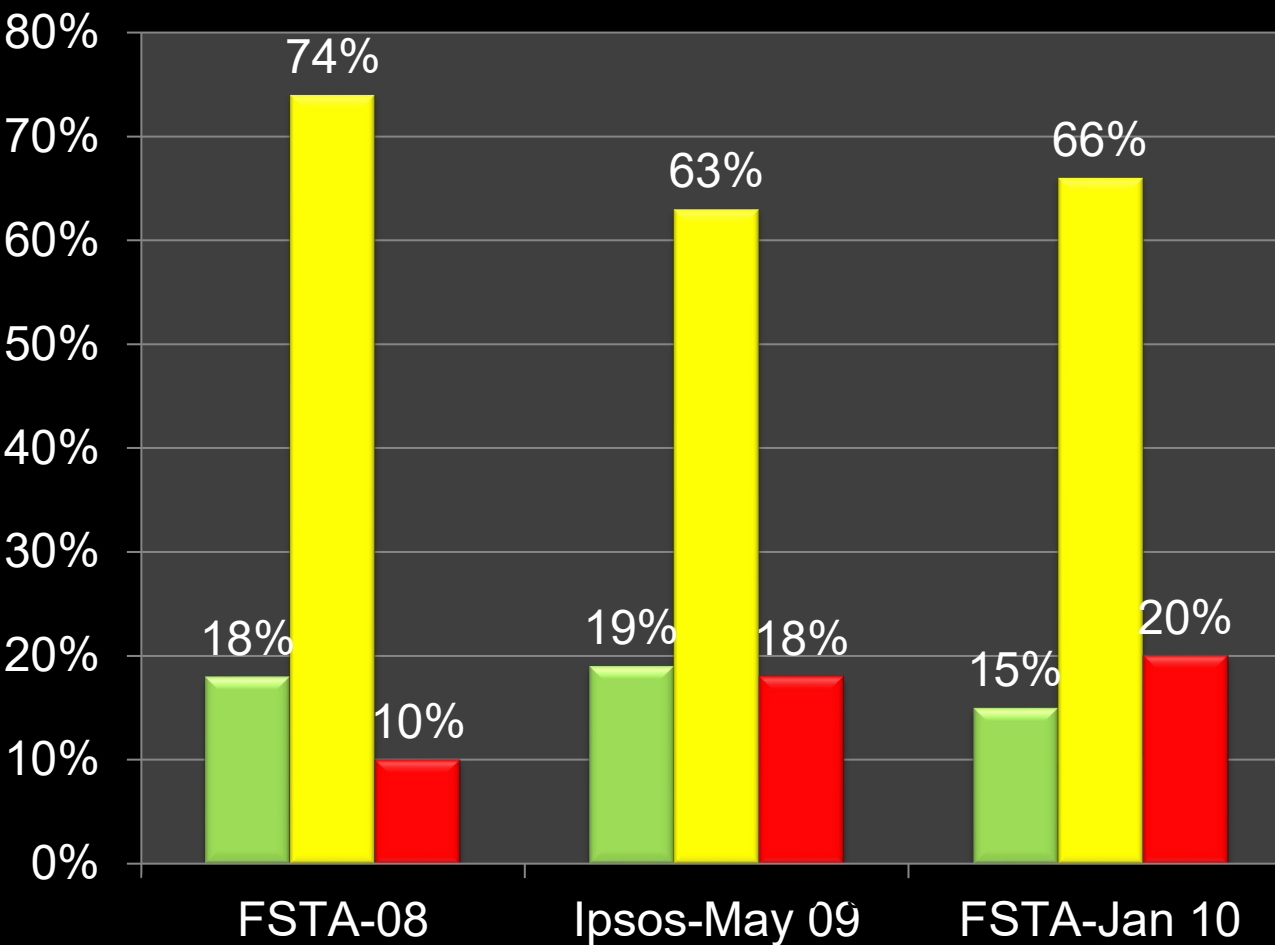
I will play/played in Pay-2-Play fantasy contests...



12% improvement from May

- More
- Same
- Less

I will play/played in FREE fantasy contests...



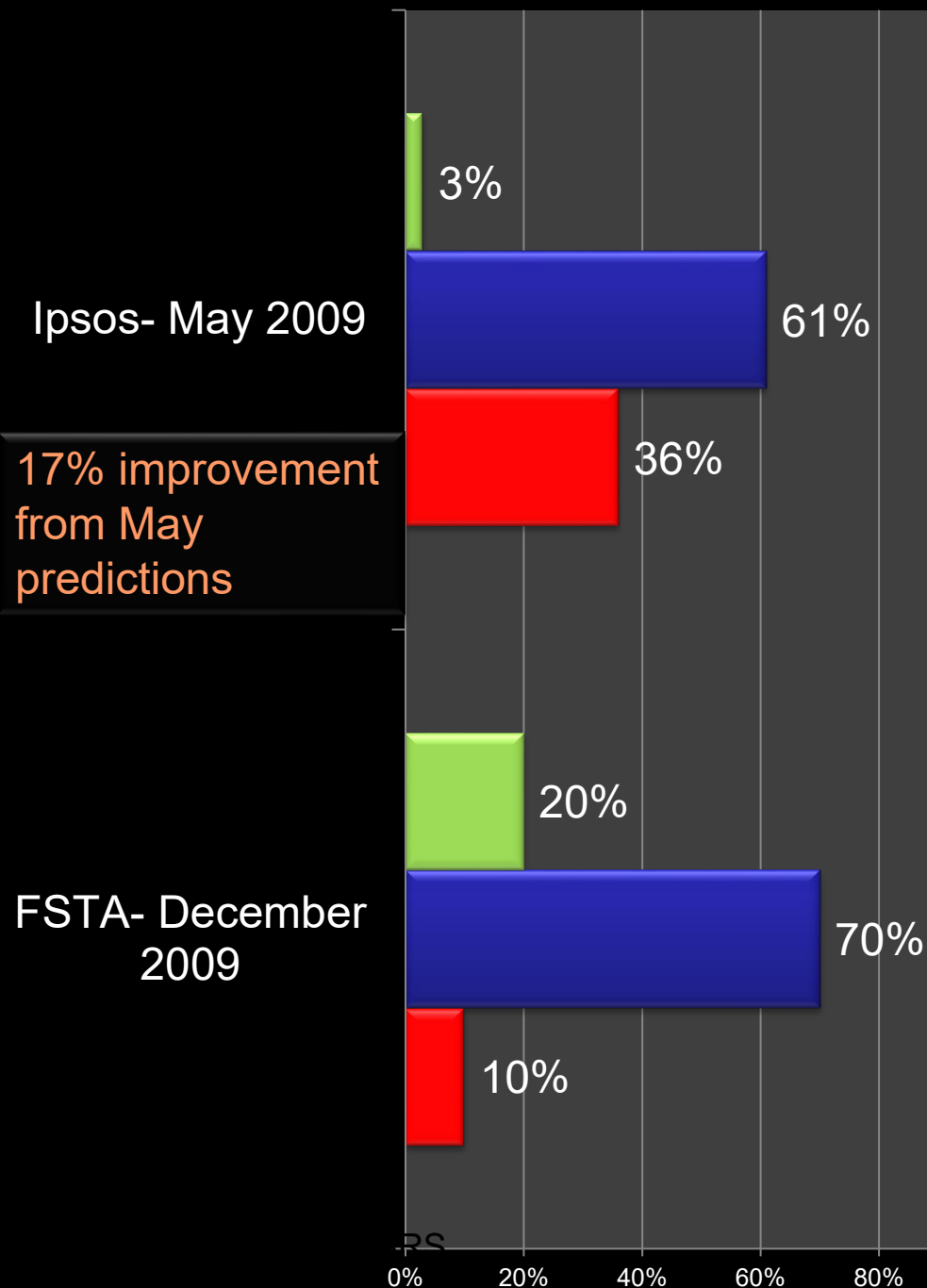
Free play goes down slightly as pay-2-play increases

- More
- Same
- Less

Entry Fee Amounts

•Ipsos numbers represent the amount consumers indicated they would Pay-2-Play; in May 2009

•FSTA numbers represent the amount that participants Paid-2-Play; in 2009





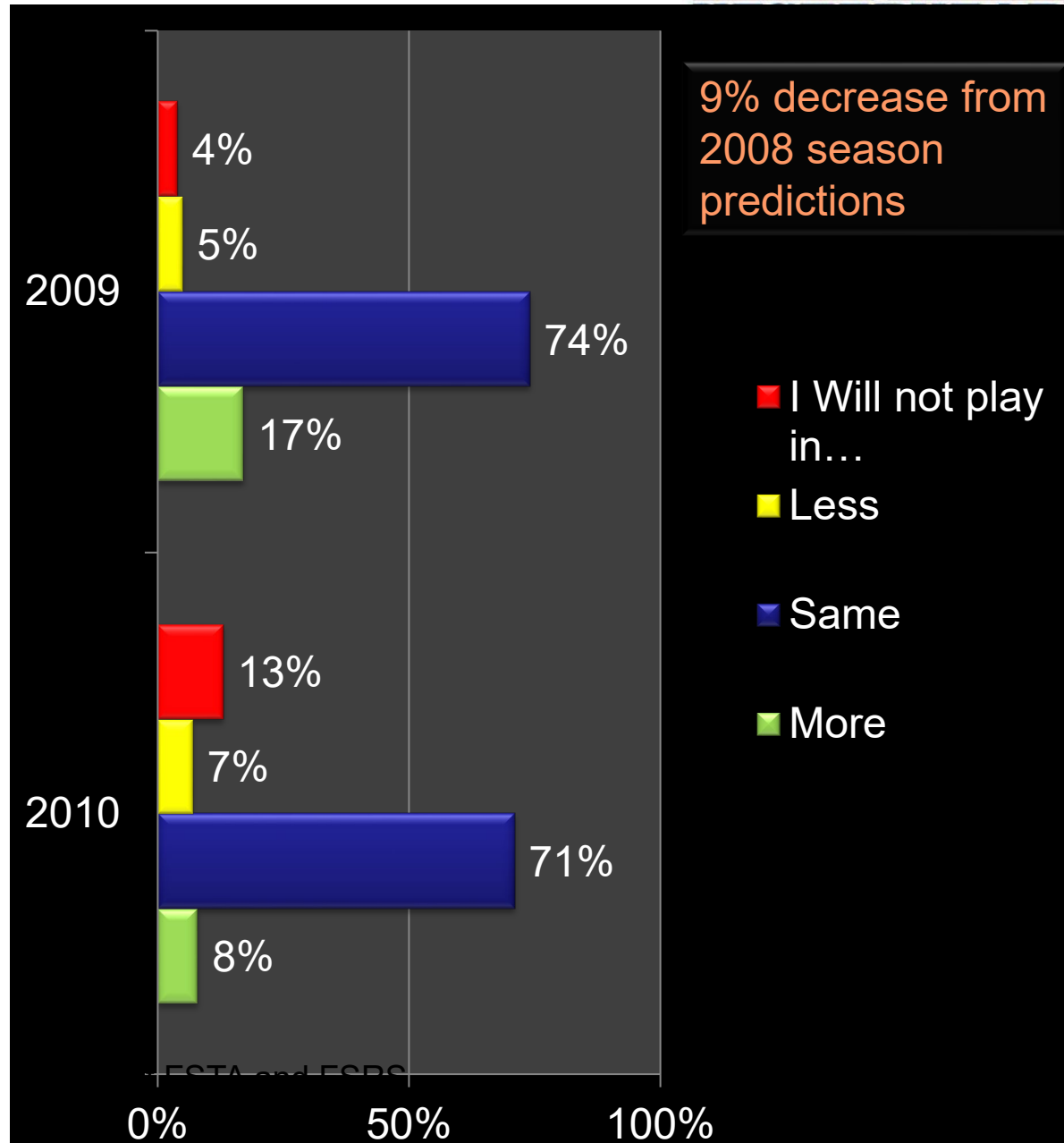
Free Contests

Fall of 2008 we asked consumers...

“Based on the prospects of the 2009 economy how will it effect your fantasy sport participation in 2009”

December, 2009 we asked...

“Based on the prospects of the 2010 economy how will it effect your fantasy sport participation in 2010”





Pay-2-Play contests

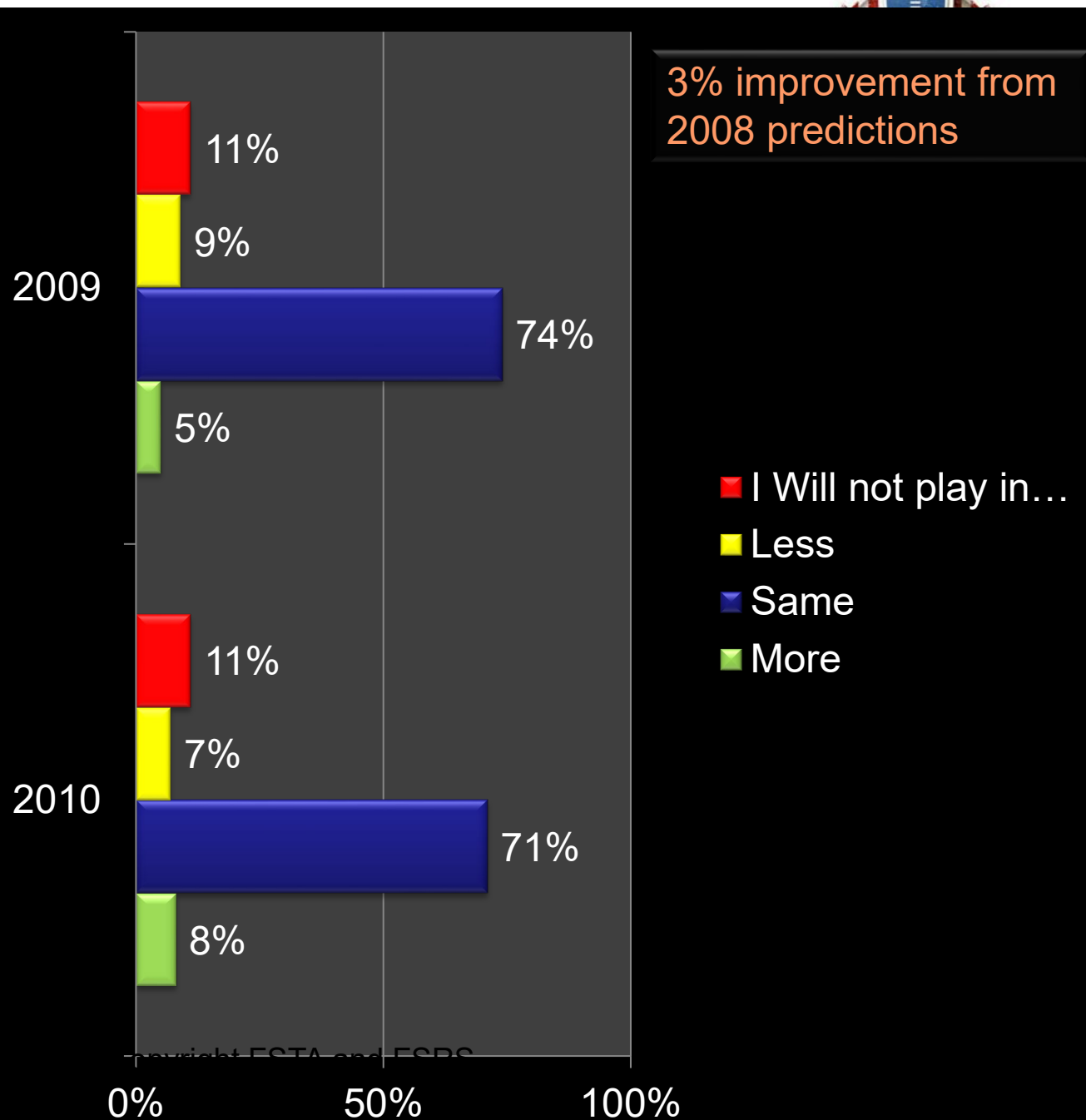
**The Fall of 2008 we asked
consumers...**

“Based on the prospects of
the 2009 economy how will
it effect your fantasy sport
participation in 2009”

**In December, 2009 we
asked...**

“Based on the prospects of
the 2010 economy how will
it effect your fantasy sport
participation in 2010”

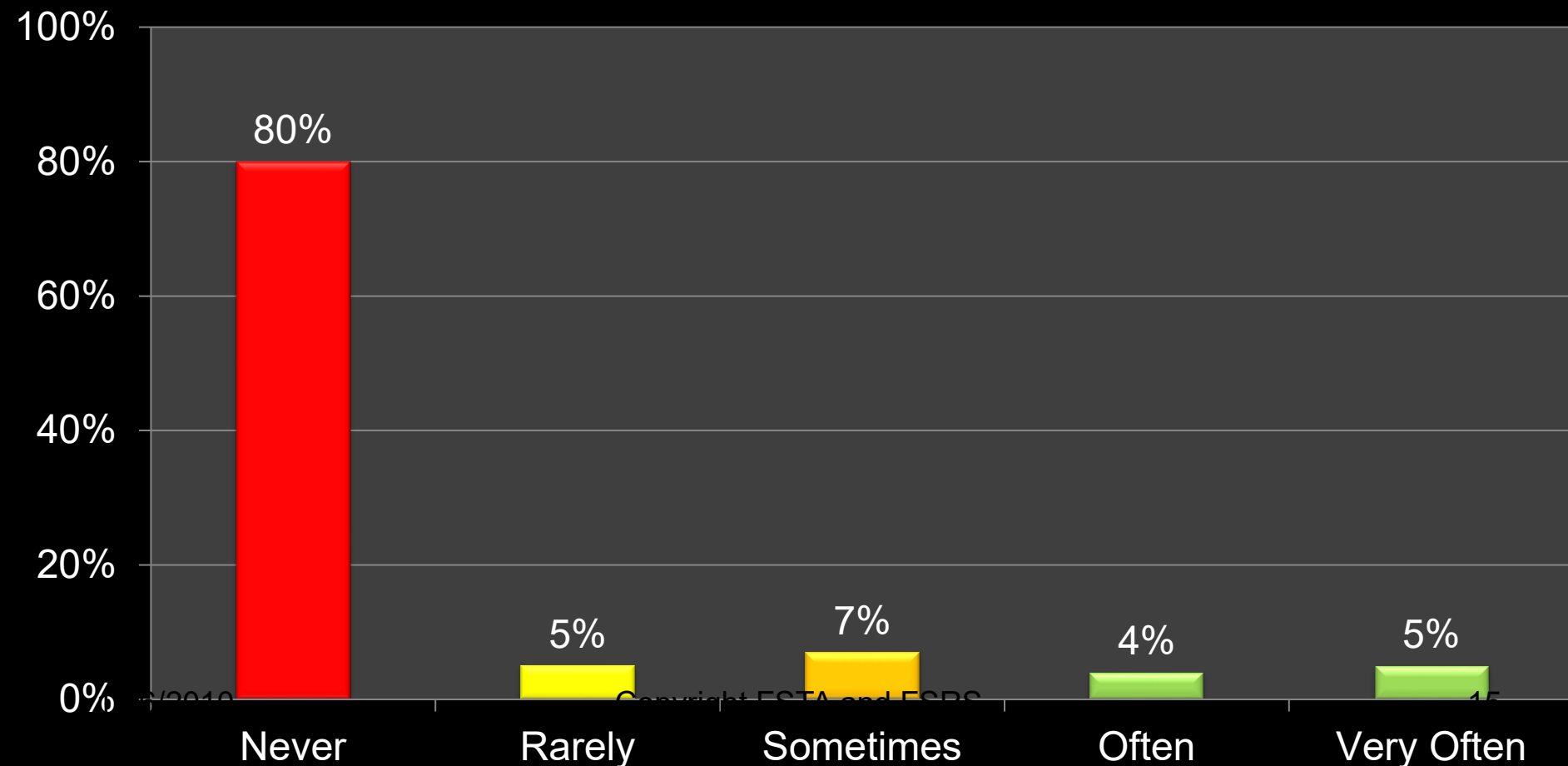
1/26/2010



Mobile Technology

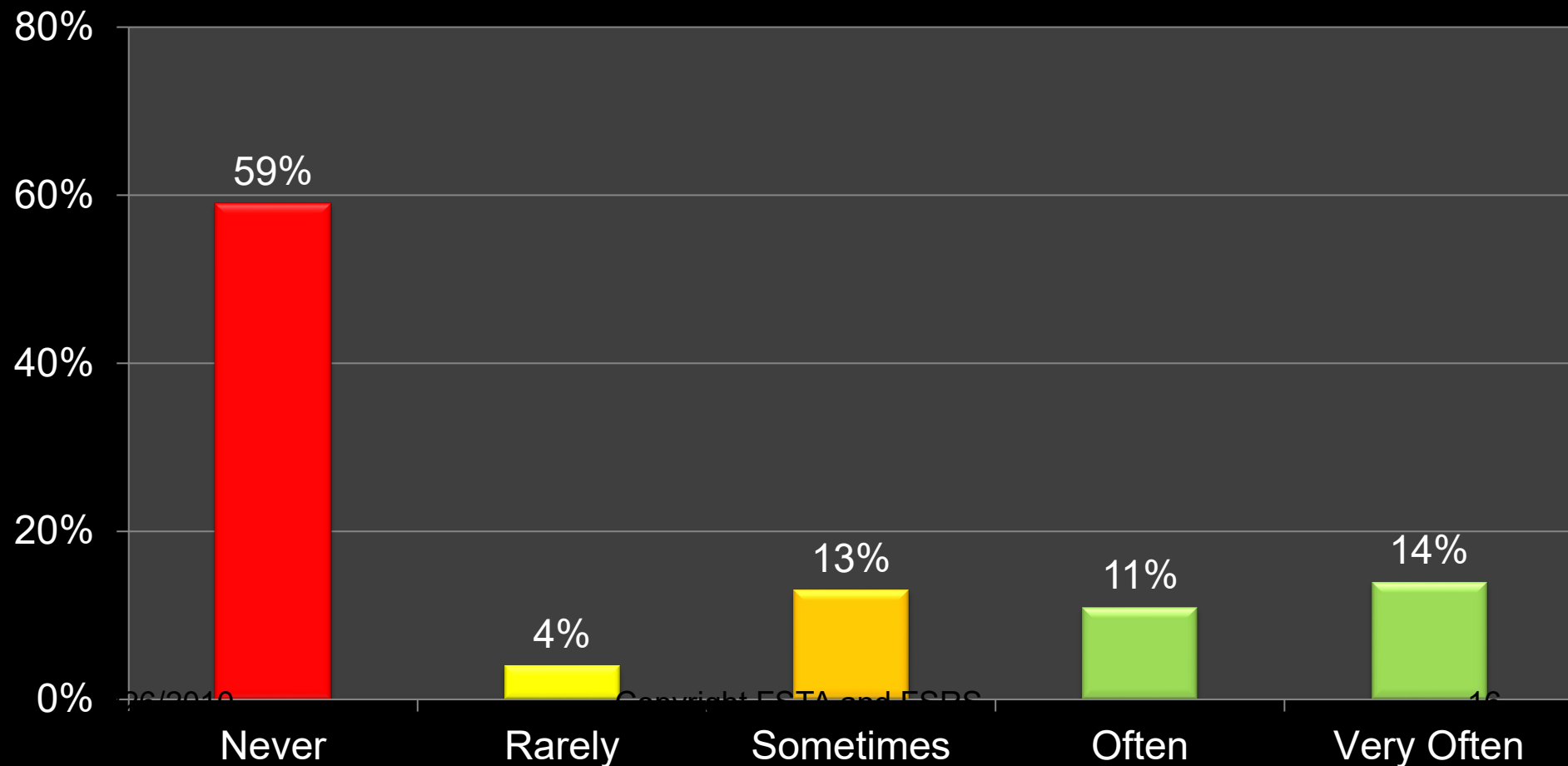
Mobile Technology

I used a device/app to access cheat sheet/rankings to help with my draft/auction



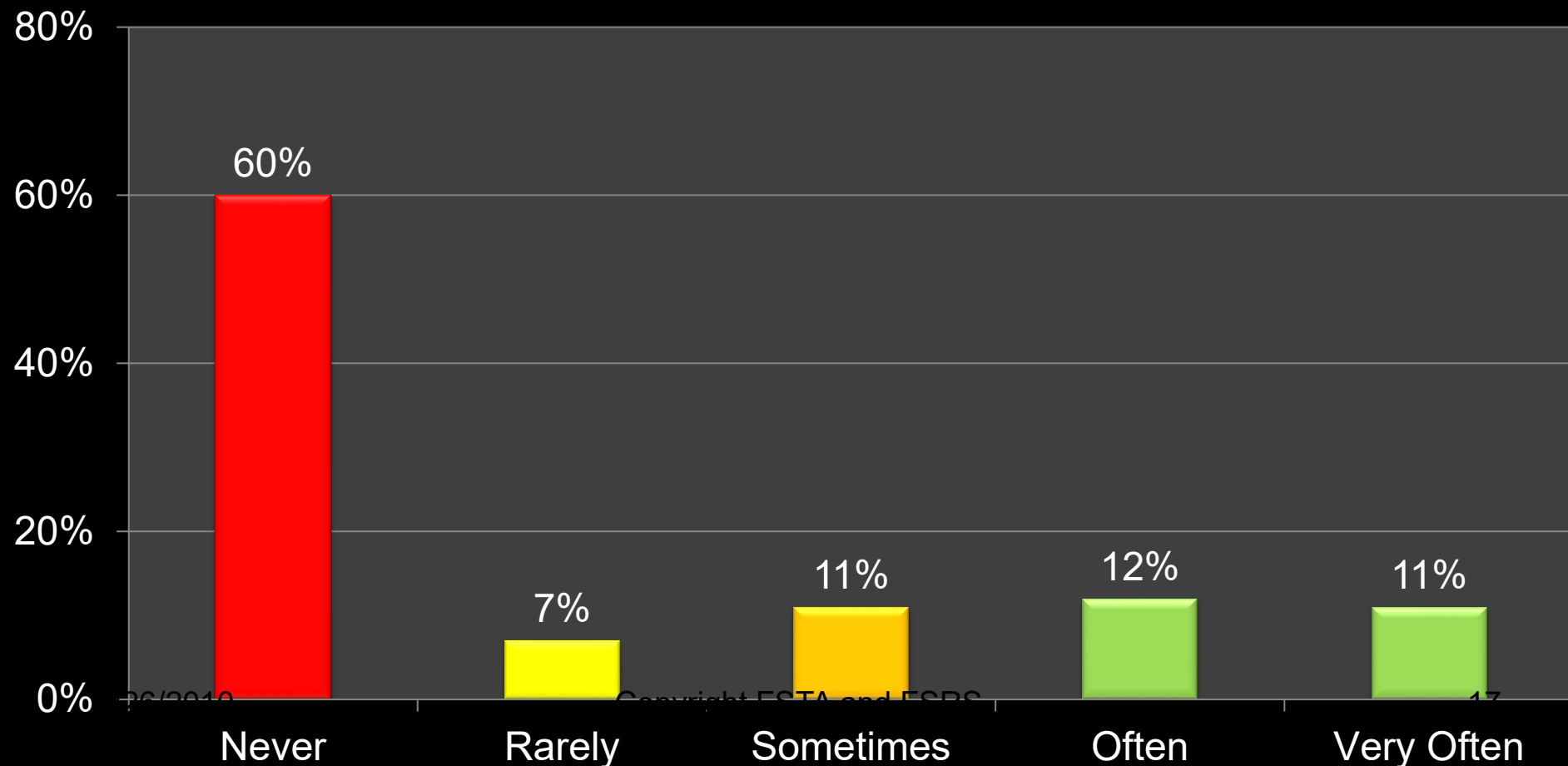
Mobile Technology

**I used the device/app to access real time fantasy game
or player stats**



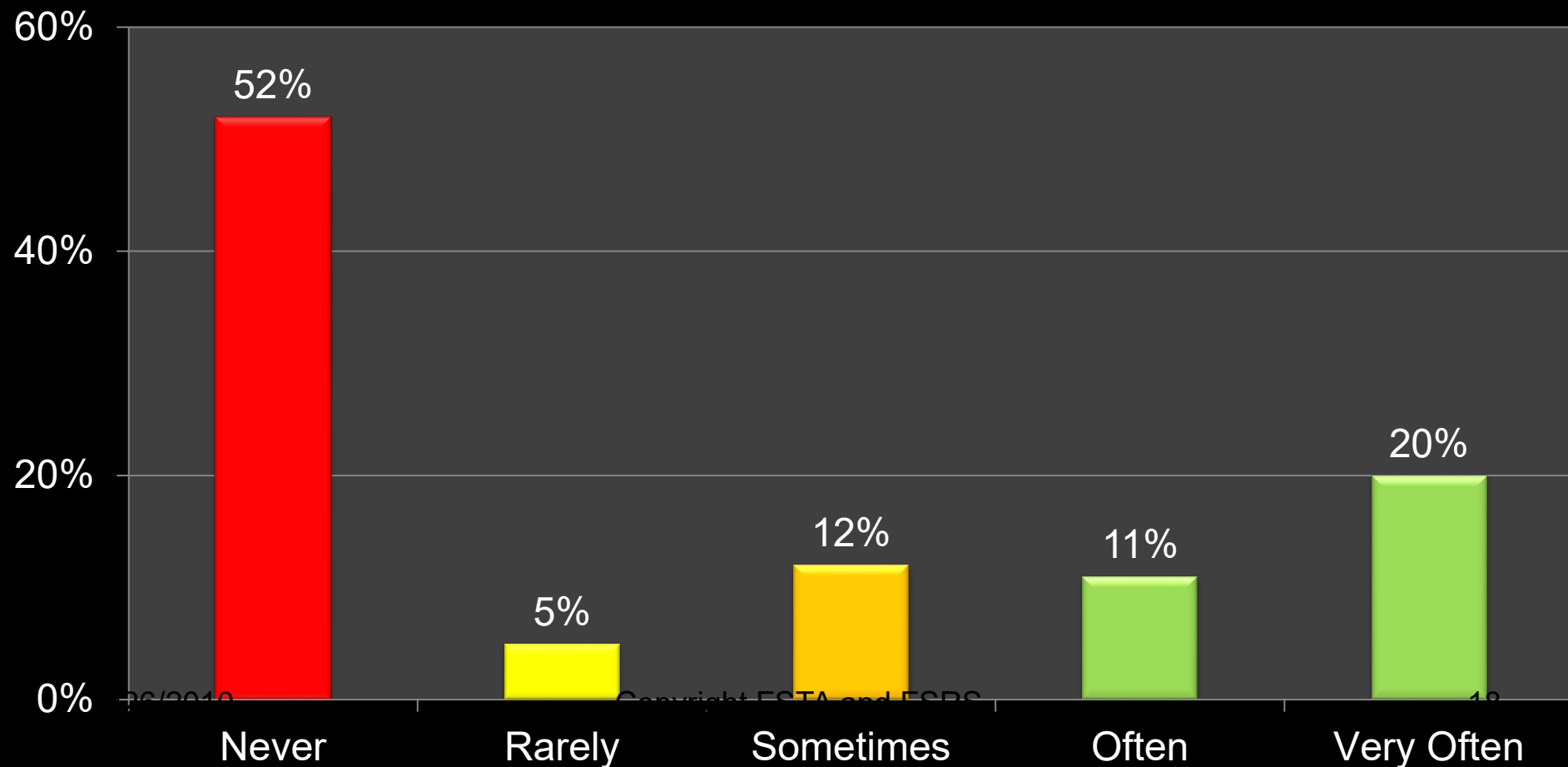
Mobile Technology

I used the device/app to get player news/information/injury reports



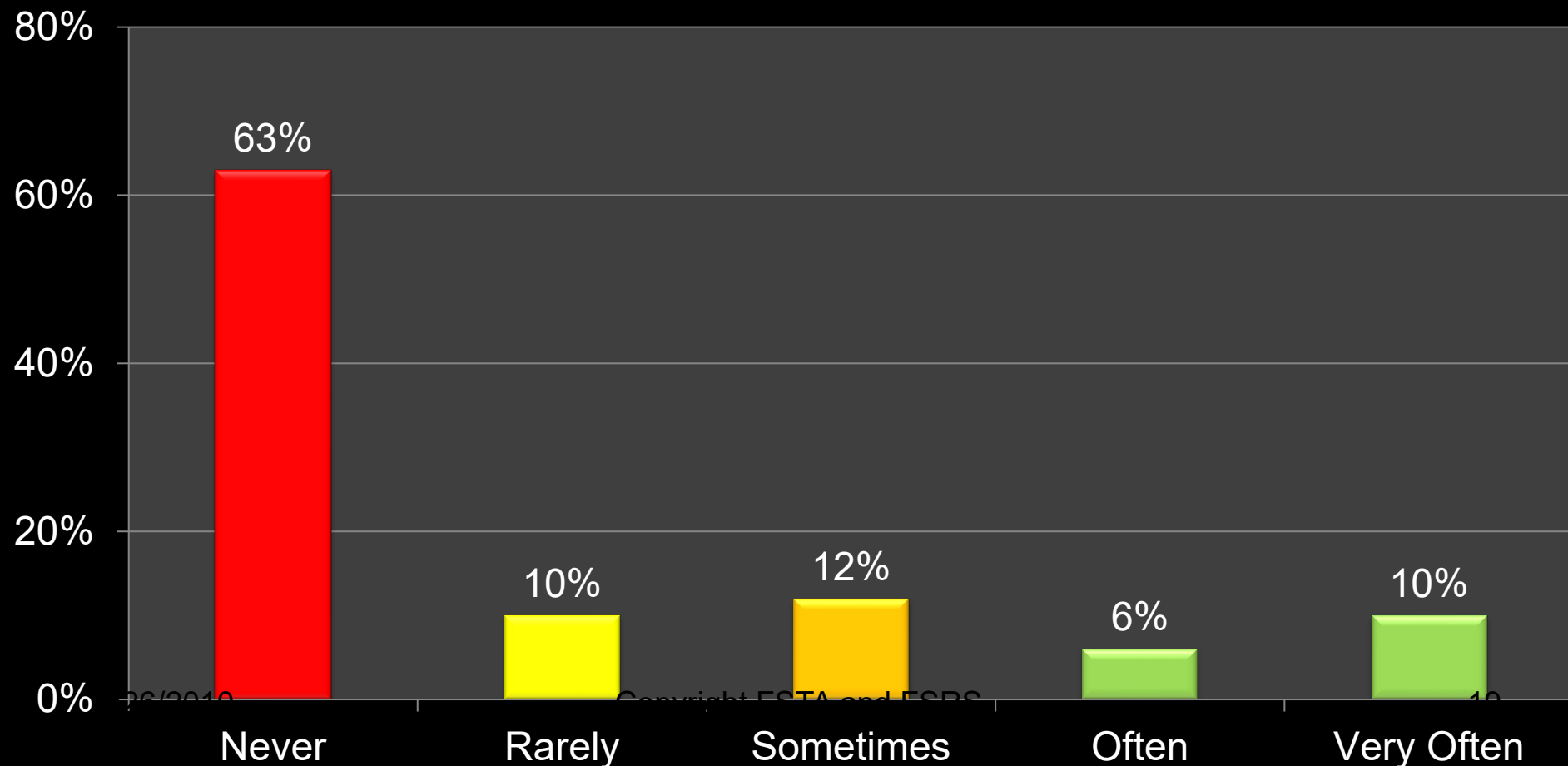
Mobile Technology

I used the device/app to get scores of actual MLB, NHL, NBA, MLB (etc.) games



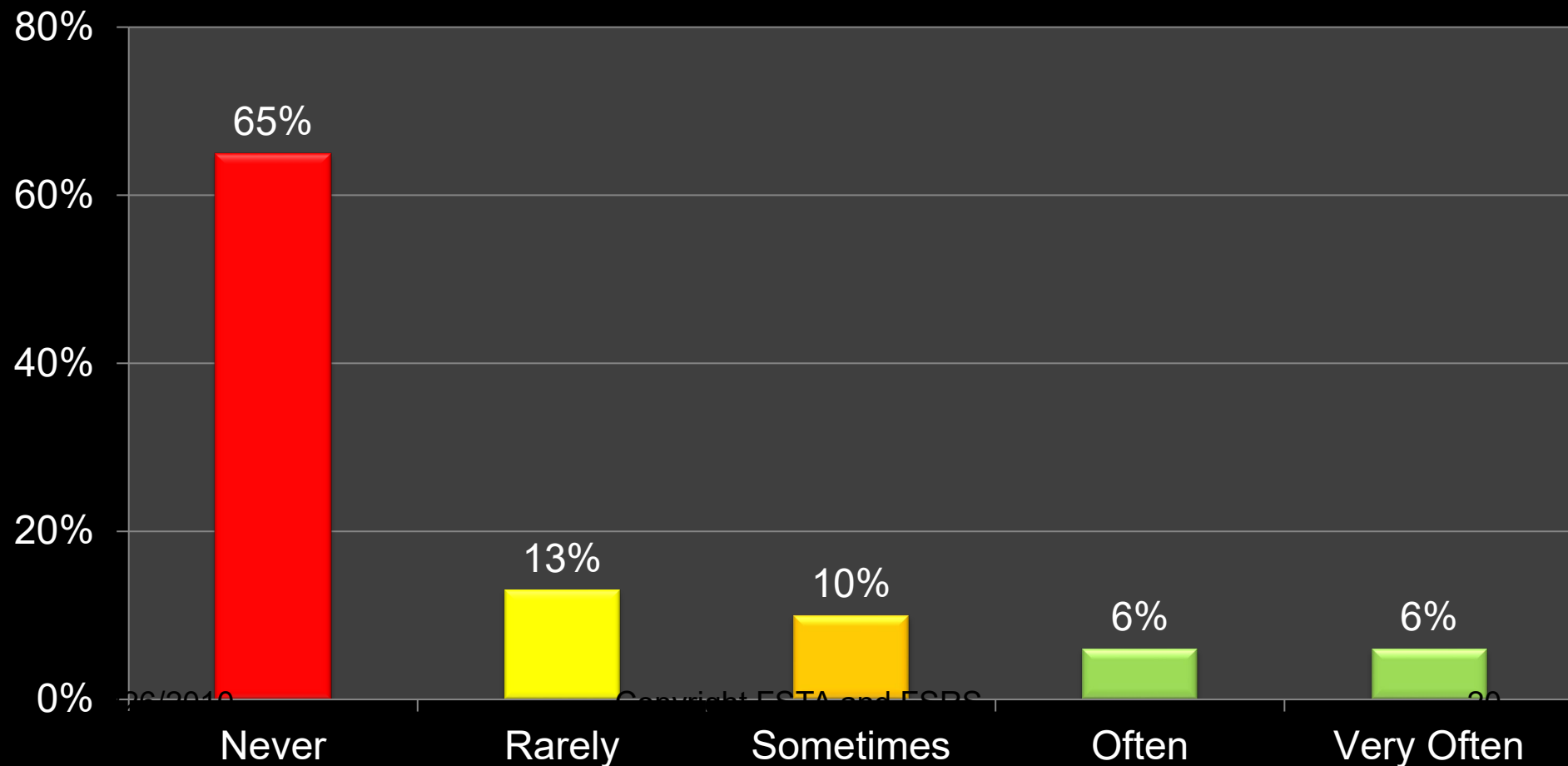
Mobile Technology

I used the device/app to change my fantasy team's lineup/make trades/conduct transactions



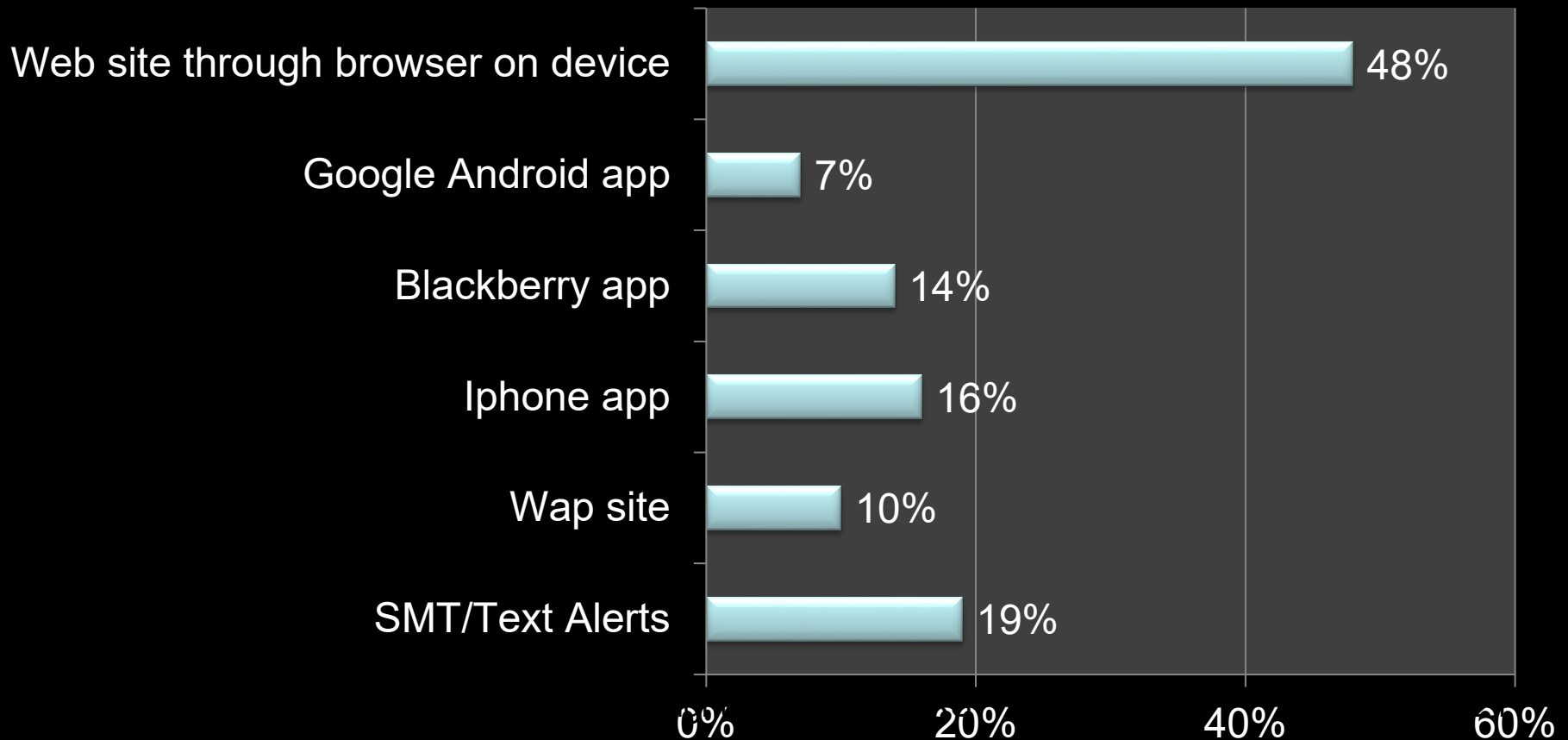
Mobile Technology

I used the device/app to send messages/smack talk to other members of my fantasy league/game



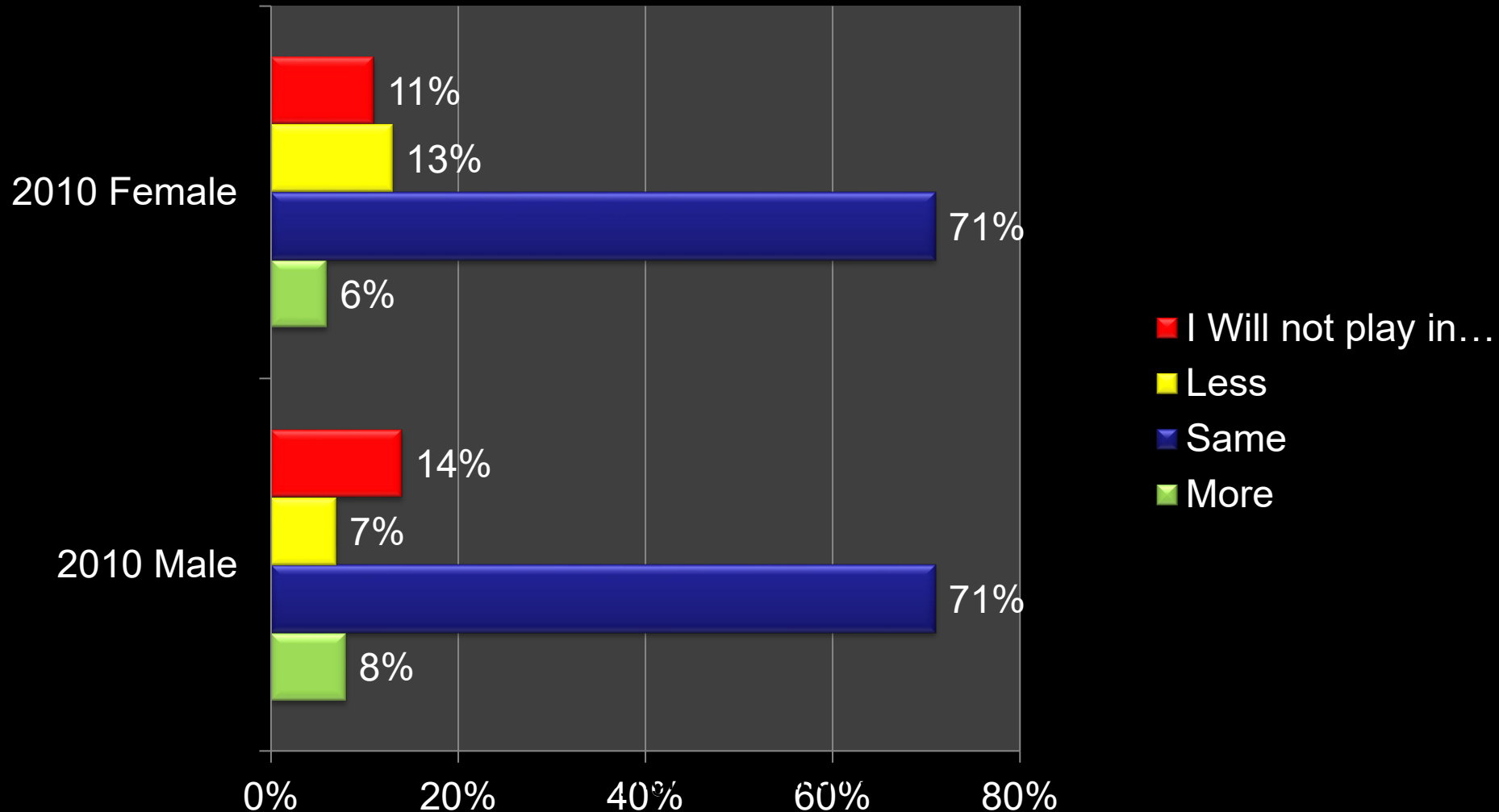
if you're accessing fantasy sports information via your handheld device, what method are you using?

I access using:

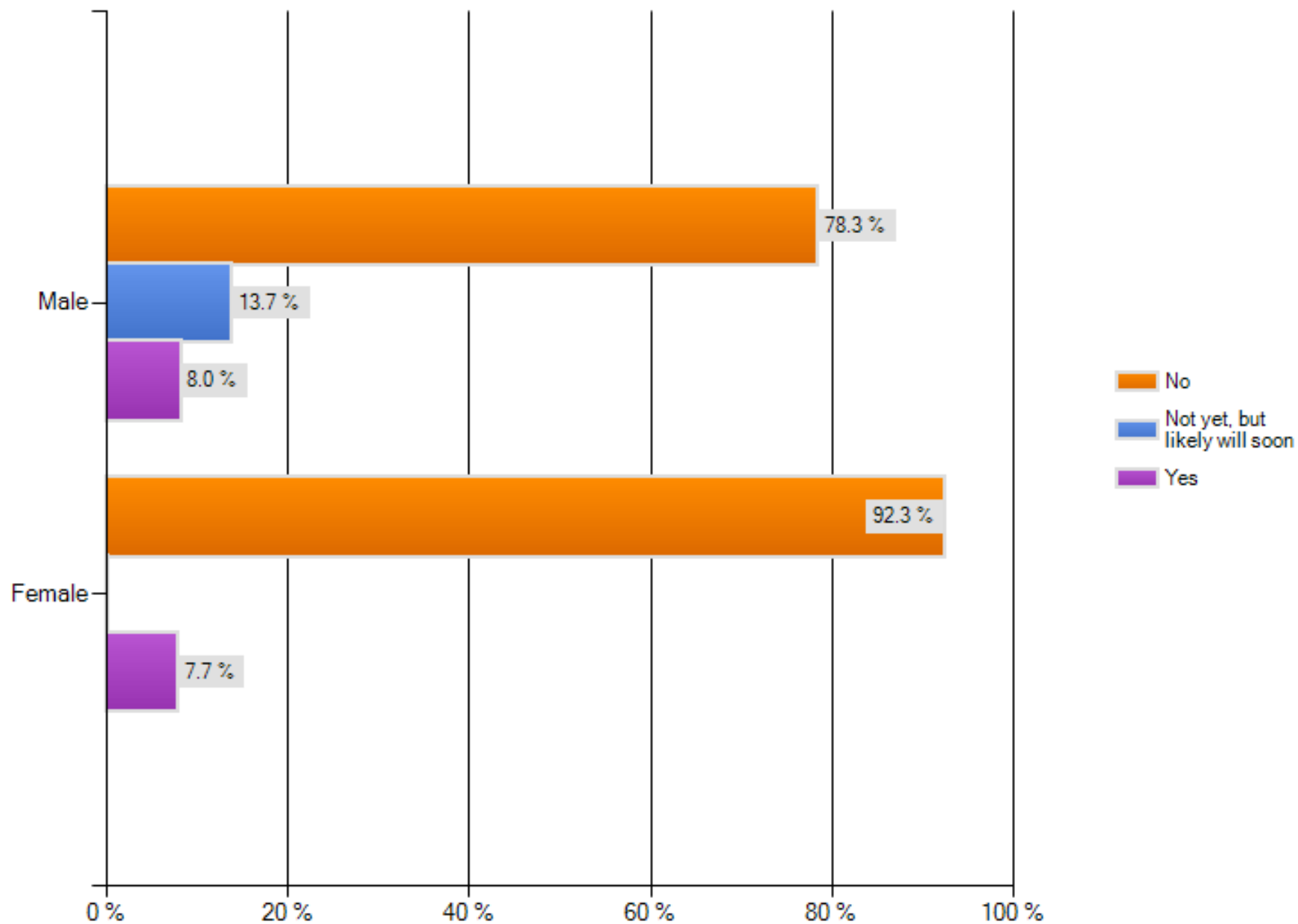


Gender Crosstabs

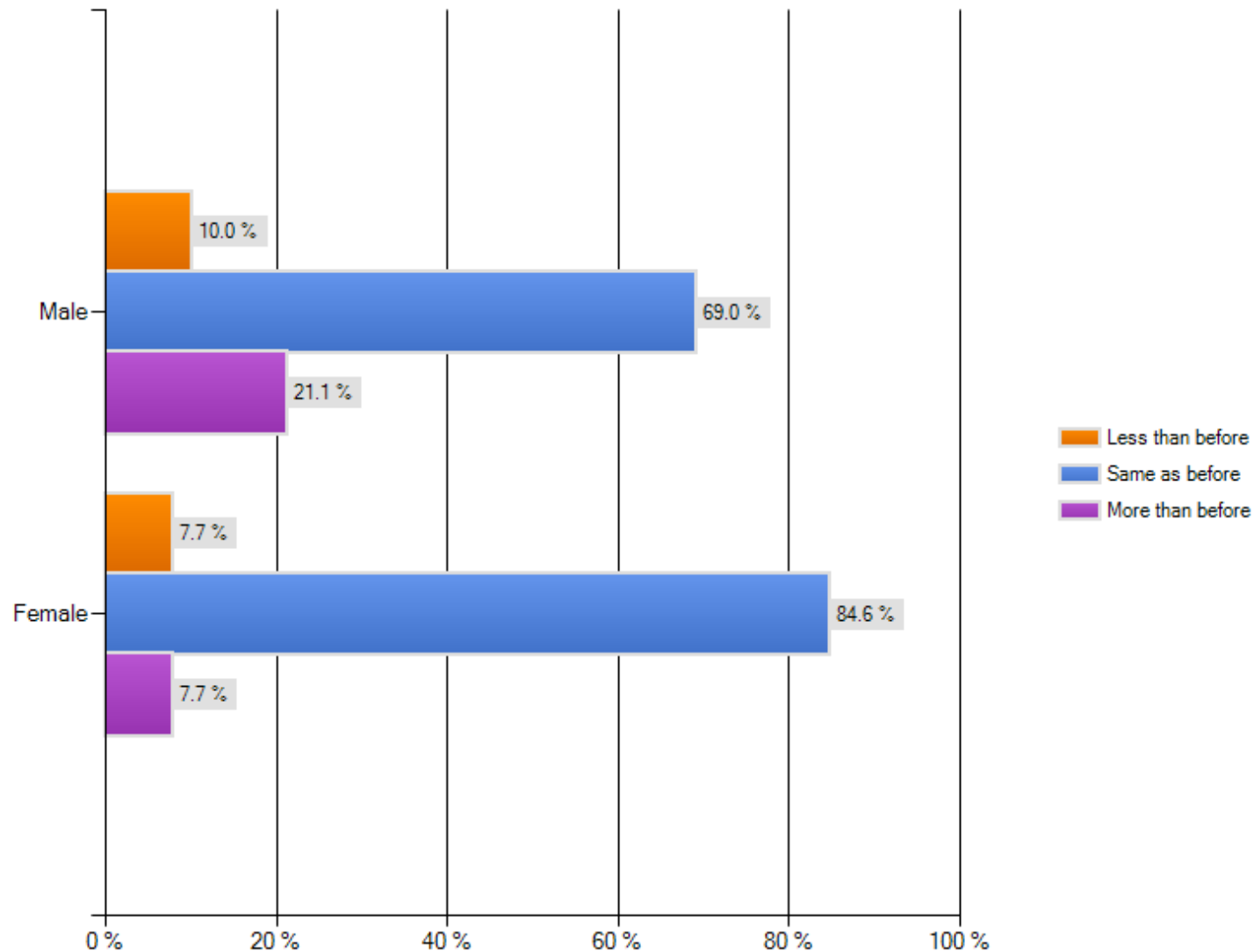
In 2010 I will Pay-2-Play...



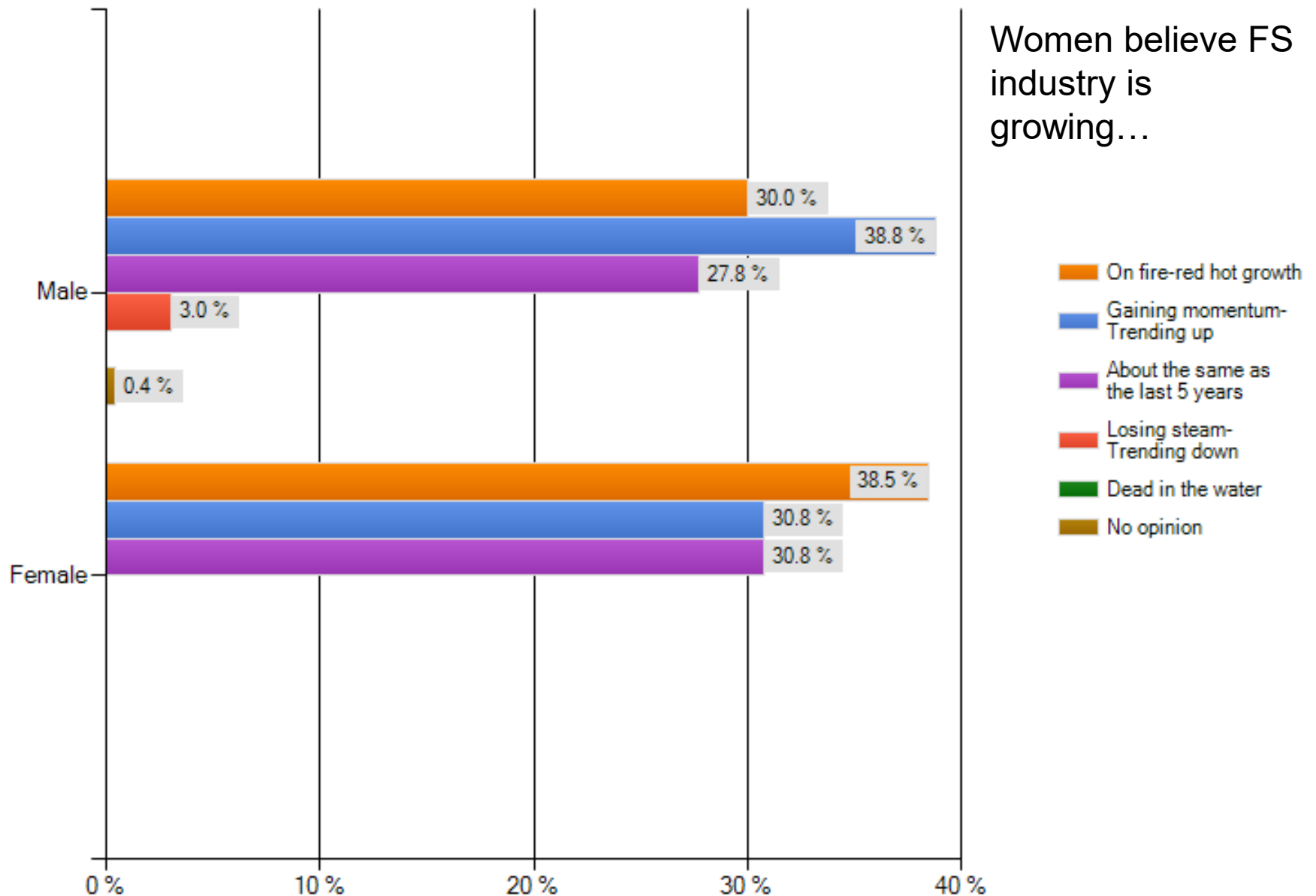
Has the economy impacted the amount you play Fantasy Sports?



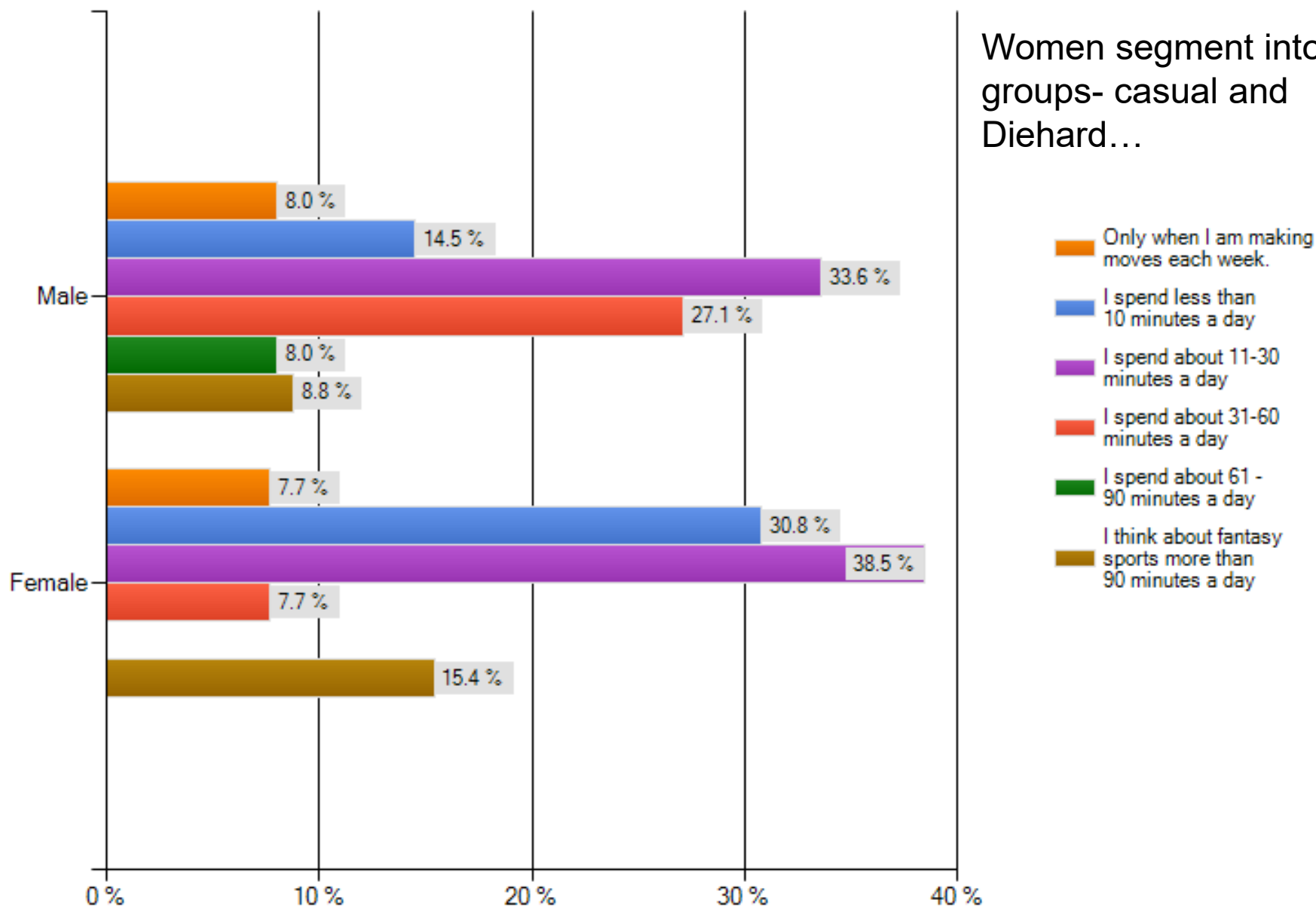
The entry fee amounts I paid in 2009 to play were...



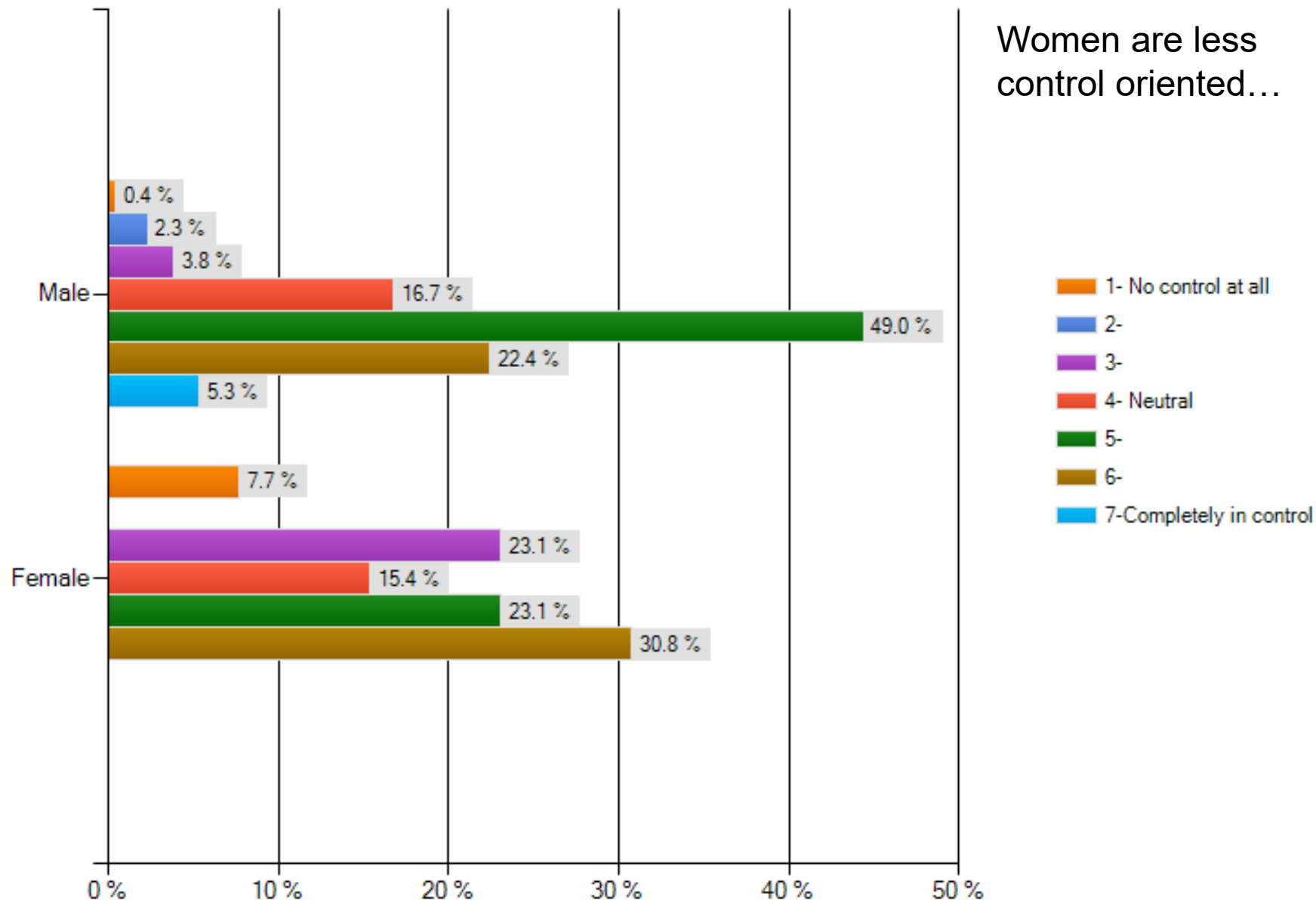
What is your opinion on the growth status of the fantasy sport industry?



Please estimate during a TYPICAL DAY do you think about fantasy sports (other than time directly working/managing your teams)?



How much control do you have over your fantasy team's win/loss record? (1=No control at all, 7=Completely in control)



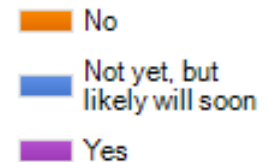
Income Crosstabs

Has the economy impacted the amount you play Fantasy Sports?



Time and Money...

•Blue collar and Retirees more affected



Income

		-Pay-2-Play fantasy sport contests				-Free-only fantasy sport contests			
		will not play next year	will play fewer	will play the same	will play more	will not play next year	will play fewer	will play the same	will play more
	rather not disclose	11.8%	12.9%	9.3%	5.9%	18.2%	10.5%	6.5%	21.7%
	less than 24,999	5.9%	.0%	1.6%	.0%	.0%	5.3%	1.1%	8.7%
	25,000-34,999	11.8%	3.2%	2.2%	5.9%	.0%	5.3%	4.3%	4.3%
	35,000-49,999	14.7%	6.5%	4.4%	5.9%	3.0%	.0%	6.5%	13.0%
	50,000-74,999	14.7%	6.5%	17.0%	17.6%	6.1%	15.8%	18.3%	8.7%
	75K- 99,999	11.8%	22.6%	16.5%	.0%	15.2%	21.1%	16.1%	13.0%
	100K-149,999	5.9%	22.6%	24.7%	23.5%	18.2%	26.3%	24.7%	8.7%
	150K-249,999	5.9%	9.7%	12.1%	11.8%	24.2%	.0%	9.1%	8.7%
	250K or more	2.9%	.0%	4.9%	5.9%	3.0%	5.3%	3.8%	.0%

Income does have an impact on pay-2-play for under

Job Classification

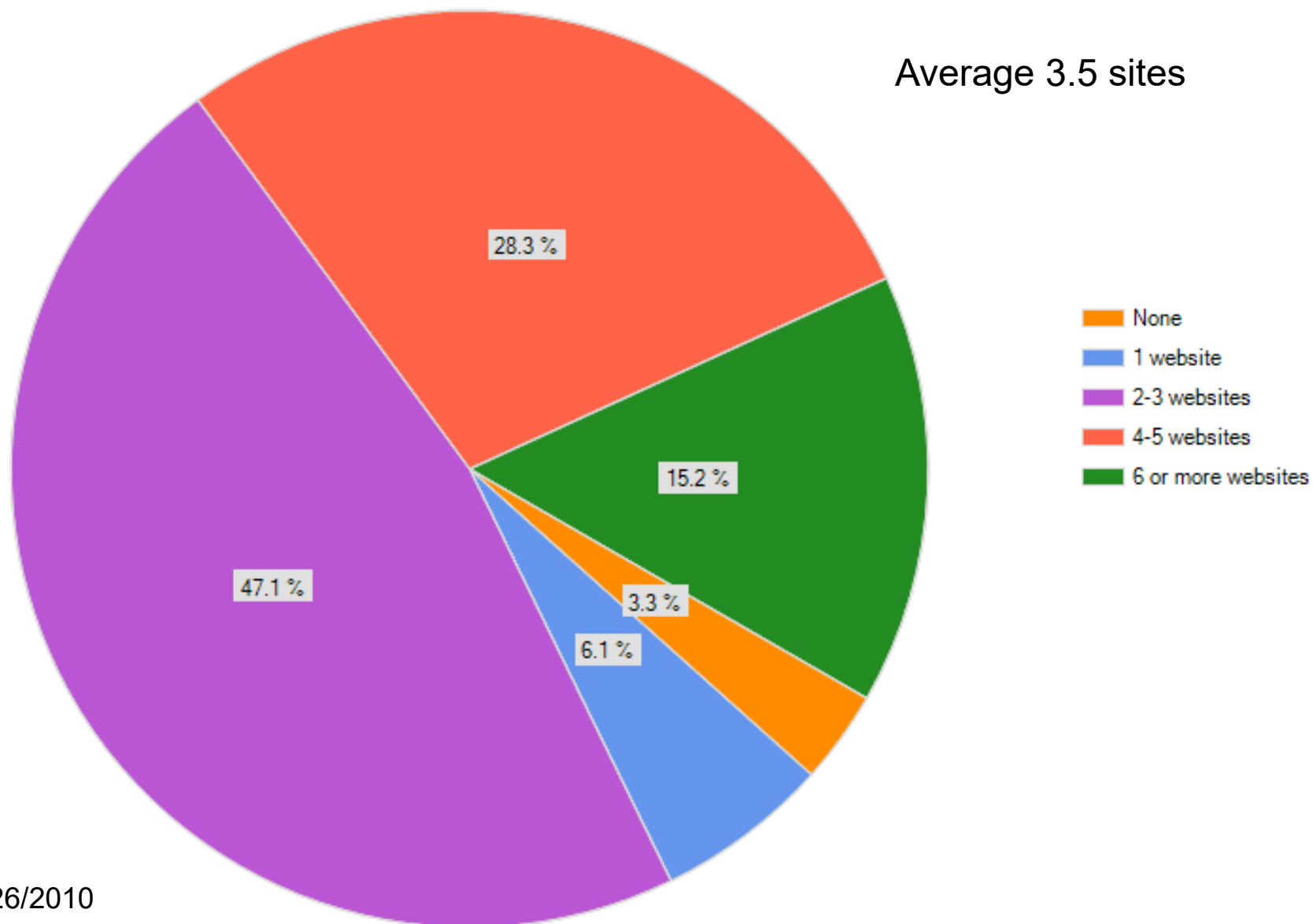
	-Pay-2-Play fantasy sport contests				-Free-only fantasy sport contests			
	will not play next year	will play fewer	will play the same	will play more	will not play next year	will play fewer	will play the same	will play more
Higher managerial, administrative or professional	17.6%	22.6%	23.6%	23.5%	33.3%	21.1%	21.5%	13.0%
Intermediate managerial, administrative or professional	23.5%	35.5%	34.1%	11.8%	24.2%	26.3%	31.7%	39.1%
Supervisory or clerical, junior managerial, administrative or professional	23.5%	9.7%	13.2%	5.9%	12.1%	21.1%	15.1%	4.3%
Skilled manual workers	2.9%	12.9%	8.2%	11.8%	.0%	21.1%	8.6%	8.7%
Semi and unskilled manual workers	.0%	6.5%	1.1%	5.9%	3.0%	.0%	1.6%	.0%
Currently unemployed	.0%	6.5%	4.9%	5.9%	6.1%	.0%	4.3%	8.7%
Retired	17.6%	3.2%	8.2%	11.8%	15.2%	5.3%	8.1%	17.4%

2009 Fantasy Football

Hot off the Research Wires

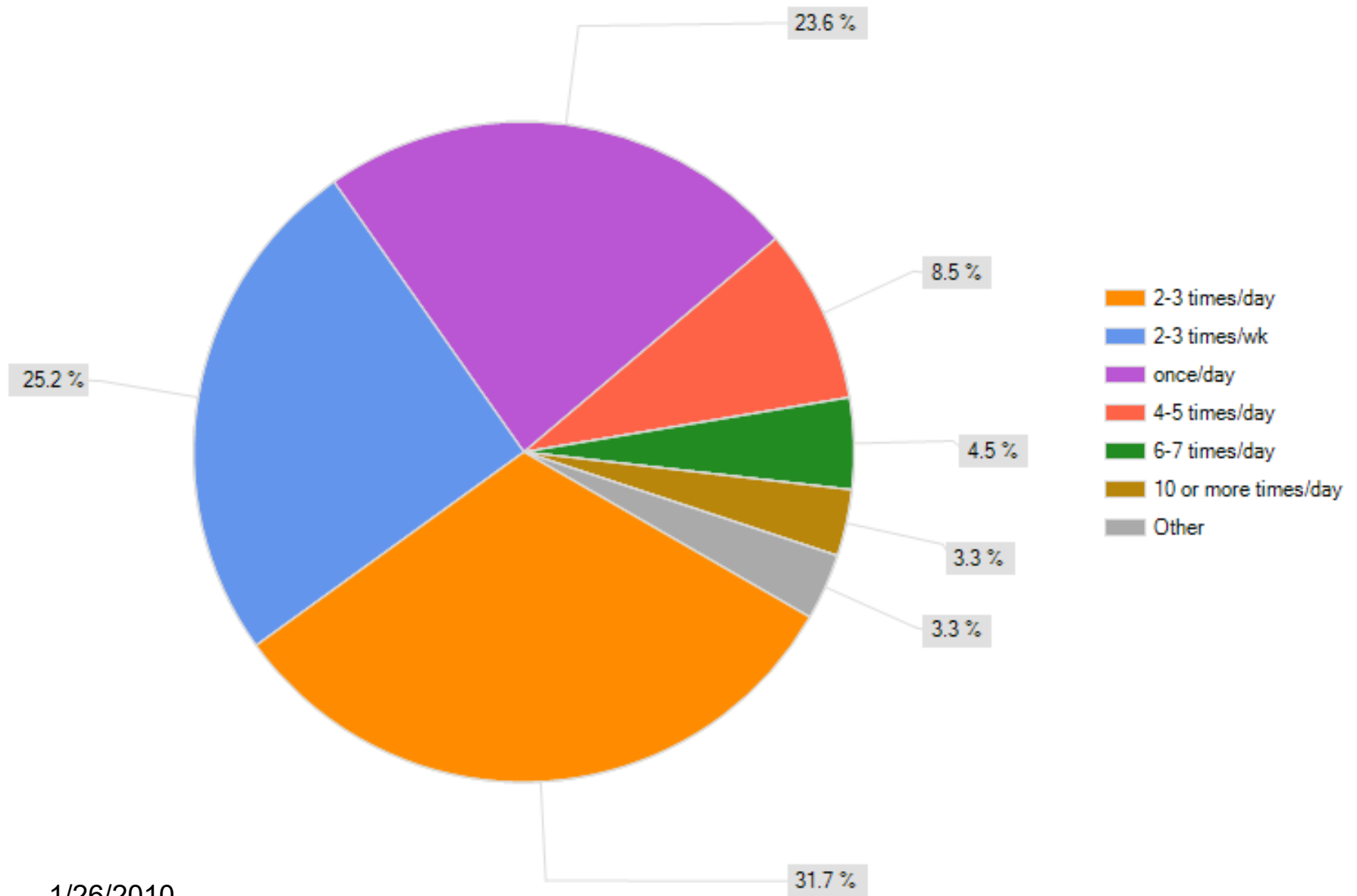
On average, how many “sports news websites” (e.g., SI.com, espn.com, etc.) did you visit to obtain relevant information for your fantasy football league?

Average 3.5 sites



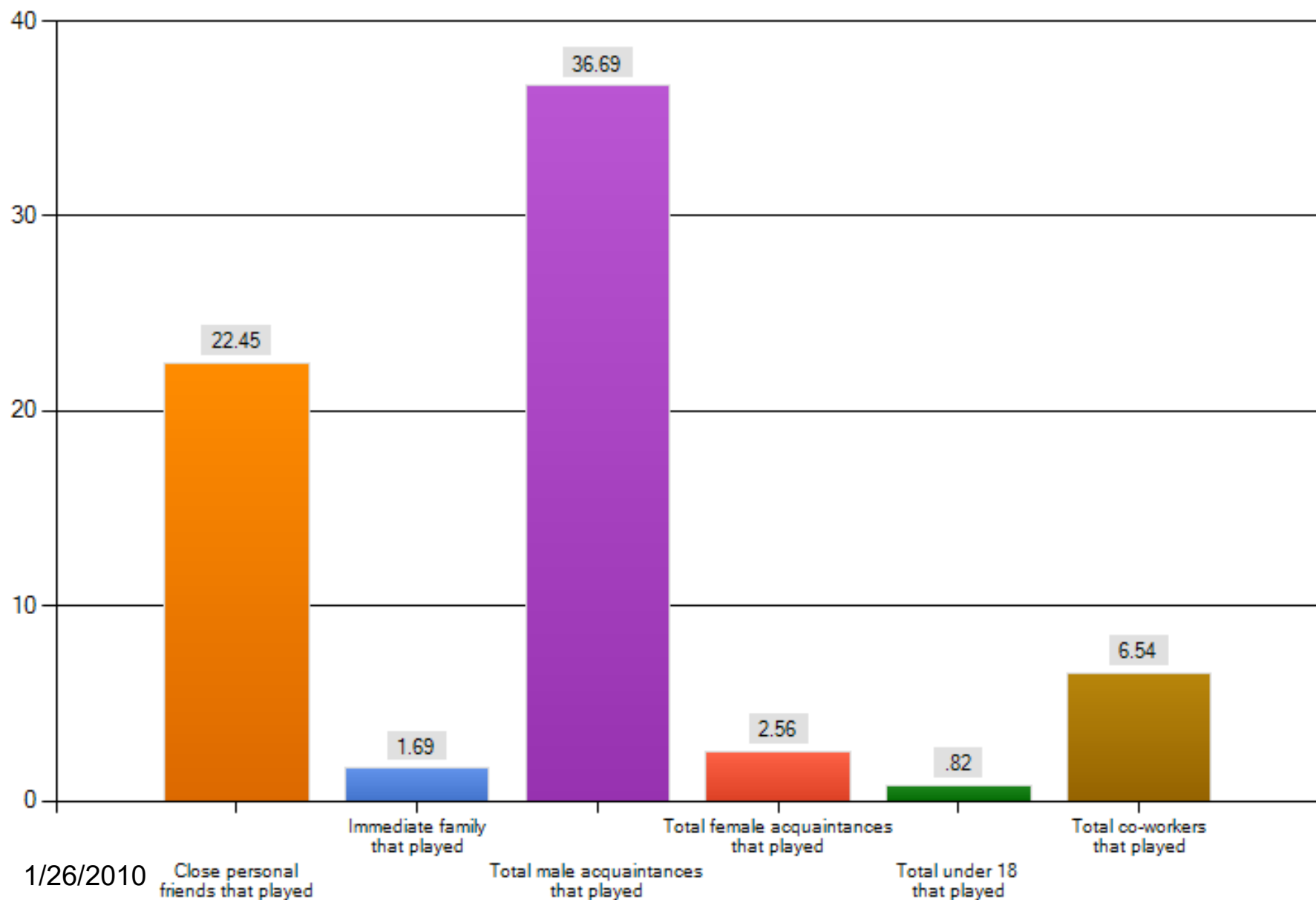
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How often did you visit your fantasy football leagues website?

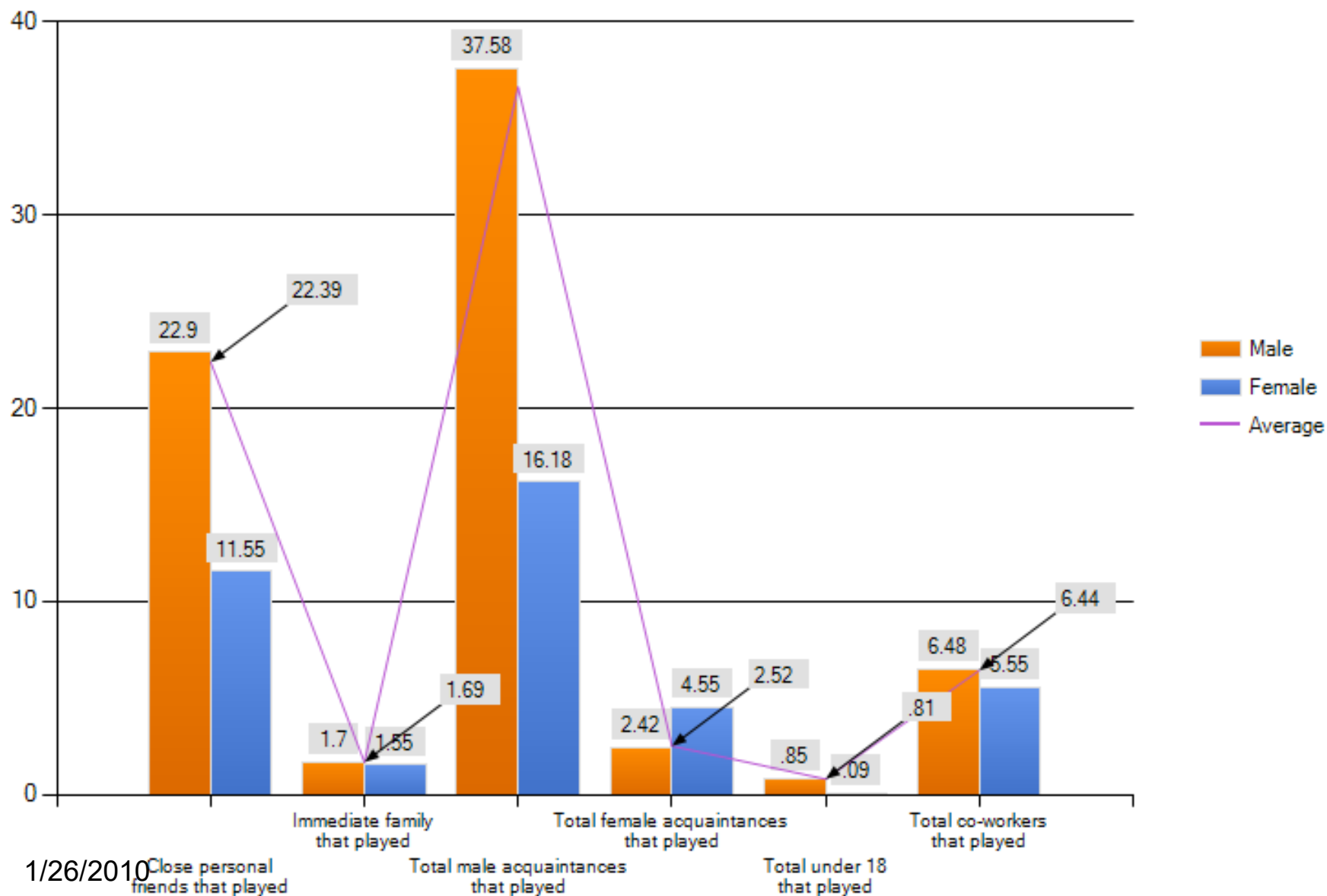


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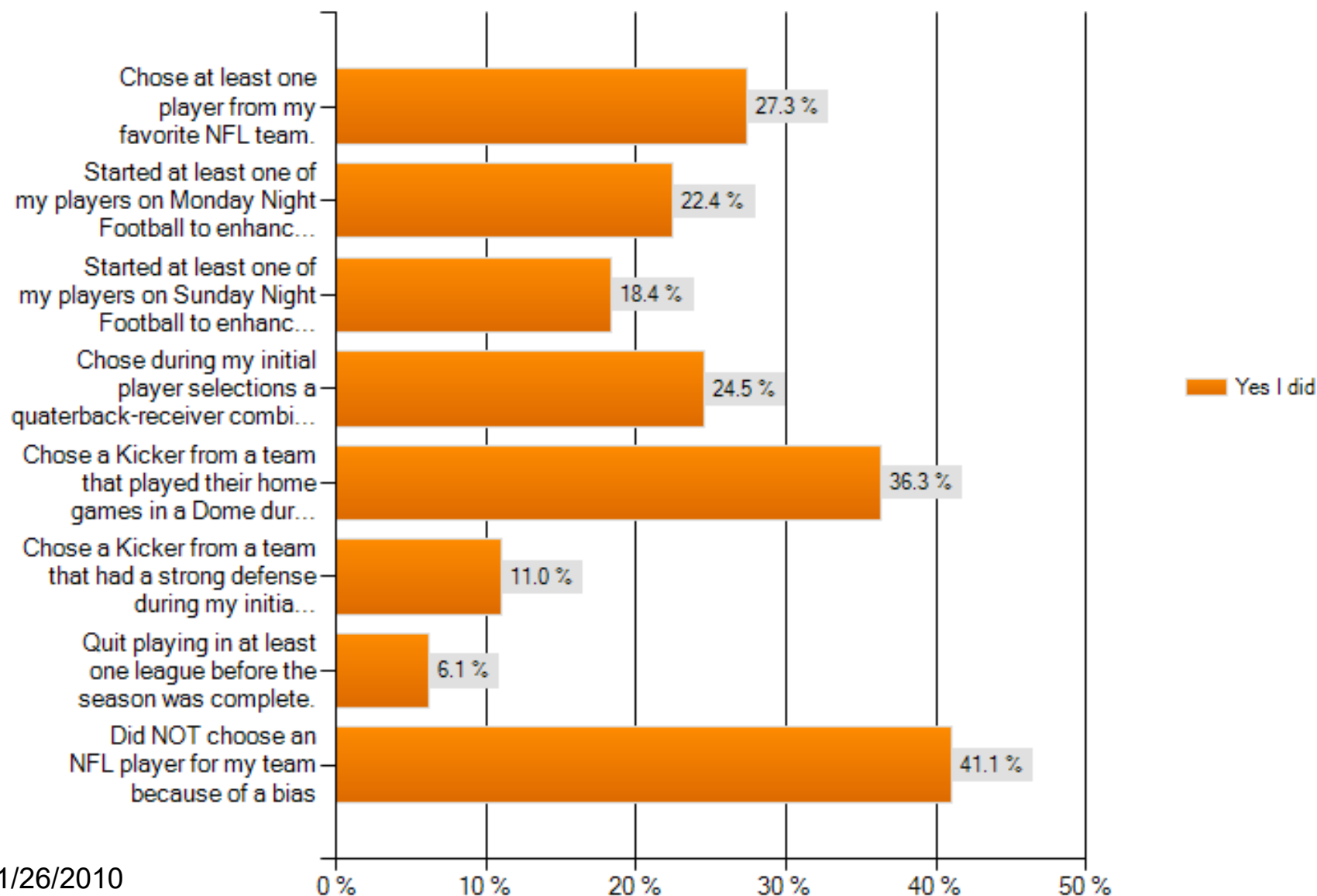
How many people do you estimate you know that played fantasy football this past fall? Please estimate for each category. Enter a numerical estimate example: 0, 8, 100, etc.



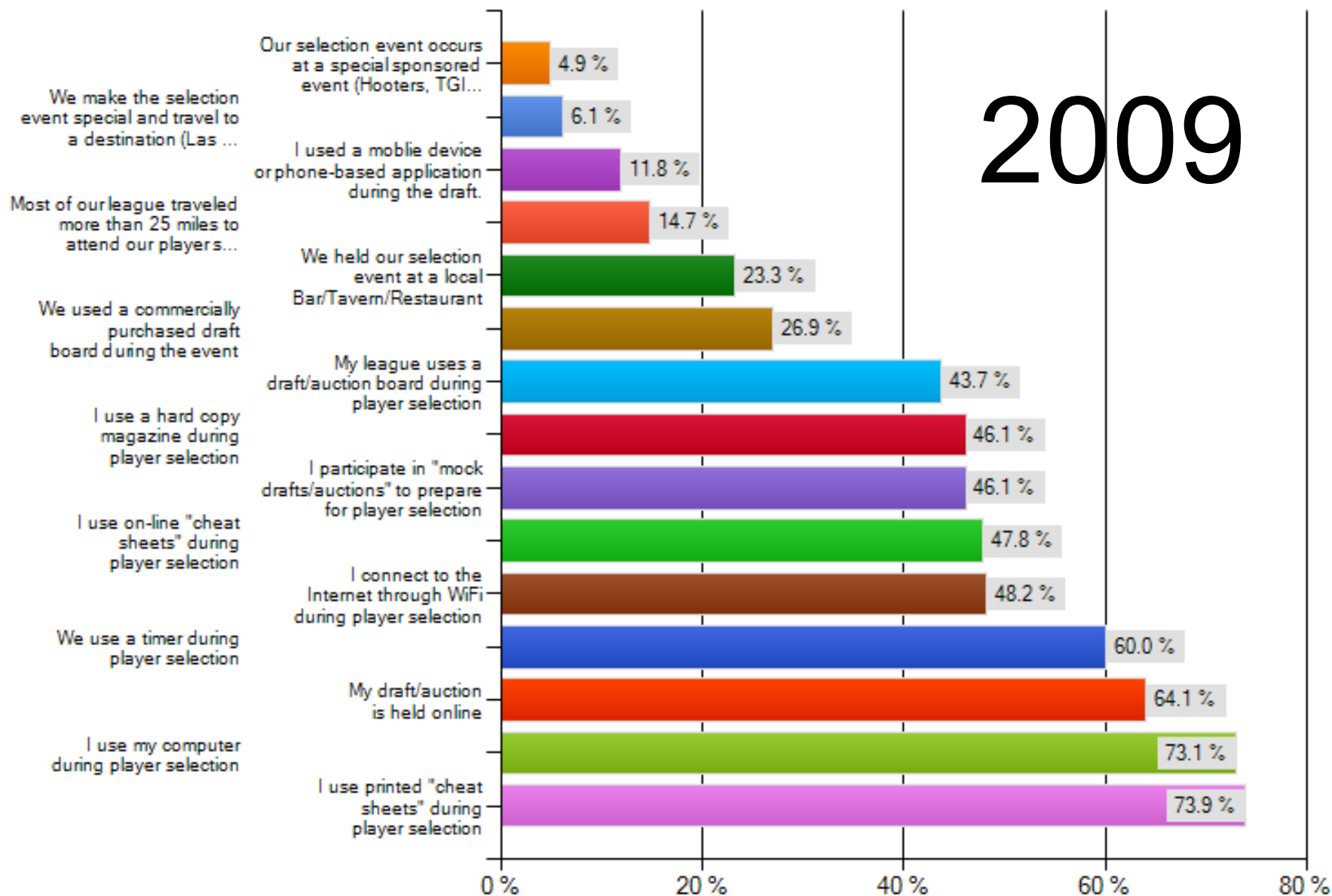
How many people do you estimate you know that played fantasy football this past fall? Please estimate for each category. Enter a numerical estimate example: 0, 8, 100, etc.



Please let us know how you played fantasy football this past season by answering the following questions. Purposefully= seperate and identifiable choice.



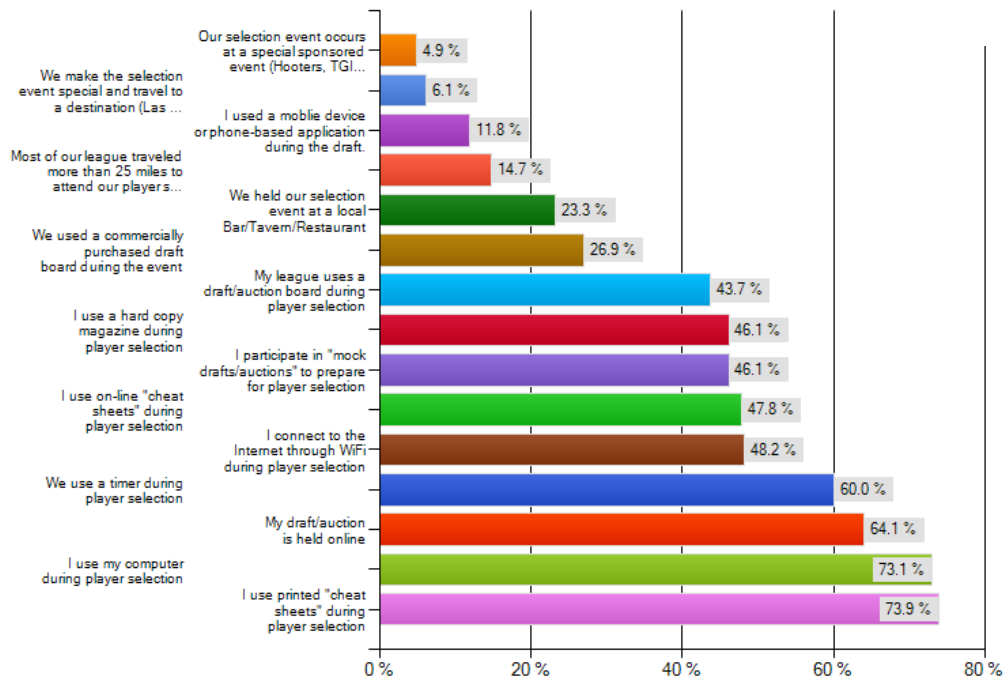
Please answer this question if you played in a draft- or auction-style contest and had a draft/auction event in 2009. Mark all that apply.



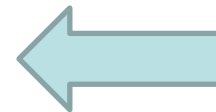
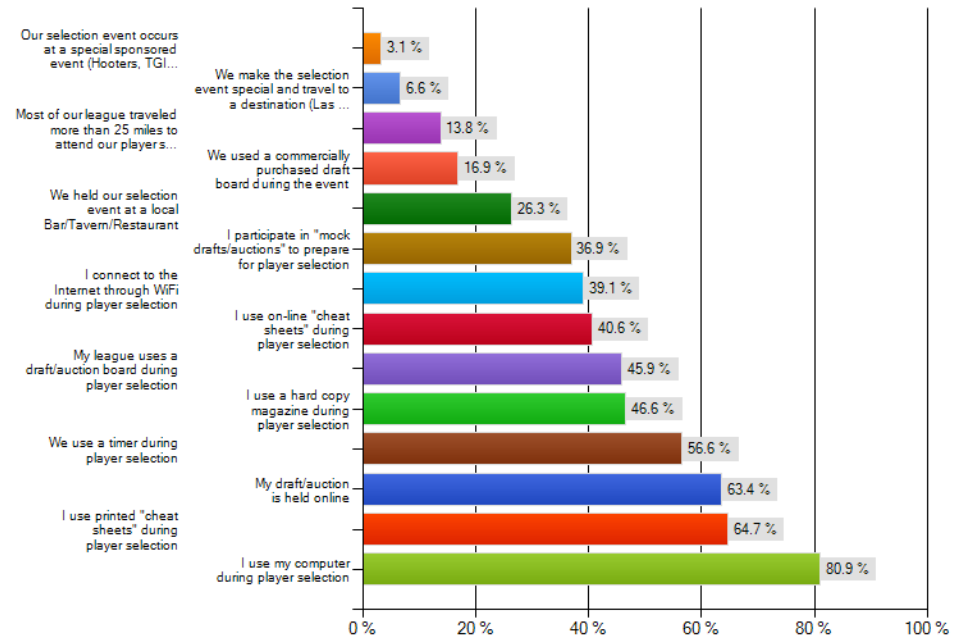
2008



Please answer this question if you played in a draft- or auction-style contest and draft/auction event in 2009. Mark all that apply.



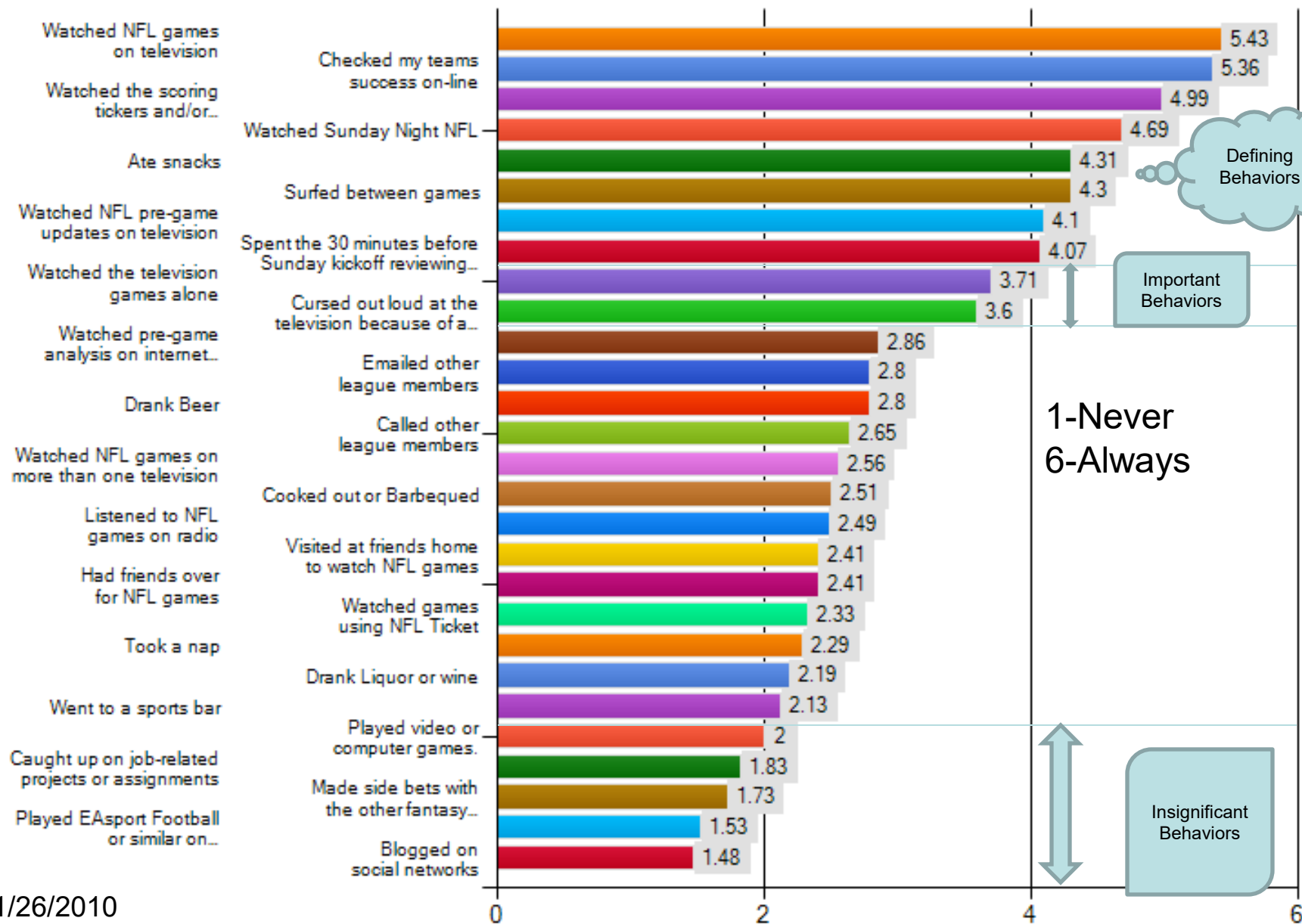
Please answer this question if you played in either a salary cap-, draft- or auction-style contest. Mark all that apply.



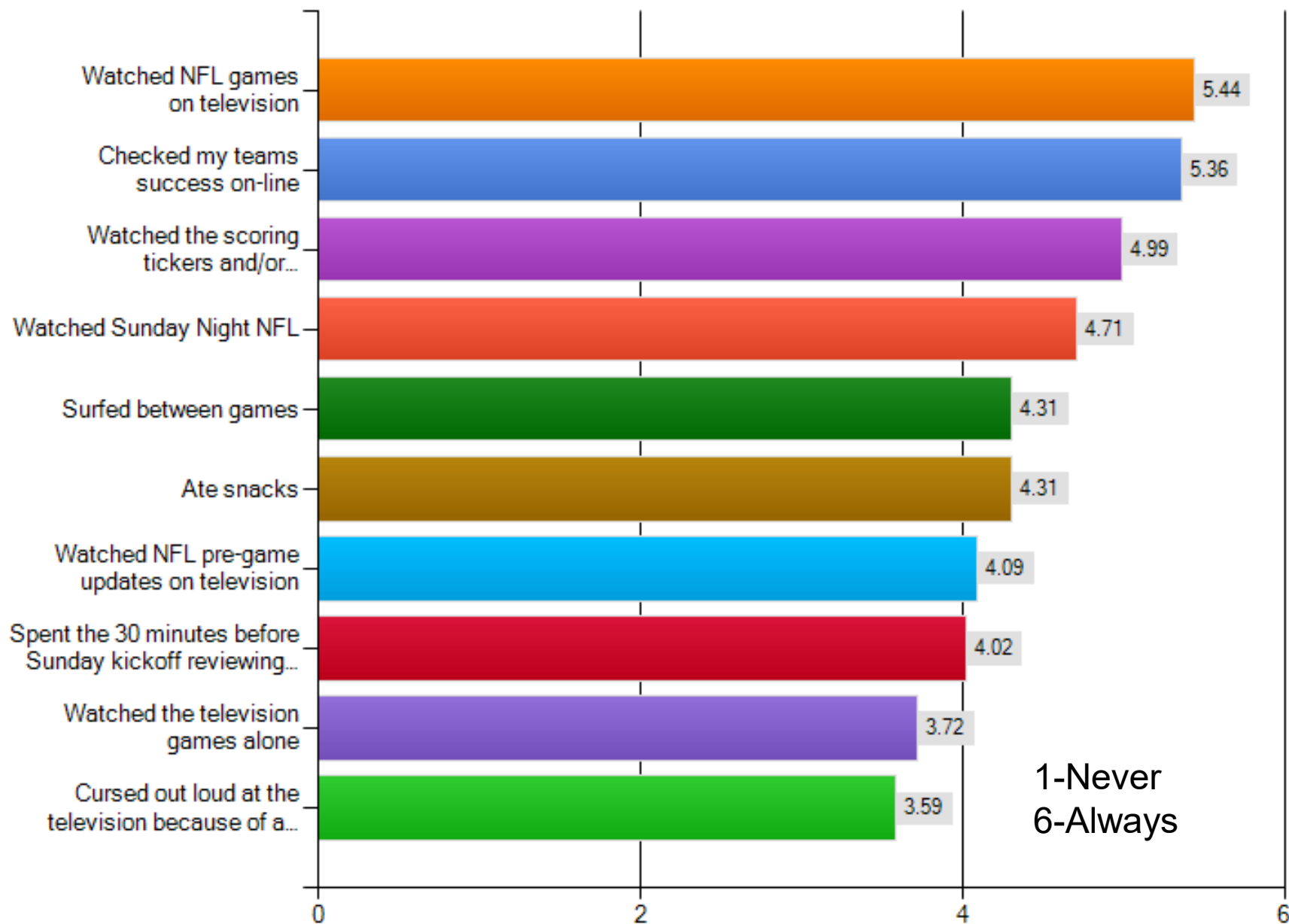
2009

- Print sheet use up
- Wifi connect up
- Mock Draft use Up

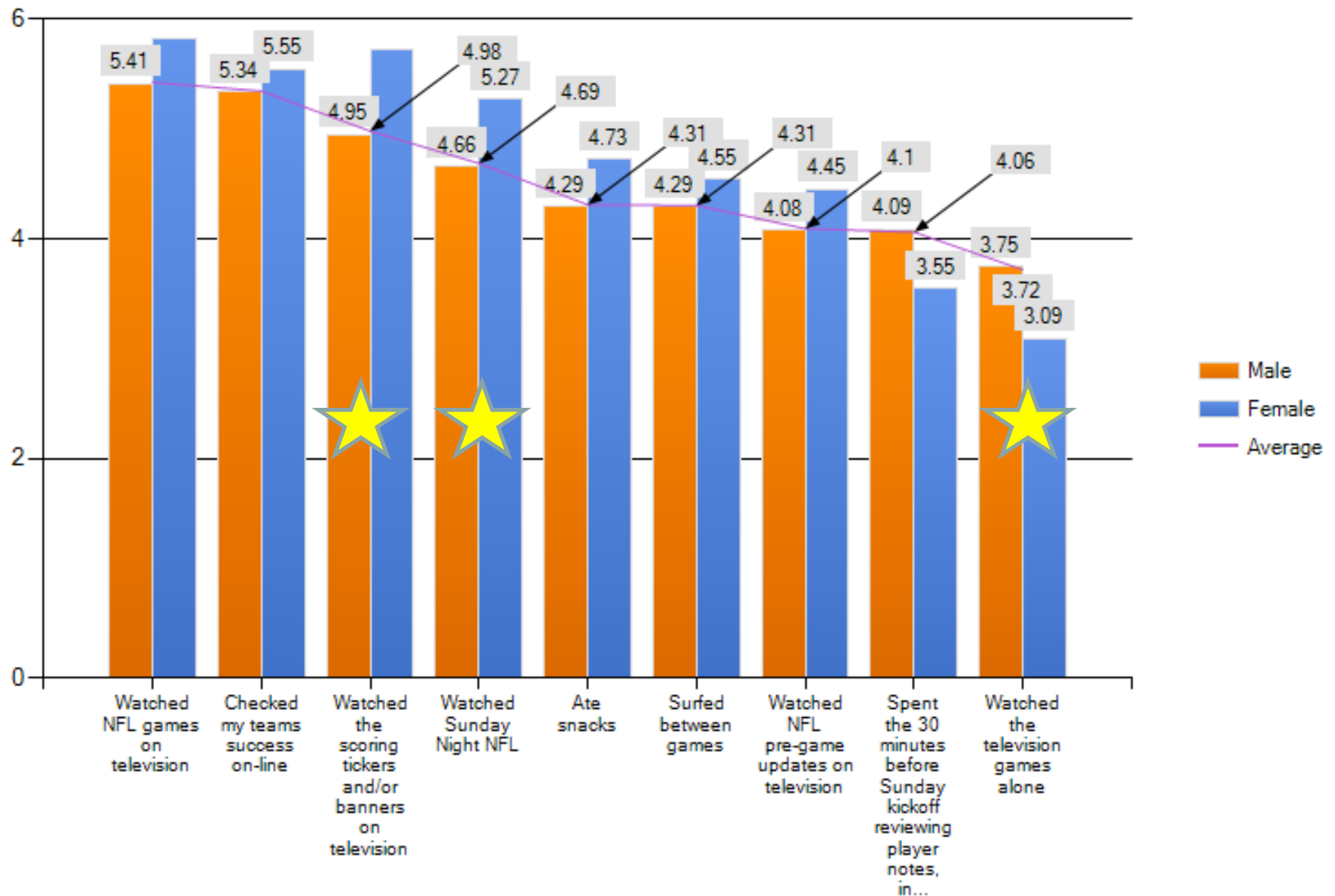
Please describe your behavior on an "average" Sunday during the NFL Football Season.



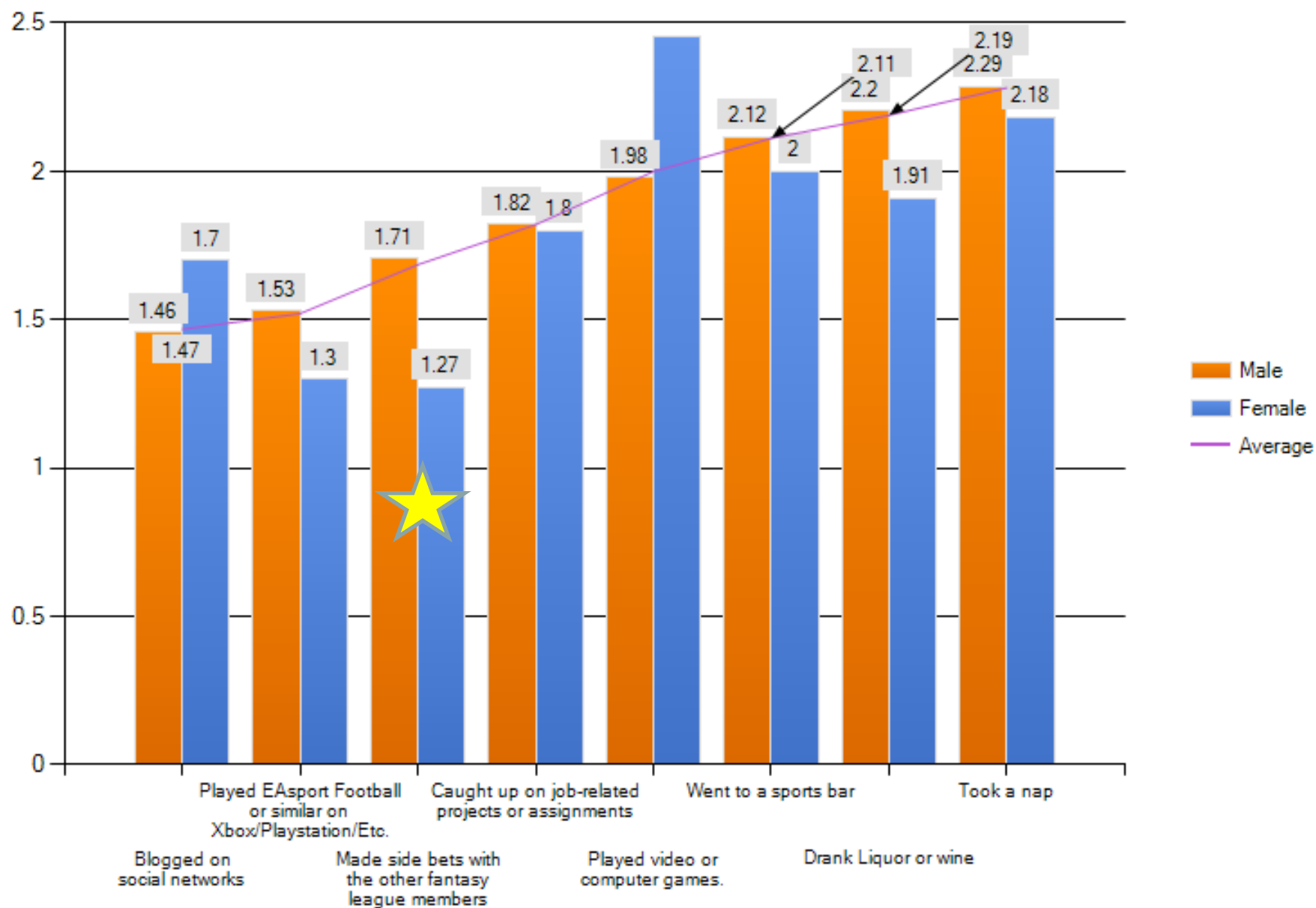
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Please describe your behavior on an "average" Sunday during the NFL Football Season.



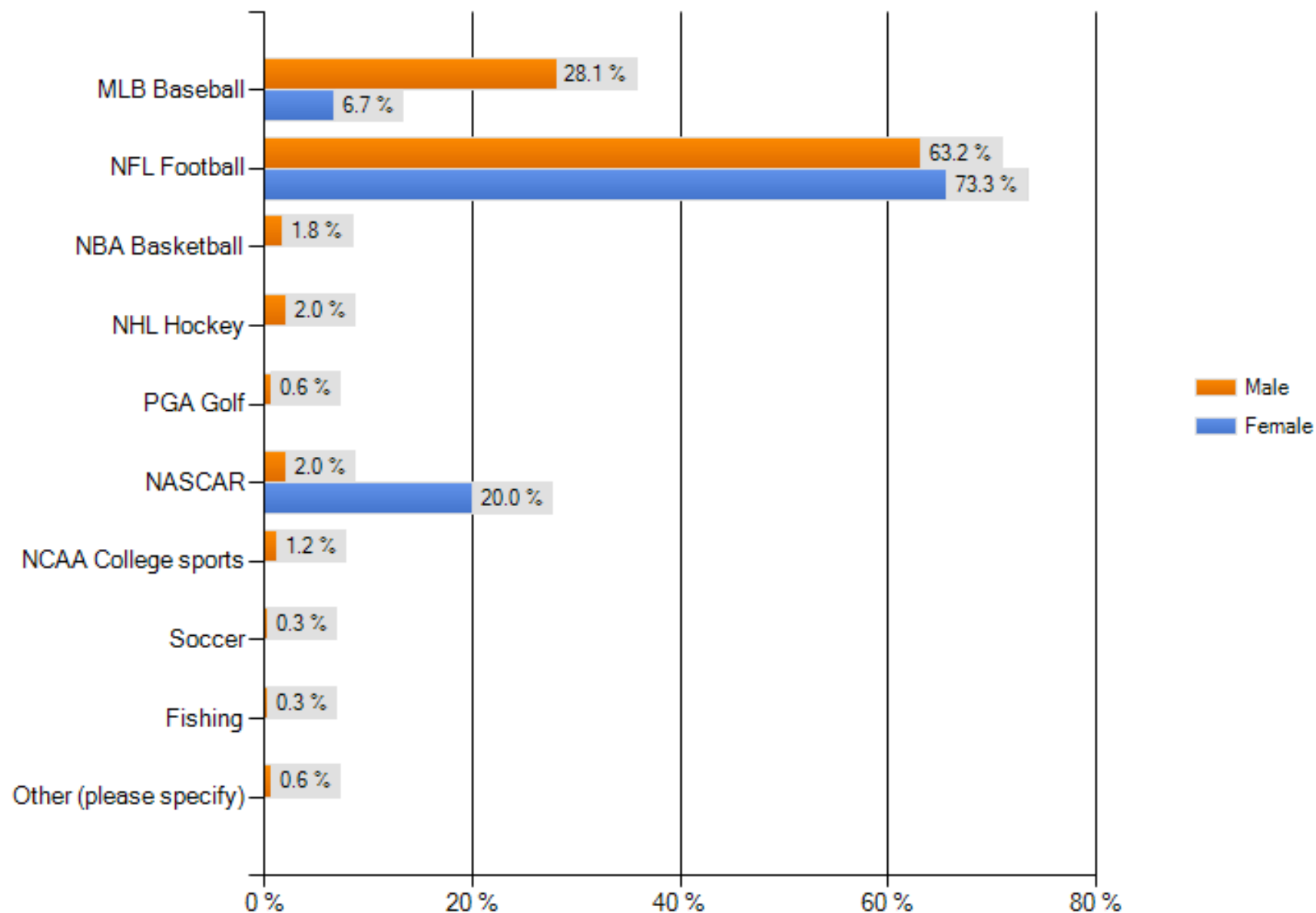
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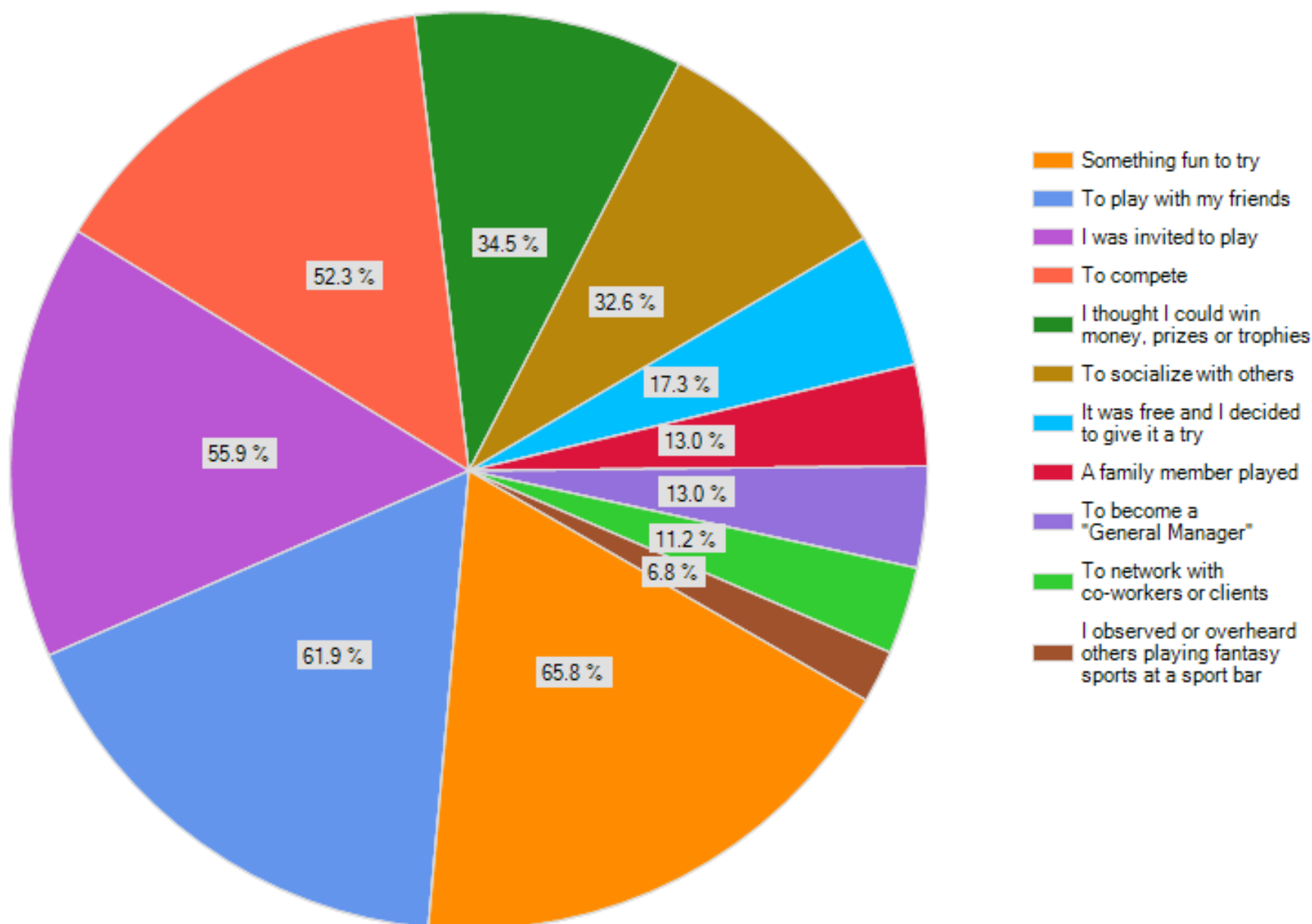
Entry Point

Dr. Kim Beason, CPRP
Fantasy Sport Research
Specialists, LLC

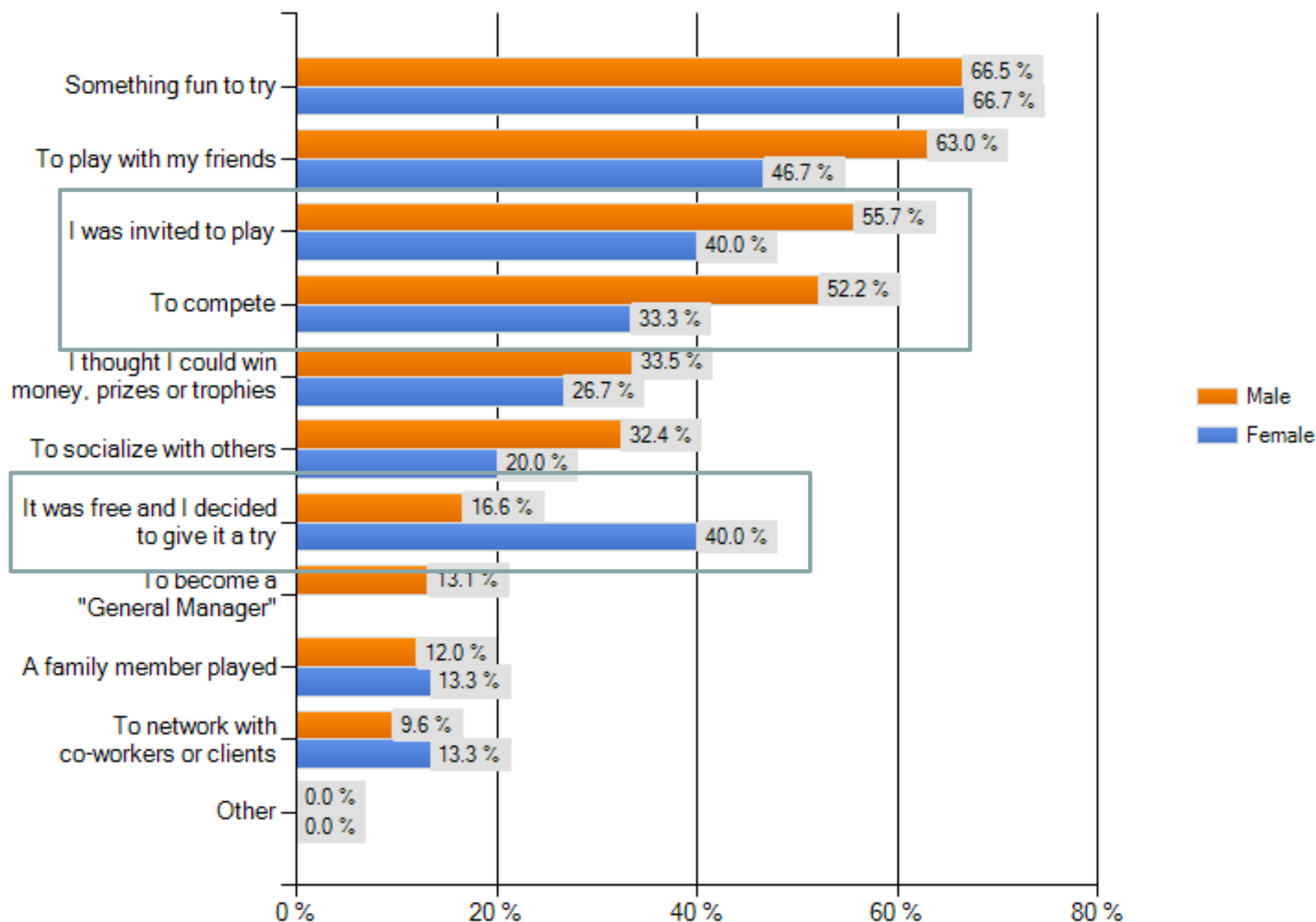
Which sport did you play to start your fantasy sport involvement? Mark only one.



Please consider the reasons you started to play fantasy sports? Mark any response that initially prompted you to try fantasy sports.

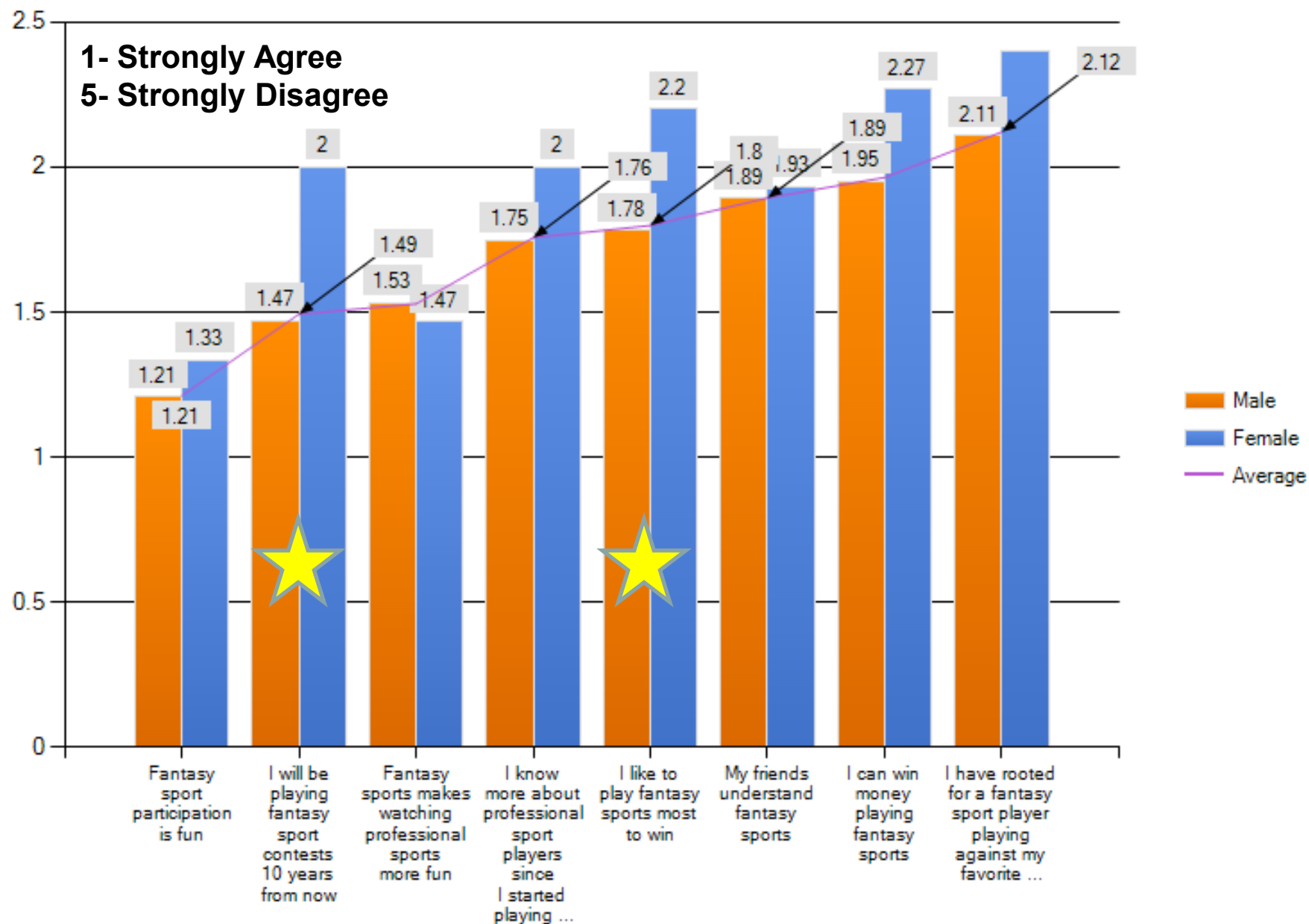


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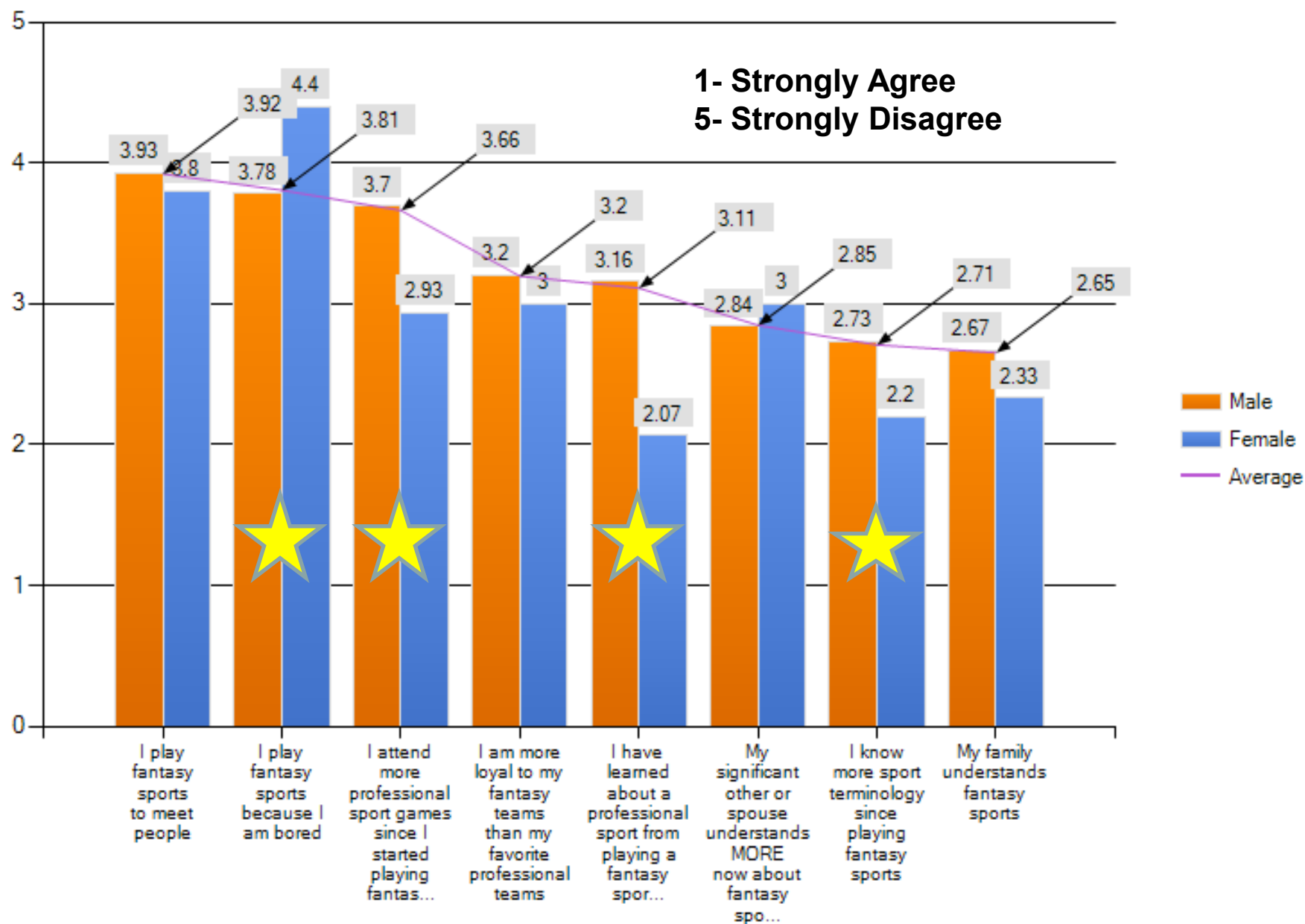


- Men-
 - Invitation to play is significant factor
 - More likely to be invited to play by a friend or a coworker
 - Like to use fantasy sport to socialize and compete
- Women-
 - Most likely to play because their spouse or significant other plays
 - Enter the market through free contests

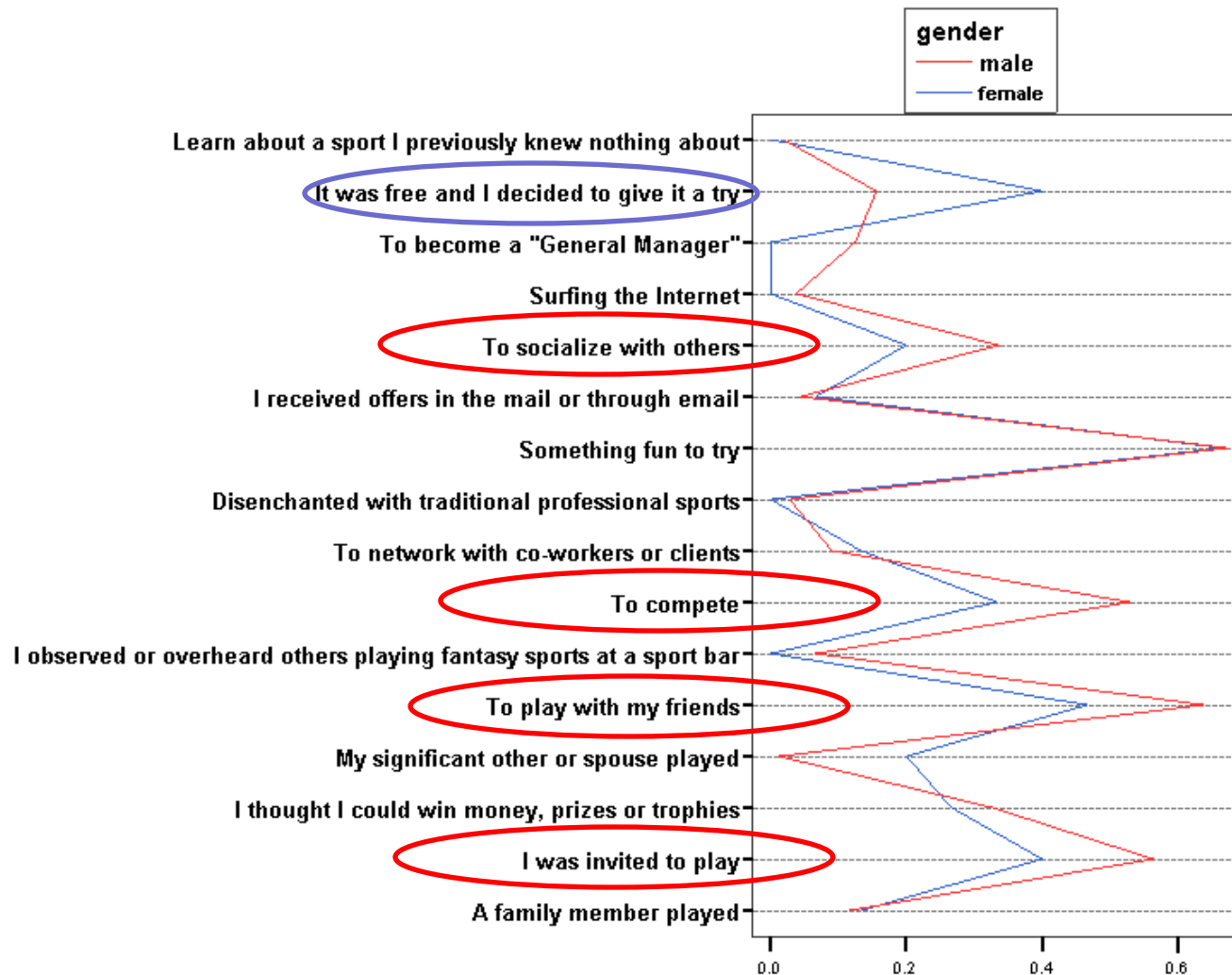
Please indicate your level of agreement with the following statements.



Please indicate your level of agreement with the following statements.



Cluster Analysis



Closer look... Age

•Older players are influenced to play through their children, receiving offers, and surfing the internet

•Young players play because someone paid their fees and they desire to learn and try new fantasy sports

	Overall Mean age= 41.4
	Mean
A family member played	43
I was invited to play	40
I thought I could win money , prizes or trophies	40
My significant other or spouse played	43
My children played	55
To play with my friends	40
I observed or overheard others playing fantasy sports at a sport bar	45
To compete	41
To network with co-workers or clients	43
Disenchanted with traditional professional sports	44
Something fun to try	41
I received offers in the mail or through email	49
To socialize with others	39
Someone paid my initial entry fees	32
Surfing the Internet	48
To become a "General Manager"	39
It was free and I decided to give it a try	42
Learn about a sport I previously knew nothing about	34

Conclusions

Economy

- Fantasy Sport Industry is showing signs of maturing
- The effect of the economy was less than initial indications earlier in 2009
- There is initial indication that consumers may play less in 2010

Gender

- Females play fantasy sports because they are free and fun and to learn about the sport
- Fantasy sport teaches them jargon and terminology
- They are introduced to FS by husbands and male friends

For further Information

Dr. Kim Beason, CPRP

CEO, Fantasy Sport Research Specialists

The University of Mississippi

225 Turner Center

University, MS 38677

662-915-5555

hpbeason@olemiss.edu