



Ipsos Public Affairs



Fantasy Sports

Prepared by Ipsos October, 2008

Background and Objectives

- The Fantasy Sports Association has for some time been interested in taking the next step in understanding the players of fantasy sports. The overall market size is understood (between 22 and 27 million American aged 12+ play fantasy sports) but not enough is known about the consumer behaviors of fantasy sports players.
- 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.
- To understand these differences, The Fantasy Sports Association commissioned Ipsos, a leader in fantasy sports research, to survey fantasy sports players, sports fans, and the general population on the usage of a broad spectrum of products and services.

- Two separate but identical surveys were conducted for this research, and the data was merged to compare and contrast the three groups.
 - First, using the Ipsos proprietary panel, Ipsos identified 1,242 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. This survey also included a battery of question 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.
- All interviews were conducted online between September 5th and October 10th.

Key Findings

- Fantasy Sports Players are voracious consumers of everything from beer to athletic shoes. This is primarily driven by their demographics, as Fantasy Sports Players are young, and predominantly male.
- Product usage among Fantasy Sports Players, where the difference compared to the General Population was not just statistically significant but remarkably so, include beer consumption, alcohol consumption, fast food consumption, credit card usage, sports magazine readership, and athletic shoe ownership.
- The results suggest that if marketing departments are looking to reach a young demographic with money to spend, advertising where Fantasy Sports Players go could make good business sense.



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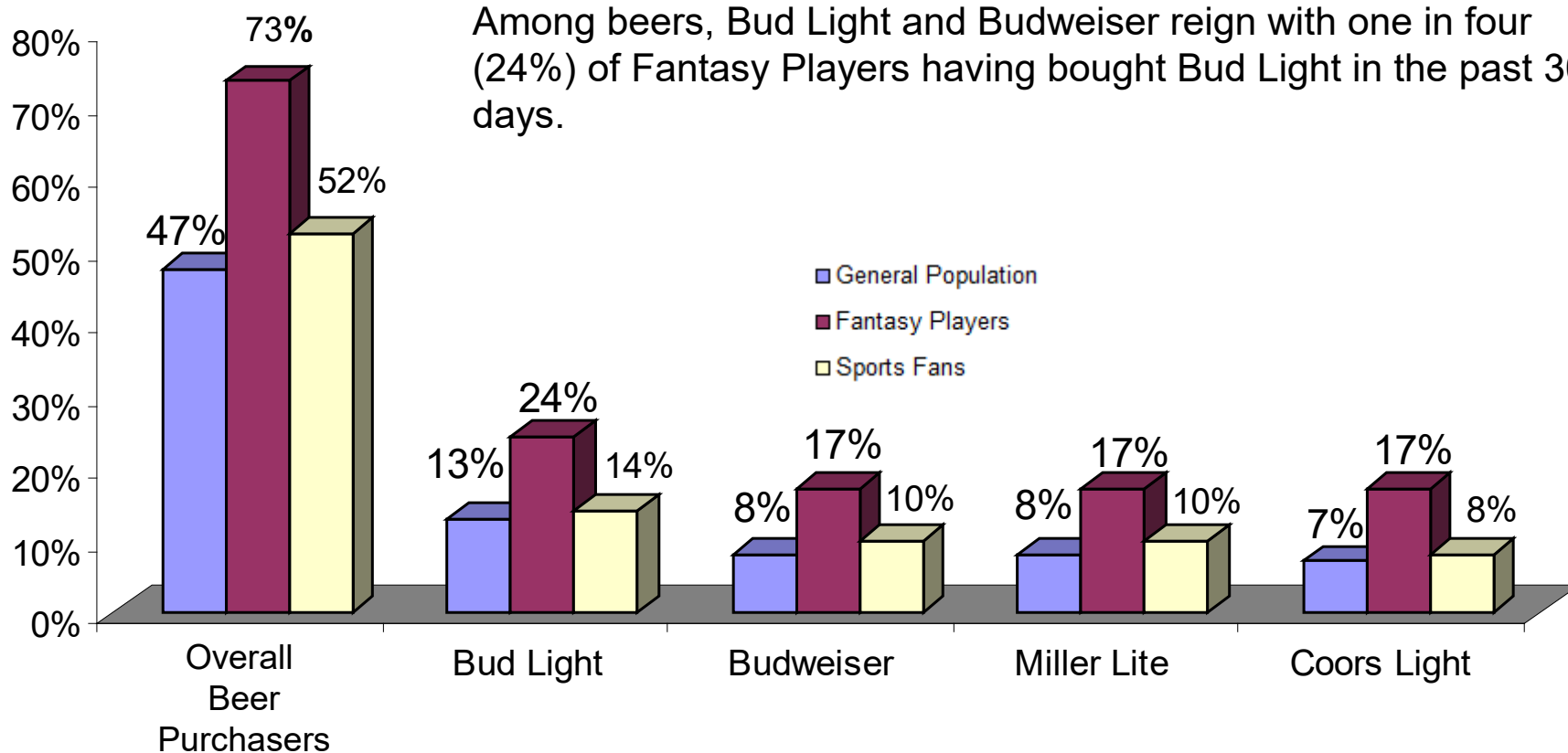
Beer Consumption

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.

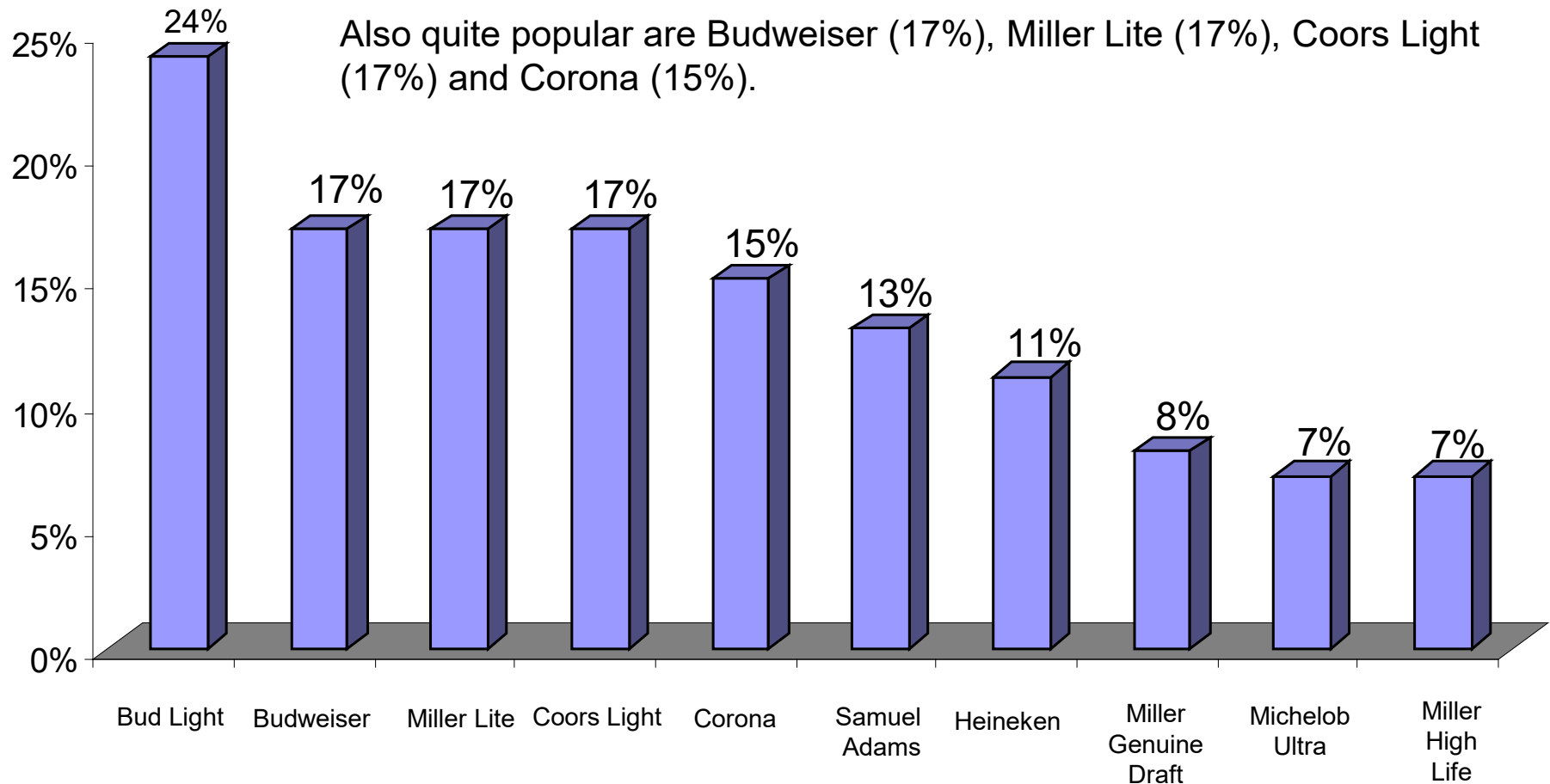


Bud Light is the Beer of Choice for Fantasy Sports Players

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

Bud Light is the drink of choice among Fantasy Sports Players (24%).

Also quite popular are Budweiser (17%), Miller Lite (17%), Coors Light (17%) and Corona (15%).





Fantasy Sports Players Demographics – 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?

	Bud Light	Budweiser	Miller Lite	Coors Light	Corona
Males	23%	17%	17%	17%	14%
Females	28%	18%	18%	15%	17%
21-34	28%	21%	24%	19%	22%
35-54	23%	15%	11%	16%	14%
55+	22%	15%	19%	15%	8%
<\$50K	21%	19%	14%	13%	12%
\$50K>	27%	15%	19%	19%	17%
Northeast	22%	21%	15%	25%	18%
Midwest	25%	15%	22%	15%	12%
South	29%	16%	15%	14%	14%
West	17%	17%	13%	16%	19%

Three in ten (28%) female Fantasy Sports Players have consumed Bud Light in the past 30 days.

Three in ten (28%) 21-34 year old Fantasy Sports Players have consumed Bud Light.

One in four (24%) 21-34 year olds have consumed Miller Lite in the past 30 days.

Bud Light is most popular among southern Fantasy Sports Players as 29% have drank the beverage in the past 30 days.



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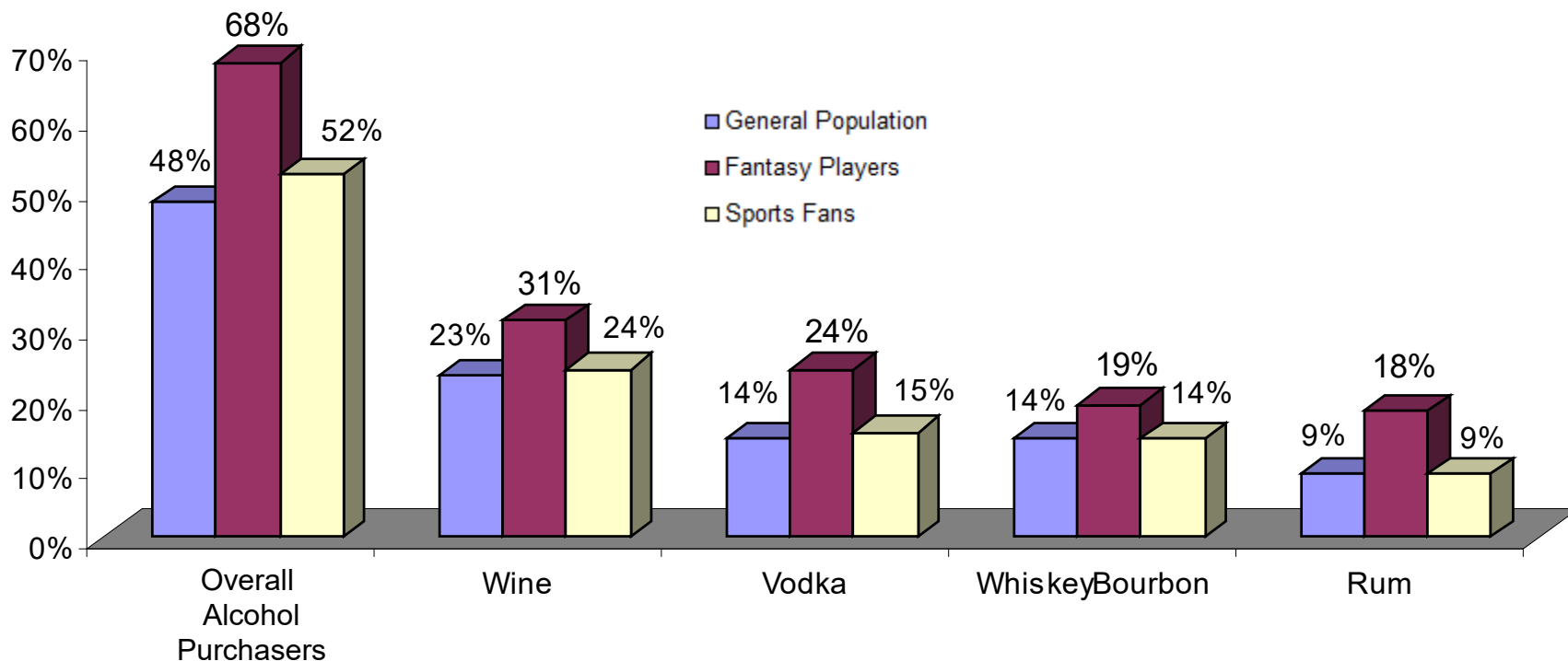


Wine Consumption

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

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%).

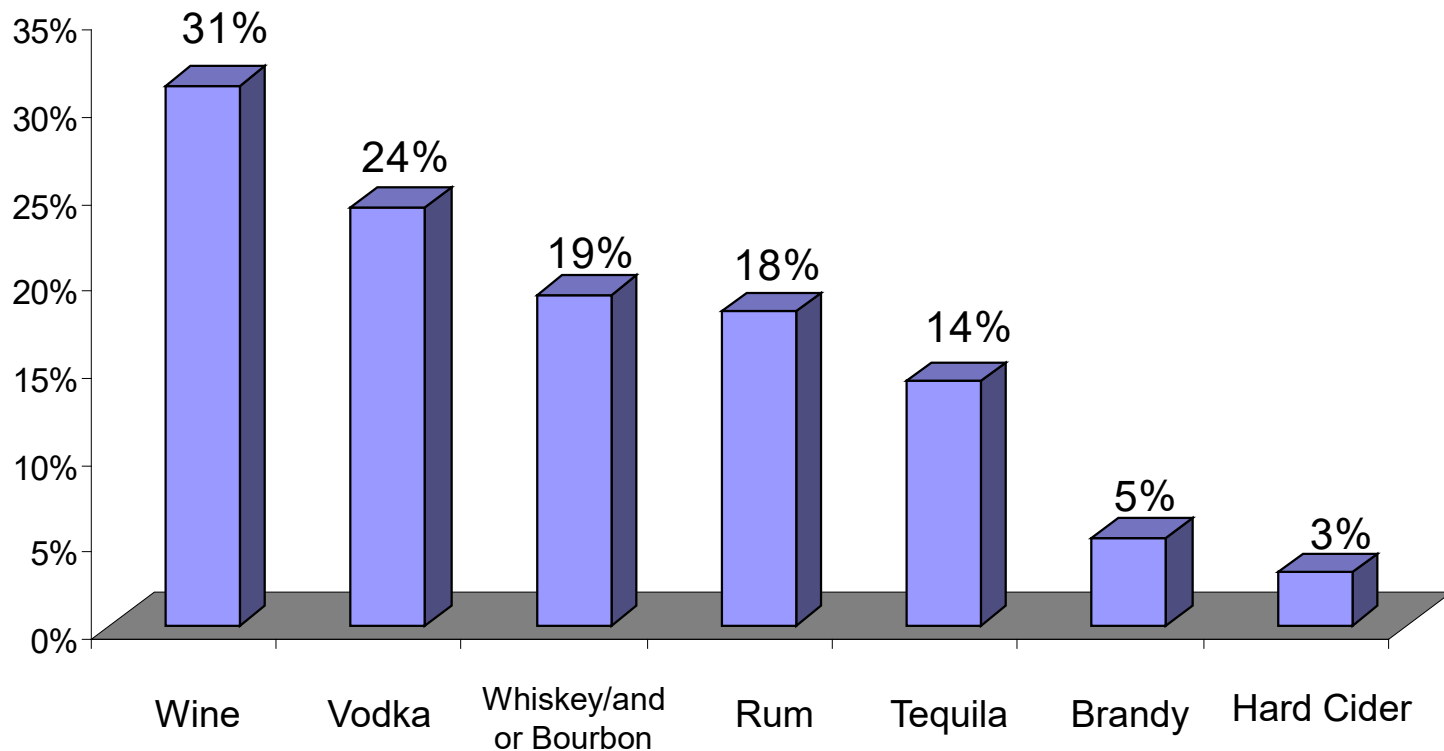


Nearly a third of Fantasy Sports Players have purchased wine in the past month

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

Fantasy Players prefer wine. One in three (31%) have purchased wine in the past 30 days.

Vodka, whiskey, and rum are also purchased by about one in five Fantasy Sports Players.





Fantasy Sports Players Demographics – Alcohol Purchasers

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

	Wine	Vodka	Whiskey/ Bourbon	Rum	Tequila
Males	29%	22%	19%	17%	13%
Females	40%	31%	16%	25%	20%
21-34	33%	35%	21%	26%	19%
35-54	28%	20%	15%	16%	13%
55+	34%	20%	21%	12%	10%
<\$50K	21%	21%	17%	18%	13%
\$50K>	38%	27%	20%	19%	15%
Northeast	37%	24%	17%	20%	10%
Midwest	29%	24%	18%	14%	13%
South	29%	25%	22%	23%	16%
West	30%	24%	15%	16%	17%

Four in ten (40%) female Fantasy Sports players drink wine.

More than one in three (35%) 21-34 year old Fantasy Sports Players drink vodka.

More than one in five (22%) southern Fantasy Sports players drink Whiskey/ bourbon.

One in four (26%) 21-34 year old fantasy Sports players drink rum.

Tequila is popular among one in five (20%) female Fantasy Sports Players.



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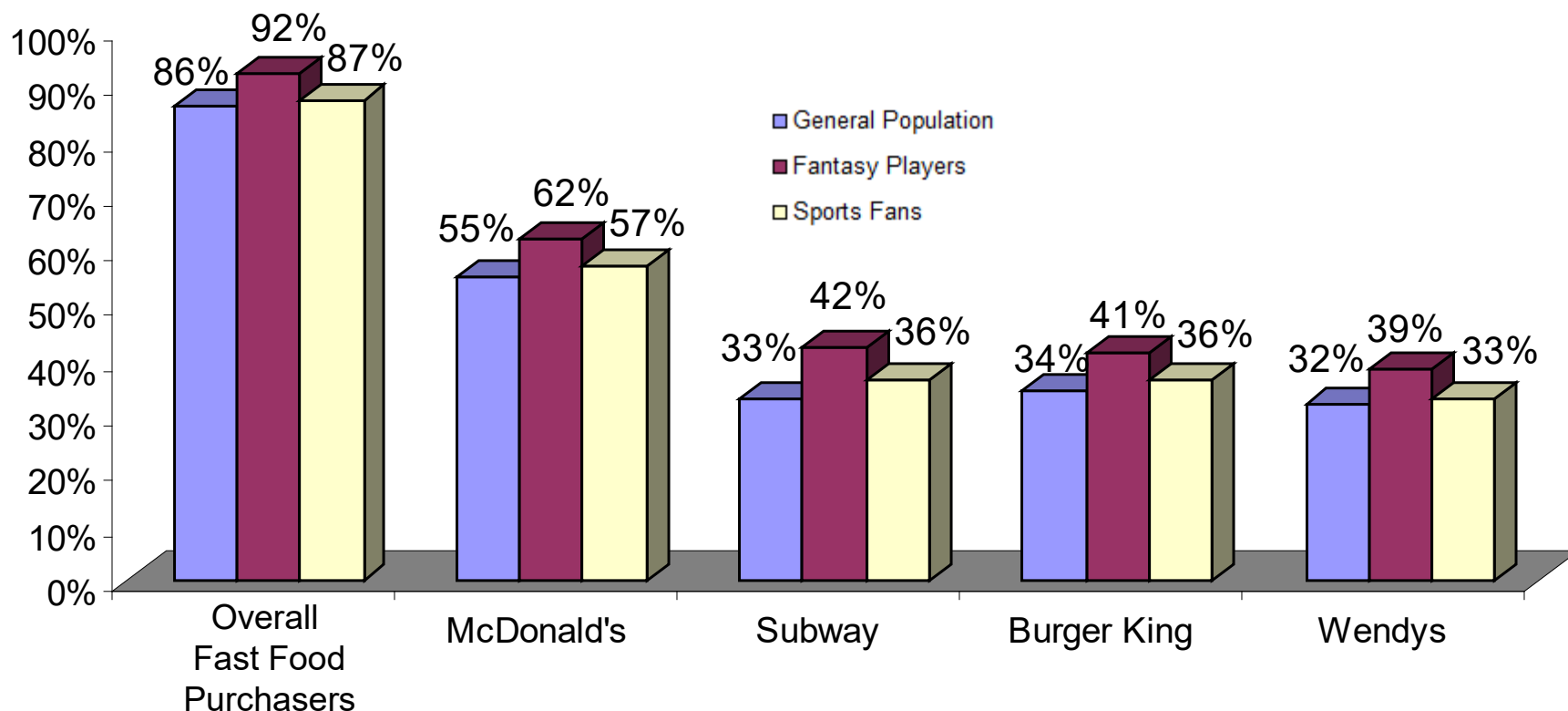


Fast Food Consumption

General Population, Fantasy Sports Players, Sports Fans – Fast Food Purchasers

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.

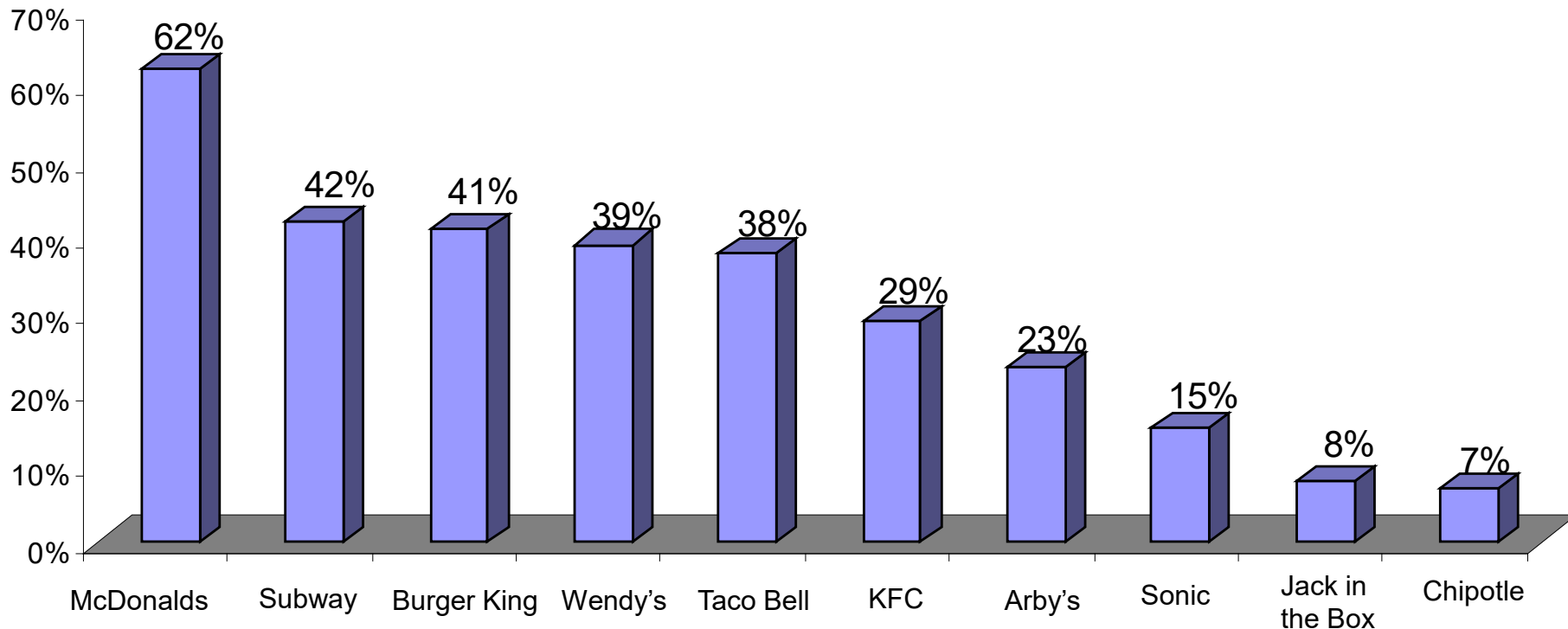


McDonalds Leads as the Fast Food choice for Fantasy Sports Players

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?

By a large margin, McDonald's rules among Fantasy Sports Players.

Four in ten also eat at Subway, Burger King, Wendy's, and Taco Bell on a monthly basis.





Fantasy Sports Players Demographics

– Fast Food Purchasers

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?

	McDonald's	Subway	Burger King	Taco Bell	Wendy's
Males	60%	40%	40%	38%	36%
Females	67%	49%	44%	44%	48%
18-34	65%	46%	45%	42%	49%
35-54	64%	42%	42%	41%	39%
55+	53%	37%	34%	34%	23%
<\$50K	59%	39%	40%	35%	36%
\$50K>	64%	45%	42%	43%	40%
Northeast	62%	39%	43%	40%	27%
Midwest	65%	43%	42%	39%	44%
South	62%	44%	40%	42%	37%
West	53%	41%	38%	35%	46%

Female Fantasy Sports Players love McDonald's as two in three eat at the quick service establishment.

Subway is also very popular among female Fantasy Sports Players.

Half of 18-34 year old Fantasy Players are Burger King fans (45%).

More than four in ten (43%) higher income Fantasy Sports players consume Taco Bell monthly or more often.



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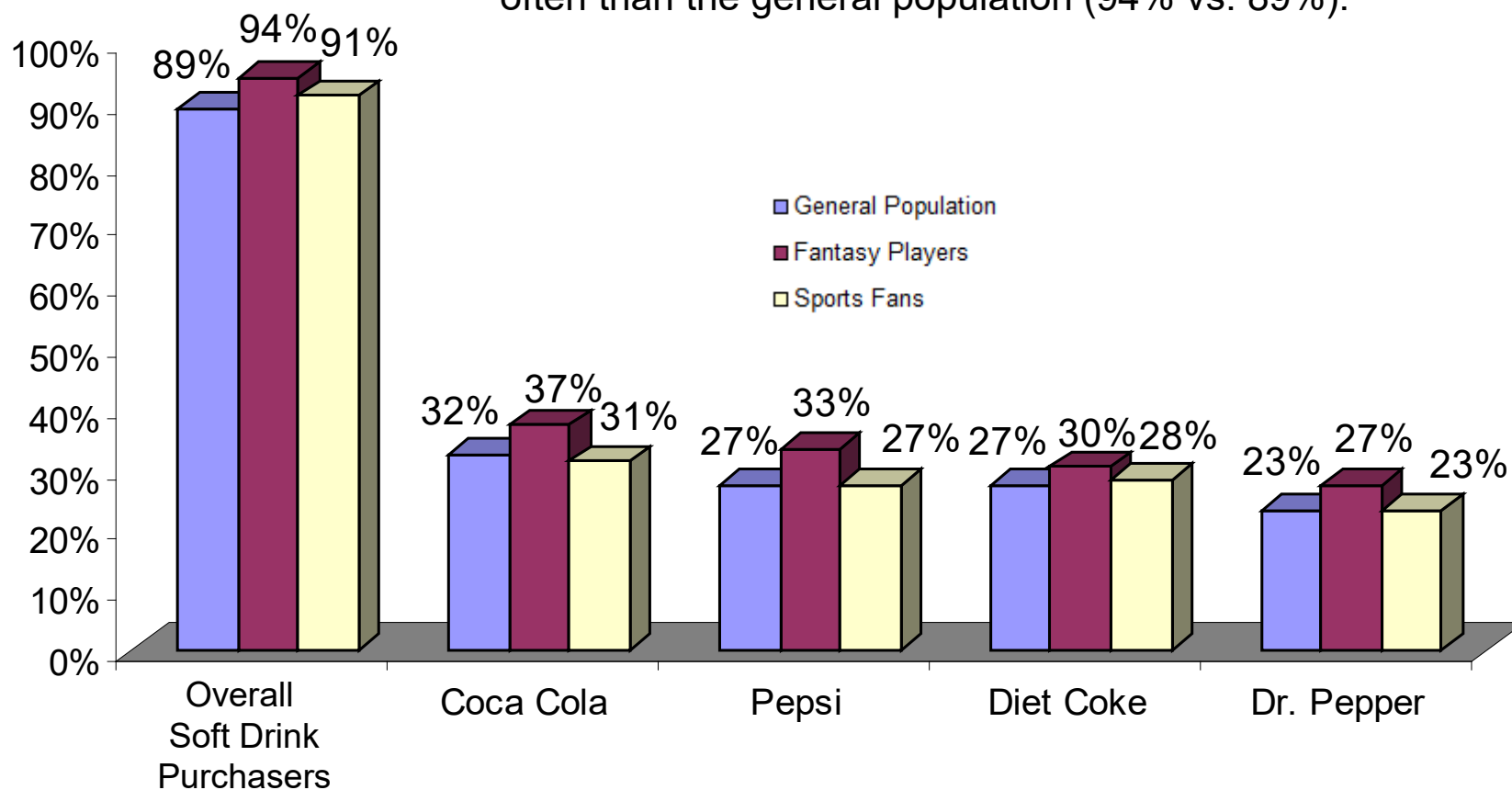


Soft Drink Consumption

General Population, Fantasy Sports Players, Sports Fans – Soft Drink Purchasers

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%).

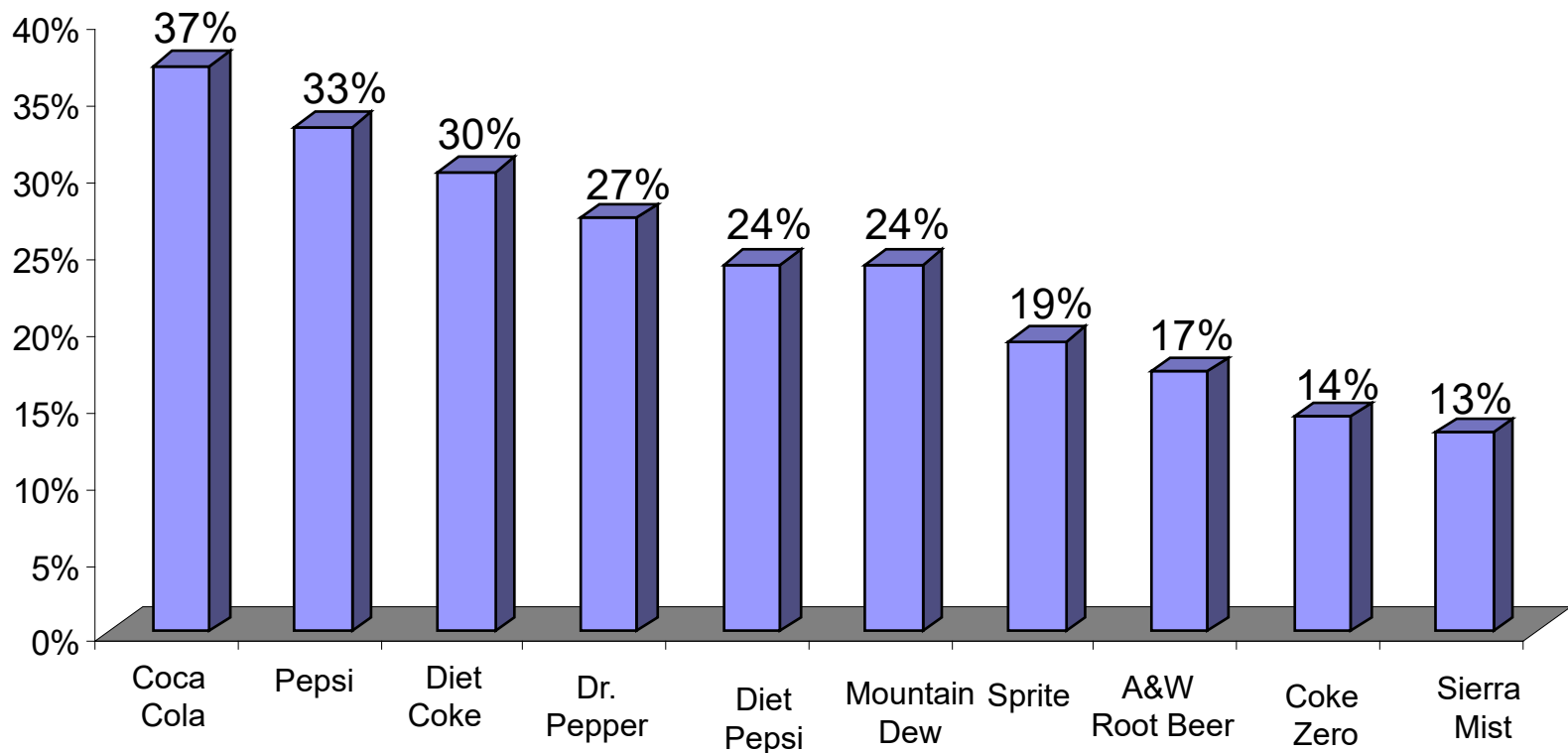


Nearly 40% of Fantasy Sports Players Purchase Coca Cola

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?

Coca-Cola and Pepsi are significantly more popular among Fantasy Sports Players than the General Population.

Seven of the sodas tested were consumed at least monthly by at least one in five Fantasy Sports Players!





Fantasy Sports Players Demographics – Soft Drink Purchasers

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?

	Coca Cola	Pepsi	Diet Coke	Dr Pepper	Diet Pepsi
Males	36%	31%	30%	26%	24%
Females	41%	39%	30%	32%	25%
18-34	39%	36%	26%	31%	19%
35-54	39%	31%	31%	27%	25%
55+	30%	31%	34%	21%	29%
<\$50K	36%	36%	21%	26%	19%
\$50K>	37%	30%	36%	27%	28%
Northeast	32%	35%	33%	20%	31%
Midwest	33%	36%	29%	24%	26%
South	43%	29%	29%	34%	18%
West	39%	27%	26%	30%	21%

Female Fantasy Sports Players are big Coca-Cola drinkers (41%).

One-third of those earning under \$50k per year drink Pepsi.

One-third (33%) of Northeastern Fantasy Players drink Diet Coke. Diet Pepsi is also popular in the Northeast (31%).

Southern Fantasy Sports Players are Dr. Pepper fans (34%).



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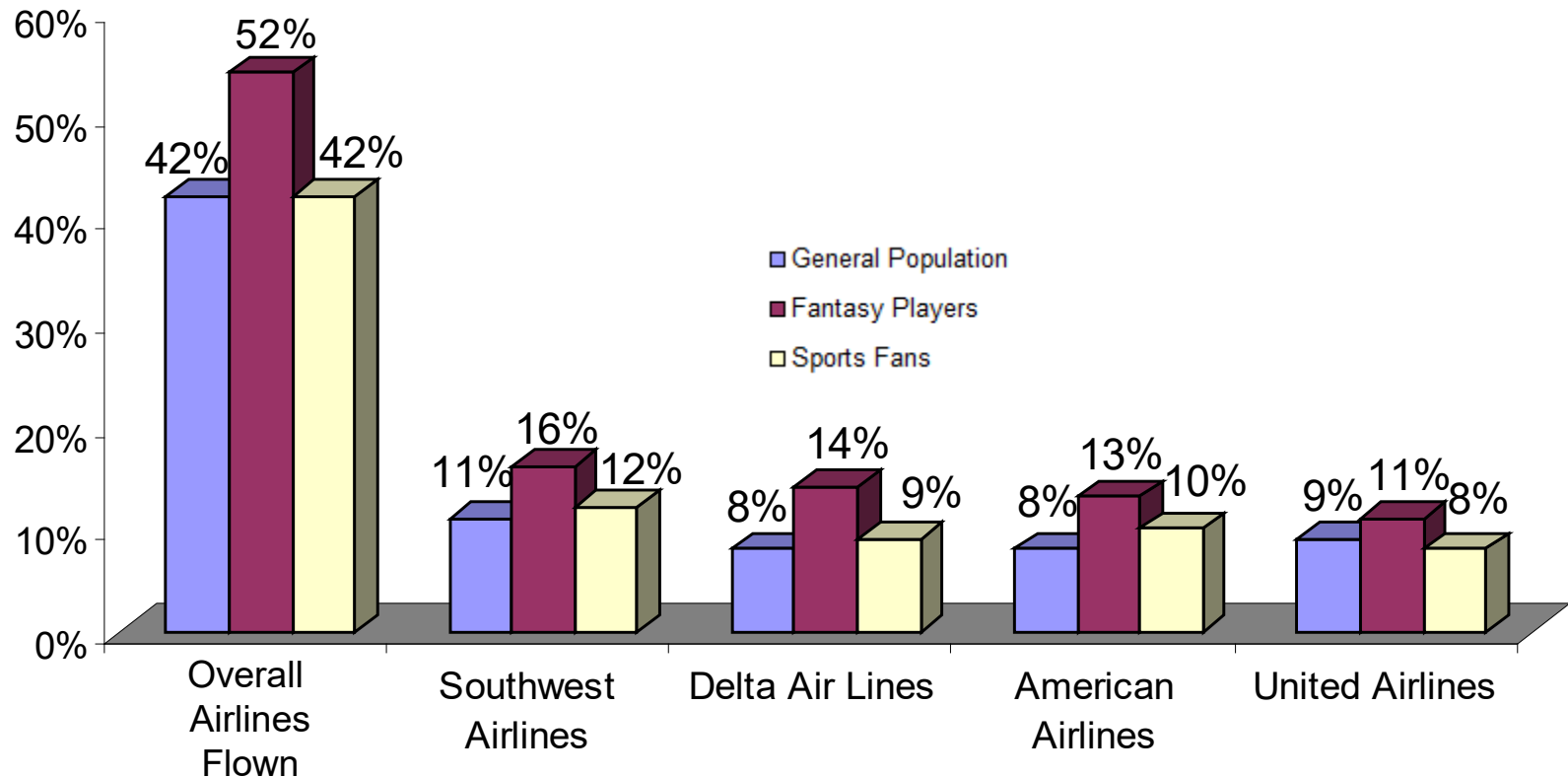


Air Travel

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

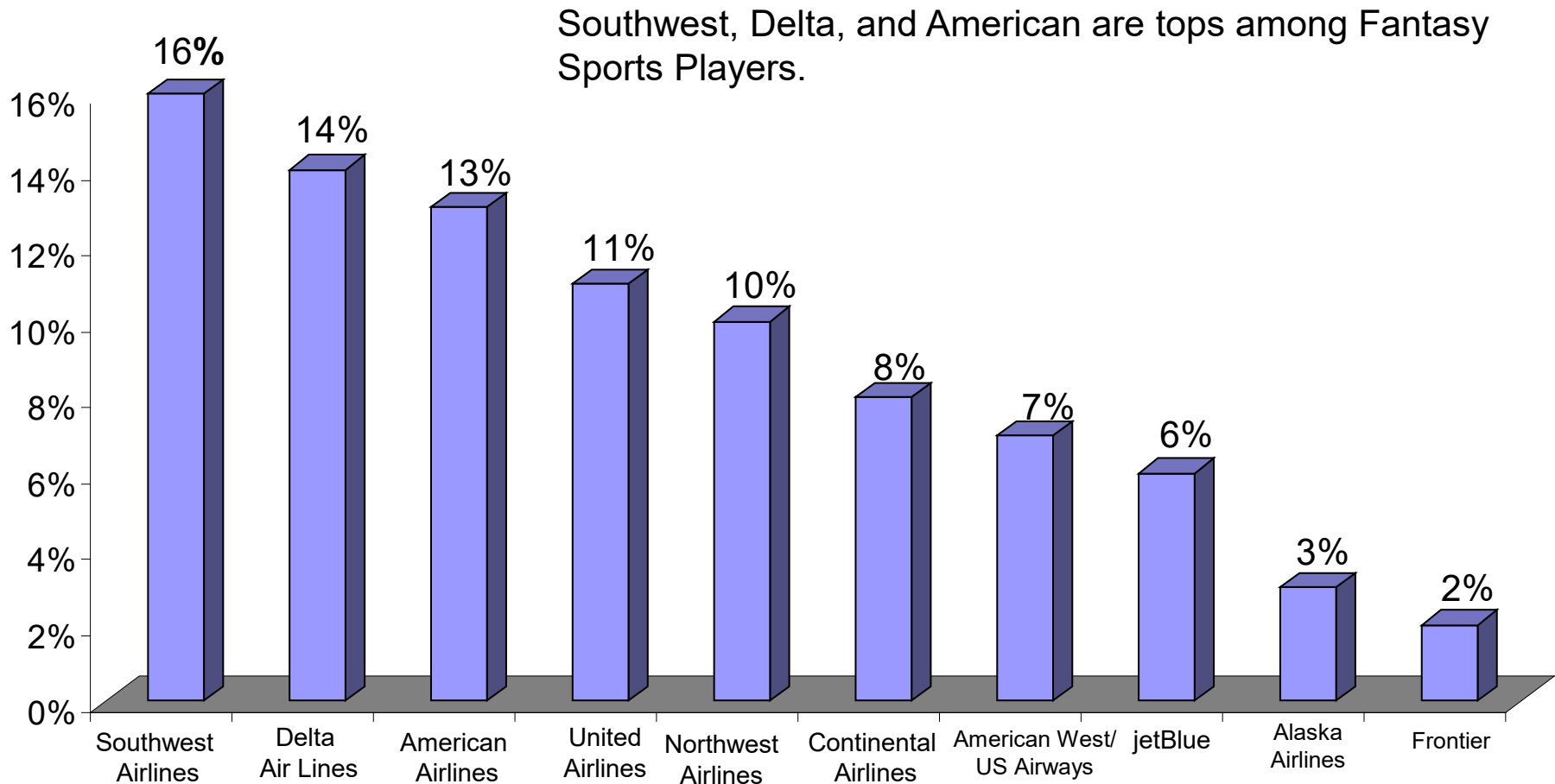
6 . Which of the following Airlines have you personally flown in the past 12 months?

Fantasy Sports Players fly significantly more often than the General population or Sports Fans (52% vs 43%/42%).



Southwest Airlines is an Often Traveled Airline for Fantasy Sports Players

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





Fantasy Sports Players Demographics – Airlines Flown

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

	Southwest Airlines	Delta Airlines	American Airlines	United Airlines	Northwest Airlines
Males	15%	14%	12%	10%	10%
Females	18%	15%	14%	13%	11%
18-34	18%	15%	17%	13%	13%
35-54	14%	13%	10%	10%	8%
55+	16%	15%	11%	8%	10%
<\$50K	12%	7%	8%	7%	7%
\$50K>	18%	20%	17%	13%	12%
Northeast	14%	14%	11%	8%	6%
Midwest	12%	11%	13%	7%	18%
South	15%	17%	15%	11%	7%
West	27%	17%	11%	21%	6%

One in five (18%) higher income Fantasy Sports Players have flown Southwest in the past year. This is also true of Delta Airlines.

18-34 year old Fantasy Sports Players are heavier travelers of American Airlines.

Western Fantasy Sports Players use United often (21%).

Nearly two in ten (18%) Midwestern Fantasy Sports Players have flown Northwest recently.



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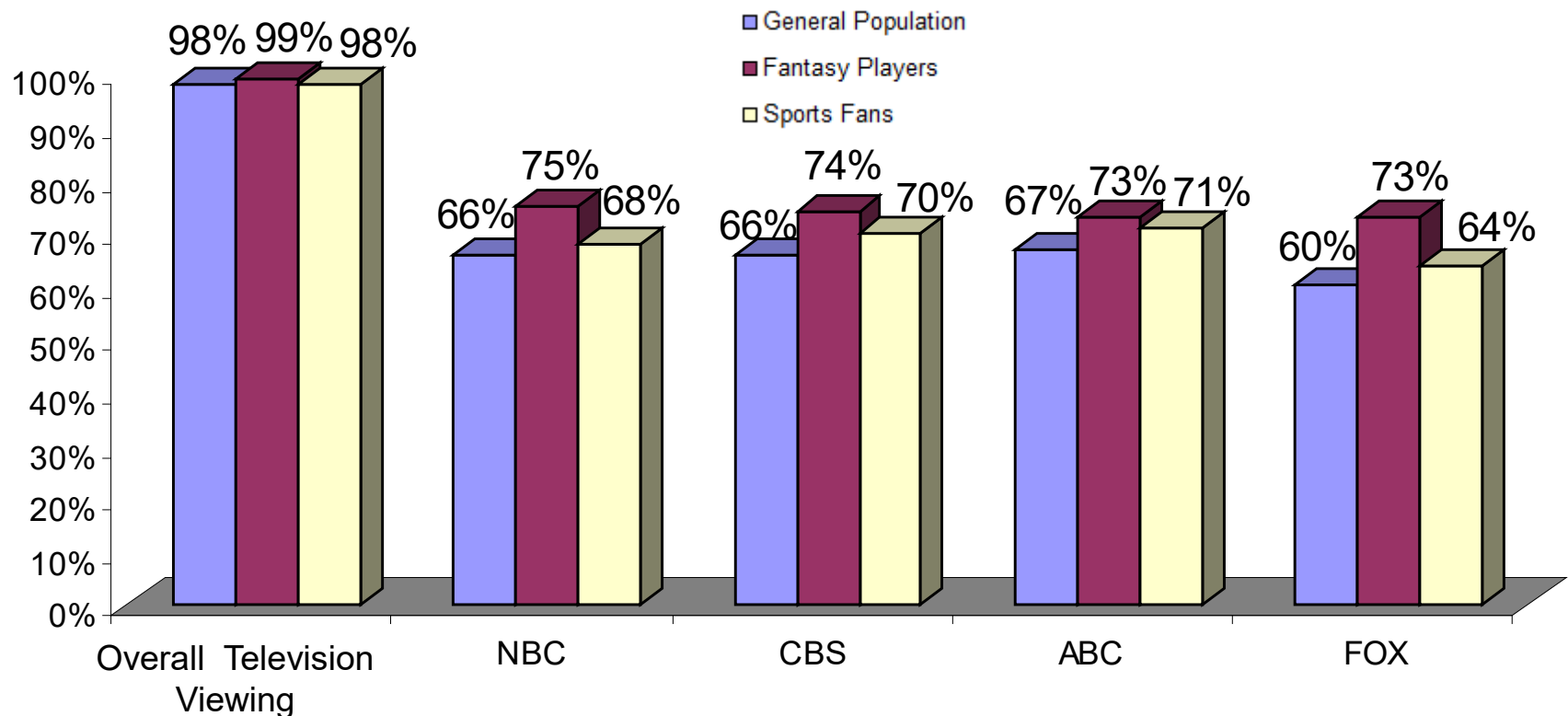


Media Consumption

General Population, Fantasy Sports Players, Sports Fans – Television Channels Watched

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

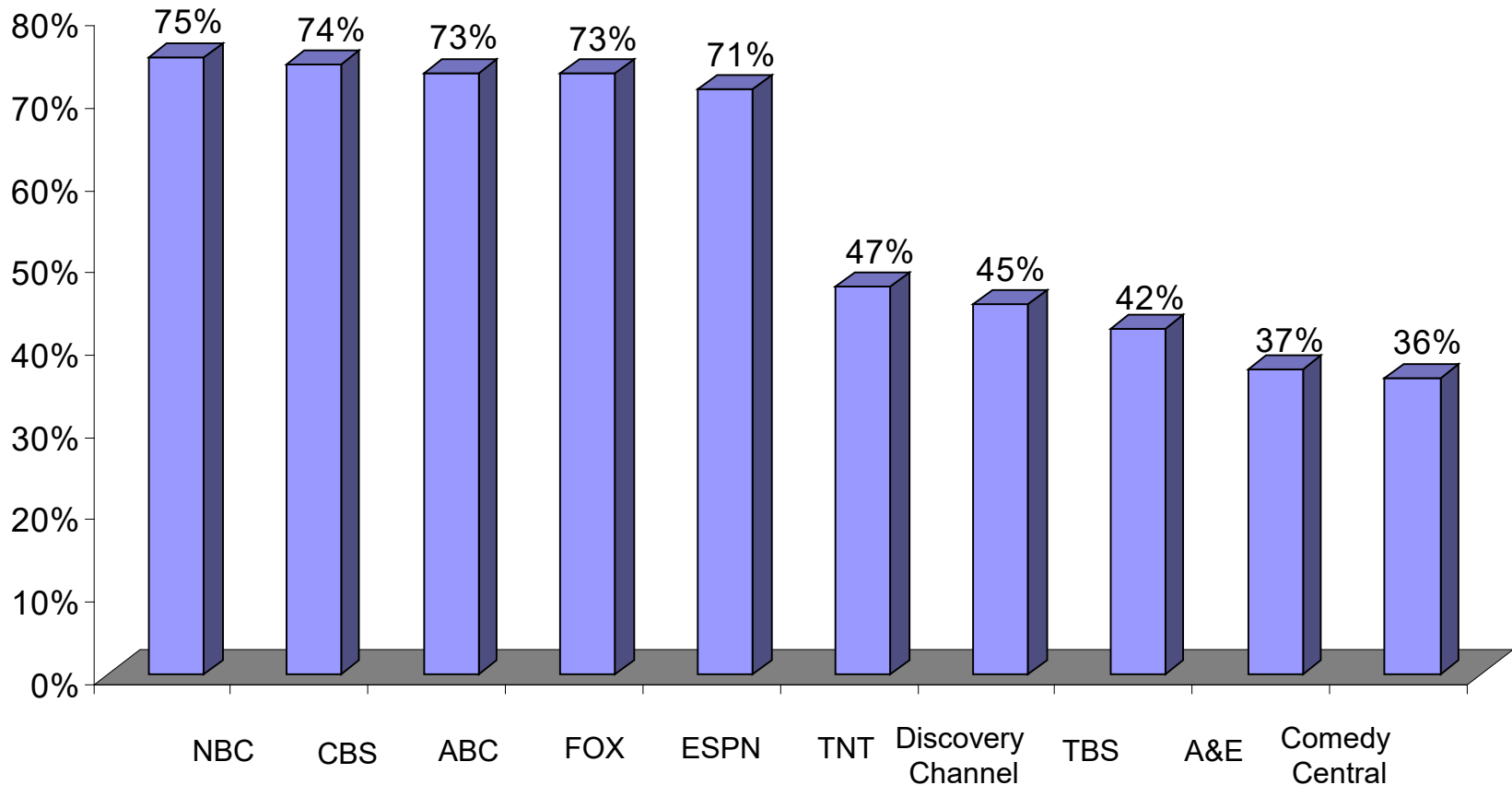
While Fantasy Sports Players are no more likely than overall Sports Fans or the General Population to watch TV, they are more likely to watch the major networks.



Three out of four Fantasy Sports Players Watch NBC

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

Along with the four major networks, ESPN is watched by seven in ten (71%) Fantasy Sports Players.





Fantasy Sports Players Demographics – Television Channels Watched

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

	NBC	CBS	ABC	FOX	ESPN
Males	74%	73%	71%	73%	76%
Females	79%	76%	79%	76%	48%
18-34	68%	61%	65%	72%	64%
35-54	78%	79%	76%	75%	71%
55+	80%	81%	78%	73%	79%
<\$50K	72%	71%	71%	76%	66%
\$50K>	77%	76%	74%	71%	74%
Northeast	78%	73%	72%	70%	74%
Midwest	75%	72%	73%	75%	68%
South	77%	78%	77%	76%	72%
West	65%	70%	66%	70%	69%

Eight in ten (80%) Fantasy Sports Players age 55+ watch NBC. This group also watches CBS at a high rate (81%).

Female Fantasy Sports Players are fans of ABC (79%).

Three in four (76%) Southern Fantasy Players watch FOX.

Male Fantasy Sports Players are significantly more likely than female Fantasy Players to watch ESPN.



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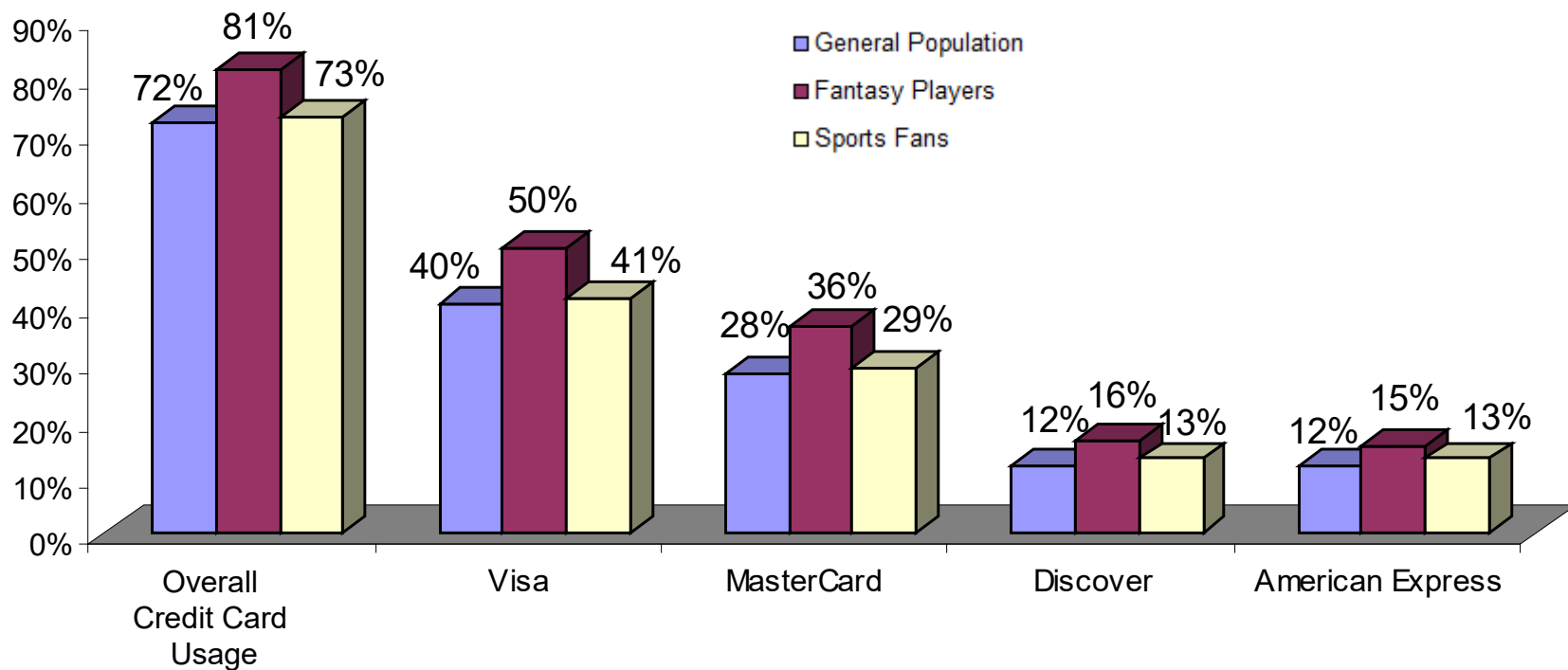


Credit Card Usage

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?

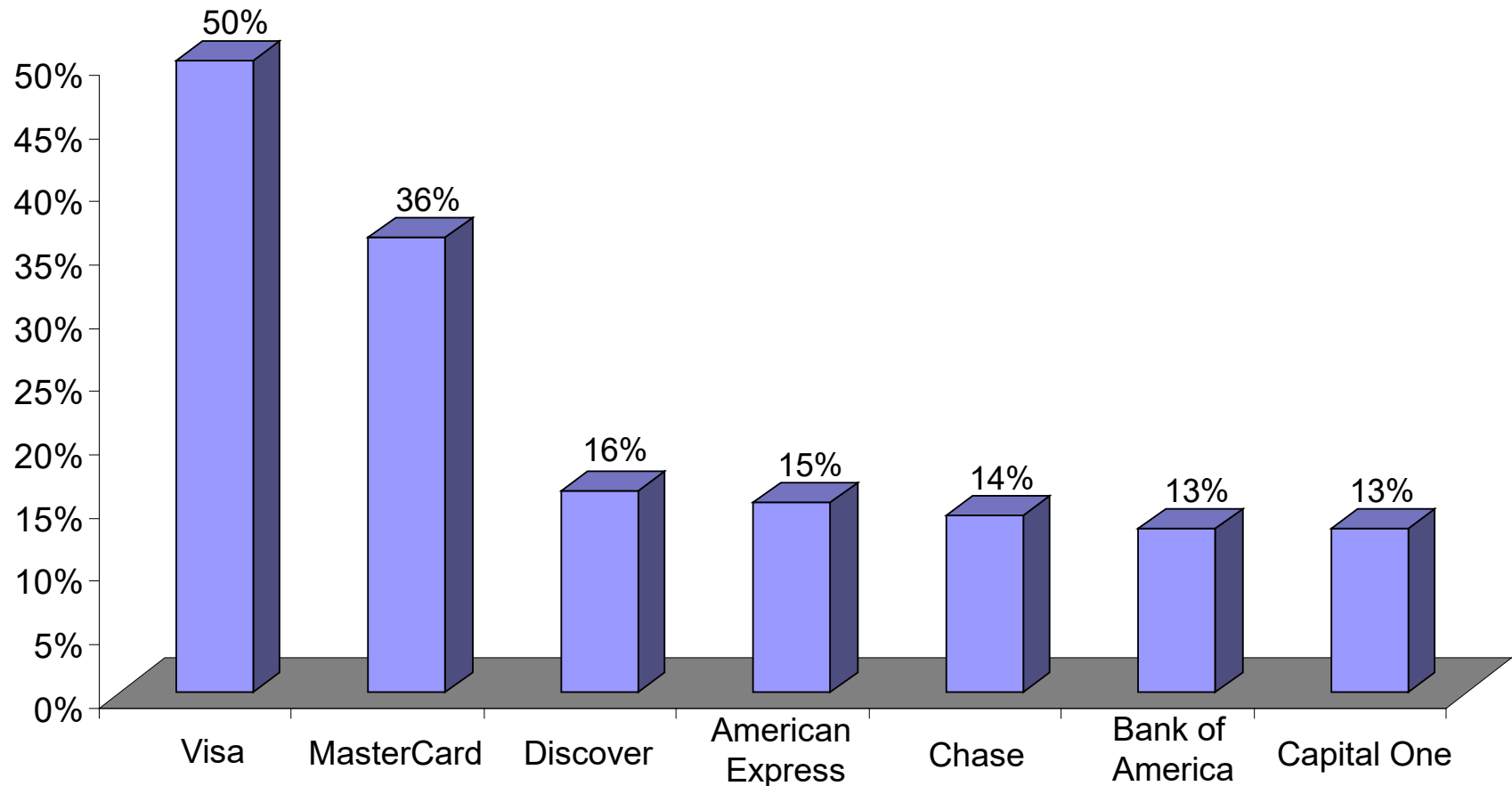
Fantasy Sports Players use credit cards more often than Sports Fans or the General Population. This is especially true with Visa and MasterCard.



Over half of Fantasy Sports Player use a Visa Card at least once per month

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

Half of Fantasy Players use Visa at least monthly. Additionally, one in three (36%) use MasterCard.





Fantasy Sports Players Demographics

– Credit Cards Used

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

	Visa	Master Card	Discover	American Express	Chase
Males	49%	36%	16%	16%	14%
Females	56%	35%	17%	12%	14%
18-34	52%	33%	15%	12%	15%
35-54	47%	37%	15%	12%	12%
55+	53%	37%	21%	24%	15%
<\$50K	43%	24%	13%	8%	10%
\$50K>	56%	44%	19%	20%	16%
Northeast	51%	41%	16%	22%	16%
Midwest	50%	34%	18%	8%	14%
South	46%	35%	15%	16%	13%
West	59%	33%	17%	19%	11%

Six in ten (59%) western Fantasy Sports Players use Visa at least monthly.

Four in ten (41%) northeastern Fantasy Sports Players are MasterCard users. This group is also a heavy user of American Express (28%) and Chase (16%).



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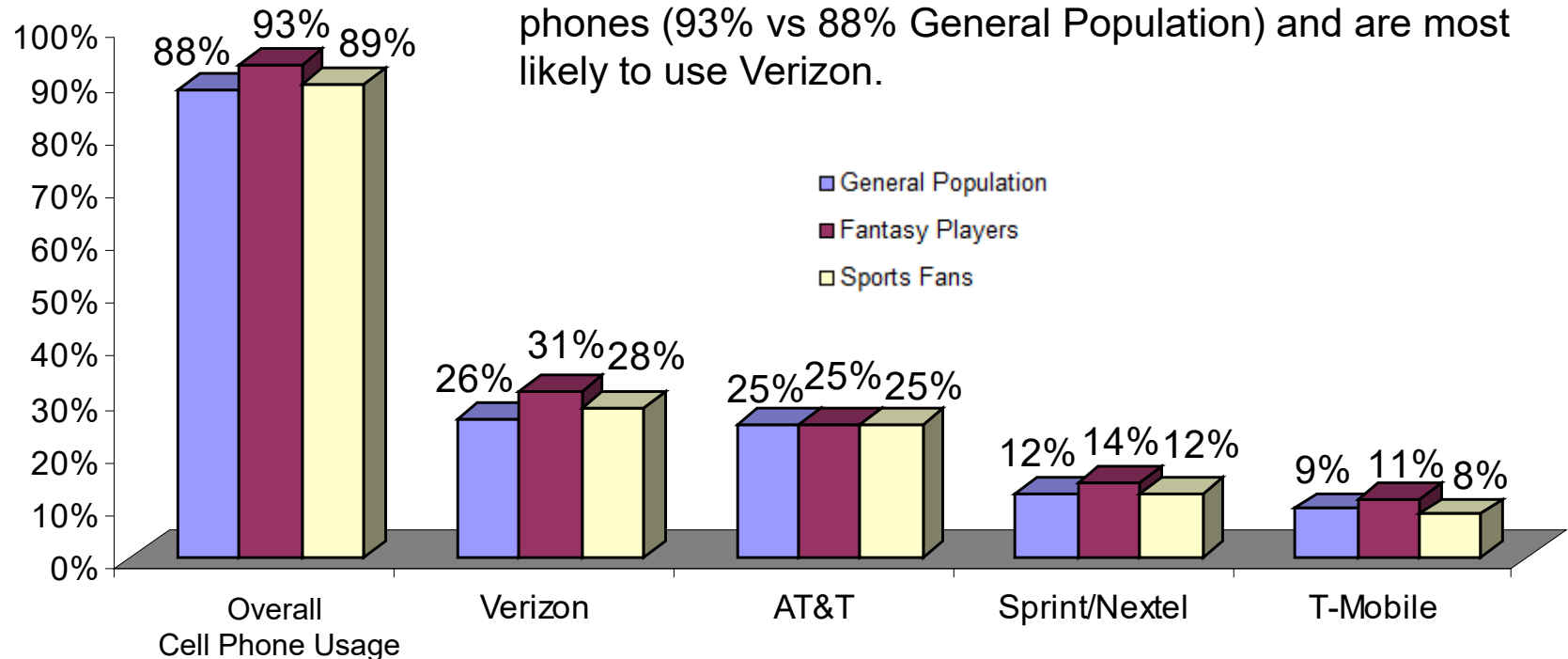
Wireless Usage

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.

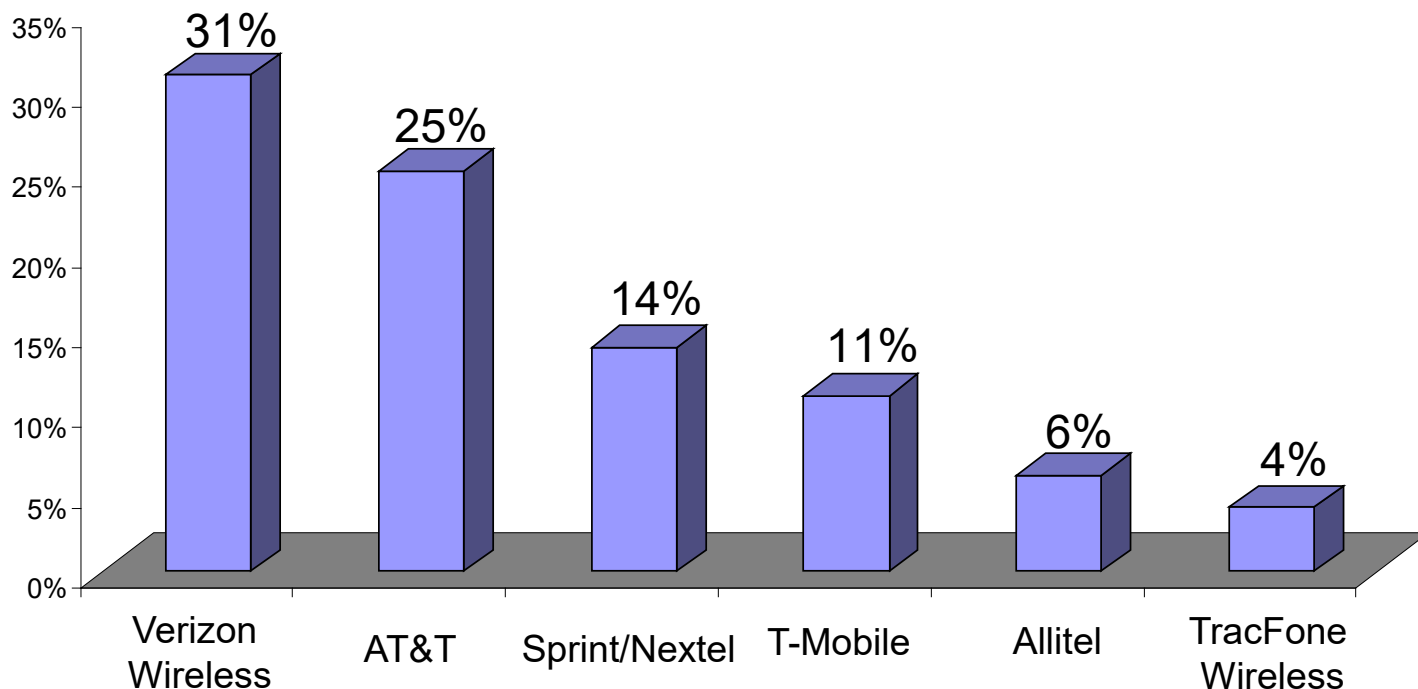




Nearly a Third of Fantasy Sports Players Use Verizon Wireless as Cell Phone Provider

9. What company provides your cell phone service?

Verizon and AT&T are most popular among Fantasy Sports Players as they are among the General Population.





Fantasy Sports Players Demographics

– Cell Phone Provider

9 .What company provides your cell phone service?

	Verizon	AT&T	Sprint/ Nextel	T-Mobile	Alltel
Males	32%	24%	14%	11%	6%
Females	29%	27%	14%	14%	7%
18-34	37%	25%	14%	15%	7%
35-54	28%	24%	14%	11%	7%
55+	28%	25%	13%	7%	5%
<\$50K	23%	24%	13%	12%	7%
\$50K>	37%	25%	14%	11%	6%
Northeast	43%	22%	13%	11%	2%
Midwest	27%	20%	16%	10%	8%
South	22%	33%	14%	10%	9%
West	38%	23%	9%	17%	6%

Over four in ten (43%) northeast Fantasy Sports Players are Verizon subscribers.

Southern Fantasy Sports Players are most likely to be AT&T subscribers (33%).



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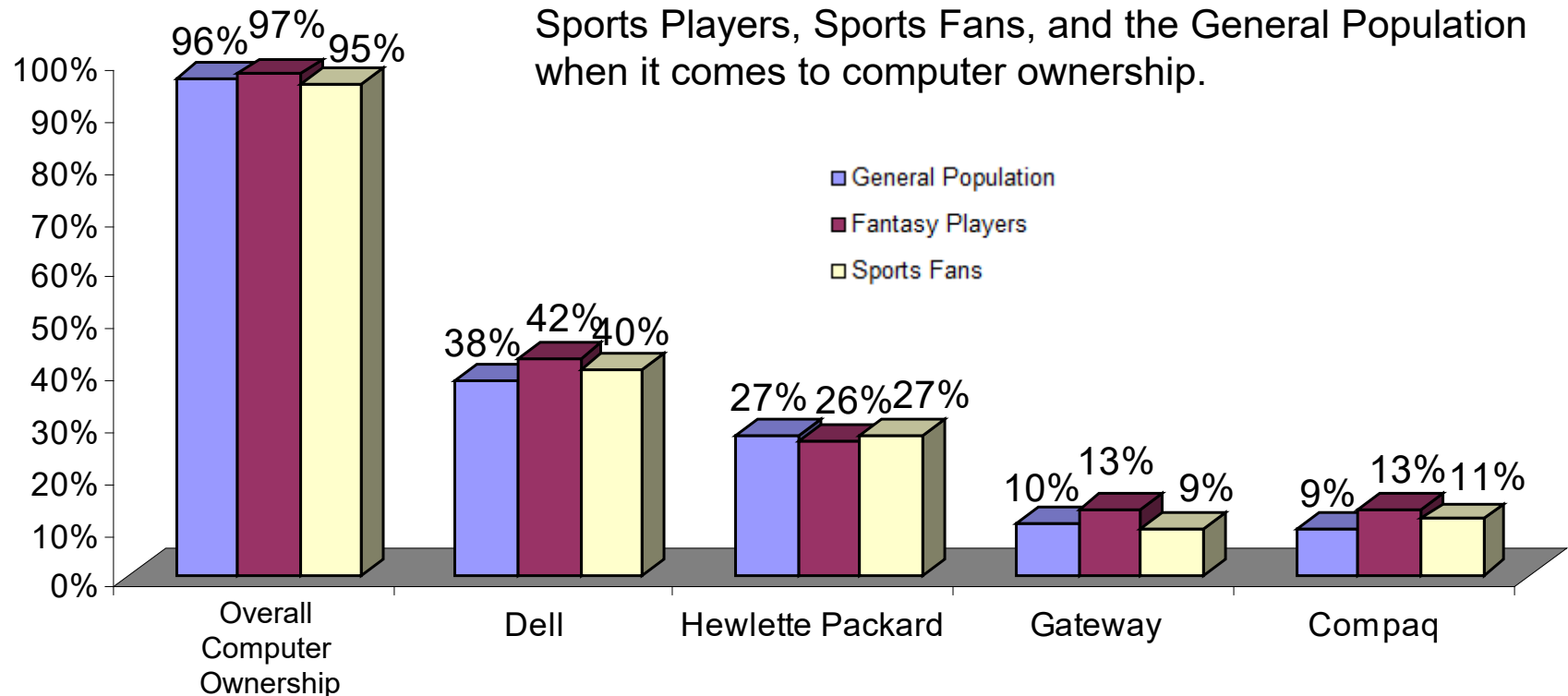
Computer Usage

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.

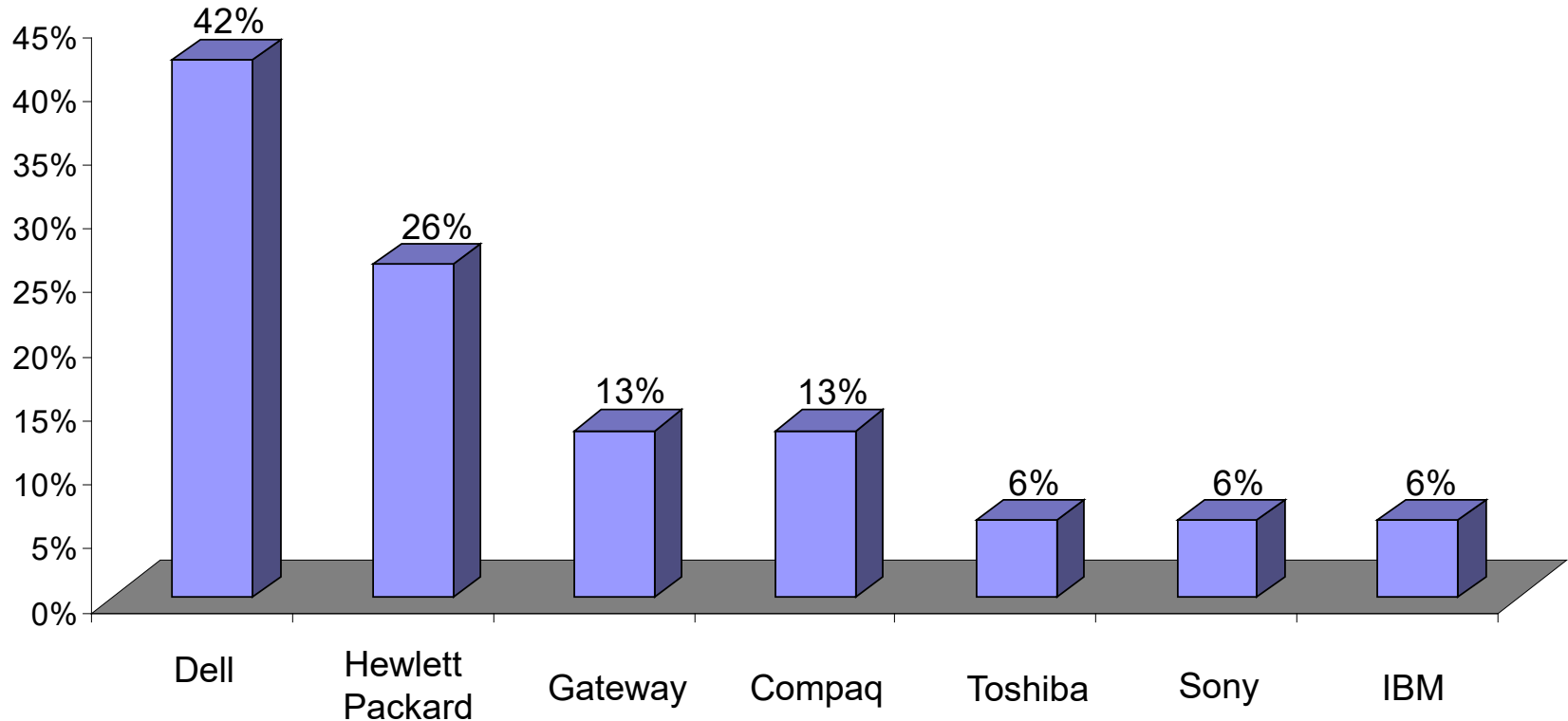
There is no real statistical difference between Fantasy Sports Players, Sports Fans, and the General Population when it comes to computer ownership.



Over 40% of Fantasy Sports Players own a Dell

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

Dell is the clear winner among Fantasy Sports Players.





Fantasy Sports Players Demographics – Computer Owned

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

	Dell	Hewlett Packard	Gateway	Compaq	Toshiba
Males	41%	25%	13%	12%	5%
Females	43%	27%	14%	14%	9%
18-34	41%	26%	12%	14%	8%
35-54	43%	27%	16%	13%	6%
55+	41%	23%	11%	10%	5%
<\$50K	34%	23%	15%	17%	6%
\$50K>	47%	28%	12%	10%	6%
Northeast	46%	22%	10%	12%	5%
Midwest	39%	28%	14%	12%	5%
South	43%	24%	14%	14%	7%
West	40%	28%	16%	13%	7%

Dell is the winner across all demographic groups.



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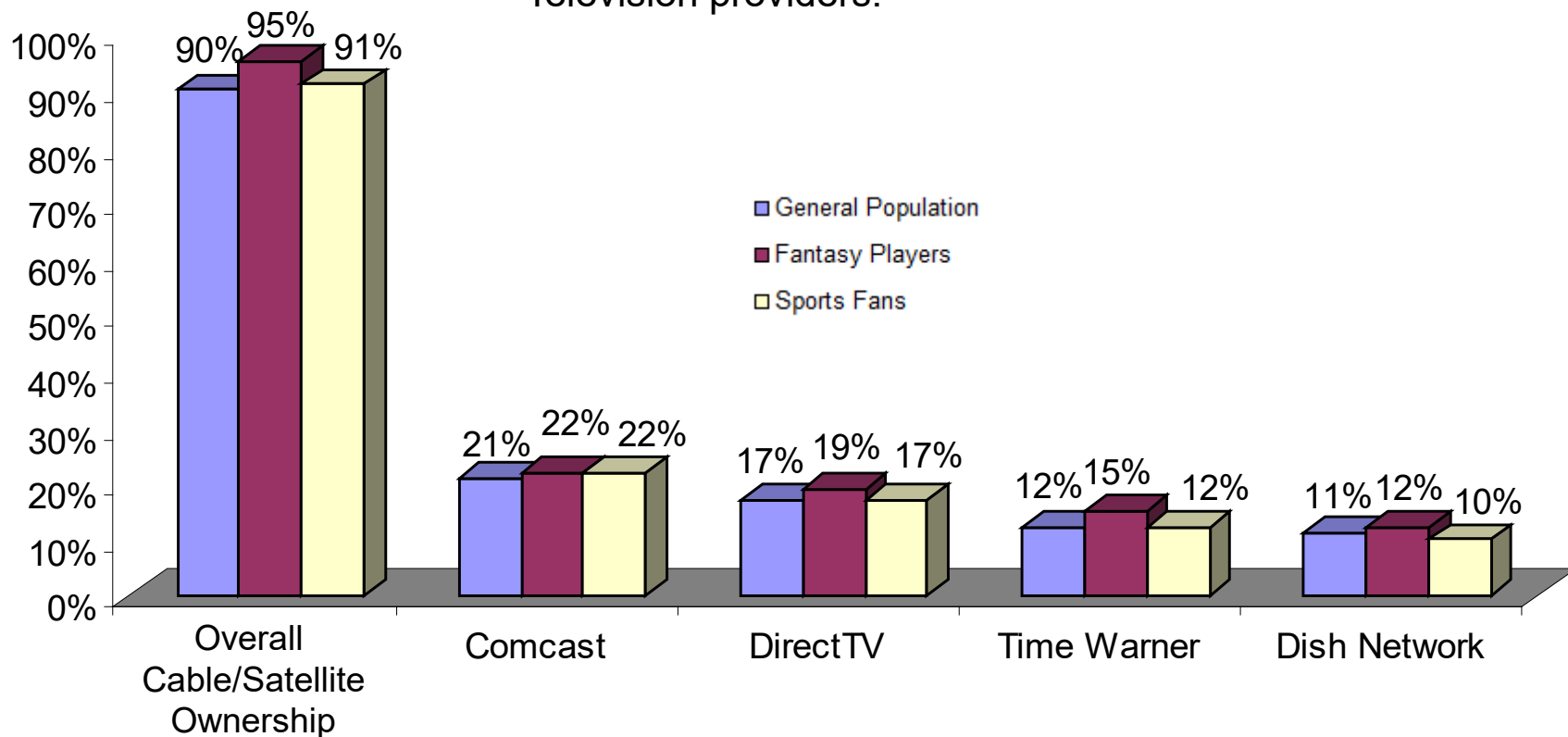


Premium Television Providers

General Population, Fantasy Sports Players, Sports Fans – Cable or Satellite Service

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.

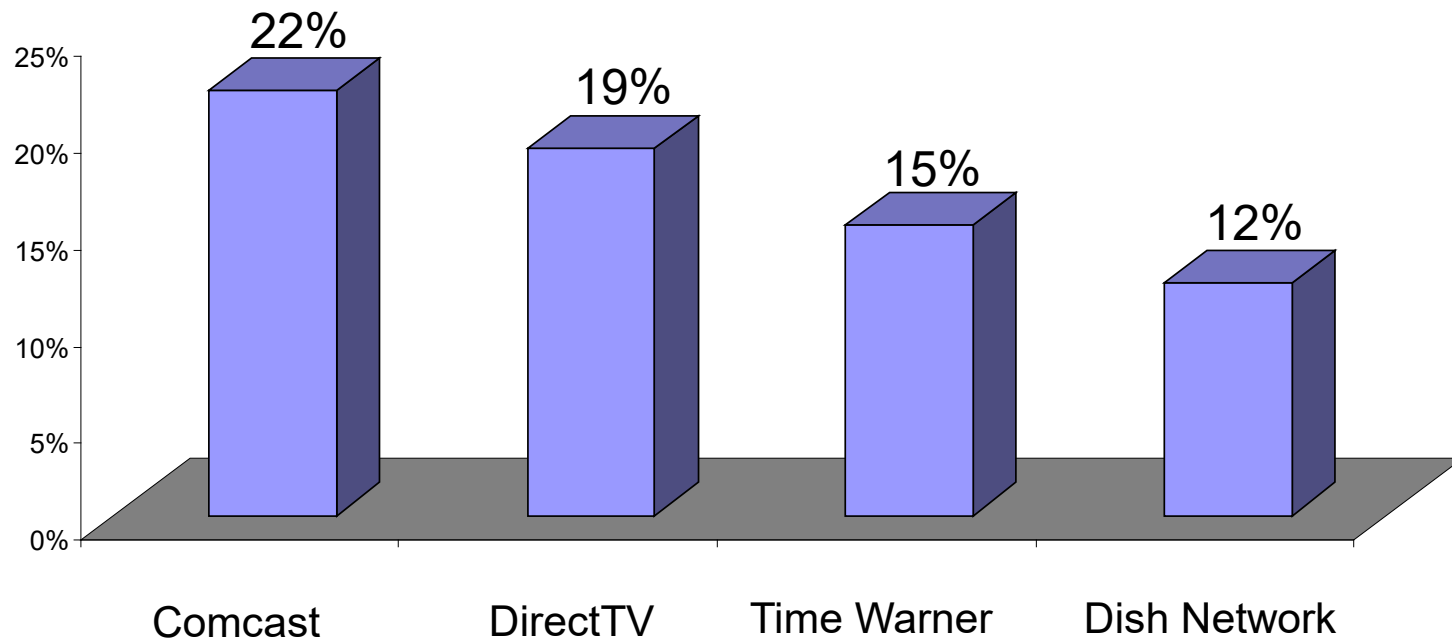




Comcast is the leading cable or satellite service for Fantasy Sports Players

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

Comcast and DIRECTV are the largest providers among Fantasy Sports Fans.





Fantasy Sports Players Demographics

– Cable or Satellite Service

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

	Comcast	DIRECTV	Time Warner	Dish Network	Charter Comm.
Males	23%	18%	16%	11%	7%
Females	19%	23%	12%	15%	5%
18-34	23%	17%	18%	13%	7%
35-54	20%	20%	13%	11%	7%
55+	25%	18%	15%	11%	7%
<\$50K	20%	17%	16%	12%	8%
\$50K>	24%	20%	15%	12%	6%
Northeast	30%	15%	25%	7%	1%
Midwest	19%	17%	15%	13%	12%
South	21%	20%	11%	12%	6%
West	21%	26%	9%	17%	5%

Comcast is tops in the Northeast among Fantasy Players (30%).

DirectTV is the provider for one in four (26%) western Fantasy Sports Players.



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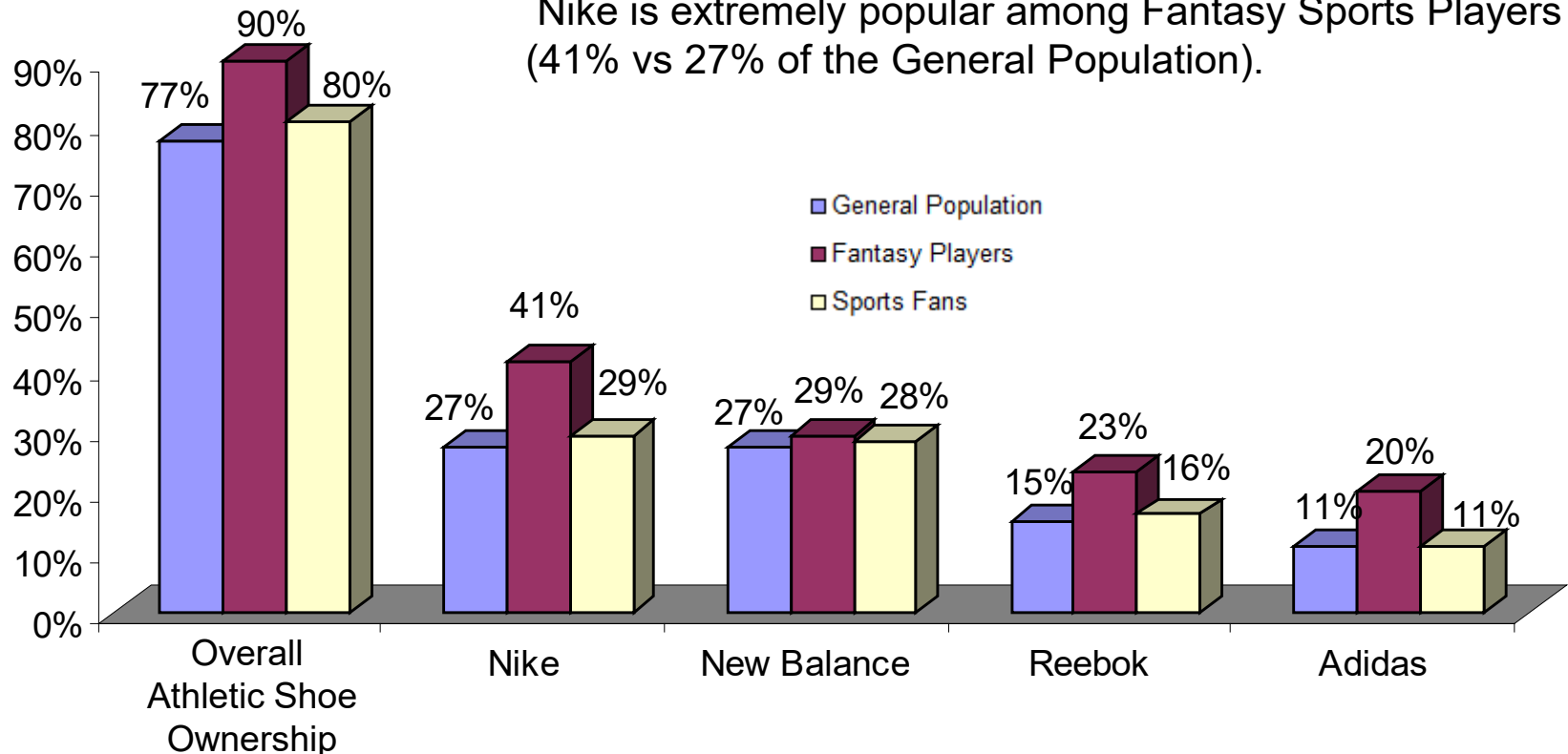
Athletic Shoe Ownership

General Population, Fantasy Sports Players, Sports Fans – Athletic Shoes Owned

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.

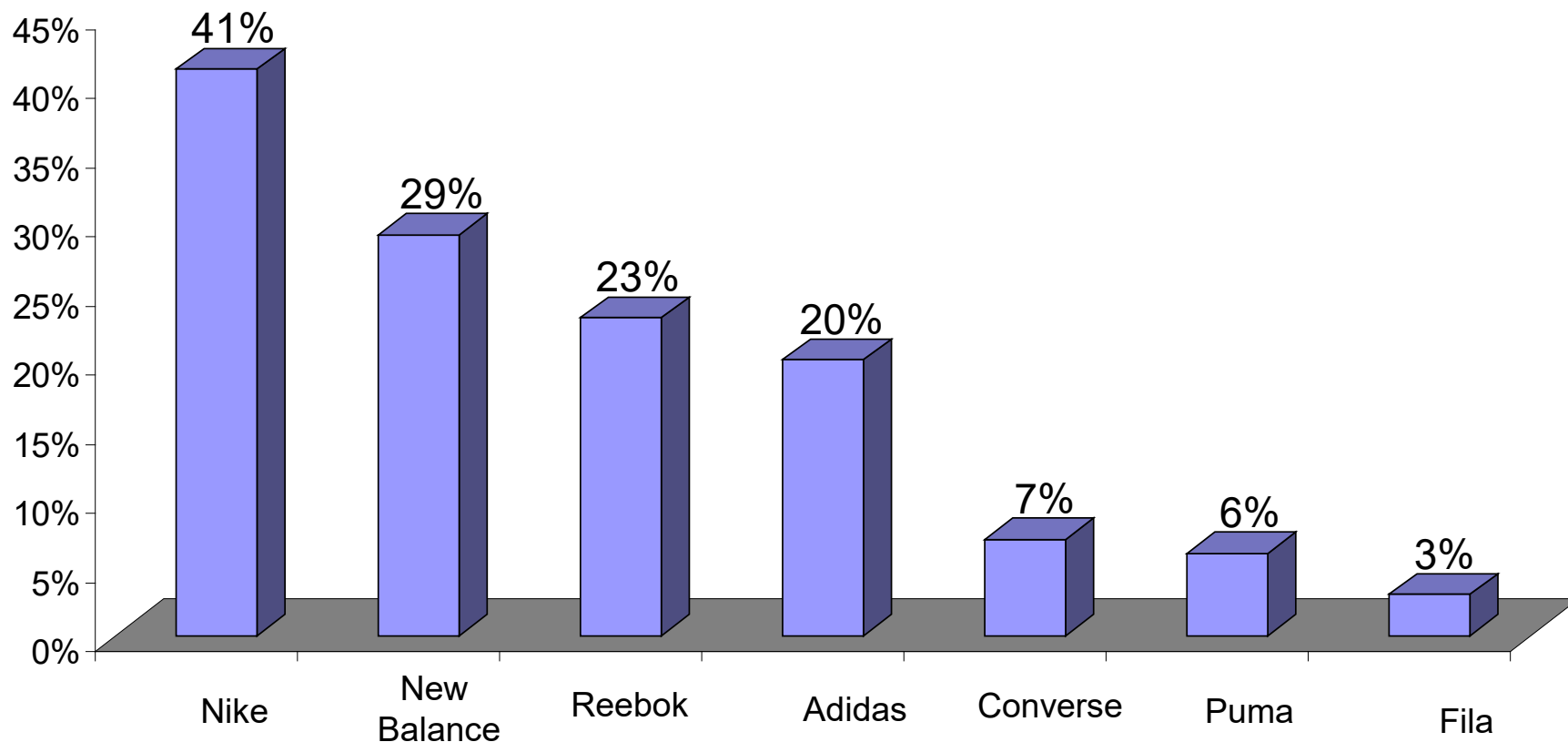
Nike is extremely popular among Fantasy Sports Players (41% vs 27% of the General Population).



Nike is the Most Popular Athletic Shoe Brand Among Fantasy Sports Players

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

Nike is king while New Balance Reebok, and Adidas also have a strong following among Fantasy Sports Players.





Fantasy Sports Players Demographics – Athletic Shoes Owned

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

	New				
	Nike	Balance	Reebok	Adidas	Converse
Males	40%	29%	22%	20%	7%
Females	45%	32%	27%	21%	7%
18-34	53%	26%	20%	31%	10%
35-54	37%	31%	24%	16%	6%
55+	32%	32%	23%	13%	5%
<\$50K	37%	25%	20%	20%	7%
\$50K>	44%	32%	25%	21%	6%
Northeast	39%	35%	26%	23%	6%
Midwest	43%	24%	21%	19%	5%
South	40%	32%	25%	19%	7%
West	42%	27%	18%	24%	12%

More than half (53%) of 18-34 year old Fantasy Players own Nike athletic shoes!

New Balance is popular among female Fantasy Sports Players (32%).



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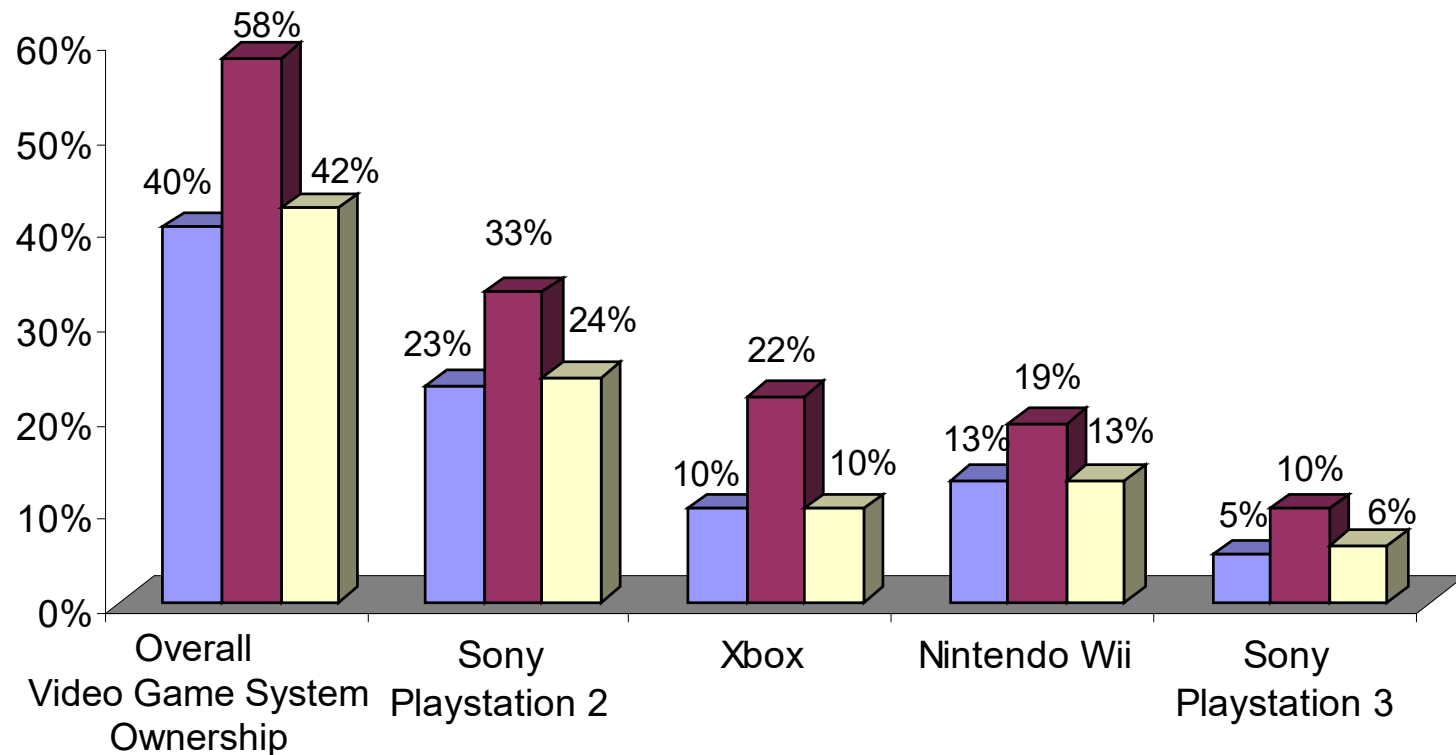
Game Console Ownership

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.

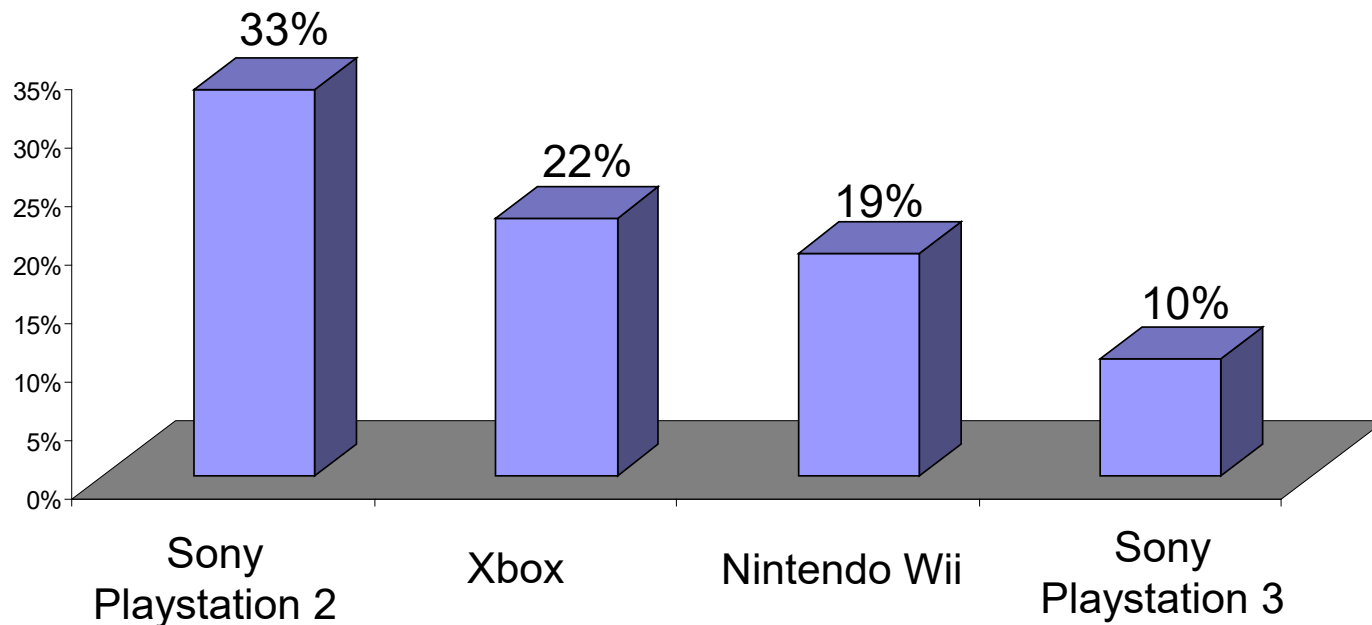
This is true across the four main video game consoles.



Over a Third of Fantasy Sports Players Own a Sony Playstation 2

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

One out of every three (33%) Fantasy Sports Players owns a Sony Playstation 2.





Fantasy Sports Players Demographics – Video Game Systems Owned

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

	Sony Playstation 2	Xbox	Nintendo Wii	Sony Playstation 3
Males	31%	21%	17%	10%
Females	39%	27%	27%	10%
18-34	47%	35%	27%	17%
35-54	35%	21%	19%	8%
55+	10%	5%	6%	3%
<\$50K	36%	19%	15%	10%
\$50K>	31%	24%	21%	10%
Northeast	31%	23%	21%	14%
Midwest	33%	19%	20%	10%
South	37%	23%	14%	7%
West	29%	25%	20%	10%

High game console ownership is primarily driven by the fact that many Fantasy Players are in the 18-34 year old demographic.



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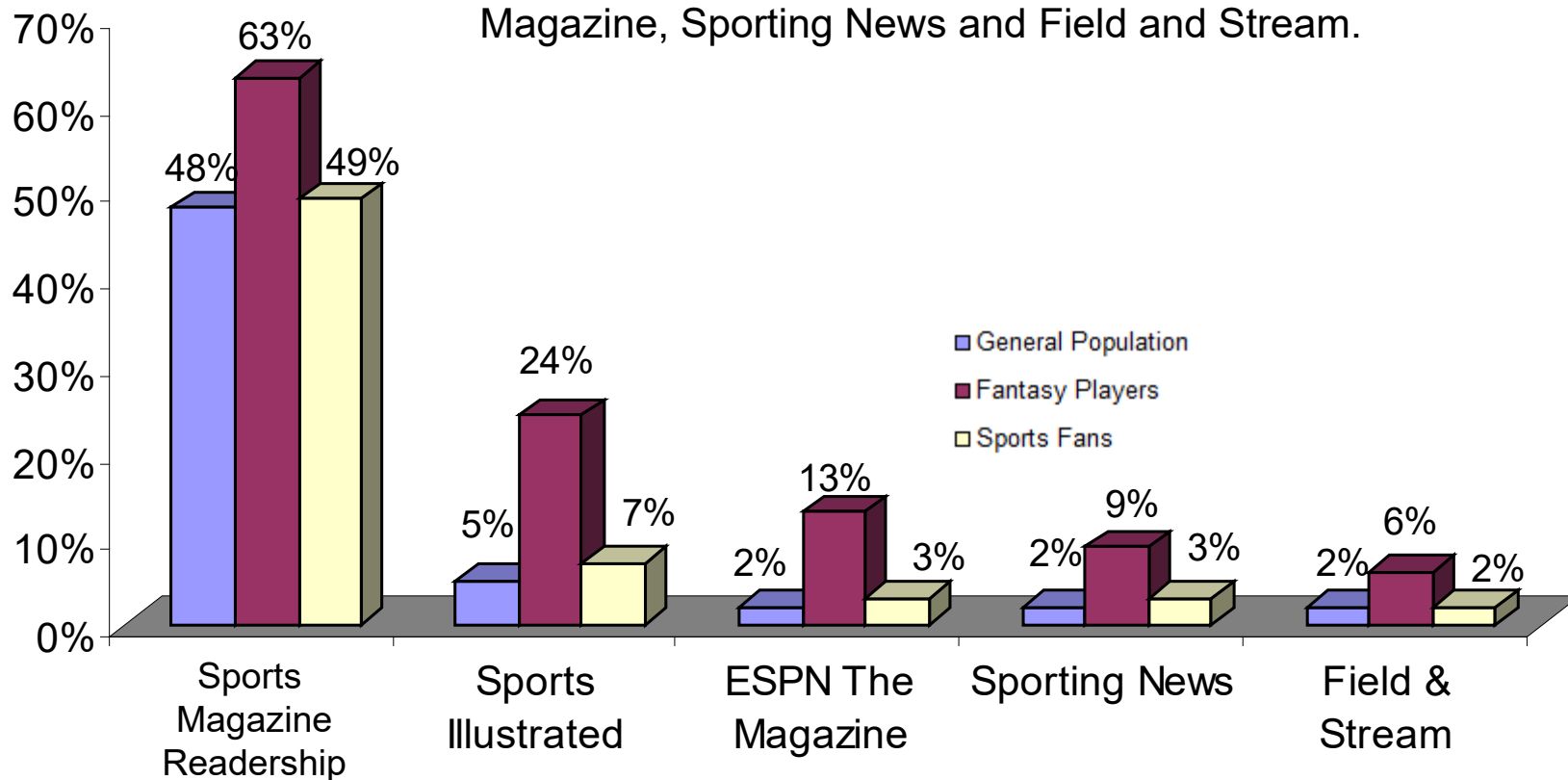
Magazine Readership

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%).

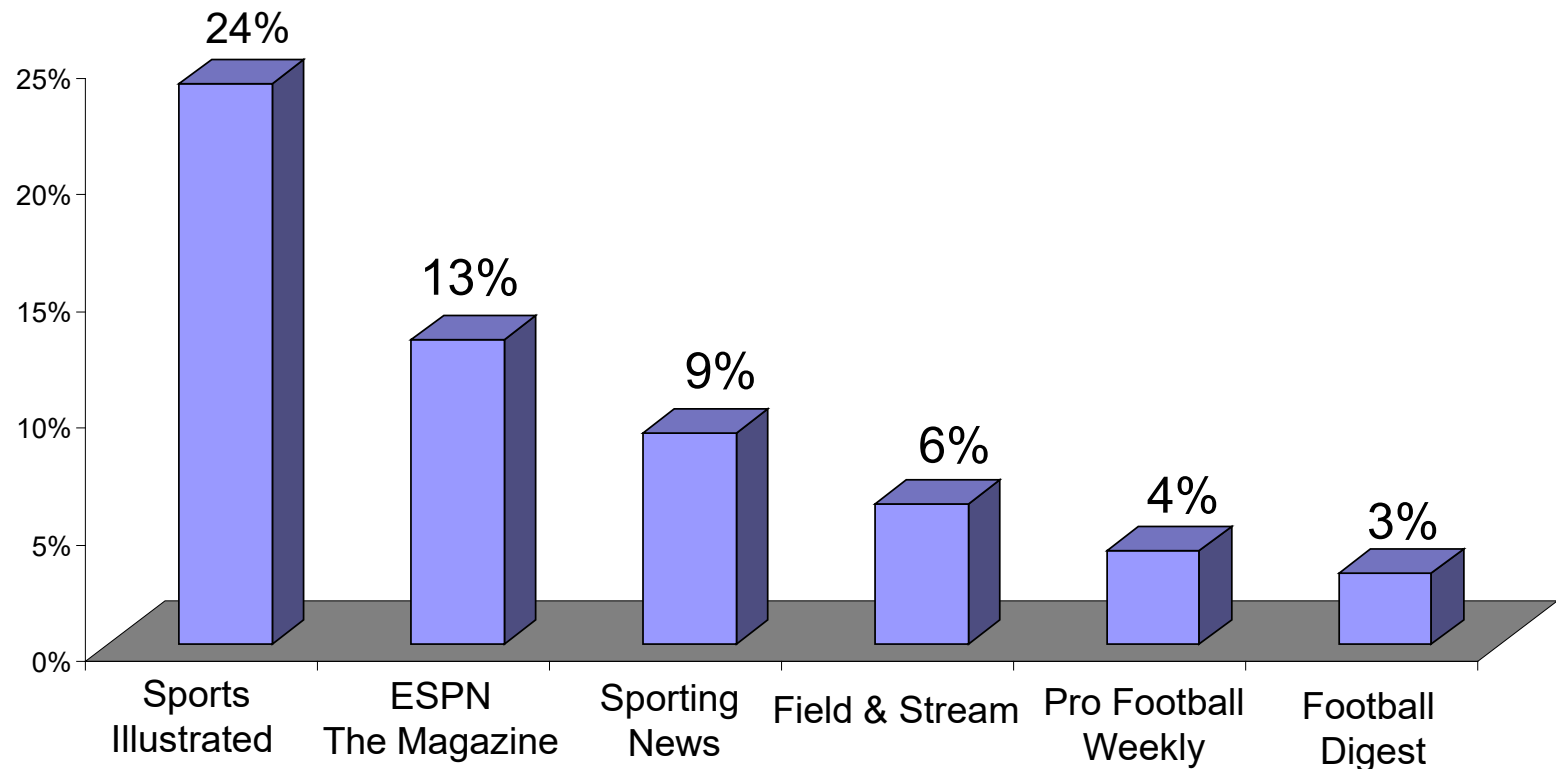
This is statistically significant for Sports Illustrated, ESPN The Magazine, Sporting News and Field and Stream.



Nearly 1 in 4 Fantasy Sports Players Subscribe or read Sports Illustrated

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

Fantasy Sports Players consume sports information at a high rate.





Fantasy Sports Players Demographics – Magazine Readership

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

Demos	Sports Illustrated	ESPN The Magazine	Sporting News	Field & Stream	Pro Football Weekly
Males	24%	13%	10%	6%	4%
Females	22%	10%	5%	6%	2%
18-34	29%	19%	9%	8%	6%
35-54	22%	11%	10%	5%	3%
55+	22%	6%	7%	4%	2%
<\$50K	20%	11%	10%	6%	4%
\$50K>	26%	13%	8%	5%	4%
Northeast	29%	14%	10%	5%	4%
Midwest	21%	10%	8%	6%	3%
South	22%	12%	9%	7%	3%
West	27%	17%	9%	4%	6%

Three in ten 18-34 year old Fantasy Sports Players read Sports Illustrated and two in ten (19%) are ESPN readers.



Questions? Please contact me!

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***This presentation is not for public release.**