



Ipsos Public Affairs

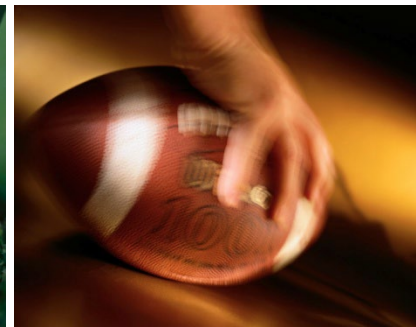
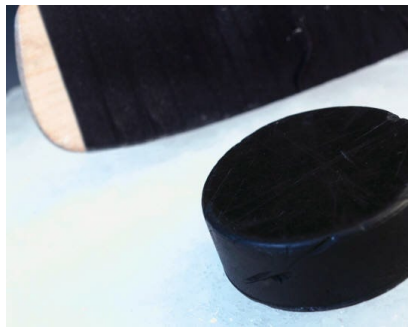
The Social Research and Corporate Reputation Specialists



Fantasy Sports Study

June 2011

- Aaron Amic, Vice President, Ipsos



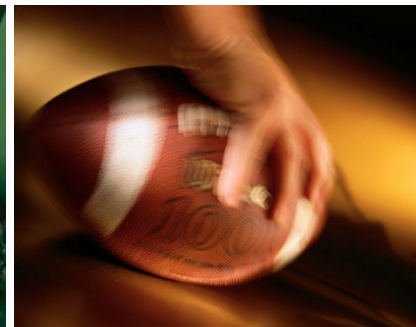
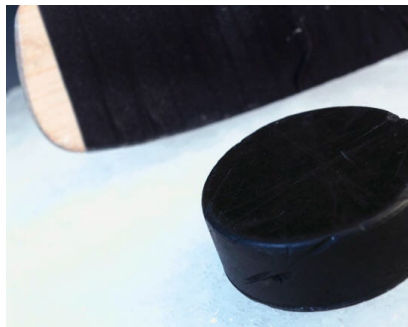


Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists



This report is not intended for public release. Any release of the data with the Ipsos name is prohibited without first receiving permission from Aaron Amic at Ipsos Public Affairs (aaron.amic@ipsos.com)



The Sample and Methodology

Ipsos was commissioned by the FSTA to conduct ongoing incidence of play research:

- **Objective:** Determine INCIDENCE of fantasy sports participation.
 - Ipsos surveyed 1,215 Americans, aged 12+.
 - Ipsos surveyed 1,226 Canadians, aged 12+.
 - Respondents were asked which Fantasy Sports they play, if any.
 - Data collection for 2011 was completed using the US and Canadian Online Omnibus, from May 2-10, 2011. Previous year research was completed at similar times in the year.

- **Survey Limitations:** This is a backward looking survey. It says nothing of future play, but simply if they have played in the past year.
 - Additionally, Ipsos usually conducts more in depth surveys such as “life cycle research” in 2010, “Reasons for play and the Economic impact from the recession” in 2009, and “Market Spend” in 2008. It was decided that the research topic for 2011 would be delayed until the NFL Lockout is resolved.

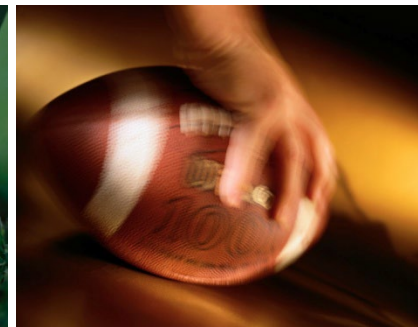
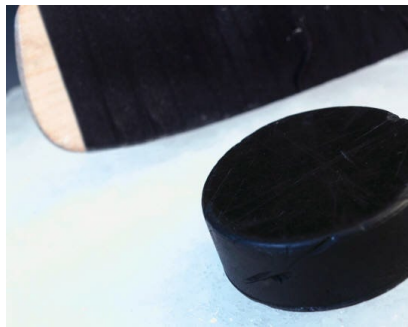


Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists

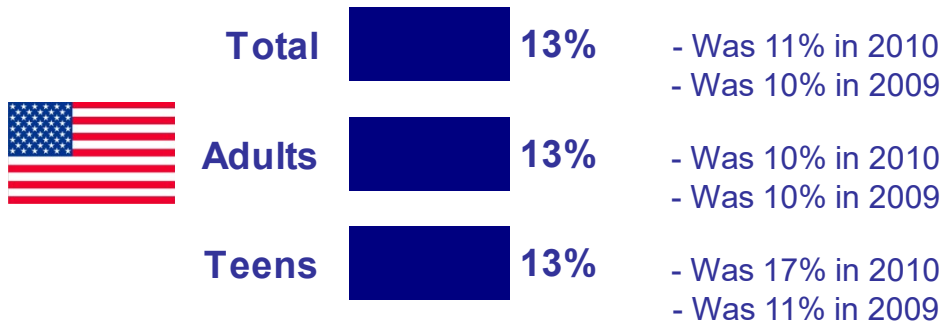


Incidence of Fantasy Sports Participation

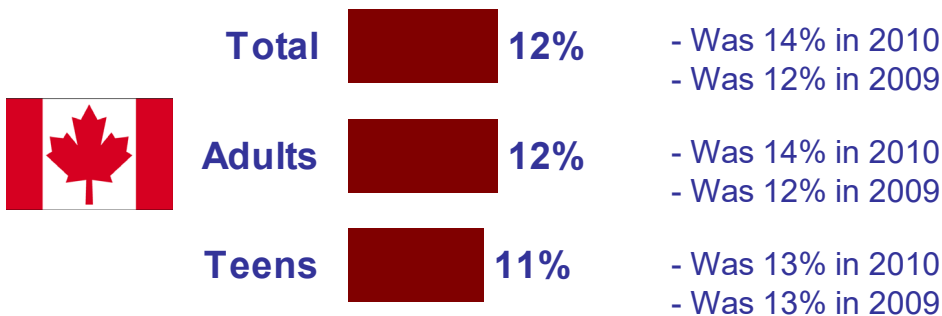


How Many People are Playing Fantasy Sports?

Q1. Since May of 2010, have you played fantasy sports, where you select a team of professional athletes or teams to earn points based on their competition performance?



• Overall, USA participation for 2011 is up from 2009 and 2010.



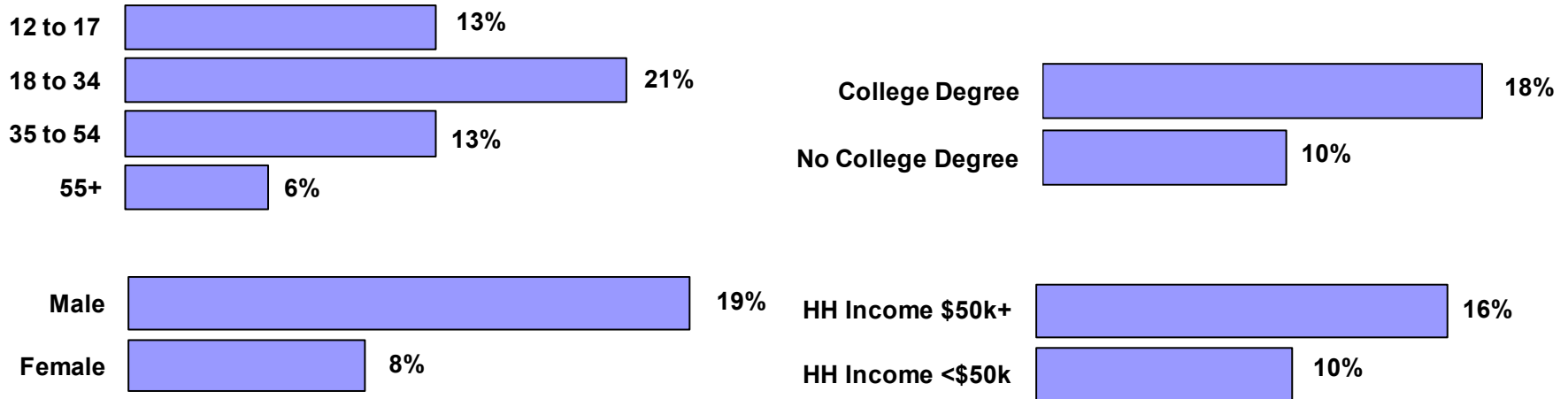
• Participation amongst Adults (18+) is down very slightly from 2010 and on par with 2009 (in the margin of error).

• Overall, Canada participation for 2011 is down slightly from 2010.

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

Q1. Since May of 2010, have you played fantasy sports, where you select a team of professional athletes or teams to earn points based on their competition performance?

% of fantasy sports players by group

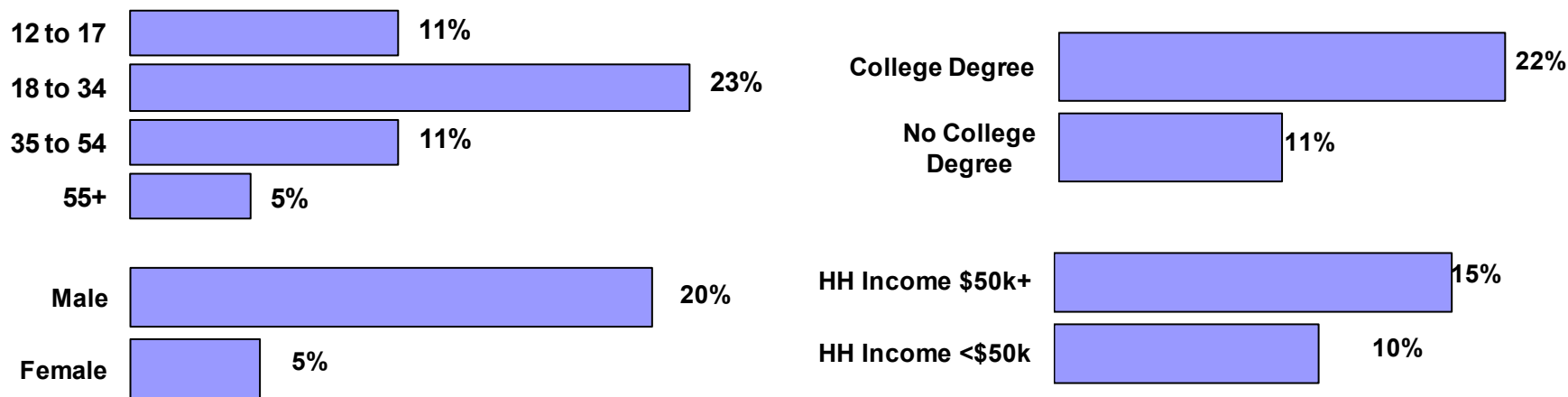


Base: All US respondents aged 12+ (Teens defined as aged 12-17)

- The correct way to read these is to add the word “among” before reading. Example: “Among 12-17 year olds, 13% are playing fantasy sports” or “among the college educated 18% are playing fantasy sports”.
- Incidence of play among 18-34 year olds remains high at 21%.
- Among those who make more than \$50,000 per year, 16% are playing fantasy sports. This is significantly more than those with lower incomes. Among those with HH incomes under \$50k per year, one in ten (10%) are playing.

Q1. Since May of 2010, have you played fantasy sports, where you select a team of professional athletes or teams to earn points based on their competition performance?

% of fantasy sports players by group

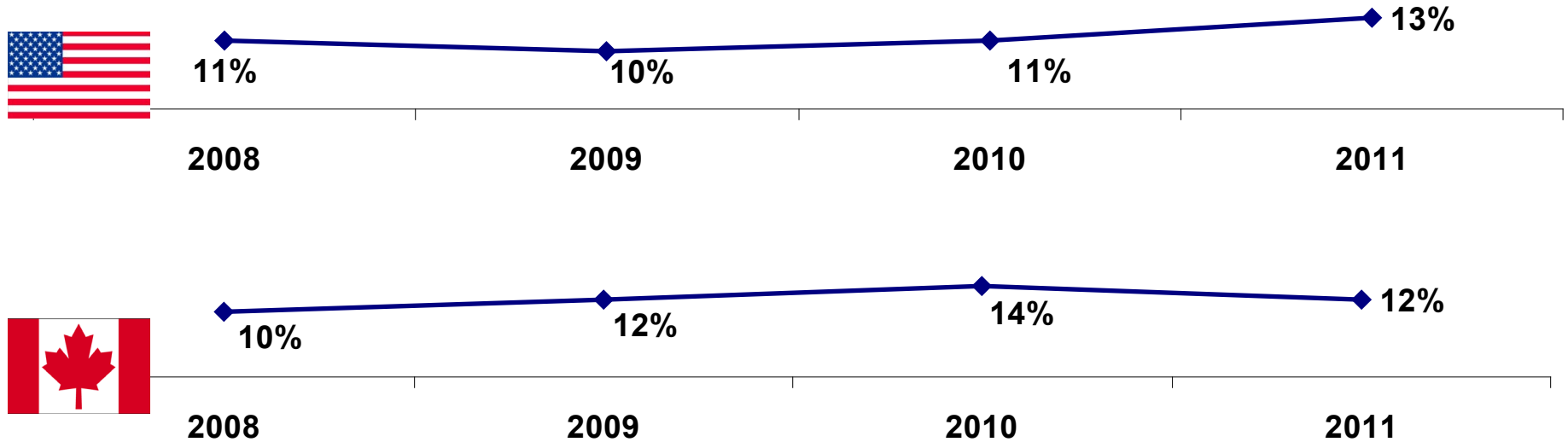


Base: All Canadian respondents aged 12+ (Teens defined as aged 12-17)

• The correct way to read these is to add the word “among” before reading. Example: “Among 12-17 year olds, 11% are playing fantasy sports” or “among the college educated 22% are playing fantasy sports”.

- Incidence of play among 18-34 year olds remains high at 23%.
- Those with college educations are twice as likely as those without a college degree to play fantasy sports.
- Men are 4 times more likely to play fantasy sports in Canada. Among Men, 20% are playing fantasy sports while only 5% of women have played in the past year.

Trended Participation of Fantasy Sports (2008-2011)



- In the US, participation for 2011 has hit an all time high but remains within the margin of error all four years.
- In Canada, participation continues to travel between a range of 10-14%