



Fantasy Sports Trade Association

FSTA 2014 Fantasy Sports Study – San Francisco Conference



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■ What we do at Ipsos Public Affairs:

- ⇒ We inform public and private sector decision-makers about the behaviors, expectations and opinions of citizen, consumers, and other stakeholders.
- ⇒ We track the evolution of opinions and behaviors around corporate reputation, voting opinion, and social issues.

■ Representation, Representation, Representation:

- ⇒ We focus on the accurate representation of stakeholders. In this case **FANTASY SPORTS PLAYERS AND NON-FANTASY SPORTS PLAYERS.**



A Quick Note about Me (Aaron Amic)

■ Vice President at Ipsos Public Affairs

- ⇒ Avid player of fantasy sports since 1990 when I was 16 years old
 - A special thanks to the USA Today sports section for getting me through those first few years as the Commissioner!
- ⇒ Researcher for Ipsos since the year 2000.
- ⇒ I have worked with the Fantasy Sports Trade Association since 2004.
- ⇒ I live in Minnesota (Go Vikings!) with my wife and three children; all of whom have no interest in fantasy sports and only pretend to show interest in how poorly I play every year.

Two Phase Research Plan

Two Phase Research Plan

- Phase One Objective: Determine INCIDENCE of fantasy sports participation.
 - Ipsos surveyed 1,209 Americans, aged 12+.
 - Ipsos surveyed 1,300 Canadians, aged 12+.
 - Respondents were asked which Fantasy Sports they play, if any.
 - Follow up questions were asked in the USA only (Phase Two).
 - Data collection for 2014 was completed using the US and Canadian Online Omnibus Research Services, from **May 14-19, 2014**. Previous year research was completed at similar times in the year.

- Phase Two is the main part of this presentation. In phase two, we focused on “Never Players” (those who have never played fantasy sports). In looking at Never Players, we are attempting to understand why they don’t play, how many are willing to play, and to compare and contrast demographics against Fantasy Players. In looking at these differences, it is our hope we can help FSTA members understand their best avenues for finding new players.

Methodology	Date	Who	Qualifications	Length of Time
Online interviewing methodology 	May 14-19, 2014	n=1,209 respondents (12+) within the U.S. & n=1,300 respondents (12+) within Canada (these respondents were only asked the incidence question, not the follow up survey).	To qualify for the study, respondents must have been aged 12+.	The survey averaged approximately 10 minutes in length.

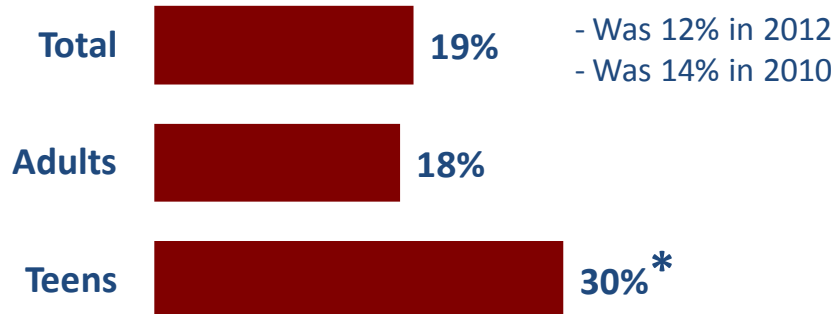
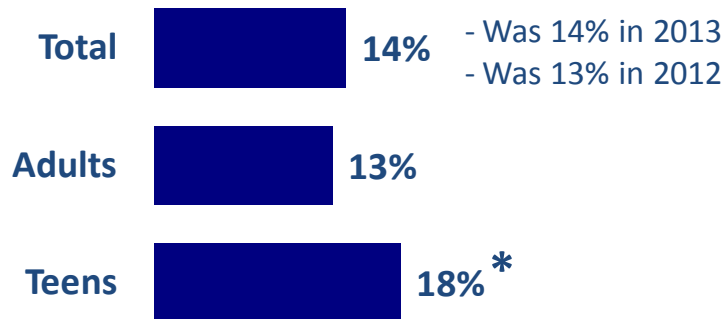
Accuracy:

The precision of online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.7 percentage points. Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error.

Phase One: Incidence of Fantasy Sports Participation

How Many People are Playing Fantasy Sports?

Q3. Please select the responses below that best describe your participation level in Fantasy Sports since May of 2013 (within the past 12 months).



- Overall, USA participation for 2014 is consistent with the past few readings. However, participation is up in Canada (mostly due to Hockey).

- There are 40.5 million total Fantasy Players aged 12+ in North America, **the most ever recorded by Ipsos.**

- In the United States, there are 35.8 million people playing fantasy sports.

- There are 4.7 million people playing in Canada.

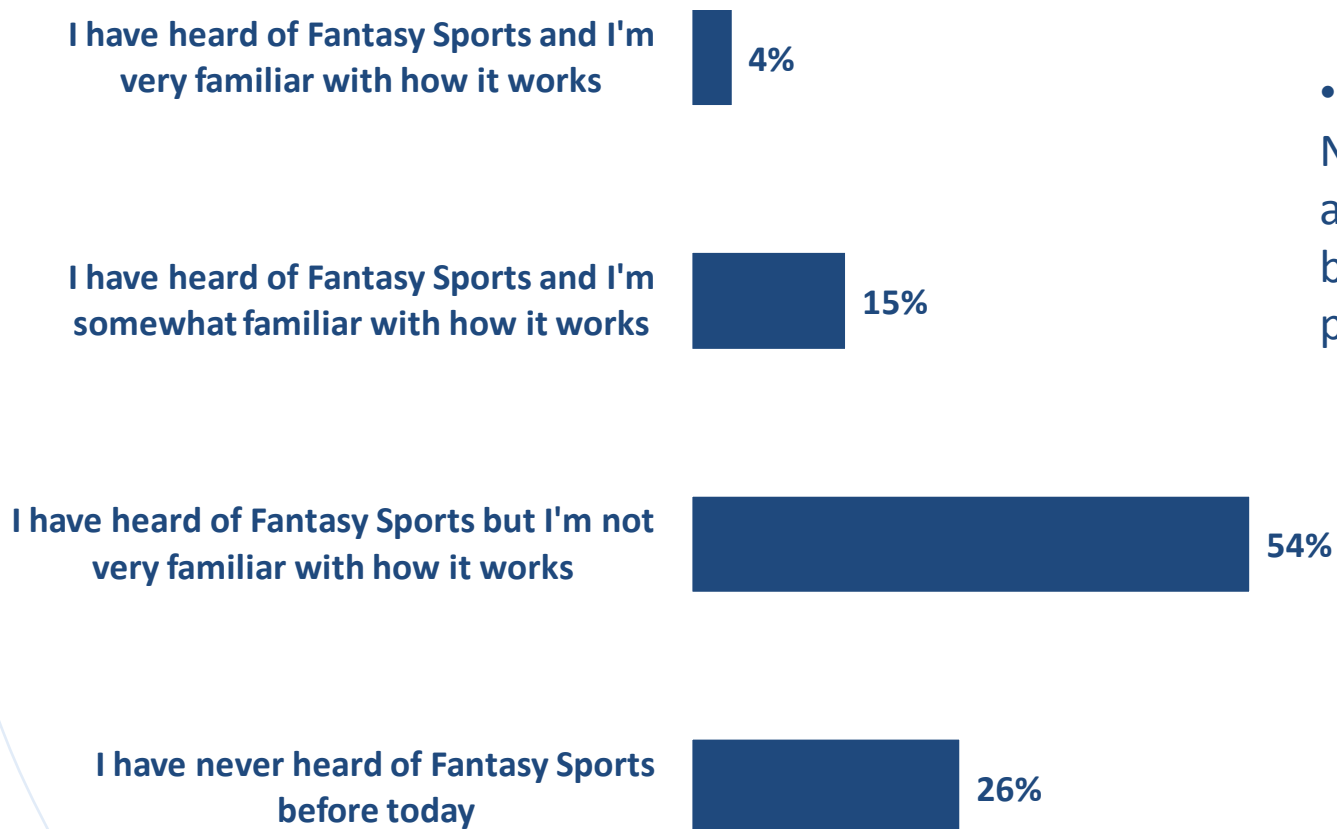
*caution: small sample size among teens

Base: All US and Canadian respondents aged 12+ (Teens defined as aged 12-17)

Phase Two:
A closer look at those who have never
played fantasy sports
“Never Players”

Familiarity with Fantasy Sports Among Never Players

Q1. How familiar are you with “Fantasy Sports”?



• **BARRIER TO PLAY: Lack of Understanding!**

• For the first time, we asked the Never Players how familiar they are with fantasy sports. This has been a question we have looked past prior to this year.

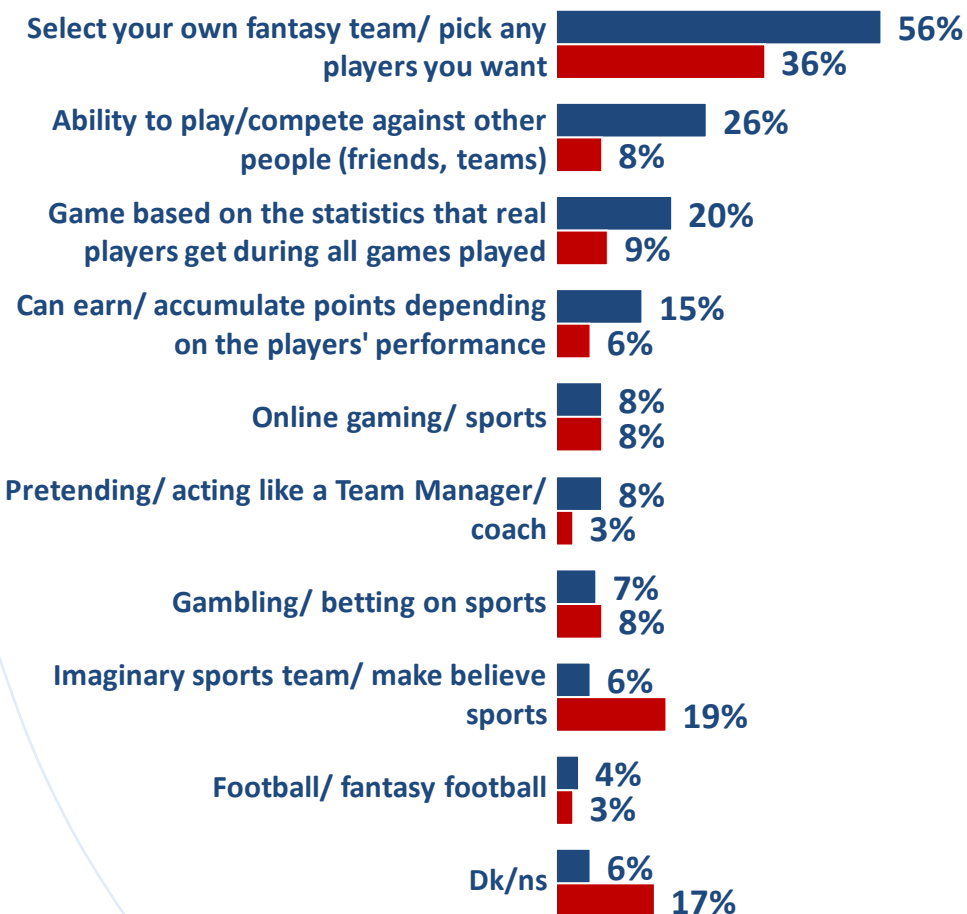
• Despite all of the coverage of fantasy sports, it appears that there is still a large part of the Never Player population who have very little familiarity (54%), or no familiarity at all (26%) with the concept of fantasy sports.

Base: Those who have never played fantasy sports

Unaided (Open Ended) Definition of Fantasy Sports

Q2. Can you write down what the term “Fantasy Sports” means to you? Please be as detailed as possible.

■ Fantasy Player* ■ Never Player



*caution: small sample size

Base: Those who play fantasy sports or who have never played fantasy sports

- **BUT...Maybe this lack of understanding isn't as high as first thought** – Most Never Players show a fair amount of understanding, or at least are able to guess accurately a description of fantasy sports.

- When respondents were asked to describe fantasy sports, only 17% of Never Players said they didn't know or gave another non answer.

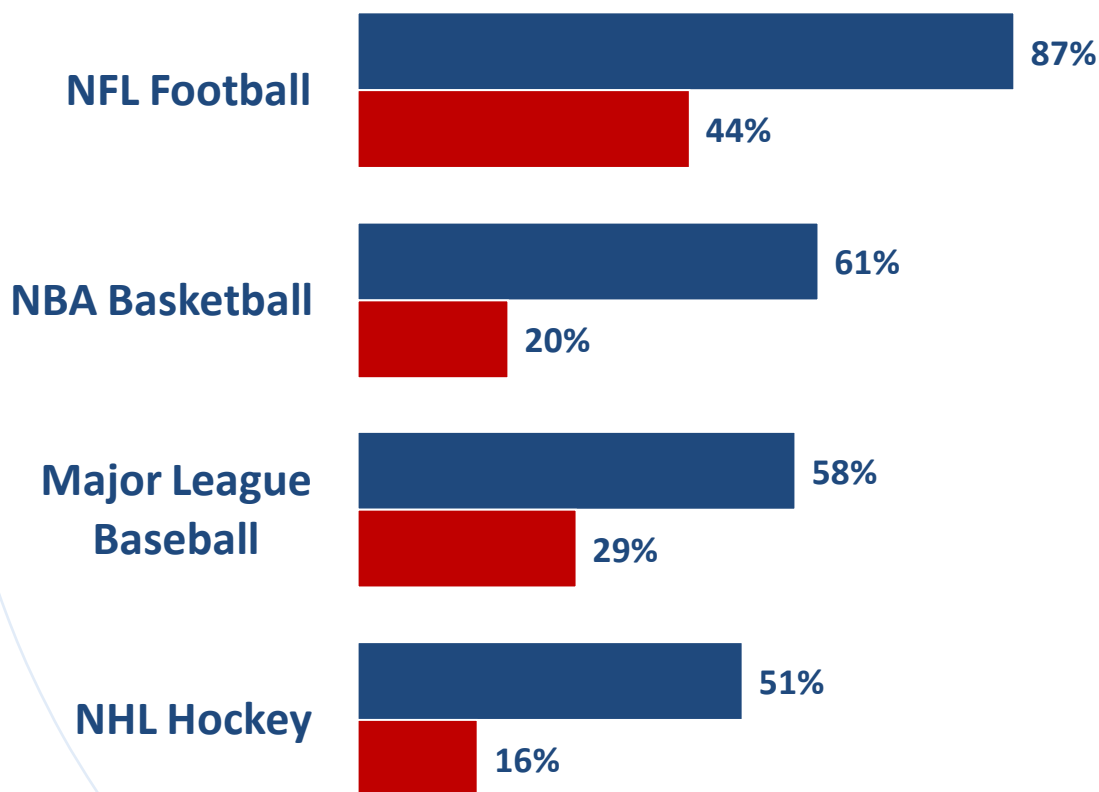
- While the base of fantasy players is small, we have shown their answers for comparison.

Sports Fandom

Q4. Now, thinking about your interest in sports as a general fan. For each of the following sports, please rate how interested you are in these sports using a scale from 1 to 7 with 1 meaning you are not at all interested and 7 meaning you are extremely interested in these sports.

“Sports Fan” (Rated 5,6, or 7 on a Seven Point Scale)

■ Fantasy Player* ■ Never Player



*caution: small sample size

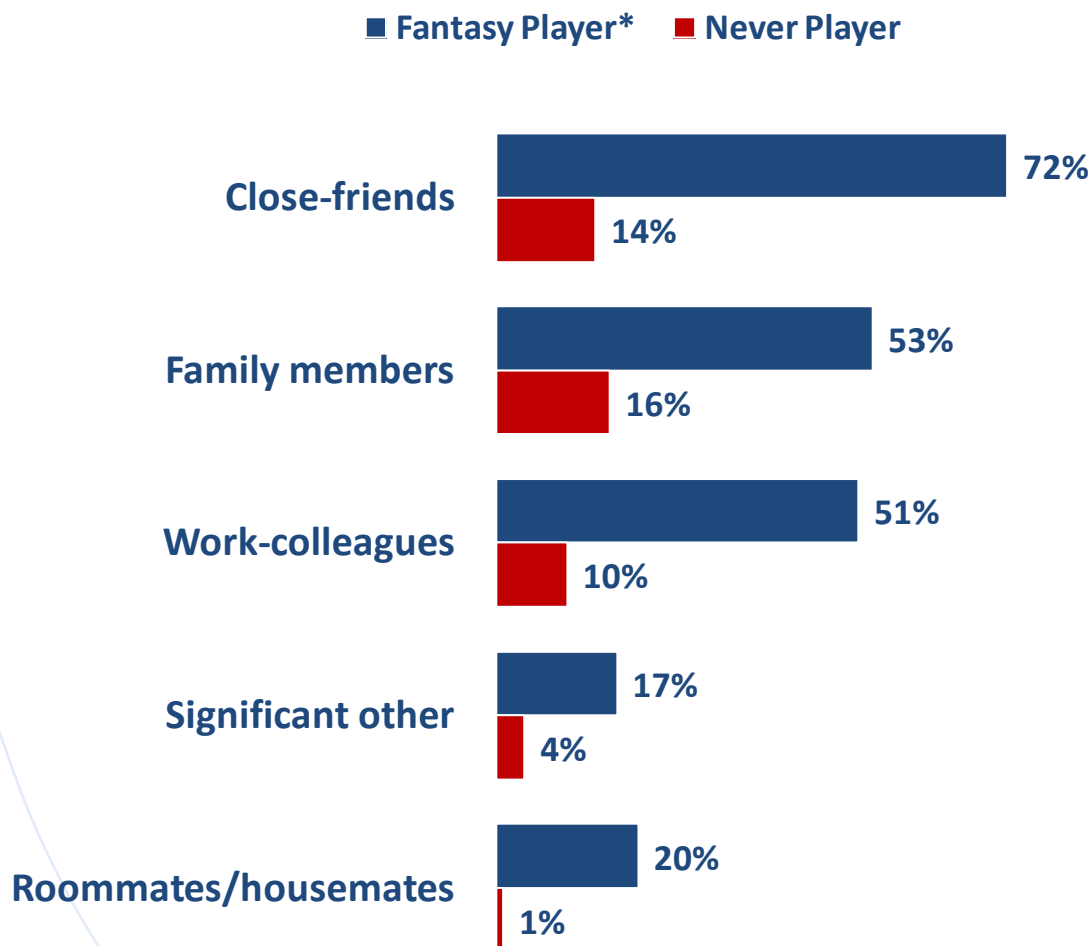
Base: Those who play fantasy sports or who have never played fantasy sports

• BARRIER TO PLAY: Lack of Interest!

- We asked respondents to rate their interest level in eight sports on a seven point scale (top 4 pro sports shown).
- 51% of those who have never played fantasy sports rated themselves as fans of at least one of the 8 sports measured (most likely NFL football).
- By comparison, 96% of fantasy players of fantasy players were fans of at least one of the 8 sports*.

Who is Playing Around Never Players?

Q8. Listed below are people that you may come into contact with on a regular basis. As far as you know, does anyone from the following groups of people play Fantasy Sports?



• **BARRIER TO PLAY: People around them aren't playing!**

• Fantasy Players are significantly more likely to have friends, colleagues, and family playing fantasy sports. Never Players either don't have these people around them or are unaware that these people are playing fantasy sports.

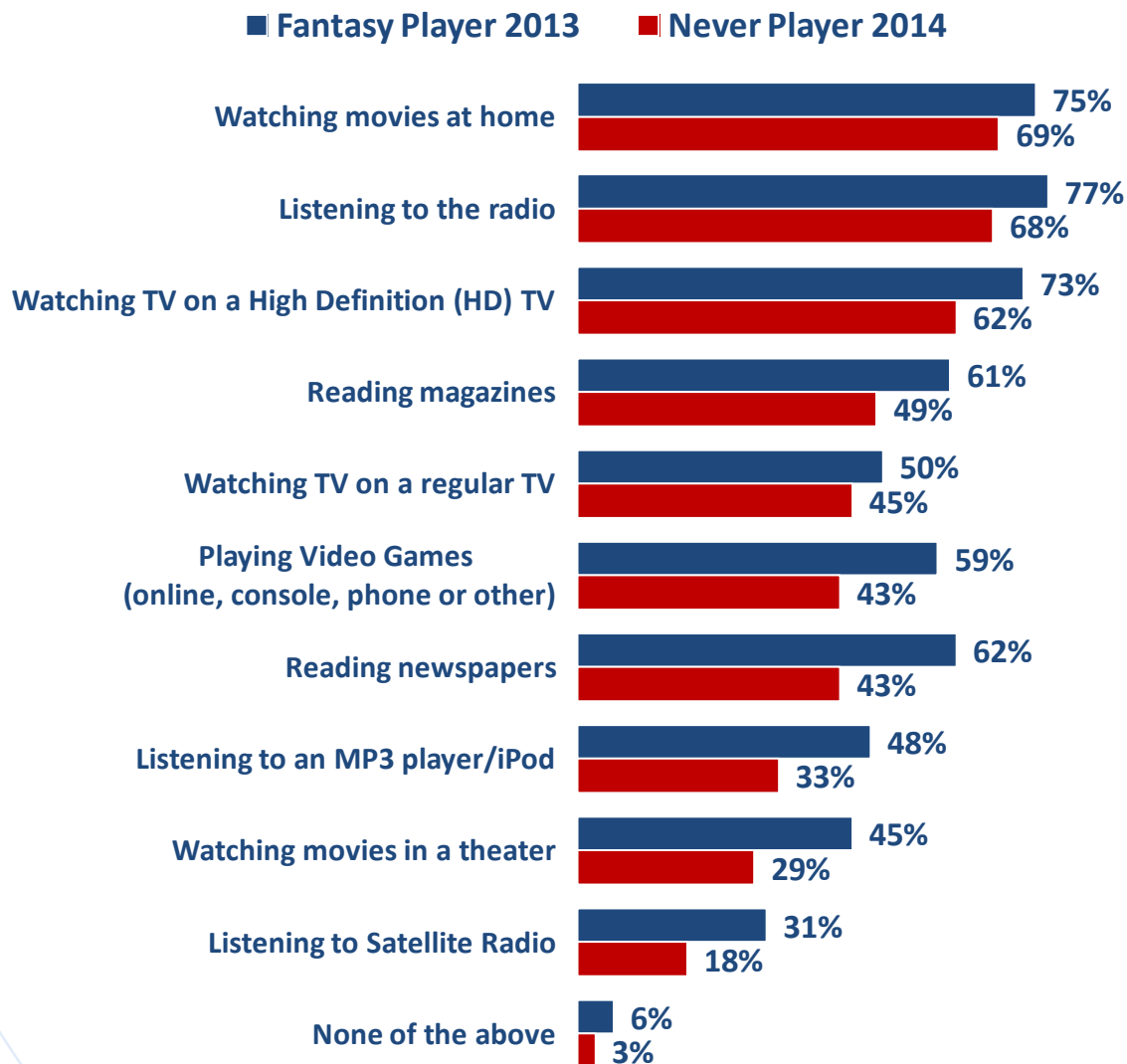
• While the base size for Fantasy Players is small, it is shown for comparison.

*caution: small sample size

Base: Those who play fantasy sports or who have never played fantasy sports

How Else are Fantasy Players and Never Players Different?

Types of Media Consumed

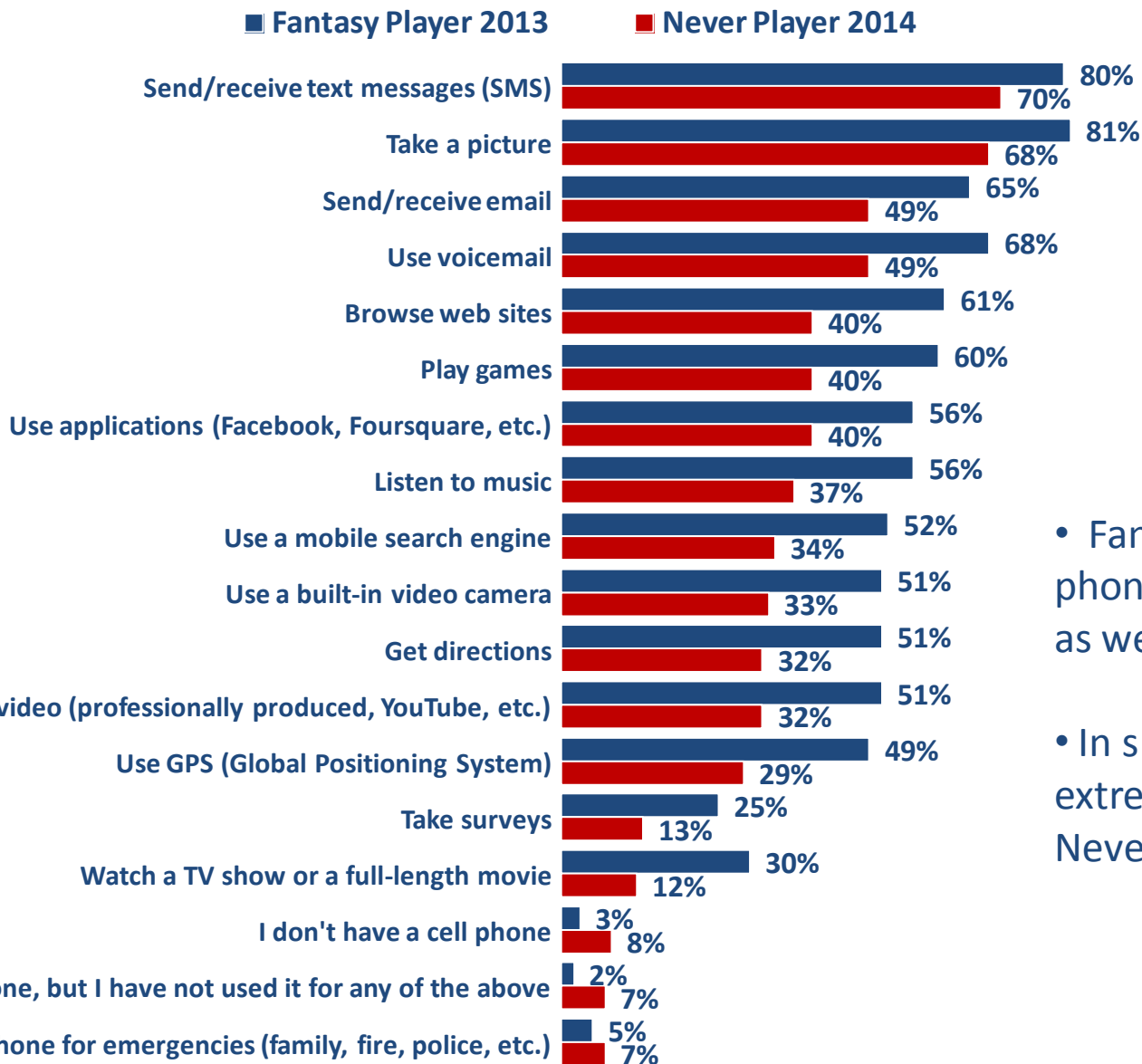


- On a few questions, we were able to compare 2013 Fantasy Player data vs. 2014 Never Player data.

- Fantasy Players consume media at a higher level than Never Players.

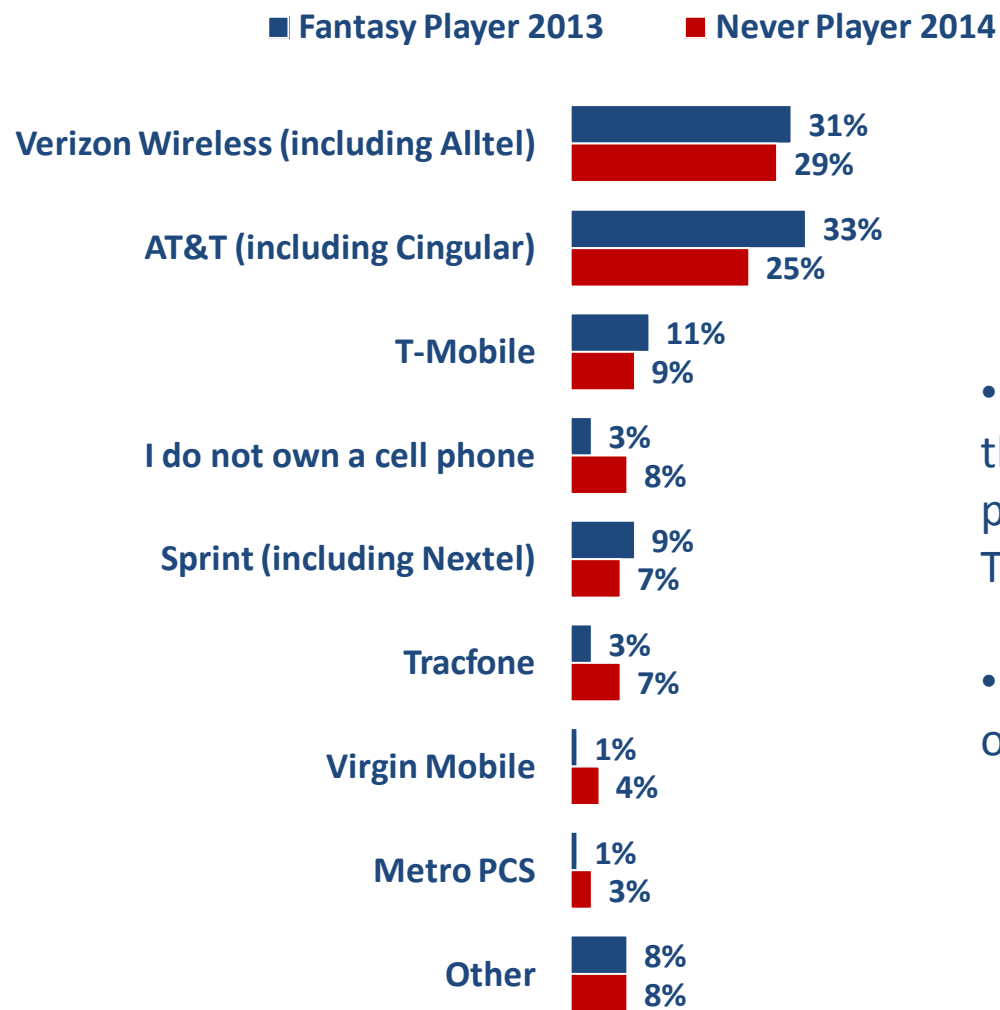
- This is similar to findings from the past. The stereotype of fantasy players being geeky guys in their basement does not hold up. Fantasy Players work hard and play hard across many media spectrums. – SEE APPENDIX

Fantasy Player vs. Never Players by Cell Phone Activities



- Fantasy players use their cell phones for more varied activities as well.
- In short, Fantasy Players are extremely social compared to Never Players.

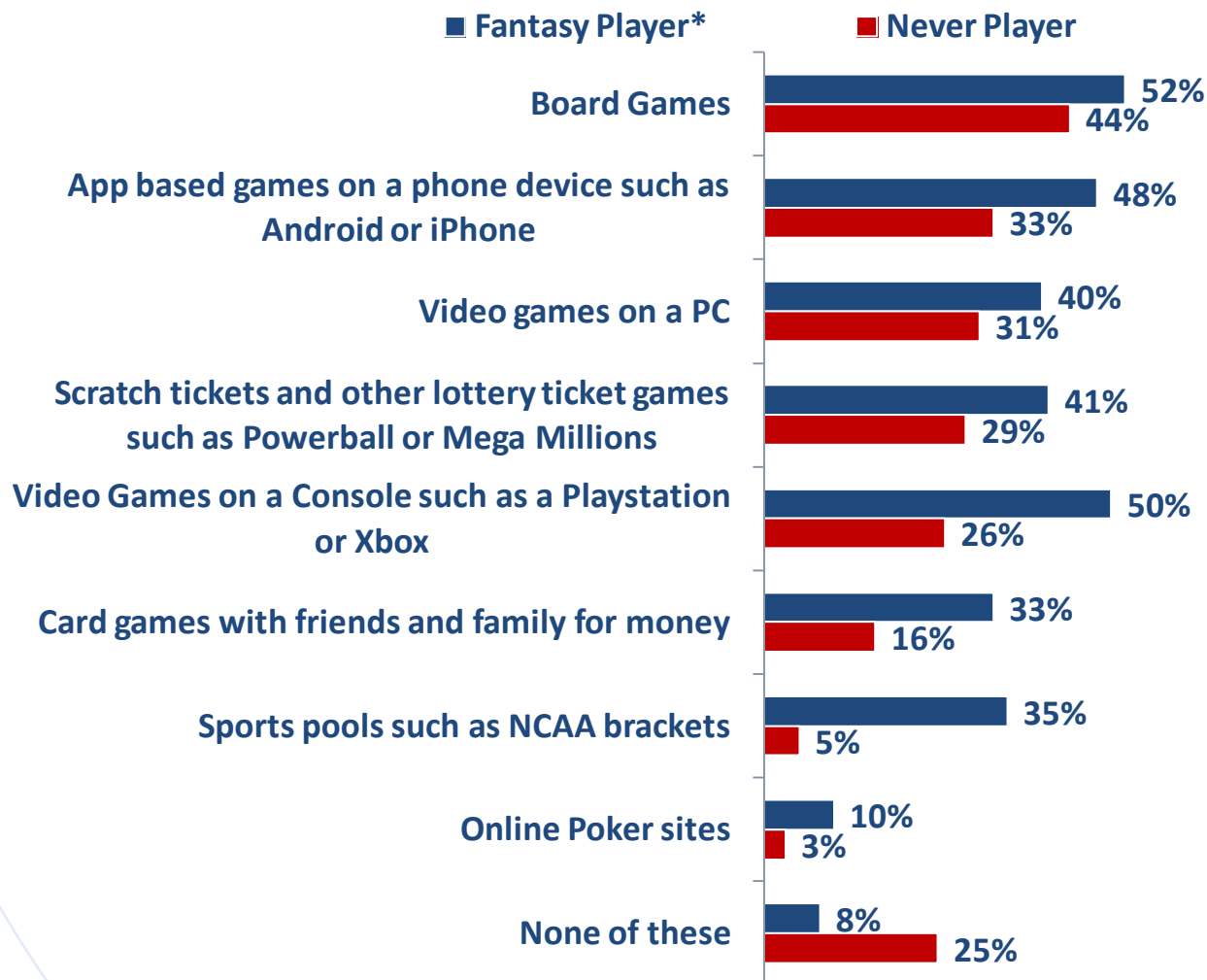
Player vs. Never Players by wireless service provider



- Never Players are more likely than Fantasy Players to use a prepaid phone service such as Tracfone or Virgin Mobile.
- They are also more likely to not own a cell phone at all.

Other Never Player Interests

Q10. Now, leaving Fantasy Sports behind and turning to all types of games in general, please select all the following types of games that you play?



- We don't have 2013 Fantasy Player data for this question. Though base size is small, 2014 Fantasy Player data is shown for comparison.

- The data holds though, Fantasy Players are more active in all game play than their Never Player counterparts!

Base: Those who have never played fantasy sports

You might be saying...

“Great – Thanks for the info on incidence of play, that was interesting.

And Fantasy Sports players are more active in all avenues of life. - That makes sense I guess.

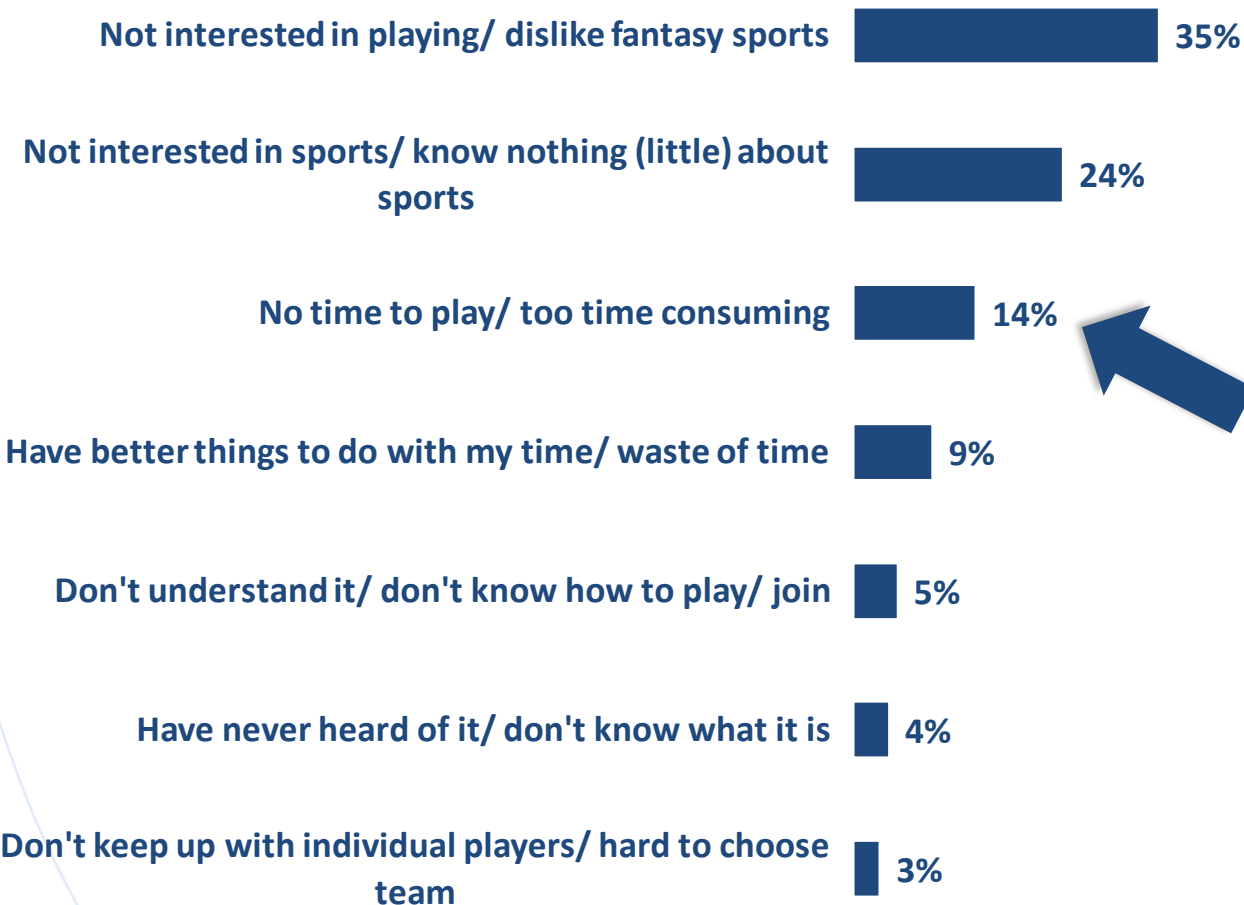
And Never Players just aren't that in to fantasy sports – so what?

You got anything more interesting than that?”

Yes!

Top Reason I Never Play (Unaided)

Q5. What would you say is the top reason you don't play Fantasy Sports? Please be specific as possible.



*caution: small sample size

Base: Those who have never played fantasy sports

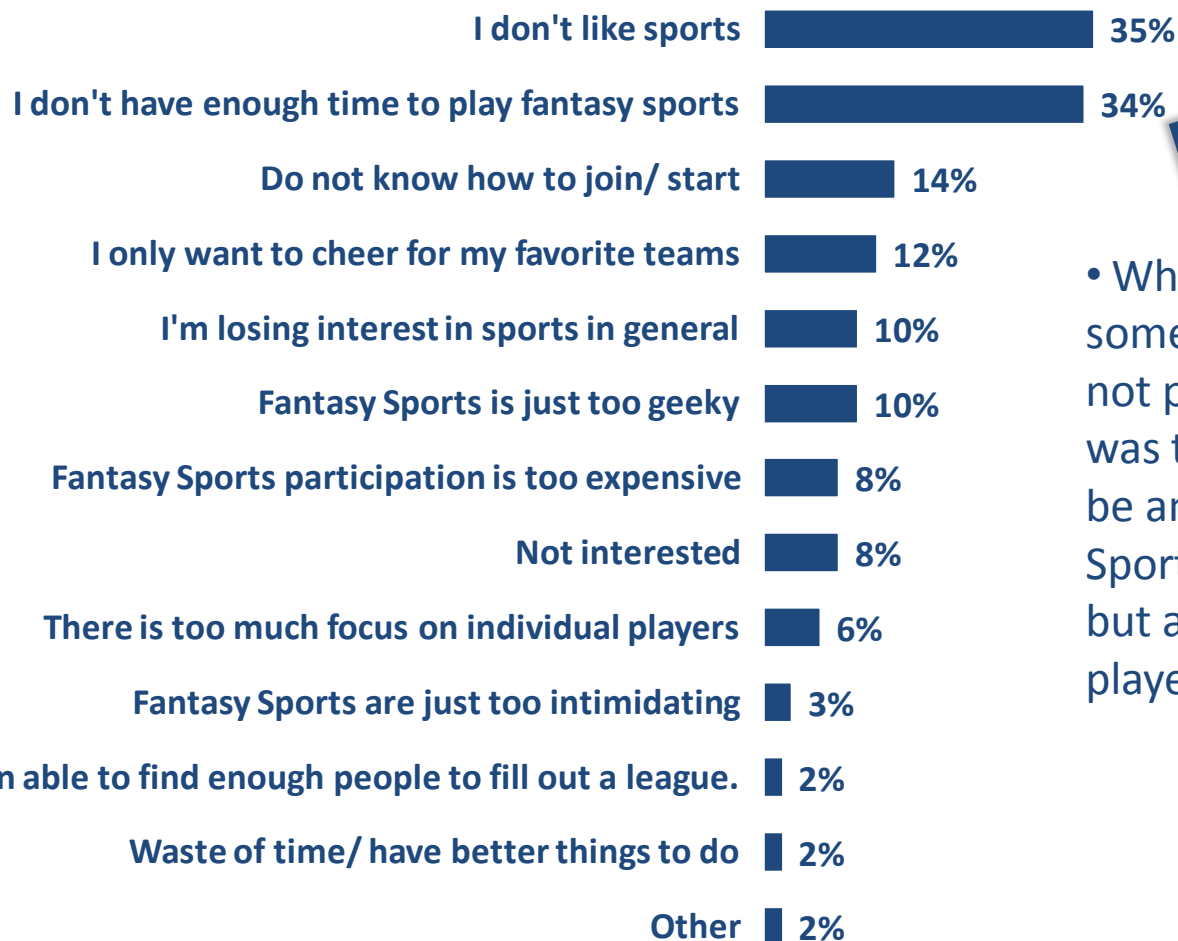
- The most important barrier - The low hanging fruit of new fantasy players has been exhausted over the past 10-15 years. - Growth continues, but at a slower pace.

- As we have seen fantasy players more than double in size over that period. The new players are going to come from increasingly hard to reach groups and segments. One such group is likely those who say they do not have enough time for fantasy sports.

- The demographics on this group are compelling. The rest of the non play excuses seem to be dead ends.

Reasons For Not Playing (Aided)

Q6. People don't play Fantasy Sports for lots of reasons. Now, thinking about your personal reasons for not playing Fantasy Sports, please select all that apply (even if you've already mentioned it in the previous question).

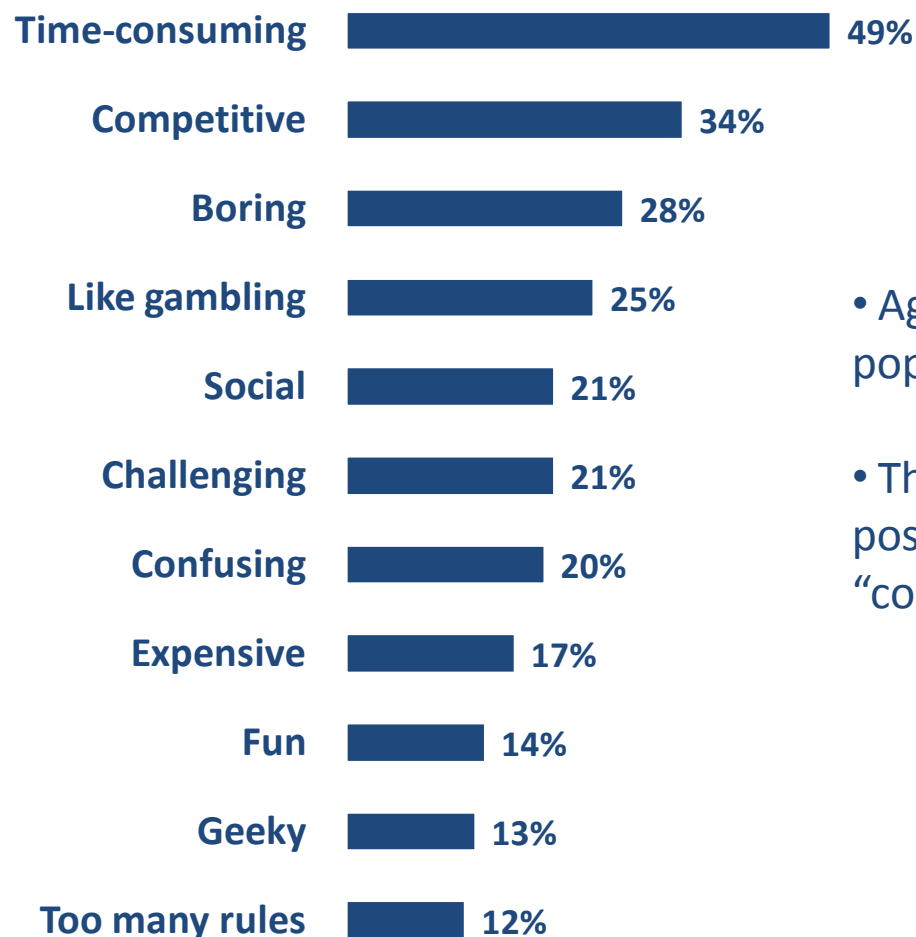


- When we asked Never Players some specific reasons you might not play, not having enough time was the winner. In this, there MAY be an opening to expand Fantasy Sports play. This may seem trivial, but an increase of 1% is millions of players.

Base: Those who have never played fantasy sports

How Never Players see Fantasy Sports

Q9. Which of the following attributes do you associate with Fantasy Sports? Please select all that apply based on your impressions, even if you are not very familiar with Fantasy Sports.



- Again, we see the “time” issue pop up.

- That said, we do have some positive attributes such as “competitive” and “challenging”.

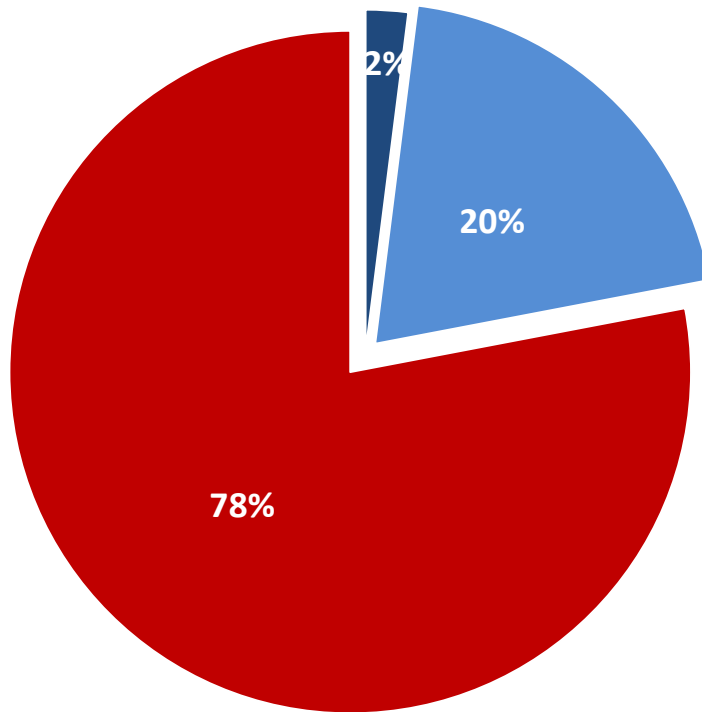
Base: Those who have never played fantasy sports

Likelihood to Play in the Future

Q7. On a scale from 1 to 7, where 1 means there is no chance you will ever play, and 7 means you are very likely to play, how likely are you to play Fantasy Sports in the future?

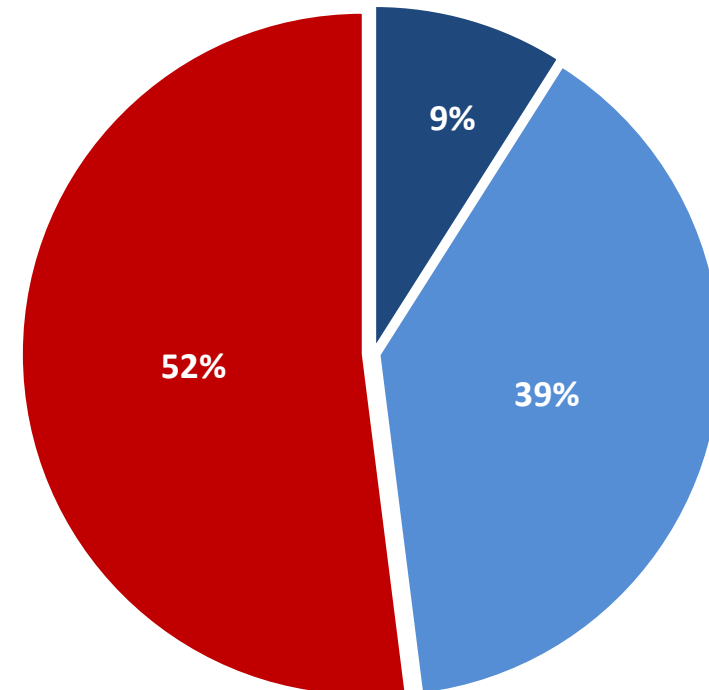
All Never Players

■ Likely to play ■ Might play ■ Not likely to play



Never players with No Time

■ Likely to play ■ Might play ■ Not likely to play



Base: Those who have never played fantasy sports

A Deeper Look at Those With “No Time”

- A quick demographic and Technographic peek at the make-up of those with “no time” for fantasy sports. These are the people who said they had no time to the open ended question of why they do not play fantasy sports. This group of 15% of Never Players looks the most like Fantasy Players and deserves a closer look.
 - It is no wonder they have “no time”. They are more likely than the general population to play board games, play phone games, play games on their PC, play lottery games, play card games, play in sports pools, and play online poker.
 - The above answers should be encouraging as this group is also more likely to say they might play fantasy sports (previous slide).
 - These folks are also more media driven (in a way that resembles Fantasy Sports players – See 2009 data in the appendix).
- Also,
 - Make \$4,000 more per year than the gen population
 - Are 56% Male, 44% Female
 - Are age 41 on average vs. 31 for Fantasy Players
 - Are actually slightly less likely than the general population to have kids (33%)
 - More likely to be employed full time

Key Take-Aways...

- The Low Hanging Fruit
 - The Internet explosion for fantasy sports 10-15 years ago largely harvested the low hanging fruit. Many of the barriers to entry for Fantasy Players were eliminated and they flooded the market (only 6% of Americans were playing when we first measured the data back in 2004). Other than targeting teens, there is little hope for expanding among most Never Players.
- The Medium Hanging Fruit
 - People with “No Time”. By no means is this the seemingly unlimited supply of players that the Internet expansion was, but these are people who need less convincing and educating and more help balancing fantasy play with a busy lifestyle. Fantasy companies will need to focus on ease of use and low time commitment to attract these people. These people look a lot like Fantasy Players. For more info on where to find Fantasy Players (and presumably those with no time), see the 2009 consumer research in our appendix.
- The High Hanging Fruit
 - The rest of the Never Players. These folks are not educated about Fantasy Sports and are not overly interested once the game is described to them. It is the opinion of the researcher that this group will be hard to reach and may not be worth the investment.

QUESTIONS???

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Appendix

2009 Fantasy Sports Study comparing Fantasy Players vs Non Players and their consumer habits – HINT – Fantasy Players are super consumers.



Background and Objectives

- The Fantasy Sports Trade Association (FSTA) has for some time been interested in taking the next step in understanding the players of fantasy sports.
- Part of being able to market Fantasy Sports sites and services as great places to advertise, was by conducting research to understand if fantasy sports players are consumers of key products more than the general sports fan or the overall general population.

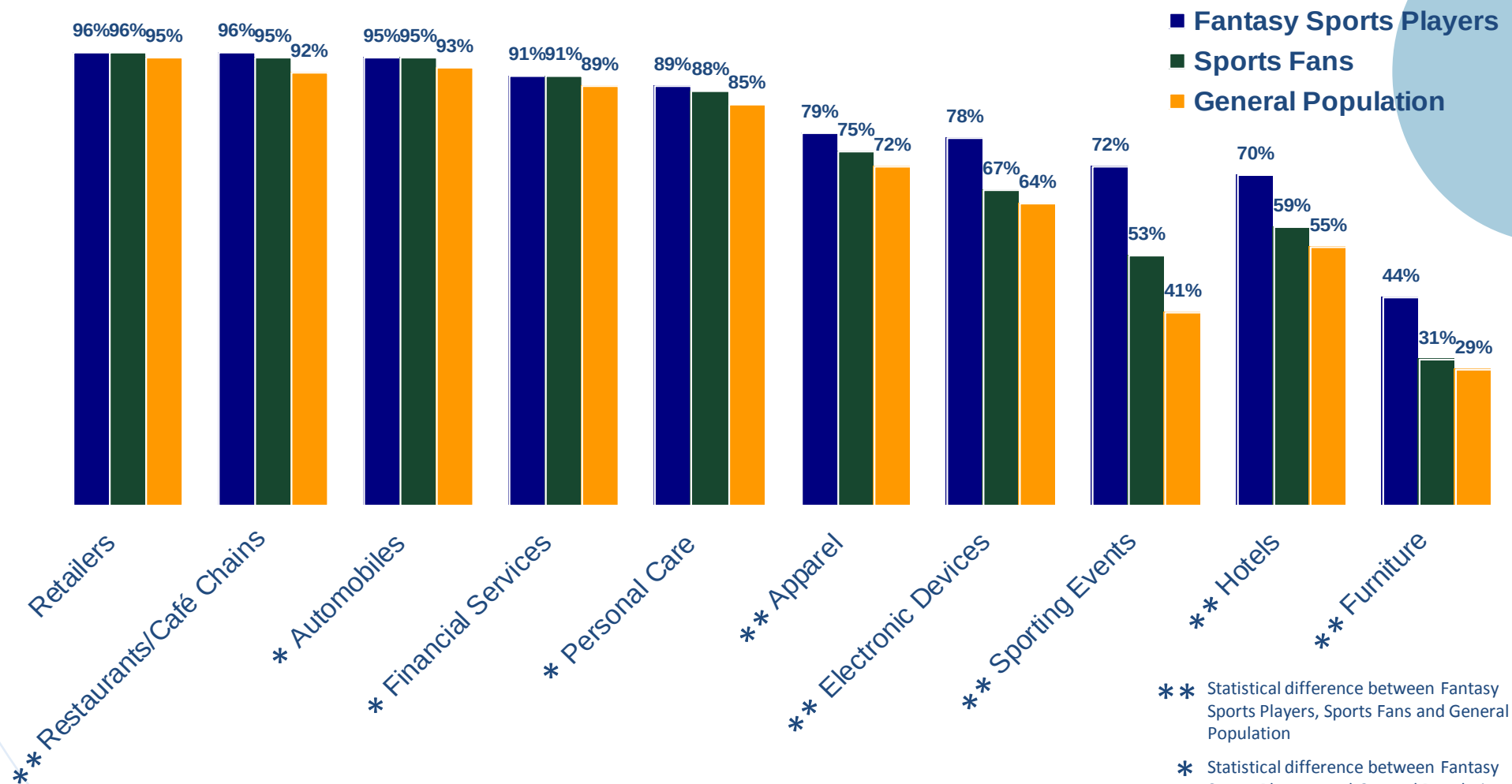
U.S. Fantasy Sports Players' Consumer Usage

- Two separate but identical surveys were conducted for the U.S. Fantasy Sports Players' Consumer Usage portion of the research, and the data was merged to compare and contrast the three groups (General Population, Sports Fans, and Fantasy Sports Players).
- First, using the Ipsos proprietary panel, Ipsos identified **1,103 Fantasy Sports Players** and interviewed them on their usage of products and services.
- Second, a survey was run across the General Population to understand their usage numbers; **3,034 members of the General Population** were interviewed.
- Third, the general population survey included a battery of questions pertaining to the level of fan interest in sports. Those rating any of the sports as a 6 or 7, on a 7 point scale, were defined as Sports Fans; **1,807 respondents qualified as Sports Fans**.
- All interviews were conducted online between July 21 and August 17, 2009.

U.S. Fantasy Sports Players' Consumer Usage in 10 Categories

Key Findings

- Fantasy Sports Players consume significantly more than the General Population in nine out of 10 new categories researched in 2009, and more than Sports Fans in six out of these 10 categories.
- The gap in the consumption patterns with electronic devices, hotels, furniture, and attendance to sporting events is particularly notable.



Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

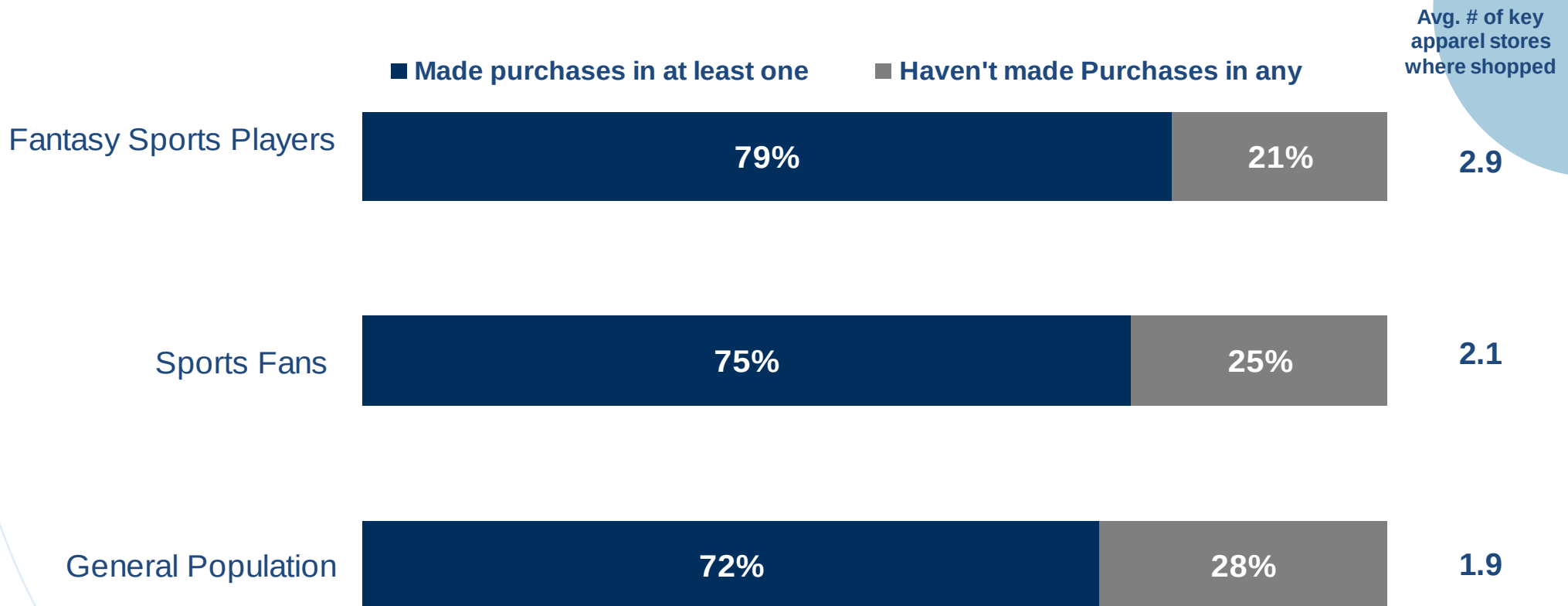
Apparel

Shopped at in the past 30 days



Apparel – Overall Comparison

- Over eight in 10 FSPs have shopped at key apparel stores in the past 30 days.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population
- On average, Fantasy Sports Players have shopped at 2.9 apparel stores in the past month, compared to 2.1 for Sports Fans and 1.9 for the General Public.

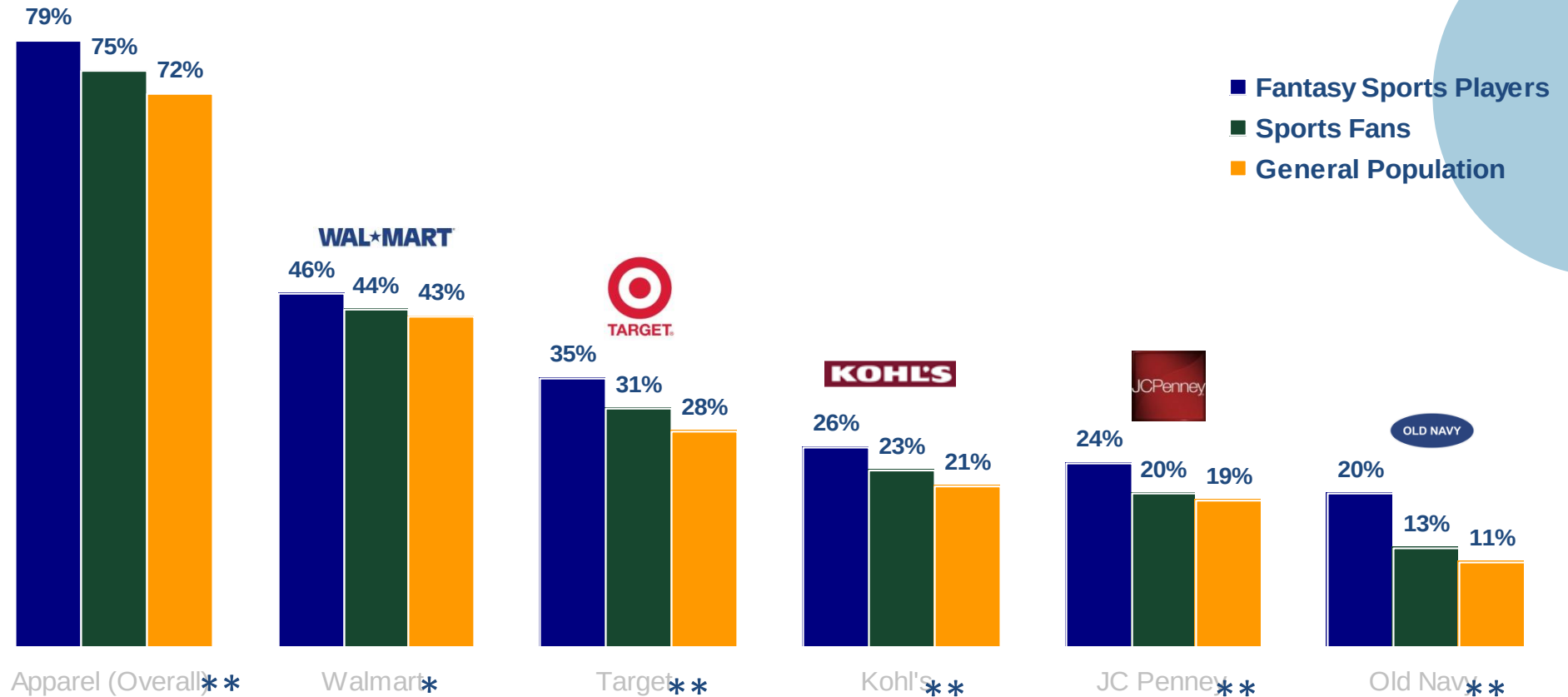


Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Q. At which of the following apparel stores have you shopped - either online or at stores - in the past 30 days?

Apparel – Significant Difference Comparison (Top 5)

- Fantasy Sports Players purchase apparel at Target, Kohl's, JCPenney and Old Navy significantly more than do Sports Fans or the General Population.
- They also shop for apparel at Wal-Mart significantly more than the general population.



** Statistical difference between Fantasy Sports Players, Sports Fans and General Population

* Statistical difference between Fantasy Sports Players, and General Population

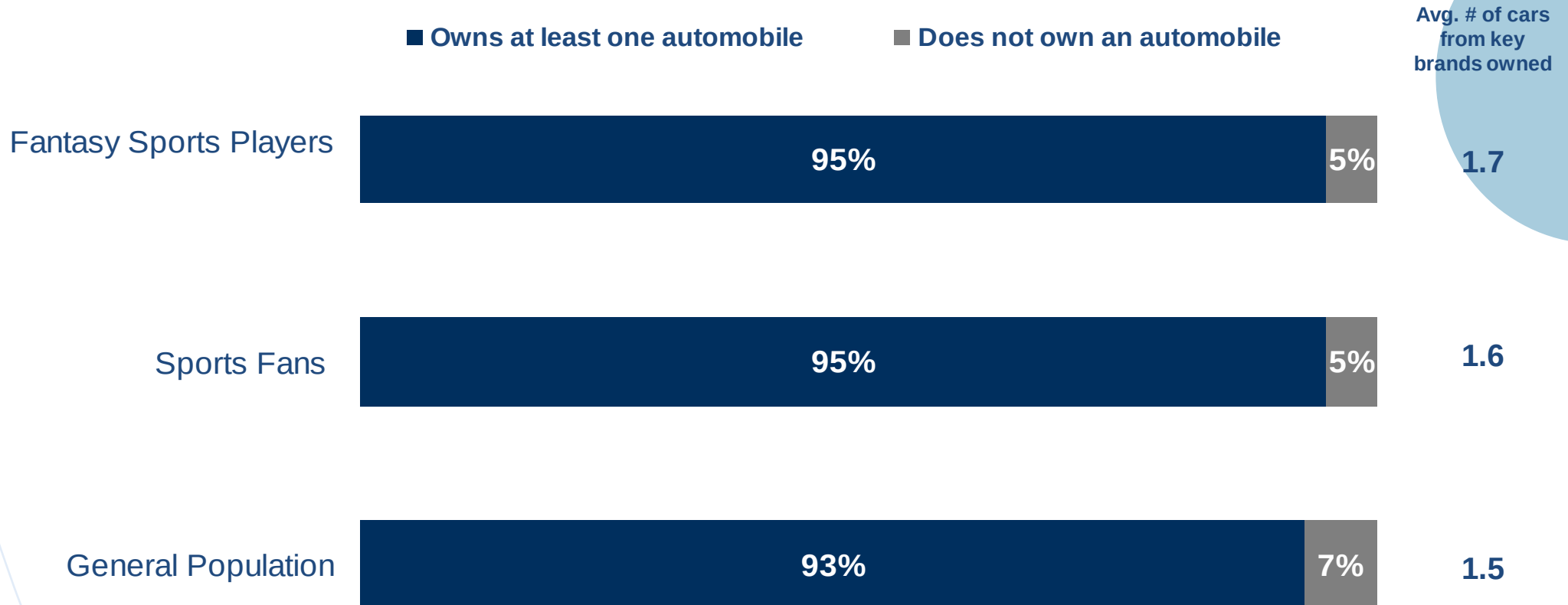
Automobiles

Currently owned



Automobiles – Overall Comparison

- Close to all FSPs own at least one car.
- Automobiles is one of the two categories surveyed for which usage among Fantasy Sports Players is not significantly higher than it is among the General Population.

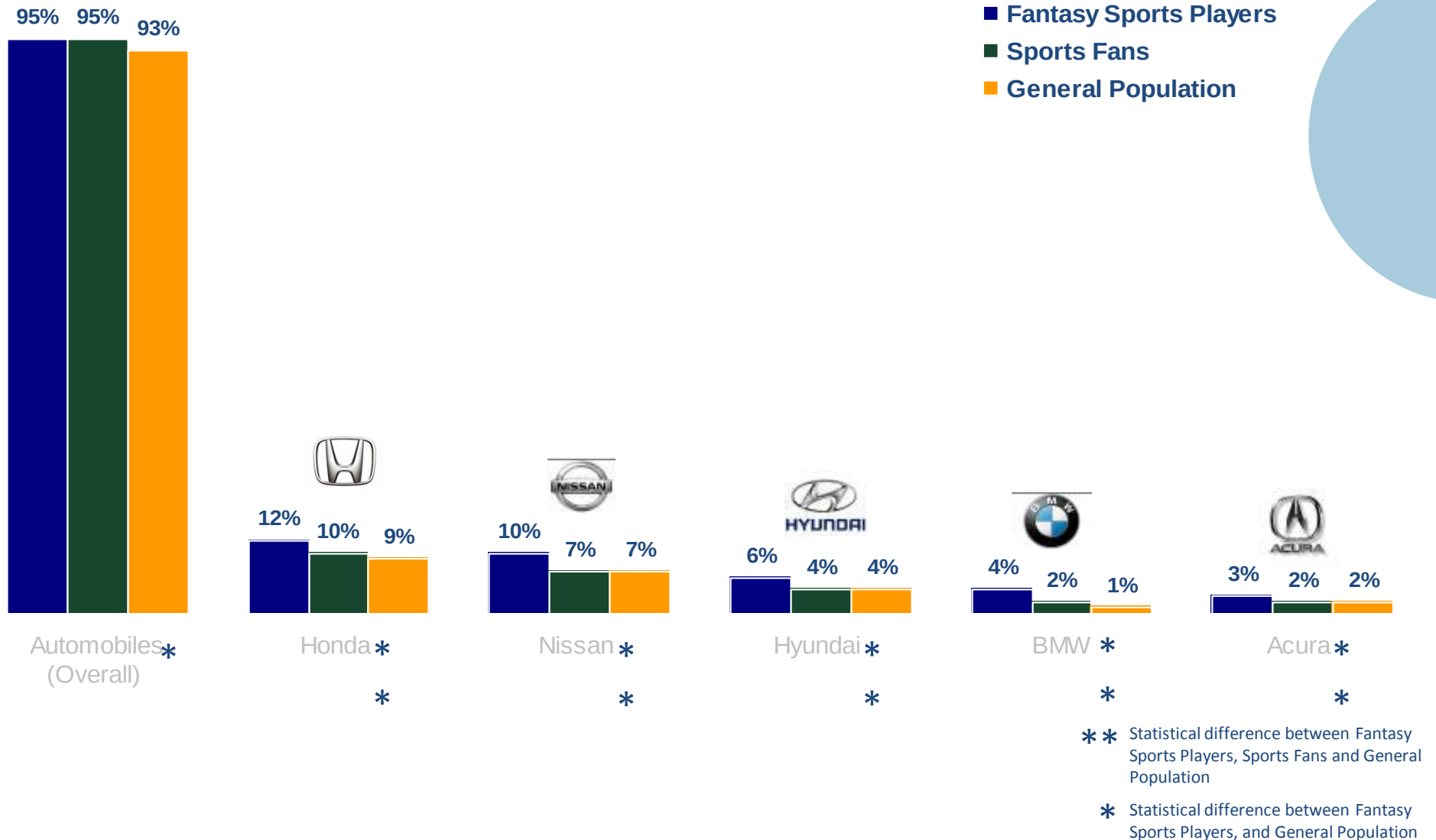


Q. Which of the following Automobile Makes do you currently own?

Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Automobiles – Significant Difference Comparison (Top 4)

- FSPs are more likely to own automobiles from brands such as Honda, Nissan, Hyundai, BMW or Acura than Sports Fans or the General Population.



Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

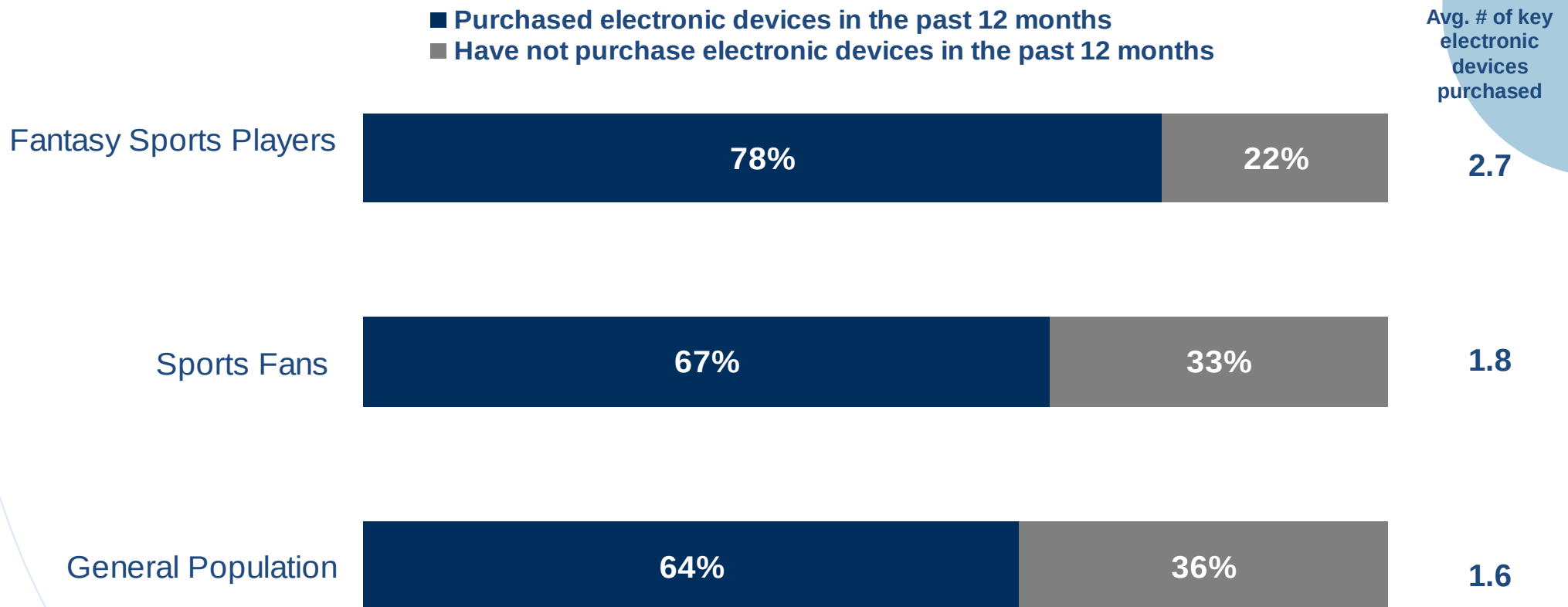
Electronic Devices

Purchased at in the past 12 months



Electronic Devices – Overall Comparison

- Close to eight in 10 FSPs have purchased an electronic device in the past year.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population
- On average, Fantasy Sports Players have purchased 2.7 electronic devices in the past year, compared to 1.8 for Sports Fans and 1.6 for the General Public.

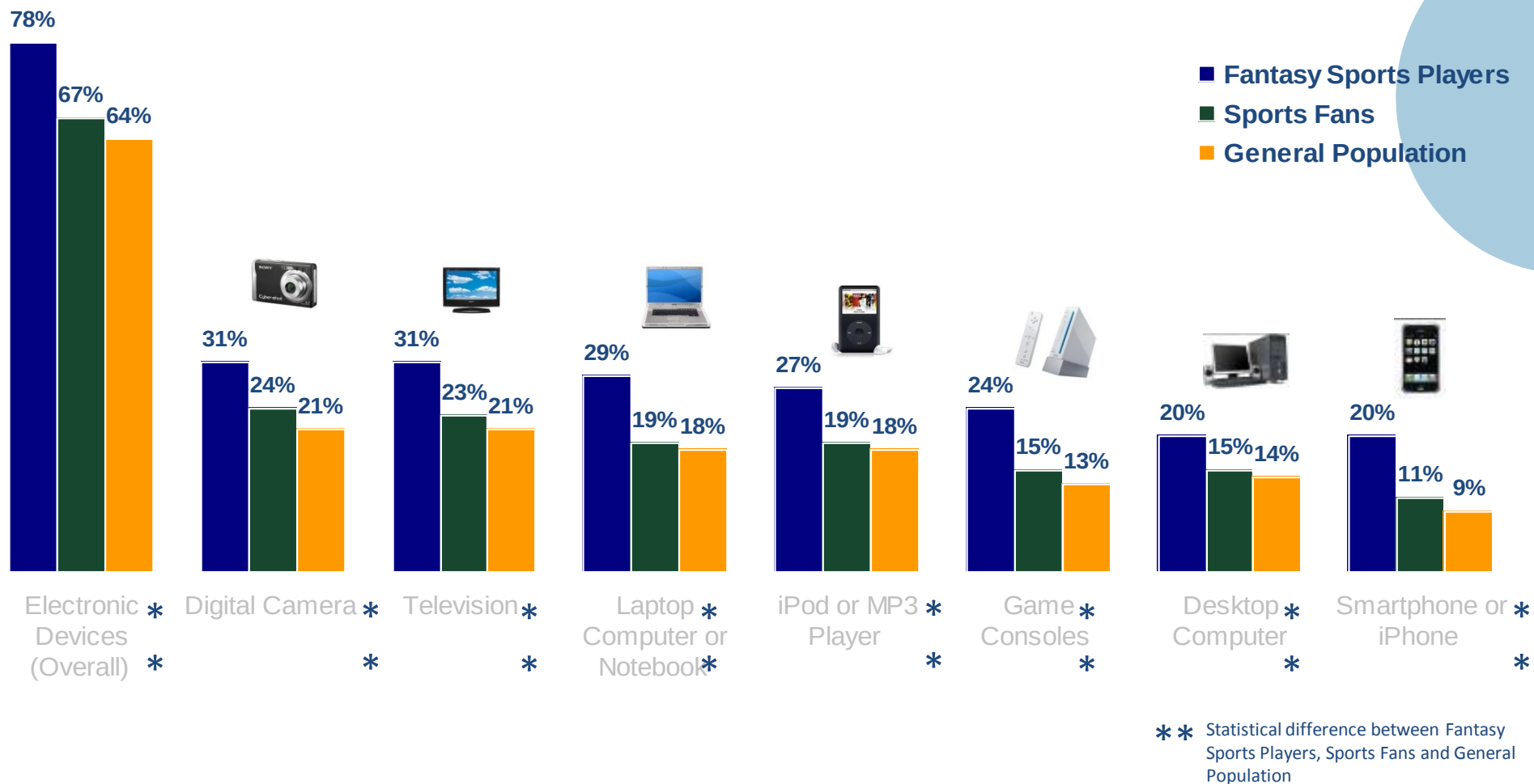


Q. Which of the following electronic devices have you purchased in the past 12 Months?

Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Electronic Devices – Significant Difference Comparison (Top 7)

- Fantasy Sports Players have purchased key electronic devices such as digital cameras, televisions, laptops, iPods/MP3 players, game consoles, desktops or smart phones/iPhones in the past year significantly more than Sports Fans or the General Population.



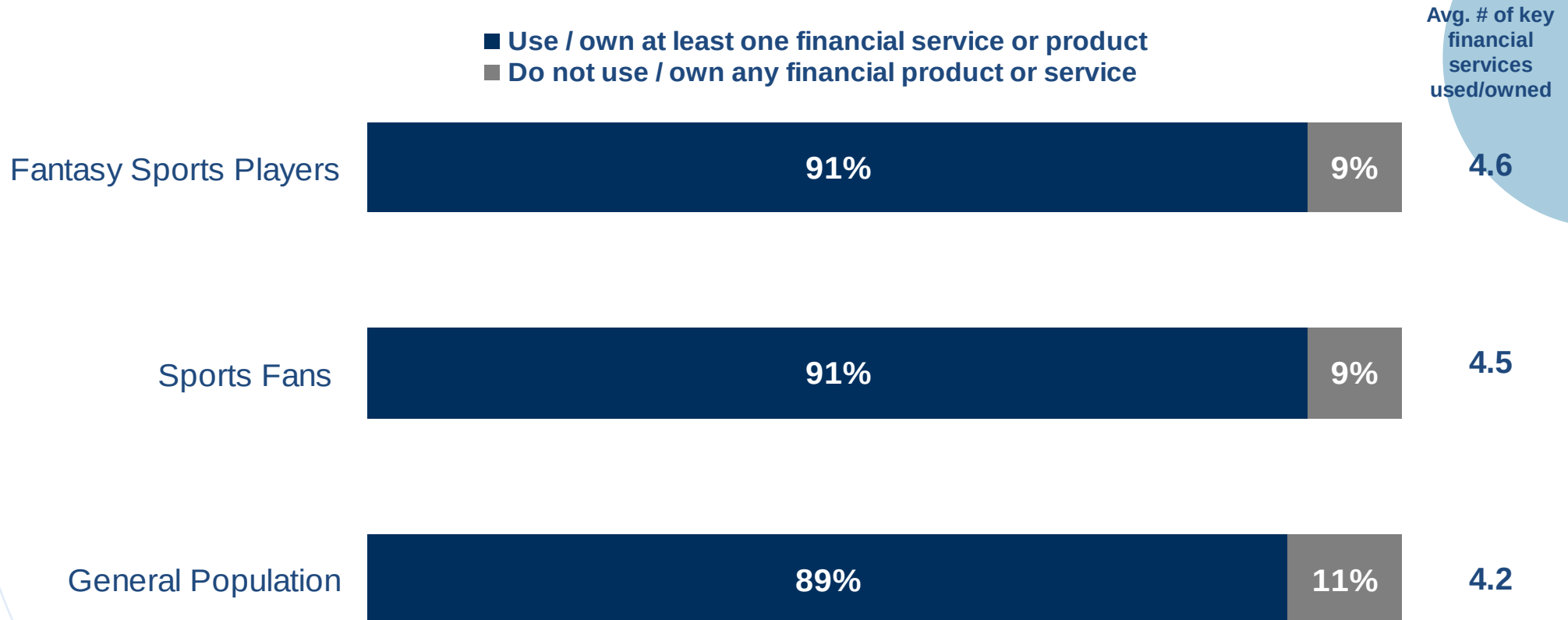
Financial Services

Currently use or own



Financial Services – Overall Comparison

- Nine in 10 FSPs currently use or own financial services or products.
- Category usage among Fantasy Sports Players is similar to Sports Fans and the General Population
- On average, Fantasy Sports Players use or own 4.6 financial services or products, compared to 4.5 for Sports Fans and 4.2 for the General Public.



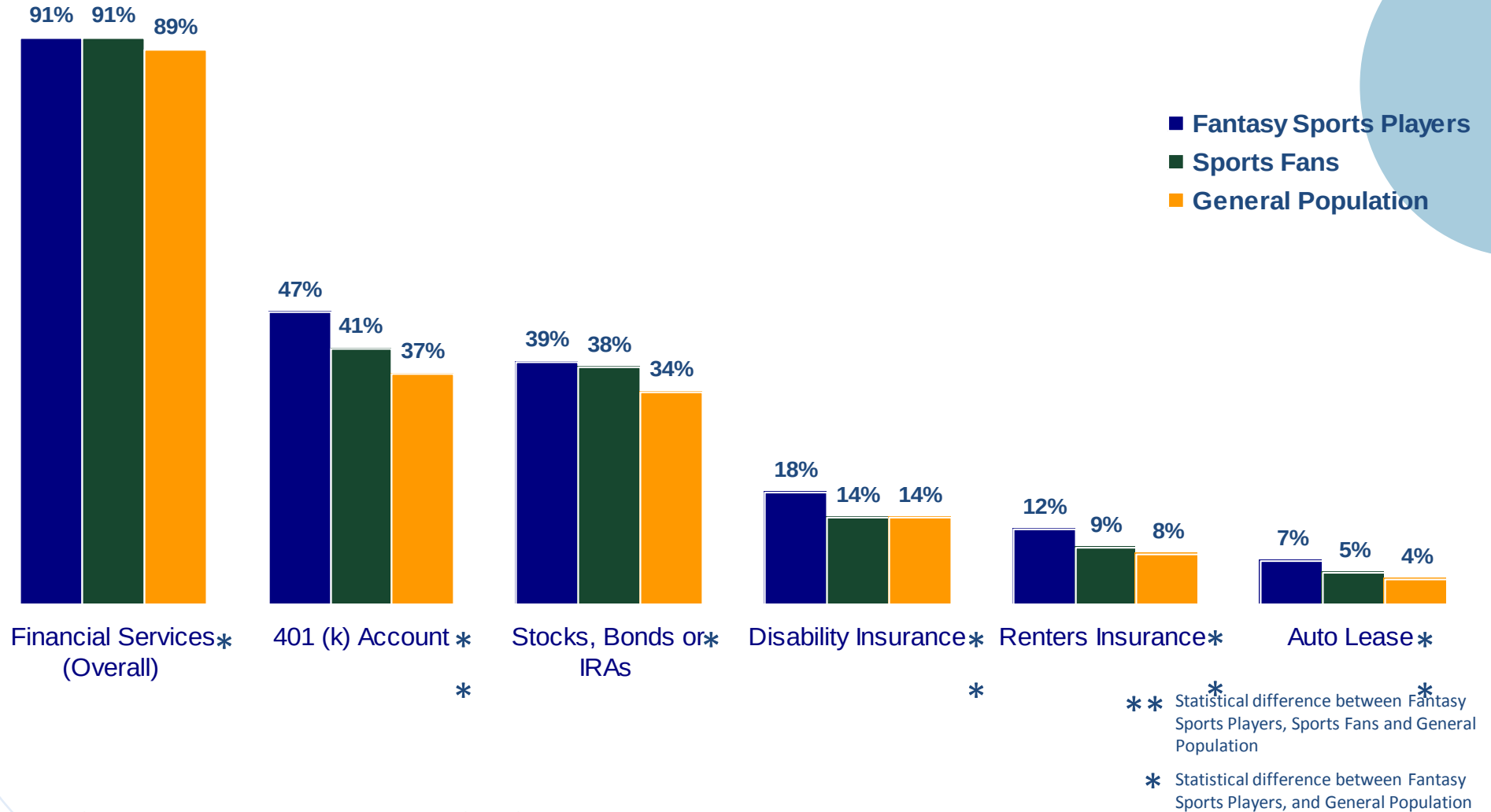
Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Q. Which of the following financial services or products do you currently use or own?



Financial Services – Significant Difference Comparison (Top 5)

- While the overall usage of financial services or products of Fantasy Sports Players is similar to Sports Fans and the General Population, some specific products like 401(k) accounts, disability insurance, renter's insurance and auto leases are higher among FSPs than the other two populations.



Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Furniture

Purchased in the past 12 months



Furniture – Overall Comparison

- Over four in 10 Fantasy Sports Players have purchased furniture from a main furniture company in the past 12 months.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population

■ Purchased Furniture in the past 12 months ■ Have not purchased furniture in the past 12 months

Fantasy Sports Players



Sports Fans



General Population



Avg. # of key furniture companies purchased from

1.0

0.6

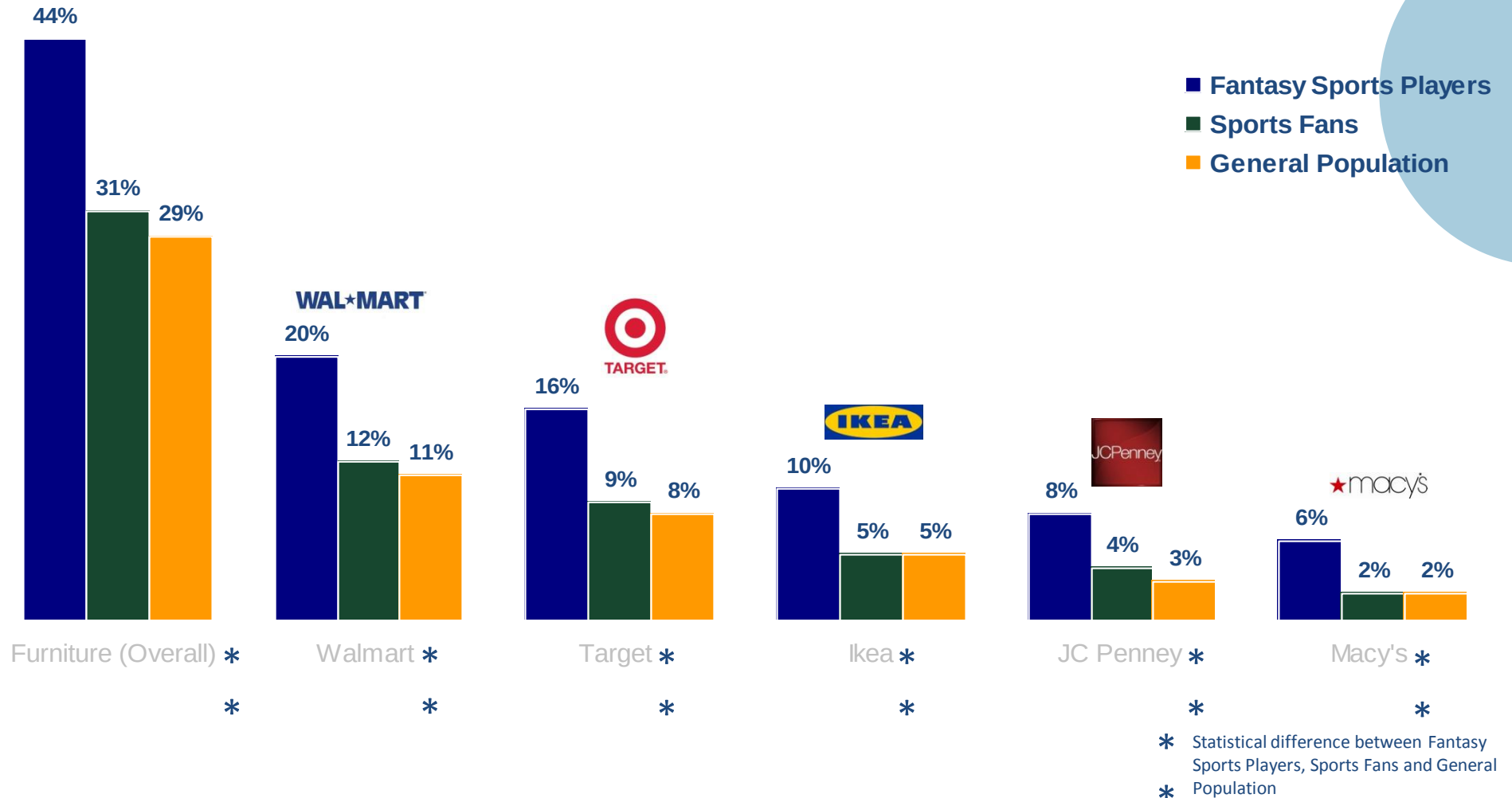
0.5

Q. From which of the following companies have you personally purchased furniture in the past 12 Months?

Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Furniture – Significant Difference Comparison (Top 5)

- Fantasy Sports Players purchased furniture from Wal-Mart, Target, Ikea, JCPenney and Macys in the past year significantly more than Sports Fans or the General Population.



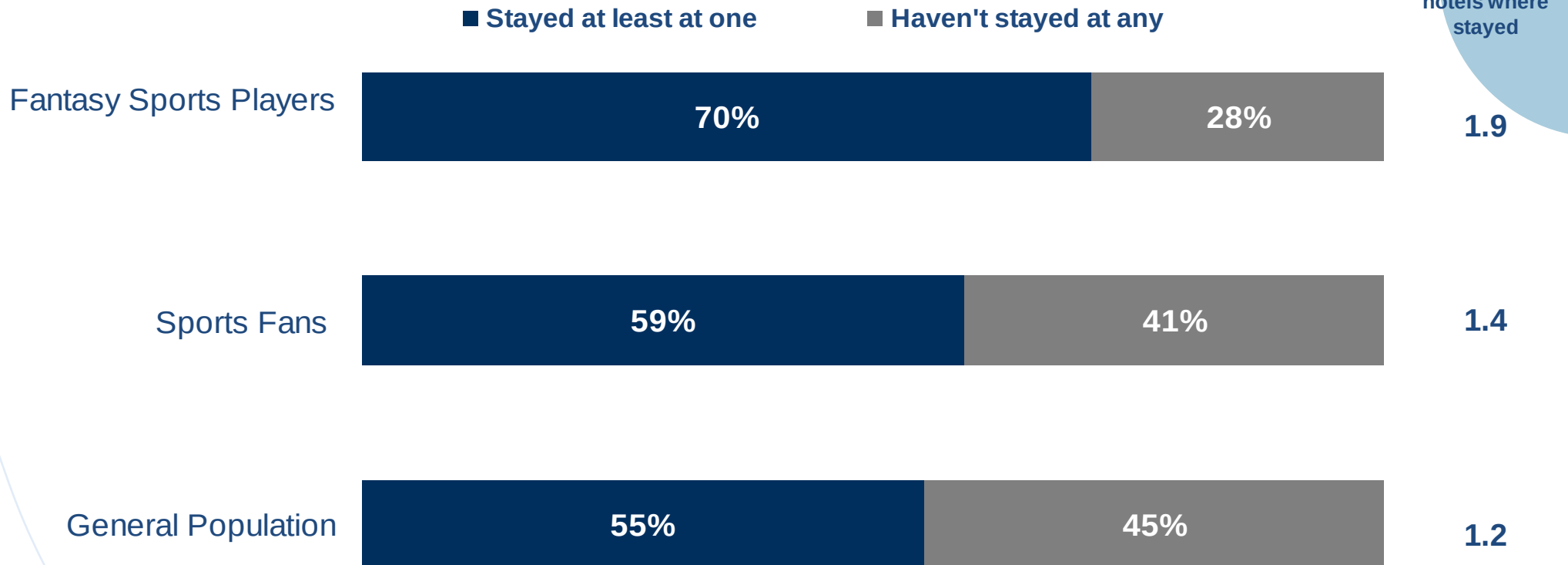
Hotels

Stayed at in the past 12 months



Hotels – Overall Comparison

- Seven in 10 FSPs have stayed in a hotel in the past year.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population
- On average, FSPs have stayed in 1.9 major hotels in the past year, compared to 1.4 for Sports Fans and 1.2 for the General Public.

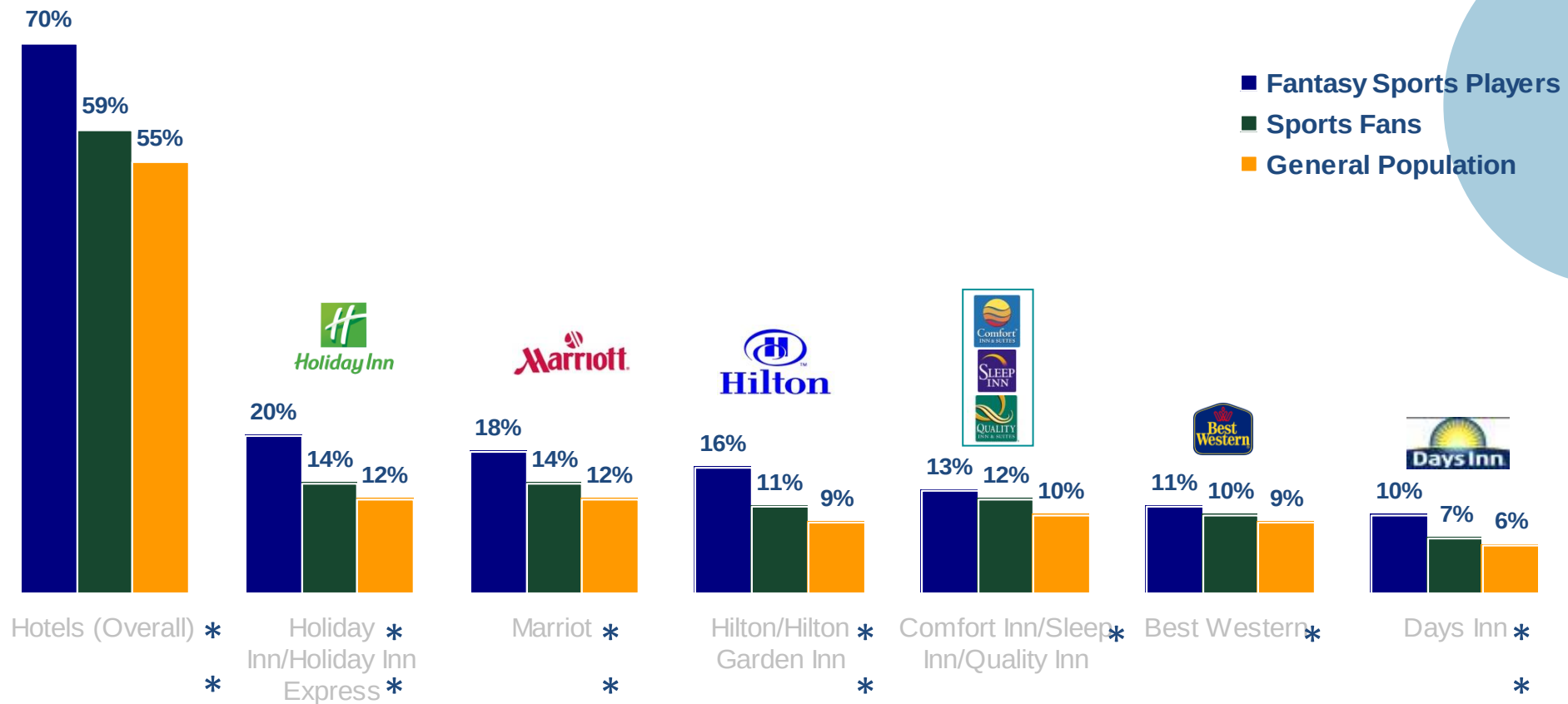


Q. In which of the following Hotels have you personally stayed in over the course of the past 12 months?

Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Hotels – Significant Difference Comparison (Top 6)

- In the past year, FSPs stayed at Holiday Inn, Marriot, Hilton and Days Inn significantly more than Sports Fans or the General Population.



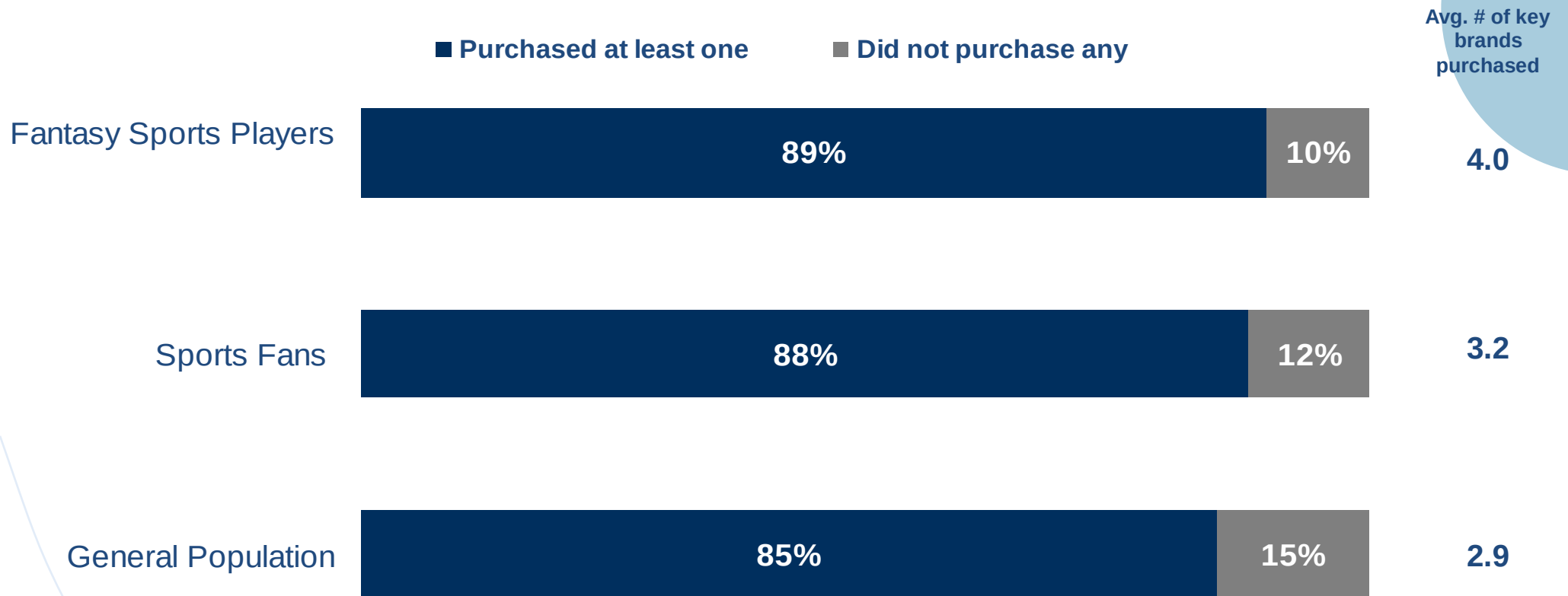
Personal Care Products

Purchased in the past 30 days



Personal Care Products – Overall Comparison

- Close to nine in 10 Fantasy Sports Players have purchased at least one personal care product in the past 30 days.
- Category usage among Fantasy Sports Players is significantly higher than it is among the General Population.
- On average, Fantasy Sports Players have purchased 4.0 key personal care brands in the past month, compared to 3.2 for Sports Fans and 2.9 for the General Public.

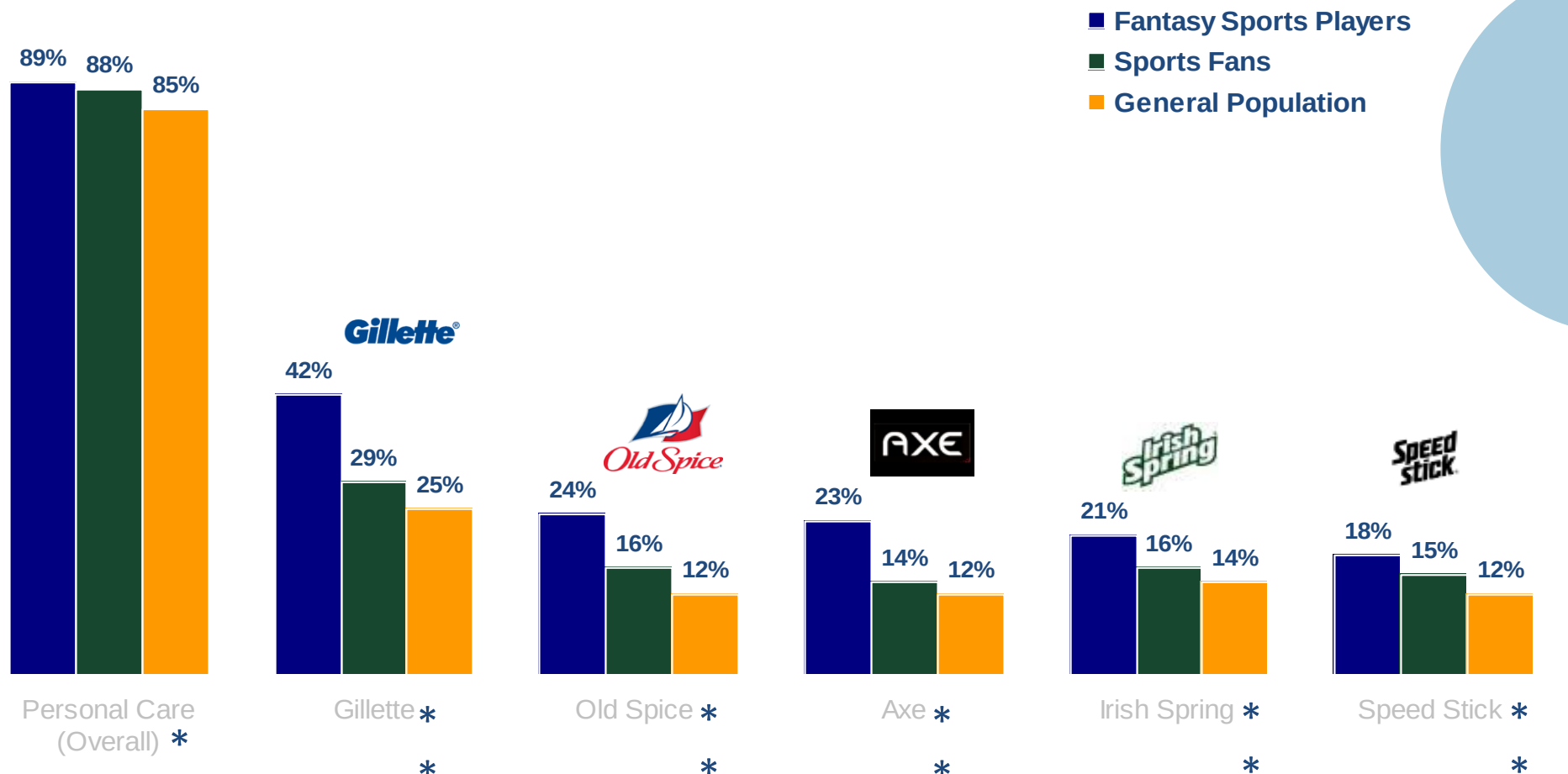


Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Q. Which of the following brands of personal care products have you personally purchased for yourself the past 30 days?

Personal Care Products – Significant Difference Comparison (Top 5)

- Fantasy Sports Players purchase Gillette, Old Spice, Axe, Irish Spring and Speed Stick products significantly more than do Sports Fans or the General Population.



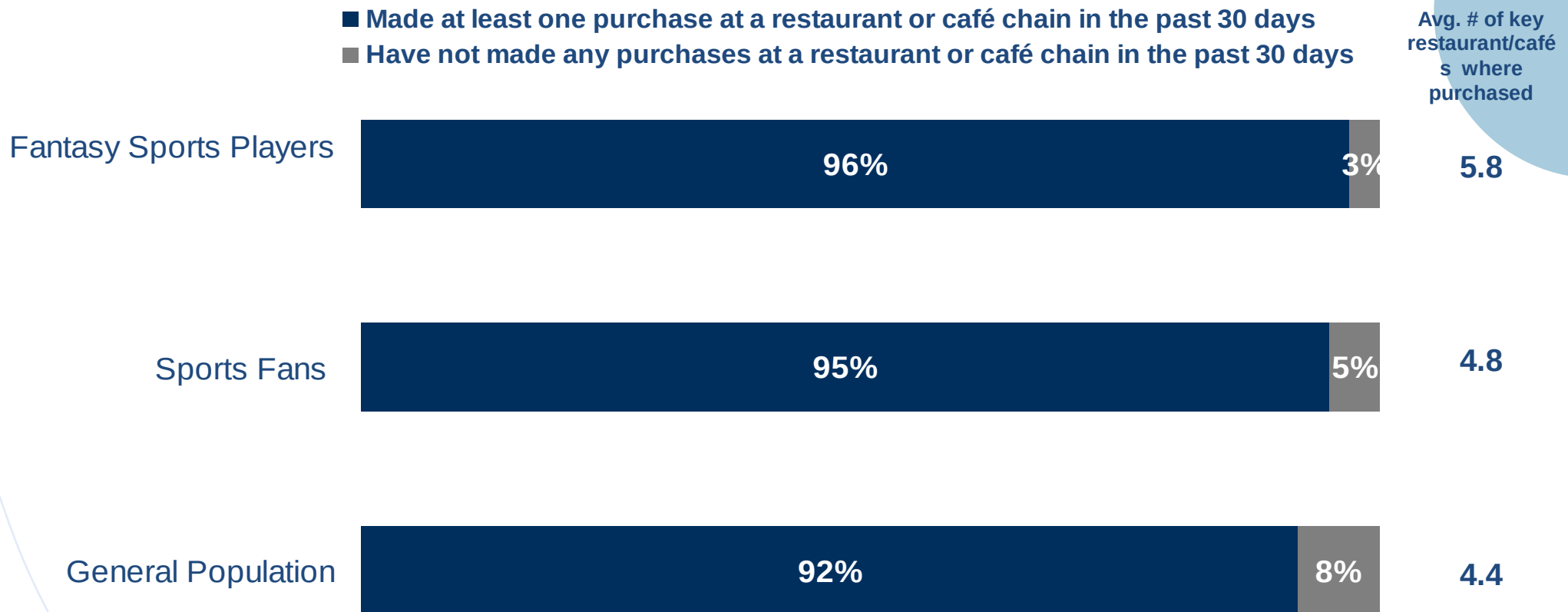
Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Restaurant and Café Chains

Made a purchase in the past 30 days

Restaurant and Café Chains – Overall Comparison

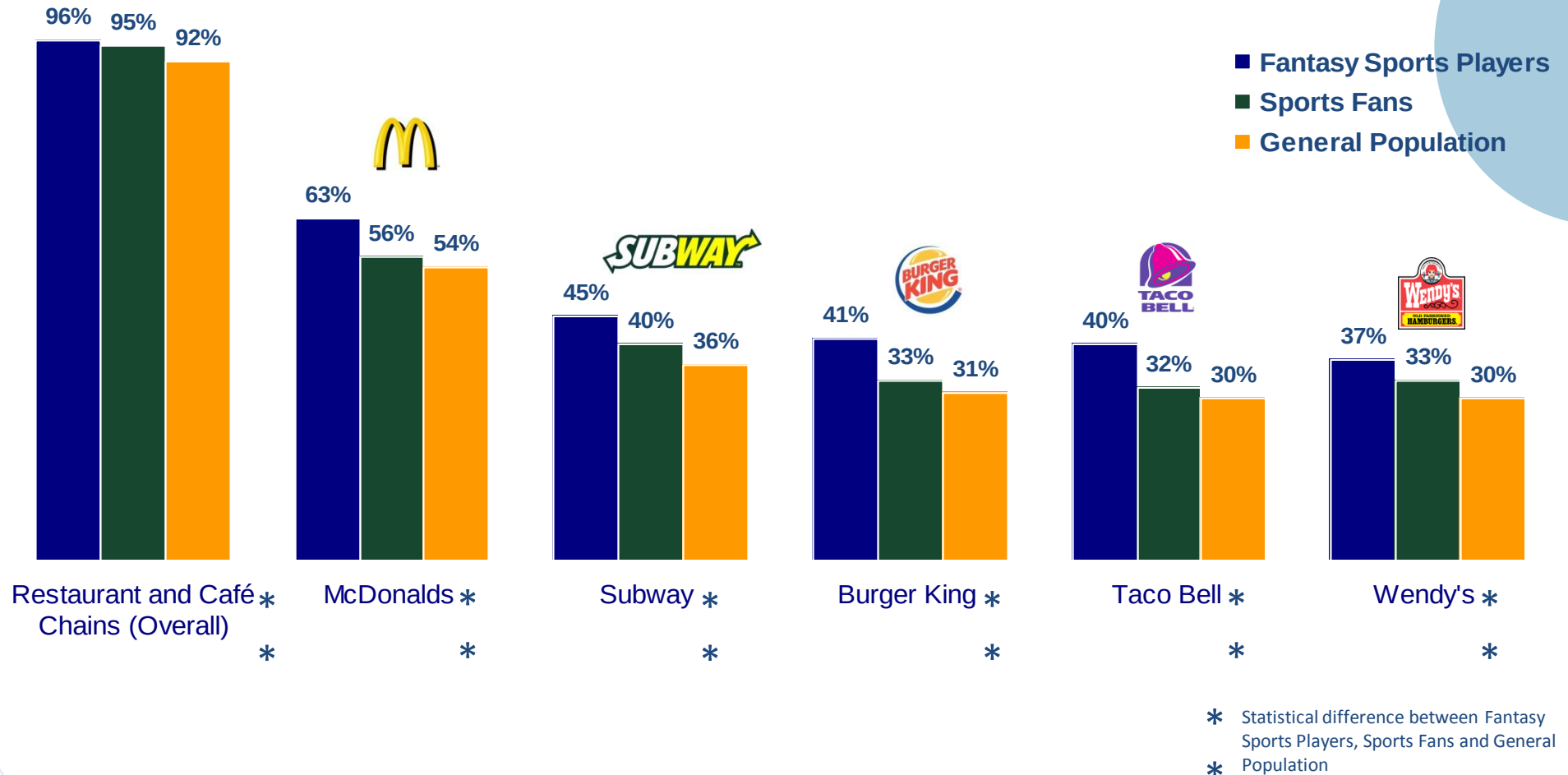
- Virtually all Fantasy Sports Players have made purchases at a key restaurant or café in the past 30 days.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population
- On average, Fantasy Sports Players have purchased at 5.8 restaurant or café chains in the past month, compared to 4.8 for Sports Fans and 4.4 for the General Public.



Q. 13. From which of the following restaurant and café chains have you made at least one purchase whether to eat in, take-out or for delivery in the past 30 days?

Leading Restaurant/Café Chains where Fantasy Sports Players Purchase – Demographic Differences (Top 5)

- Fantasy Sports Players have made a purchase at McDonald's, Subway, Burger King, Taco Bell and Wendy's in the past month significantly more than Sports Fans or the General Population



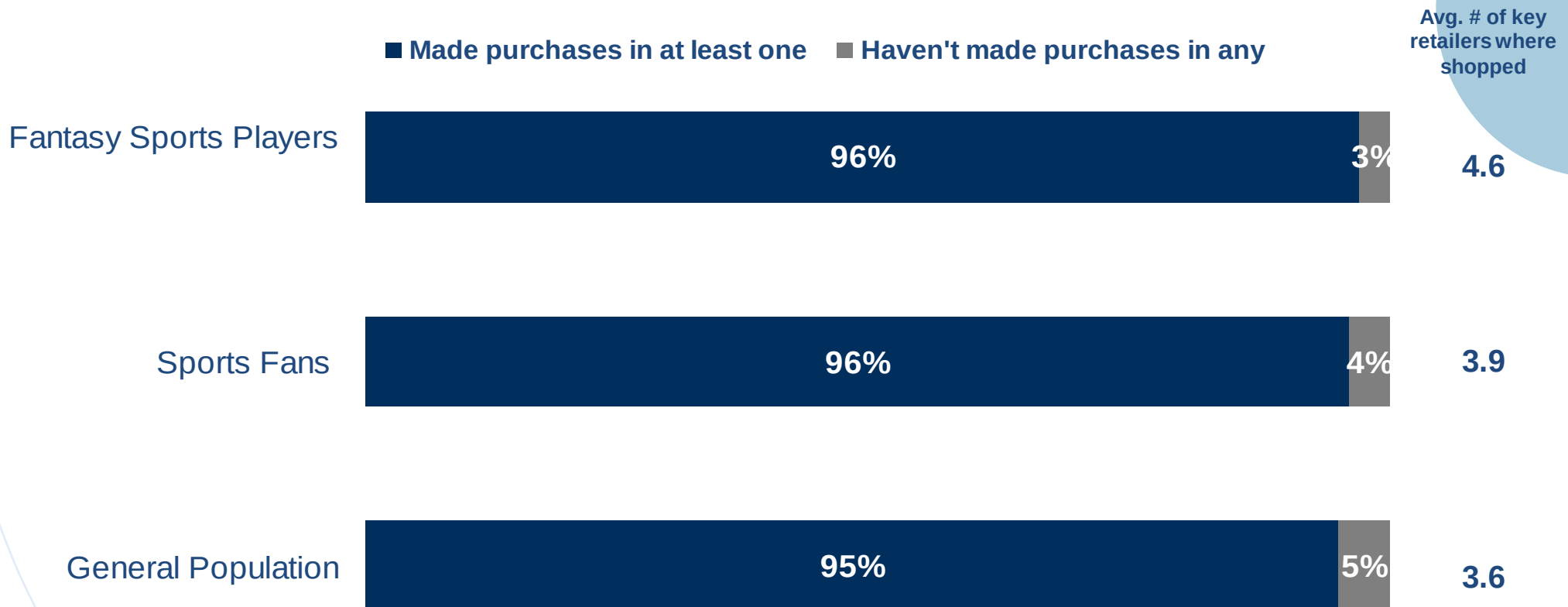
Retailers

Shopped at in the past 30 days



Retailers – Overall Comparison

- Virtually all Fantasy Sports Players have shopped in key retailers in the past 30 days.
- Category usage among Fantasy Sports Players is significantly higher than it is among Sports Fans and the General Population
- On average, Fantasy Sports Players have purchased at 4.6 retailers in the past month, compared to 3.9 for Sports Fans and 3.6 for the General Public.

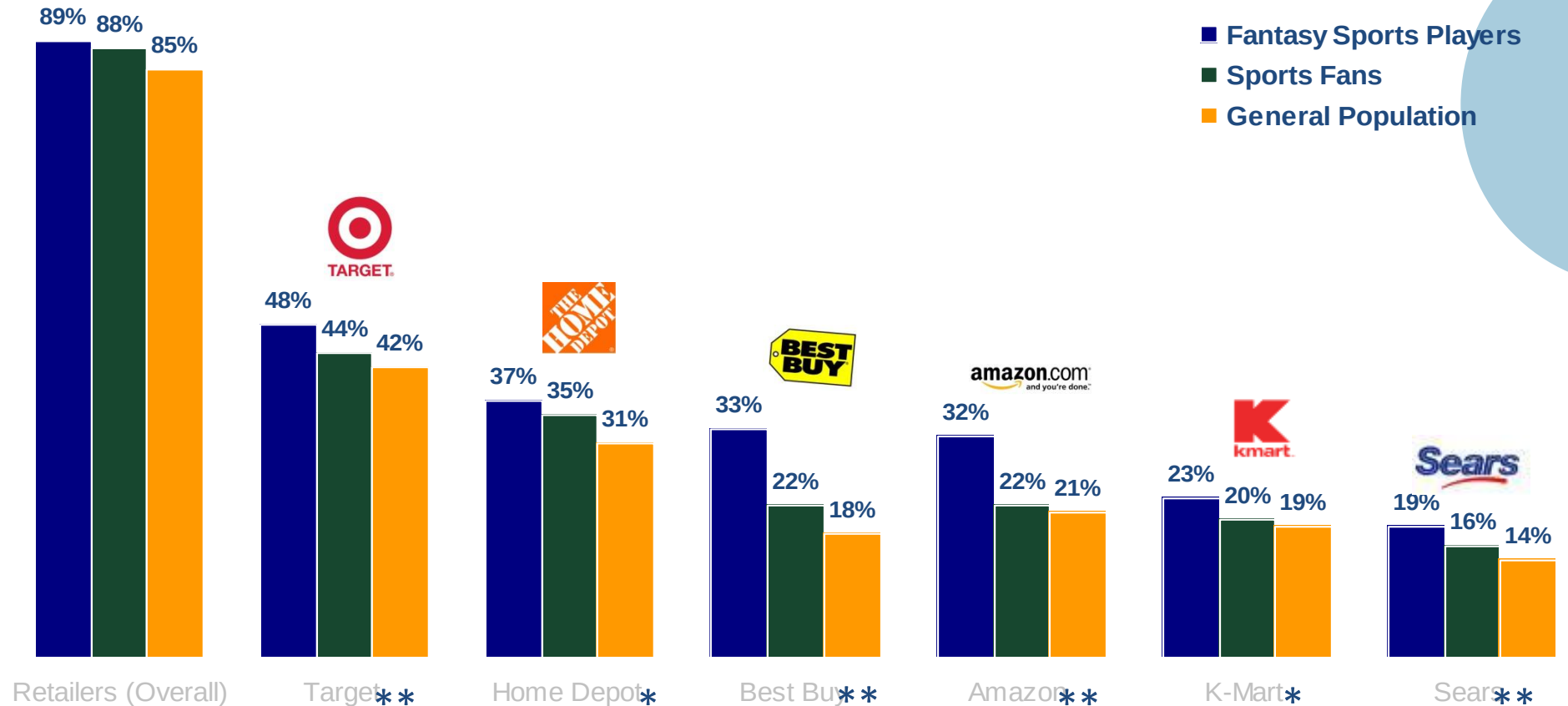


Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Q. At which of the following retailers have you shopped - either online or at stores - in the past 30 days?

Retailers – Significant Difference Comparison (Top 6)

- Fantasy Sports Players shop at Target, Best Buy, Amazon and Sears significantly more than do Sports Fans or the General Population.
- They also shop significantly more than the general population at Home Depot and K-Mart.



** Statistical difference between Fantasy Sports Players, Sports Fans and General Population

* Statistical difference between Fantasy Sports Players, and General Population

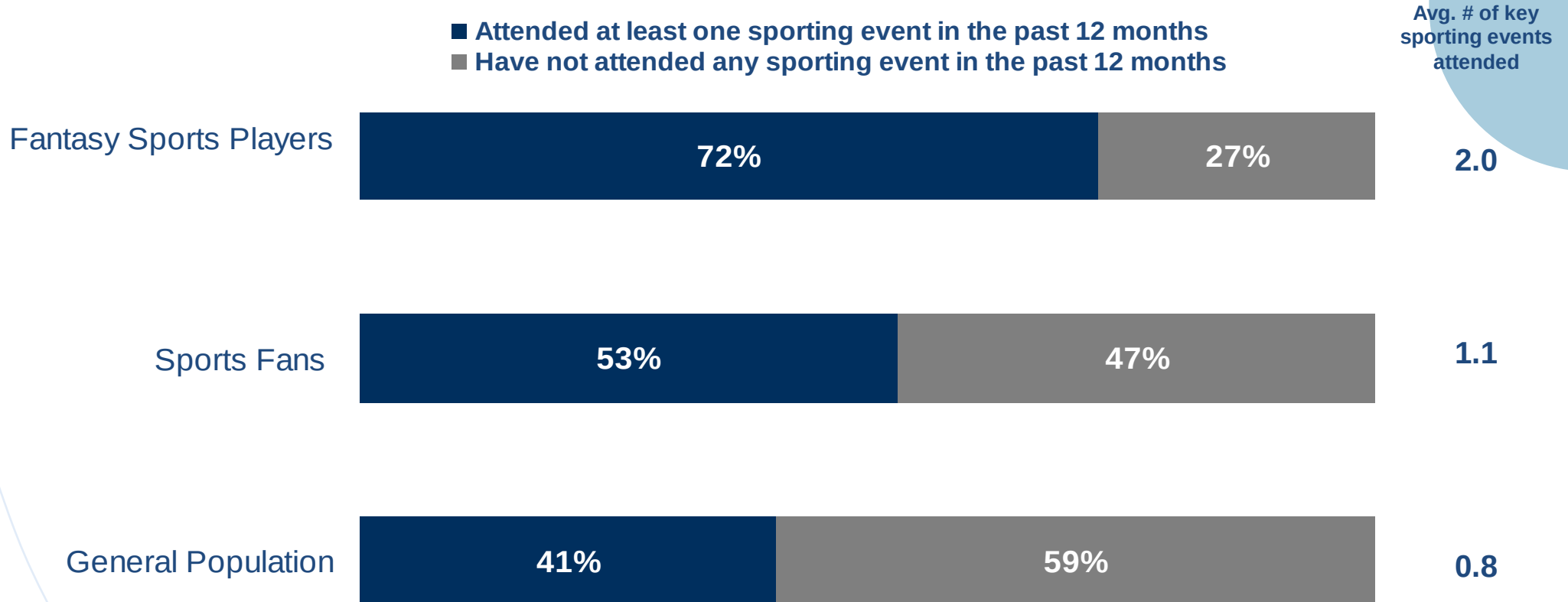
Sporting Events

Attended in the past 12 months



Sporting Events – Overall Comparison

- Over seven in 10 Fantasy Sports Players have attended a sporting event in the past year.
- Fantasy Sports Players are significantly more likely to attend sporting events than Sports Fans and the General Population
- On average, Fantasy Sports Players attended 2.0 types of sporting events in the past year; in comparison, Sports Fans attended 1.1 and the General Population 0.8.

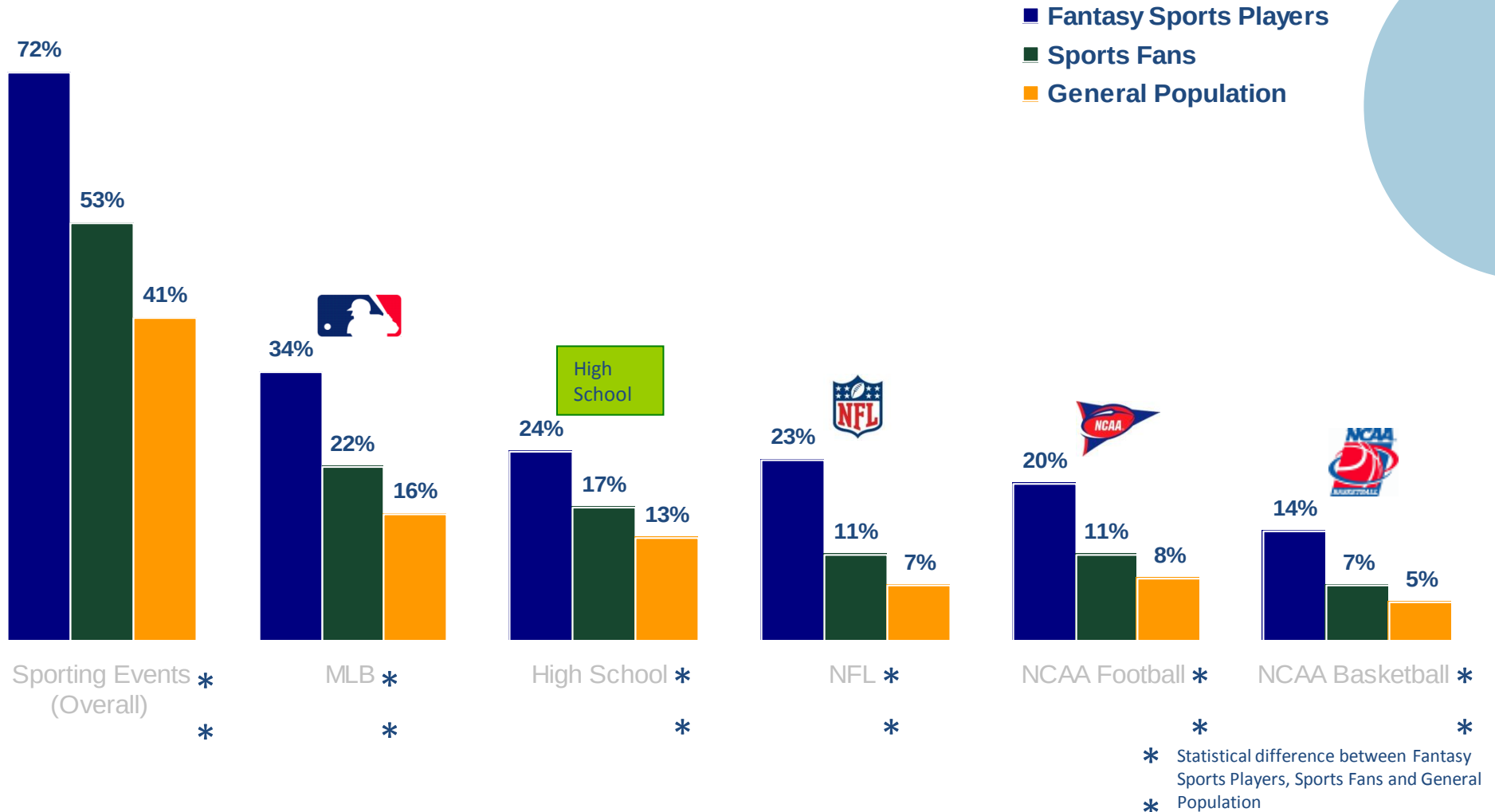


Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

Q. Which of the following sporting events have you attended in the past 12 months?

Sporting Events – Significant Difference Comparison (Top 5)

- Fantasy Sports Players have attended sporting events from MLB, High School, NFL, NCAA Football and NCAA Basketball in the past year significantly more than Sports Fans or the General Population.



Type of Fantasy Sports Played vs. Sporting Events Attended

- Fantasy Sports Player who play MLB, College Football and Basketball, Auto racing and NHL, are significantly more likely to attend sporting events from the types of leagues they play than are FSPs in general, Sports Fans or the General Population.

Type of Fantasy Sport Played

	Gen. Pop	Sports Fans	Fantasy Sports Players							
	16%	22%	34%	37%	54%	36%	34%	36%	29%	38%
High School	13%	17%	24%	25%	30%	31%	35%	34%	29%	29%
	7%	11%	23%	28%	24%	27%	28%	30%	18%	28%
	8%	11%	20%	21%	23%	24%	40%	38%	20%	22%
	5%	7%	14%	14%	18%	19%	29%	28%	13%	19%
	4%	6%	13%	13%	17%	16%	16%	17%	12%	38%
	4%	6%	12%	10%	11%	11%	22%	21%	32%	15%
	4%	6%	12%	12%	15%	26%	20%	28%	10%	14%

Type of Sporting Event Attended

Q. Which of the following sporting events have you attended in the past 12 months?

Base: Fantasy Sports Players n=1,103; Sports Fans n=1,827; General Population n=3,034

APPENDIX II

Results from consumer study conducted in 2008

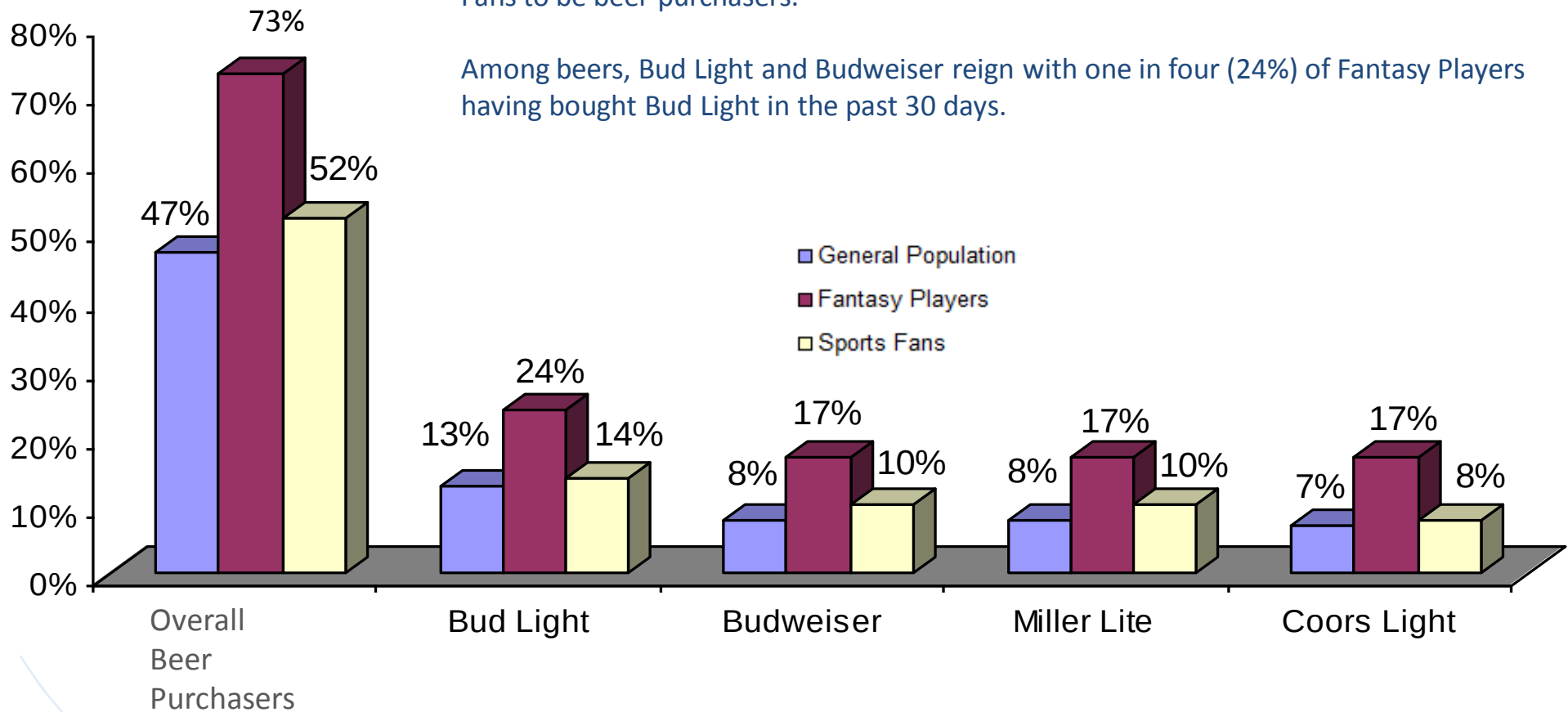
Beer Consumption

General Population, Fantasy Sports Players, Sports Fans – Beer Purchasers

2. Which of the following types or brands of beers have you personally purchased for yourself or someone else in the past 30 days?

Fantasy Sports Players are significantly more likely than the General Population or Sports Fans to be beer purchasers.

Among beers, Bud Light and Budweiser reign with one in four (24%) of Fantasy Players having bought Bud Light in the past 30 days.

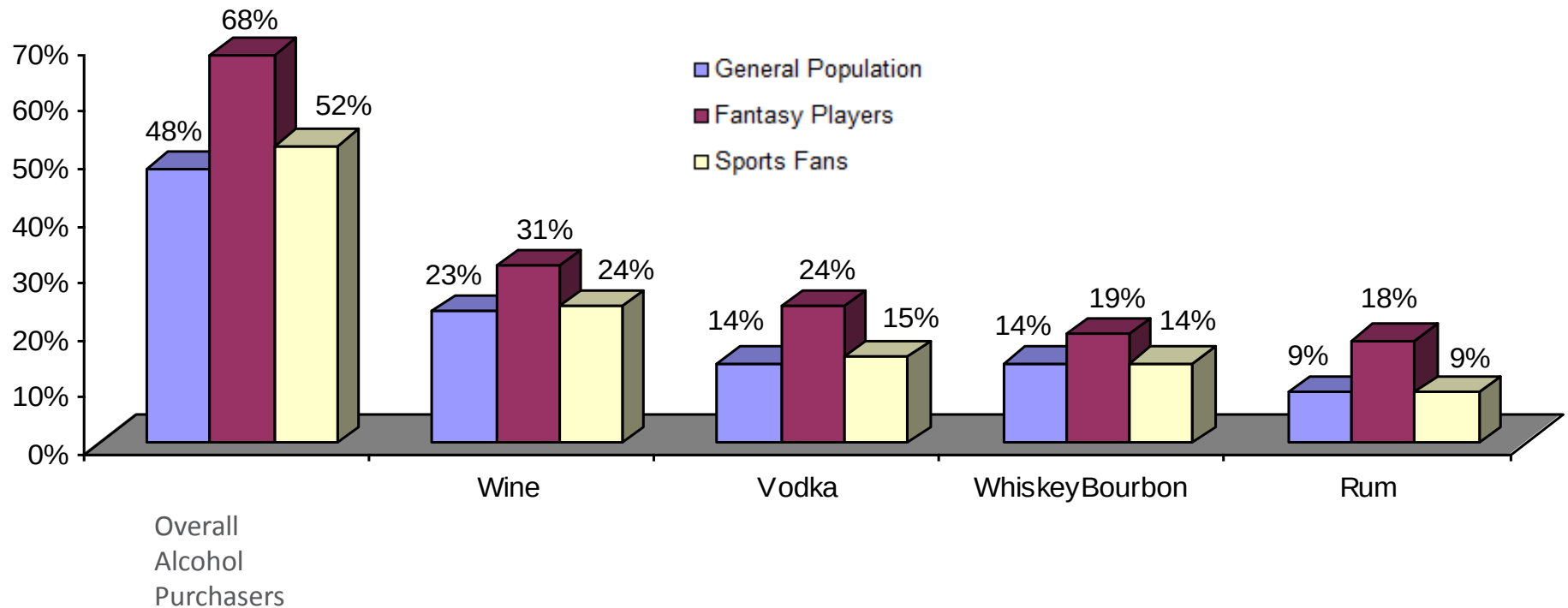


Only those aged 21+ were asked this question - General Population n=930, Fantasy Sports Players n=1,191, Sports Fans n=673

Wine Consumption

3. Which of the following types of alcohol have you personally purchased for yourself or someone in your household in the past 30 days?

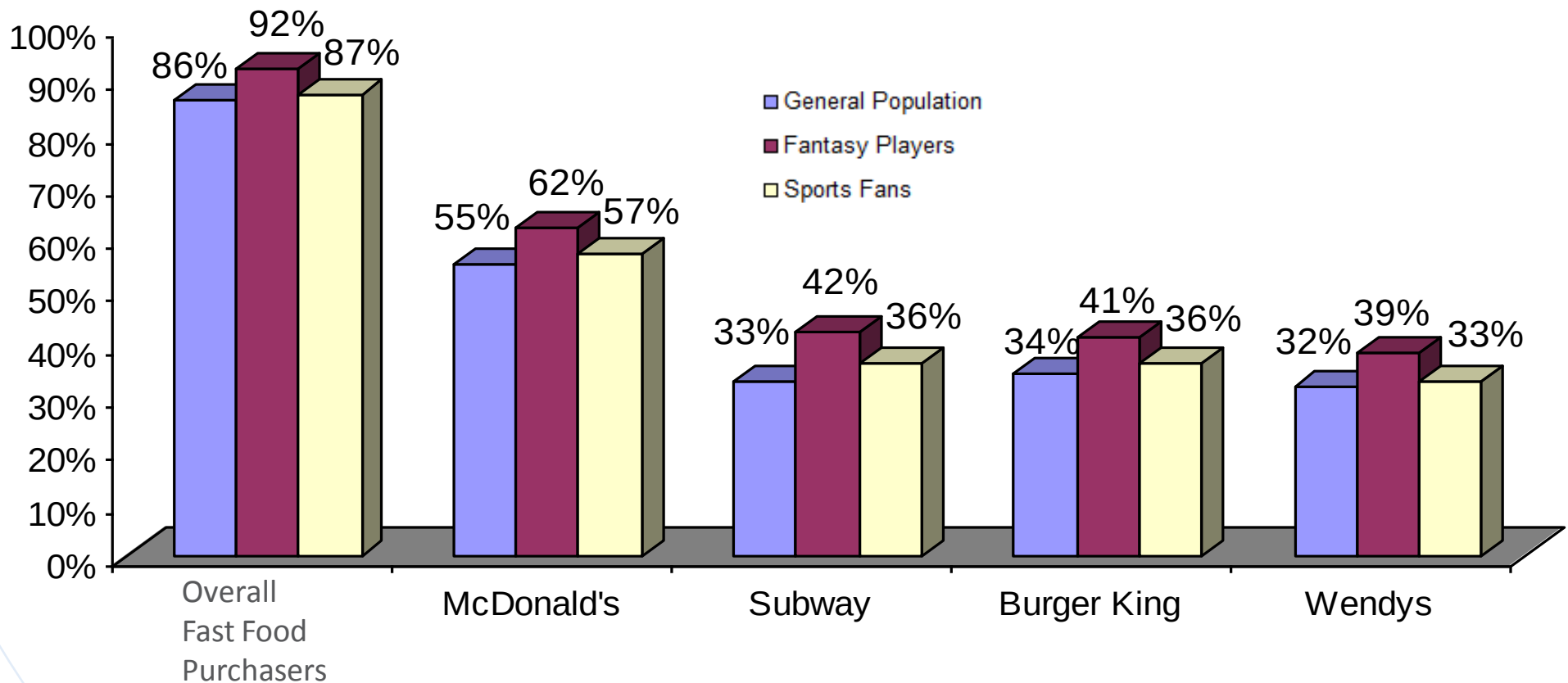
Like beer, Fantasy Sports Players also are high consumers of non-beer alcoholic beverages. Two thirds (68%) say they have consumed non-beer alcoholic beverages in the past thirty days, significantly higher than the General Population (48%) or overall Sports Fans (52%).



Fast Food

4. Which of the following types or brands of Fast Food or Quick Service restaurants have you personally purchased for yourself or someone in your household in the past 30 days?

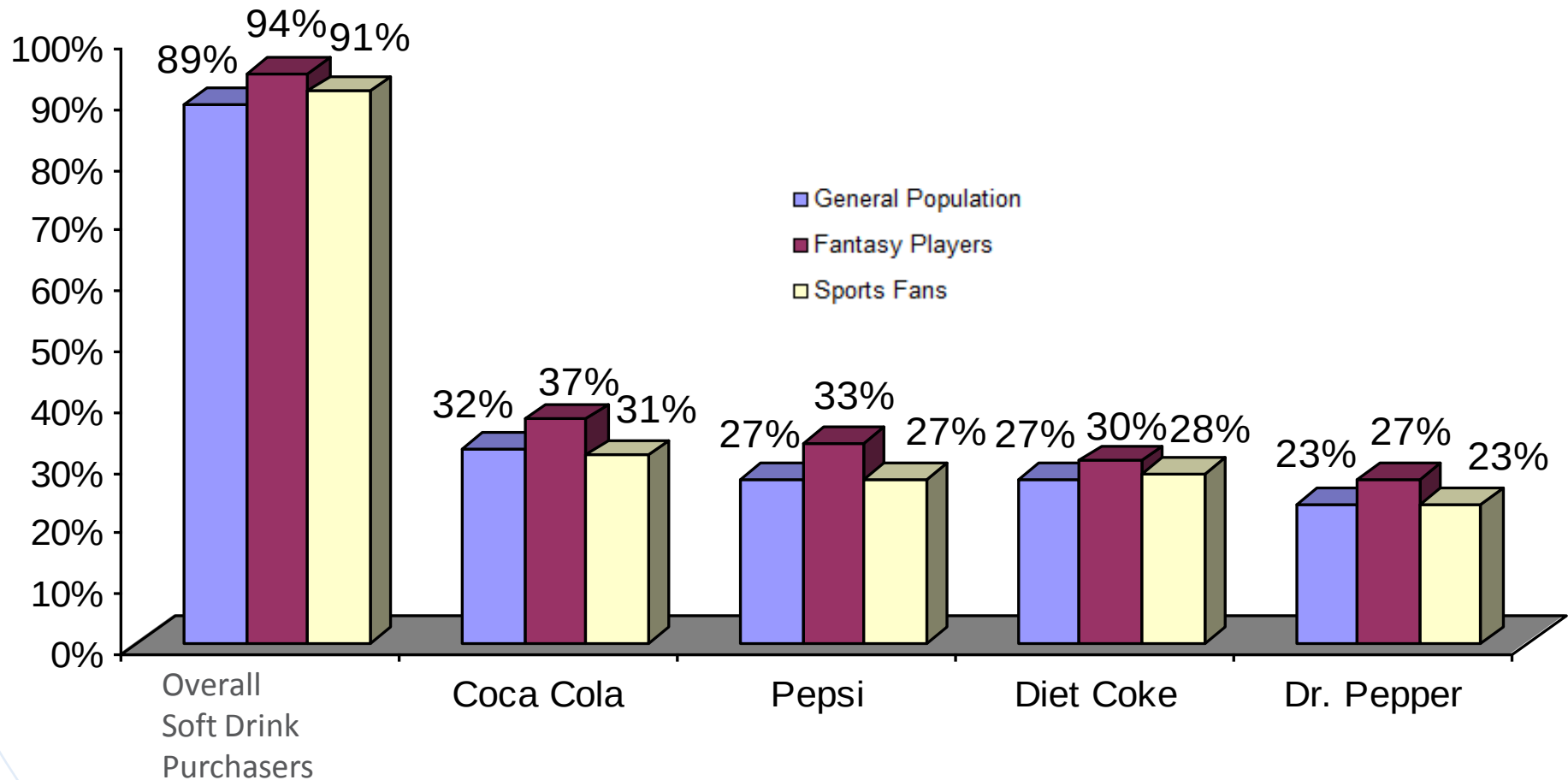
While not as large a difference as alcohol and beer, Fantasy Sports Players are significantly more likely than the general population and sports fans to eat at fast food restaurants.



Soft Drink Consumption

5. Which of the following types or brands of Soft Drinks have you personally purchased for yourself or someone else in the past 30 days?

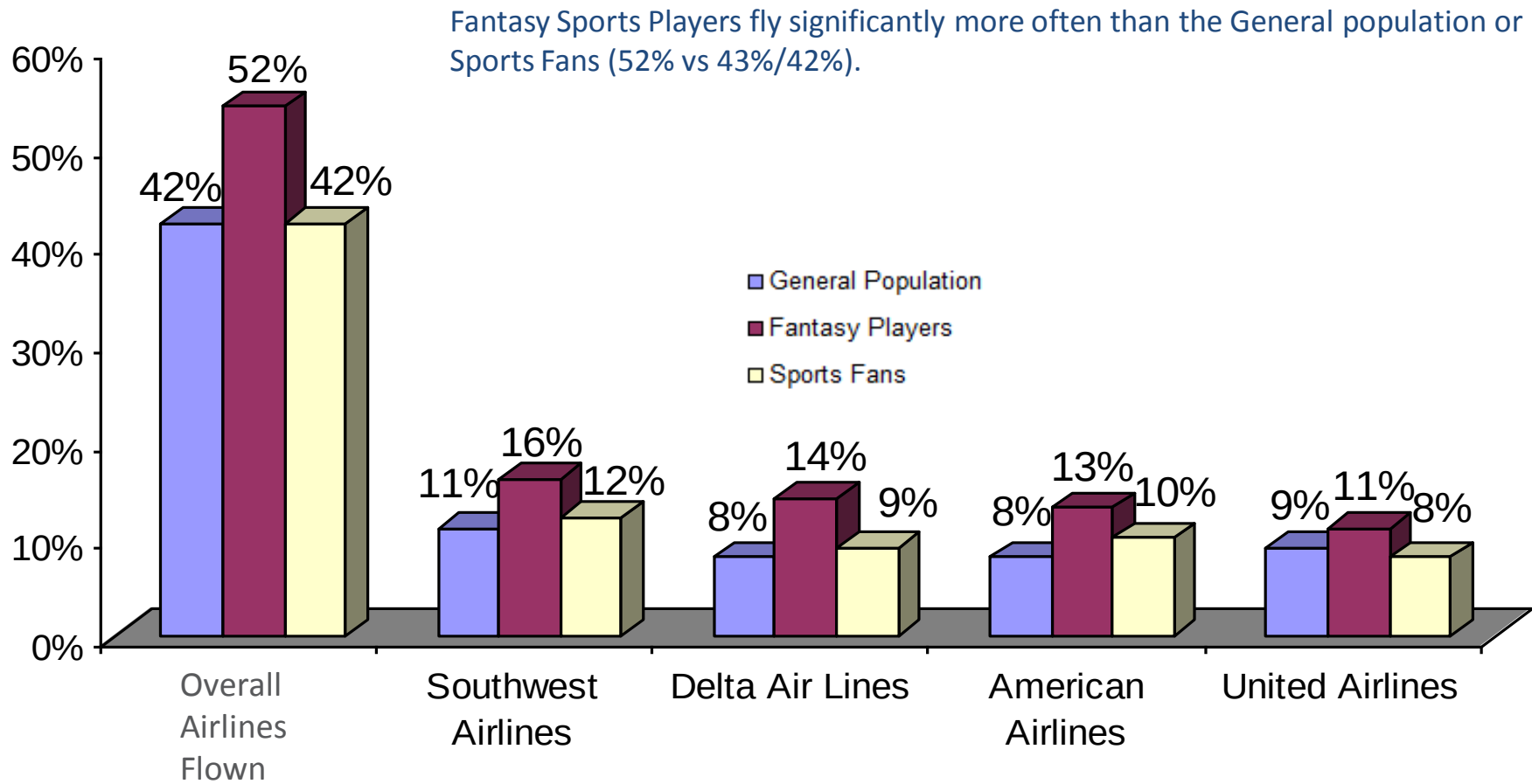
Much like other products, Fantasy Sports Players are high purchasers of Soft Drinks, buying them significantly more often than the general population (94% vs. 89%).



Air Travel

General Population, Fantasy Sports Players, Sports Fans – Airlines Flown

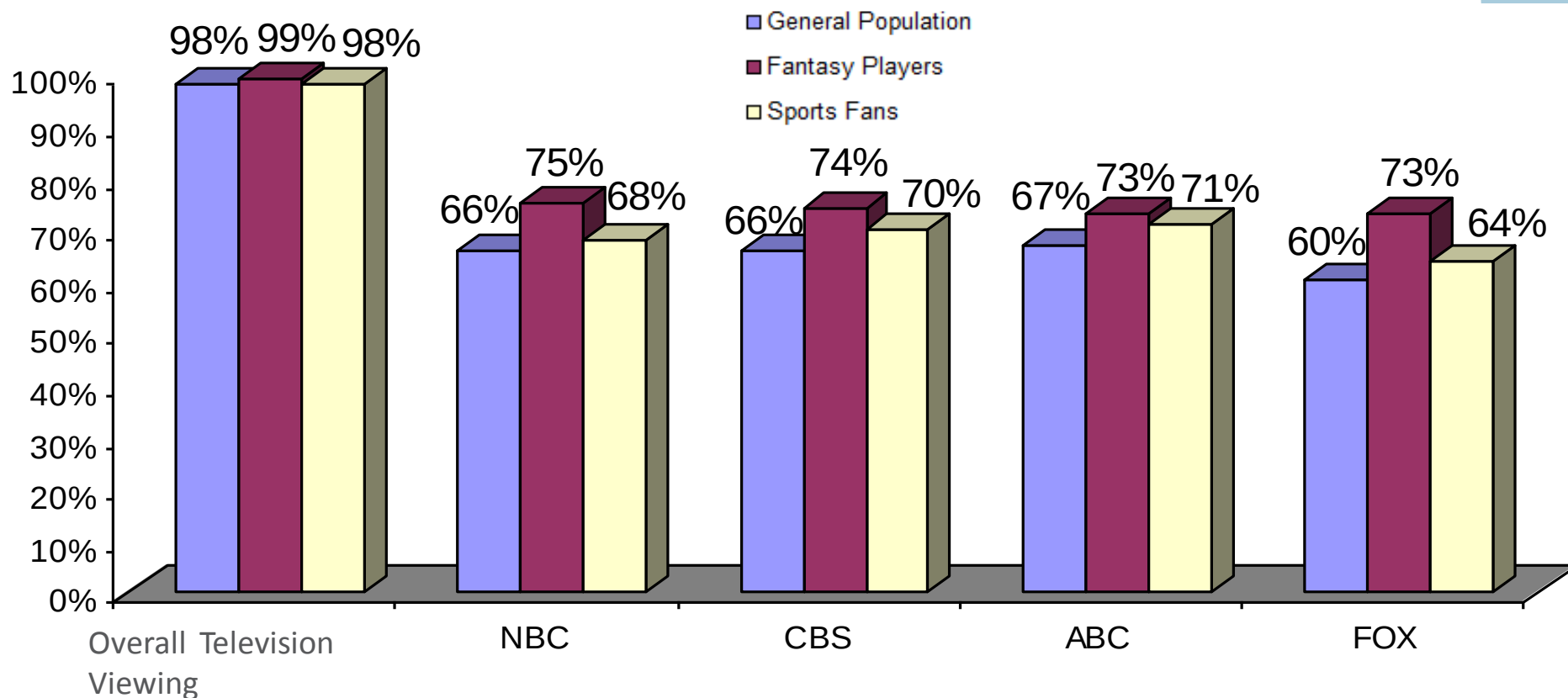
6. Which of the following Airlines have you personally flown in the past 12 months?



Media Consumption

7. Which of the following Television channels do you watch at least once per week?

While Fantasy Sports Players are no more likely than overall Sports Fans or the General Population to watch TV, they are more likely to watch the major networks.

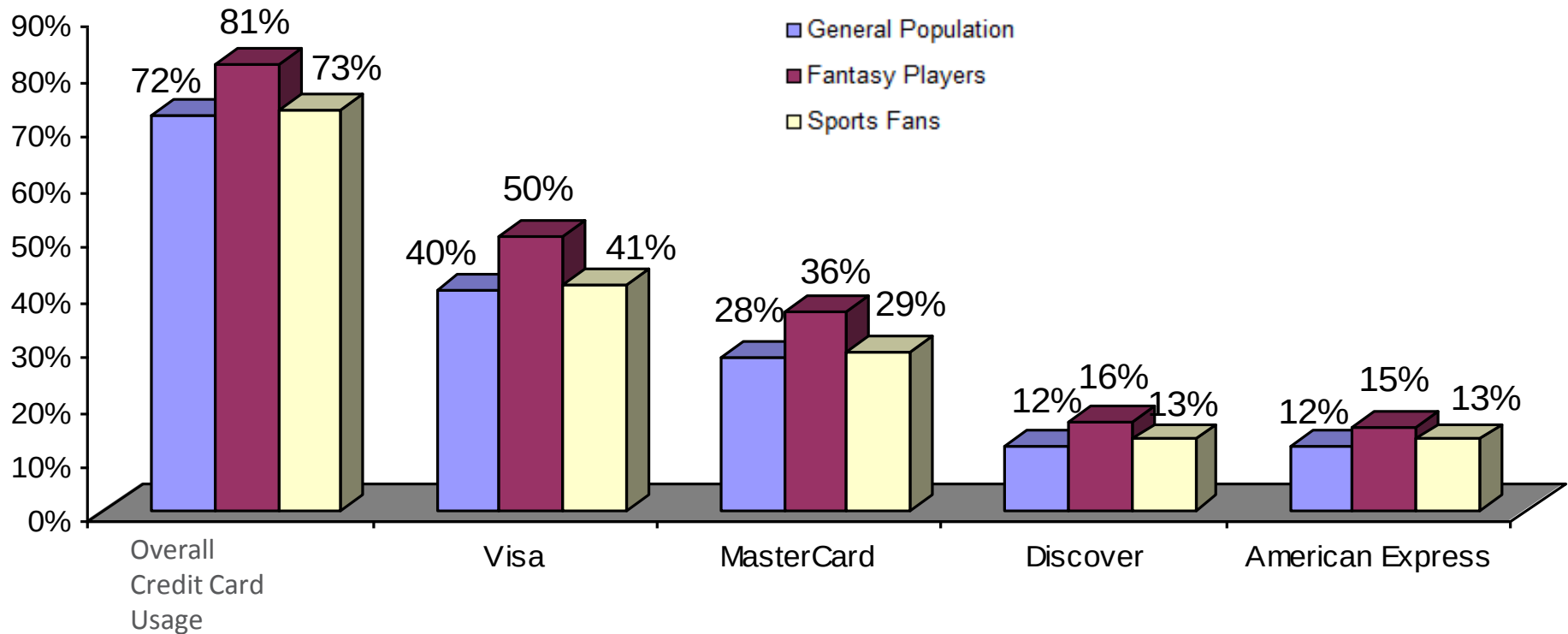


Credit Cards

General Population, Fantasy Sports Players, Sports Fans – Credit Cards Used

8. Which of the following Credit Cards do you use at least once per month?

Fantasy Sports Players use credit cards more often than Sports Fans or the General Population. This is especially true with Visa and MasterCard.



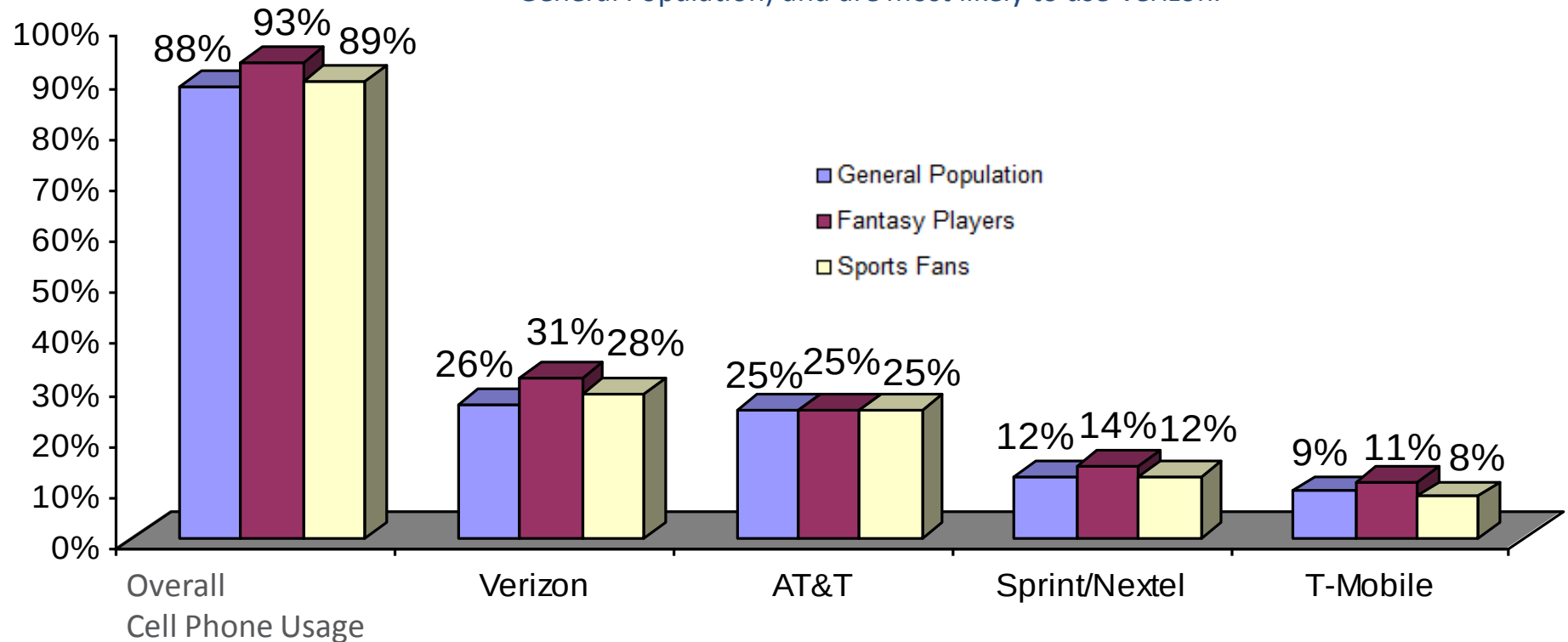
Cell-Phone Usage

General Population, Fantasy Sports Players, Sports Fans – Cell Phone Provider

9. What company provides your cell phone service?

It is important to note that this study was conducted online where cell phone usership is higher than if this had been a phone study.

Still, Fantasy Players are slightly more likely to use cell phones (93% vs 88% General Population) and are most likely to use Verizon.



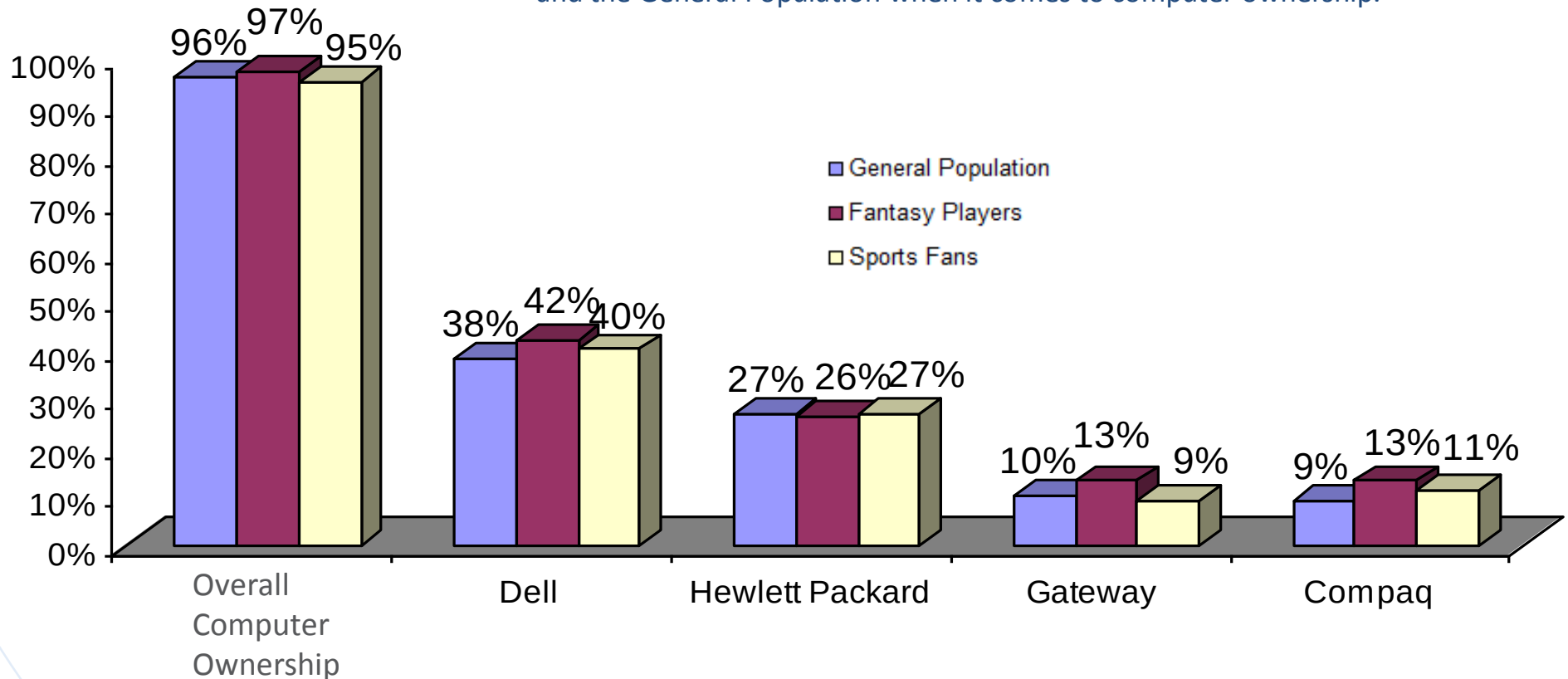
Computer Ownership

General Population, Fantasy Sports Players, Sports Fans – Computer Owned

10 .What brands of laptops or desktop computers do you personally own?

It is important to note that this study was conducted online where computer ownership is higher than if this had been a phone study.

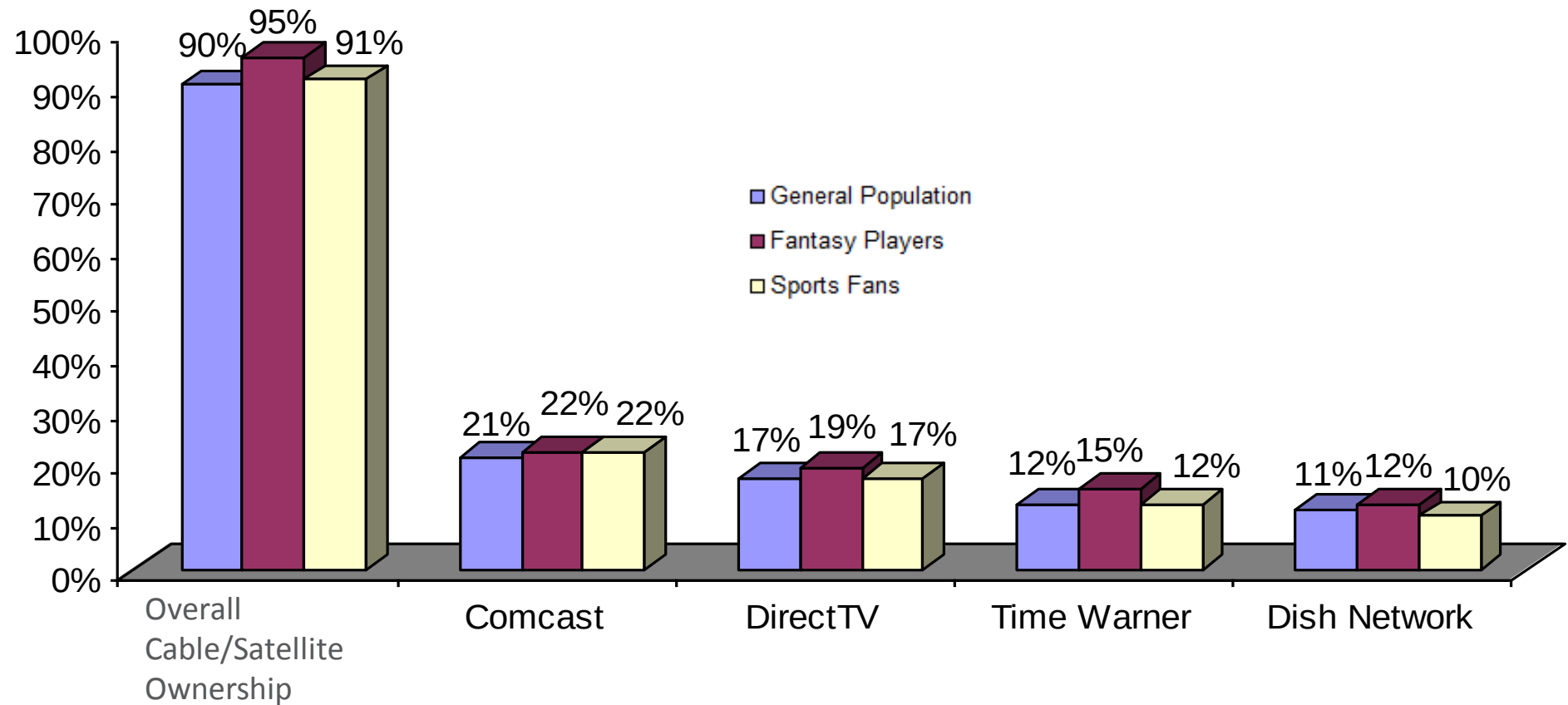
There is no real statistical difference between Fantasy Sports Players, Sports Fans, and the General Population when it comes to computer ownership.



Cable/Satellite Television

11 .What company provides you with cable or satellite television service?

Fantasy Sports Players are slightly more likely than their General Population counterparts to subscribe to Premium Television providers.

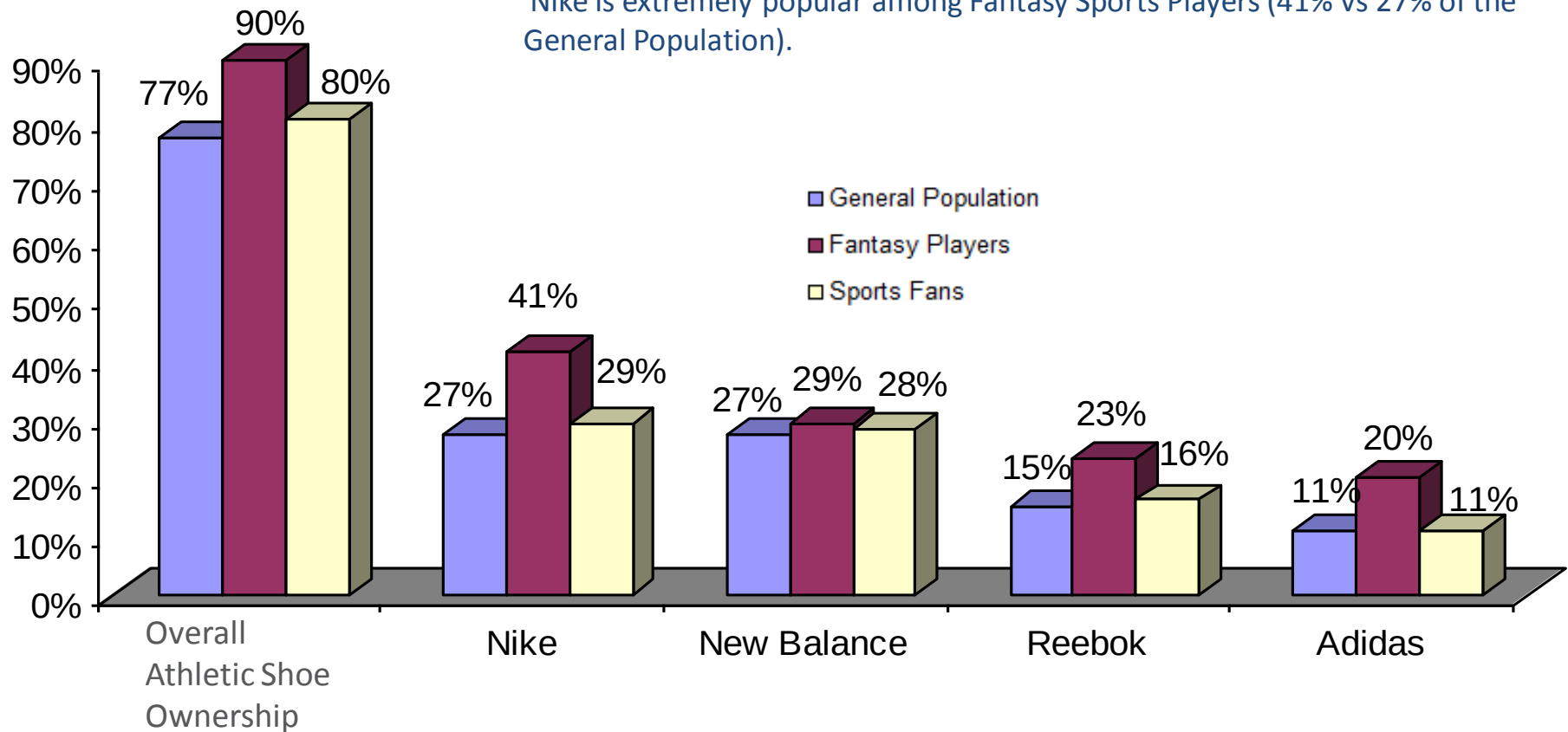


Athletic Shoes

12 .What brands of athletic shoes do you personally own?

Fantasy Sports Players are significantly more likely than Sports Fans or the General Population to own athletic shoes.

Nike is extremely popular among Fantasy Sports Players (41% vs 27% of the General Population).



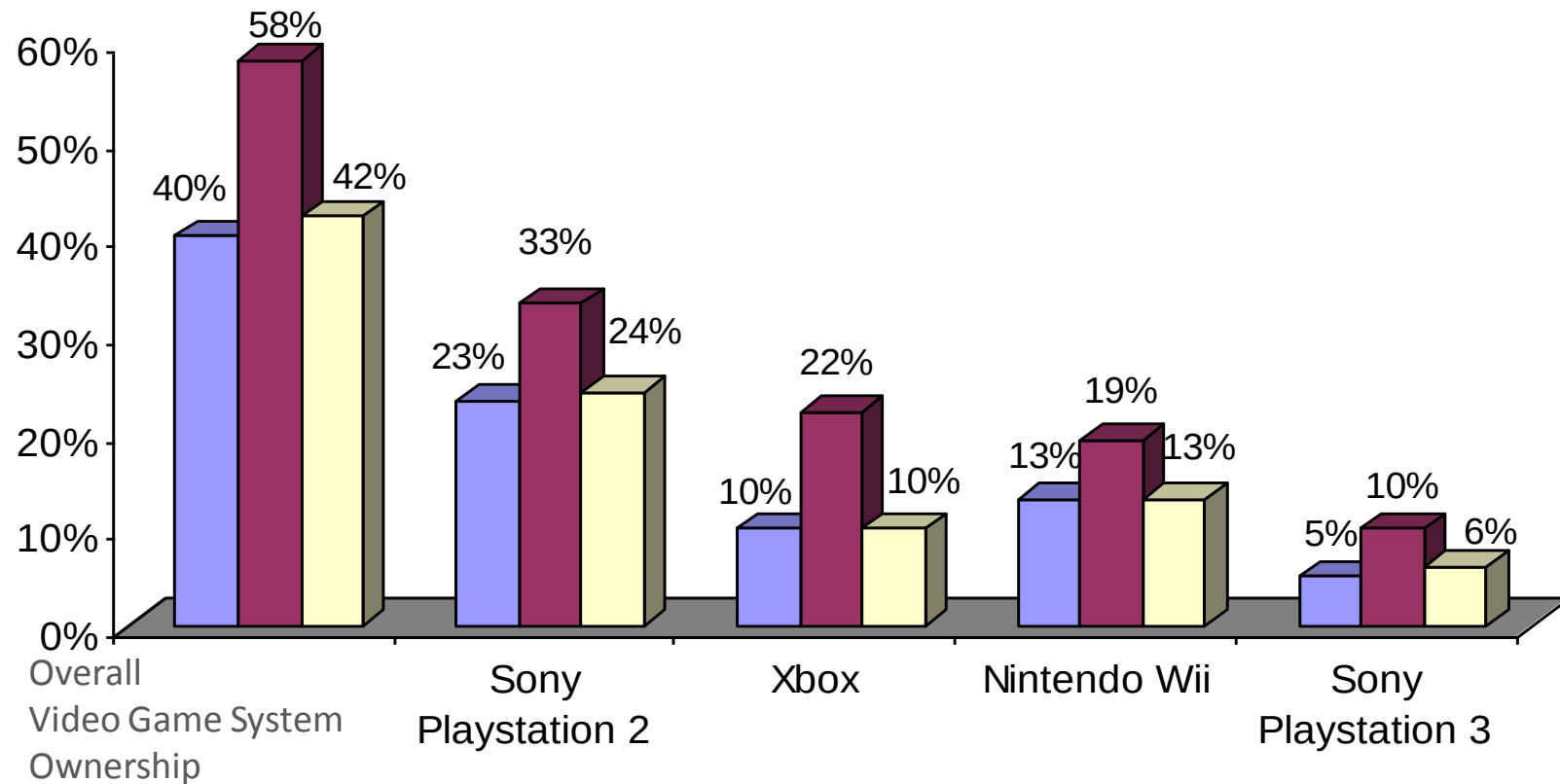
Game Consoles

General Population, Fantasy Sports Players, Sports Fans – Video Game Systems Owned

13 .Which of the following video game systems do you own?

Fantasy Sports Players are significantly more likely to own a video game system than the General Population or Sports Fans.

This is true across the four main video game consoles.



General Population n=1,011, Fantasy Sports Players n=1,242, Sports Fans n=741

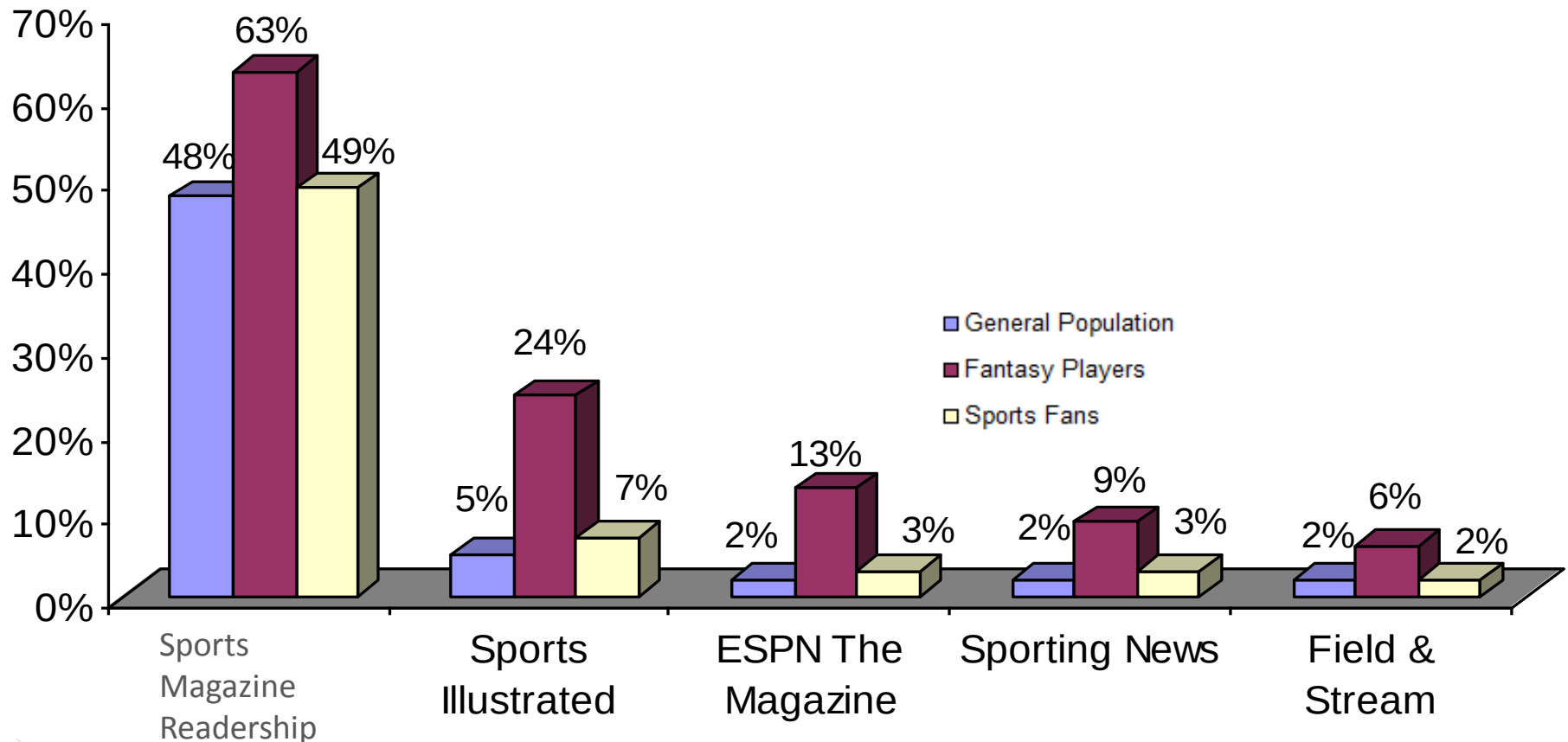
Sport Magazines

General Population, Fantasy Sports Players, Sports Fans – Magazine Readership

14 .Which of the following Magazines do you subscribe to or read at least monthly?

Fantasy Sports Players are more likely to read sports magazines than average Sports Fans (63% vs. 49%).

This is statistically significant for Sports Illustrated, ESPN The Magazine, Sporting News and Field and Stream.



General Population n=1,011, Fantasy Sports Players n=1,242, Sports Fans n=741