



Ipsos Public Affairs
The Social Research and Corporate Reputation Specialists



FANTASY SPORTS TECHNOLOGY USE and PERCEPTION STUDY

**Fantasy
Sports
Trade
Association**



January, 2012

© 2012 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

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 OR John McMurray at Ipsos Public Affairs (aaron.amic@ipsos.com; john.mcmurray@ipsos.com)



Three Phase Research Plan



Three Phase Research Plan

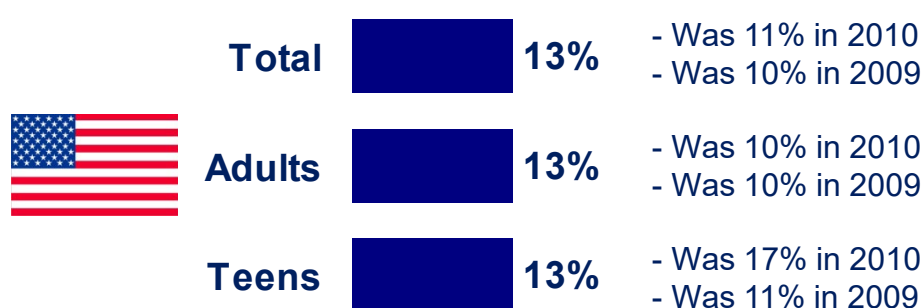
- Phase One Objective: Determine INCIDENCE of fantasy sports participation.
 - Ipsos surveyed 1,215 Americans, aged 12+.
 - Ipsos surveyed 1,226 Canadians, aged 12+.
 - Respondents were asked which Fantasy Sports they play, if any.
 - Data collection for 2011 was completed using the US and Canadian Online Omnibus Services, from **May 2-10, 2011**. Previous year research was completed at similar times in the year.
- Phase Two is the main part of this presentation which is the use of technology in fantasy sports. We'll explain the methodology more on subsequent slides.
- Phase Three will field later in 2012. It will focus on spending by fantasy sports players on fantasy sports (partial repeat of the often industry and media cited 2008 fantasy sports spending study).

Phase One: Incidence of Fantasy Sports Participation



How Many People are Playing Fantasy Sports?

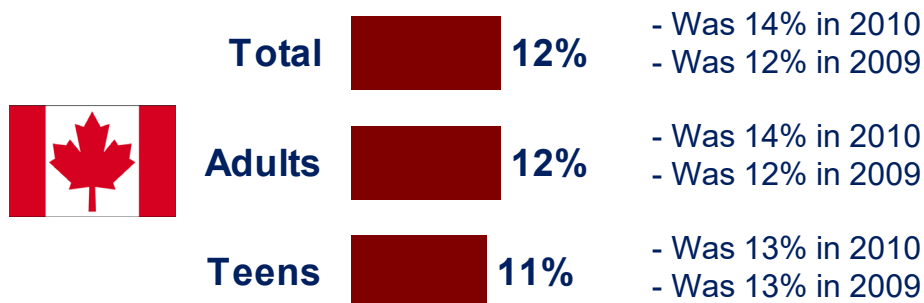
Q1. Since May of 2010, have you played fantasy sports, where you select a team of professional athletes or teams to earn points based on their competition performance?



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

- In the United States, there are 32,809,564 people playing fantasy sports.

- 12-17 – 3,213,995
- 18-34 – 14,492,947
- 35-54 – 11,225,597
- 55+ – 3,877,020



- There are 3,113,038 people playing in Canada;

- 12-17 – 280,769
- 18-34 – 1,633,935
- 35-54 – 784,255
- 55+ – 414,079

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

Phase Two: Use of Technology by Fantasy Players



The OBJECTIVE of the Technology Study is:

- To better understand fantasy players' technology use and preferences while playing fantasy sports
-
- Understand **frequency** in which players perform fantasy related activities;
 - Measure **types of technologies** fantasy players use to perform fantasy related activities;
 - Assess the **primary technology** fantasy players use to perform activity;
 - Understand the use of **scoring applications** (apps) and **news apps** as they relate to fantasy sports, including the prevalence of paying for apps;
 - Assess the **use of websites** for fantasy sports.

Methodology	Date	Who	Qualifications	Length of Time
Online interviewing methodology	December 21 st to 30 th 2011	n=526 fantasy sports players within the U.S.	To qualify for the study, respondents must have played fantasy sports within the past 12 months.	The survey averaged approximately 15 minutes in length.



526



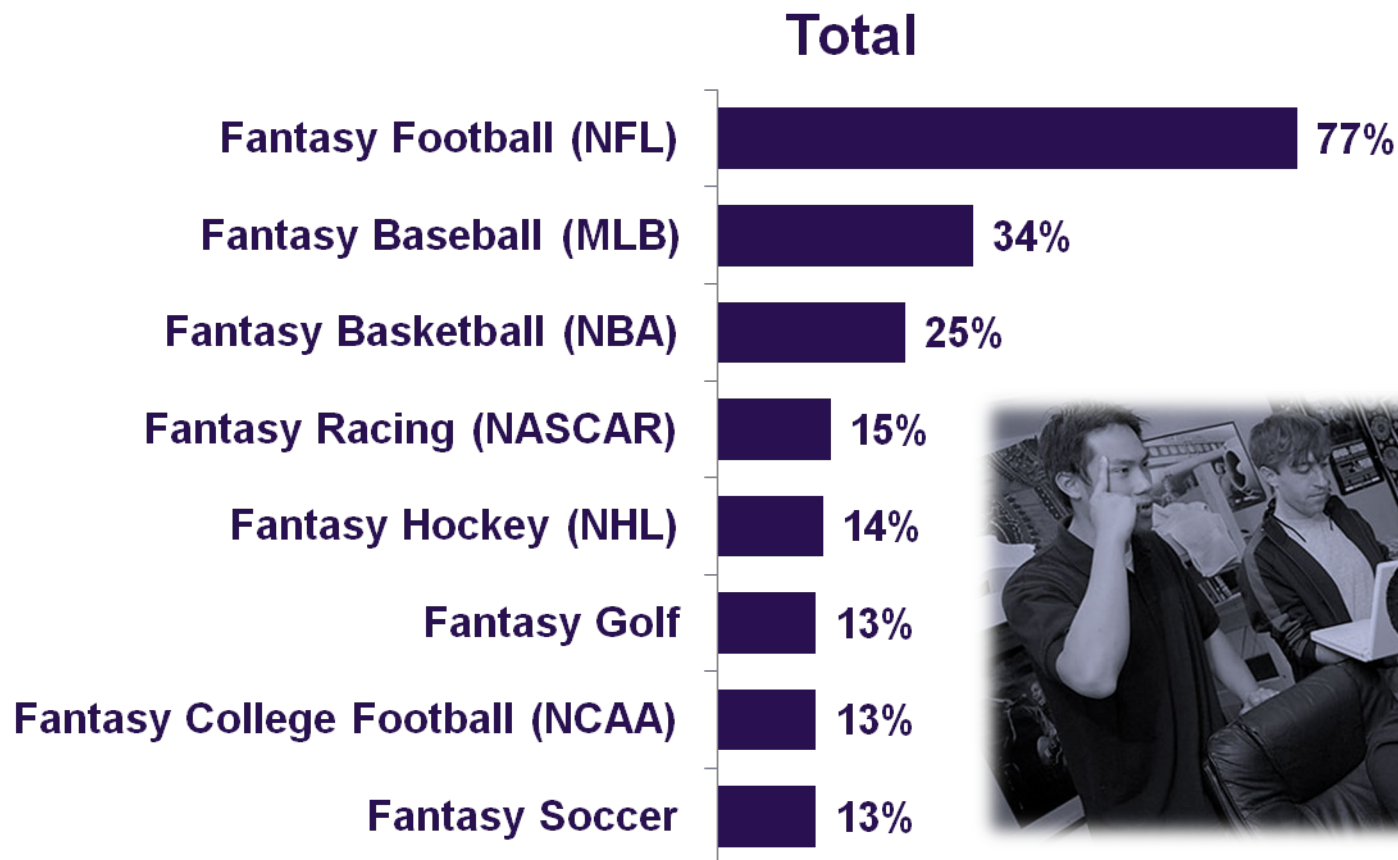
**15
Mins**

Accuracy:

With a sample size of n=526, results are accurate to +/- 4.27% when tested at the 95% confidence interval.

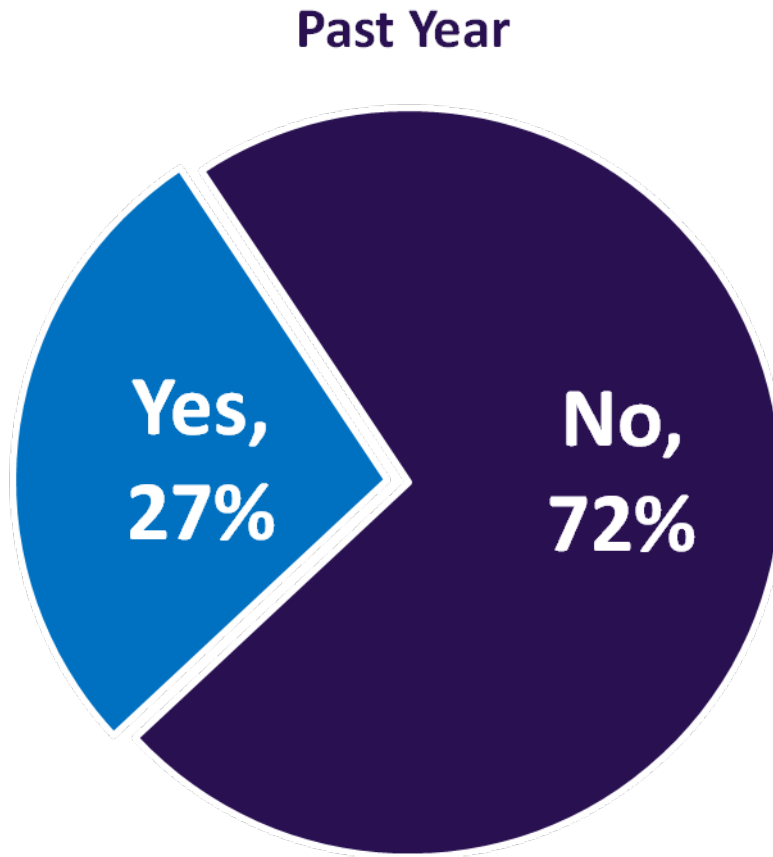
Participation in Fantasy Sports Among Fantasy Players

- As has been the case every year Ipsos has conducted studies on fantasy sports, football remains the most played fantasy sport.
- More than three in four (77%) of fantasy sports players, play fantasy football.



Served as Commissioner or Manager

- One in four fantasy sports players (who play in traditional leagues) have served as a commissioner in the past year.



27%

**Have
served as
Commissioner or Manager**



Q4. In the last 12 months, have you served as commissioner or manager for any of your fantasy leagues?

Base: Traditional leagues run by family, friends, coworkers N=468

Fantasy Player Profiles



Three Fantasy Player Profiles

Hard Core (36%)

Either:

- Owns at least 1 fantasy sports team; and
- Gives a score of 9 or 10 (out of a possible 10) for how much they enjoy playing fantasy sports; and
- Has served as commissioner or manager for their league.

OR:

- Owns at least 3 fantasy teams across all sports; and
- Gives a score of 9 or 10 (out of a possible 10) for how much they enjoy playing fantasy sports.



Engaged (32%)

- Owns at least 2 fantasy sports teams across all sports OR has served as commissioner or manager for their league; AND
- Gives a score of 7,8, 9 or 10 (out of a possible 10) for how much they enjoy playing fantasy sports.
- Doesn't meet the criteria of Hard Core.

Casual (32%)

- Has played fantasy sports in the past 12 months.
- Unlikely to have served as commissioner or manager.
- Less likely as a group to research and update their team on a weekly basis.
- Doesn't meet the criteria of Hard Core or Engaged.



Frequency of Fantasy Sports Activities **BEFORE DRAFT**



Ipsos Public Affairs

Frequency of Fantasy Sports Activities – Pre-draft

- Fantasy sports players don't wait until the season begins to get involved. Nearly all fantasy owners research players or read articles on fantasy sports before the draft (93% and 86%, respectively).



■ At Least Once ■ More than Once a Week



Q6a. [SUMMARY - AT LEAST ONCE] In the month leading up to your league draft, how often do you perform each of the following activities? If you are in multiple leagues, please think about the league you care about the most.

Base: All Respondents n=526

Frequency of Fantasy Sports Activities – Pre-draft Among Segments (More than Once a Week)

- Living up to their name, hard core players are much more likely than their engaged and casual counterparts to research players before the season.
- Showing they prepare more than anyone else, one third (32%) of hard core players conduct mock drafts, compared to only 10% of casual fantasy sports players.



Q6a. [SUMMARY - MORE THAN ONCE A WEEK] In the month leading up to your league draft, how often do you perform each of the following activities? If you are in multiple leagues, please think about the league you care about the most.

Base: Hard Core n=190; Engaged n=168; Casual n=168

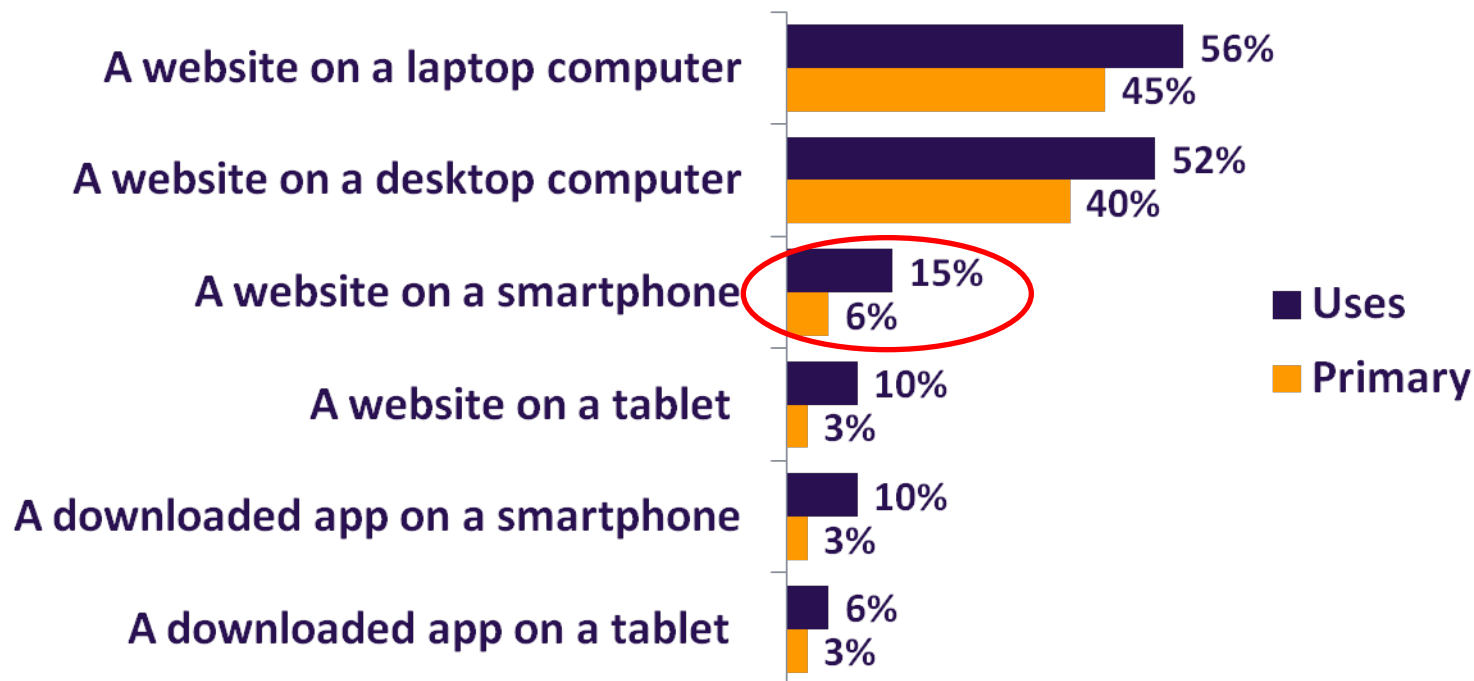
Technology Used for Fantasy Related Activities – BEFORE DRAFT



Technology Used to Perform Activity PRE-DRAFT

- 93% of fantasy sports team owners research players at least once prior to the draft.
Among this group:
 - Over 50% are conducting their research through websites on laptops or desktops.
 - 15% of them are also researching players via websites on smartphones; only 6% use websites on their smartphone as the primary means of researching players.

Research Players



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

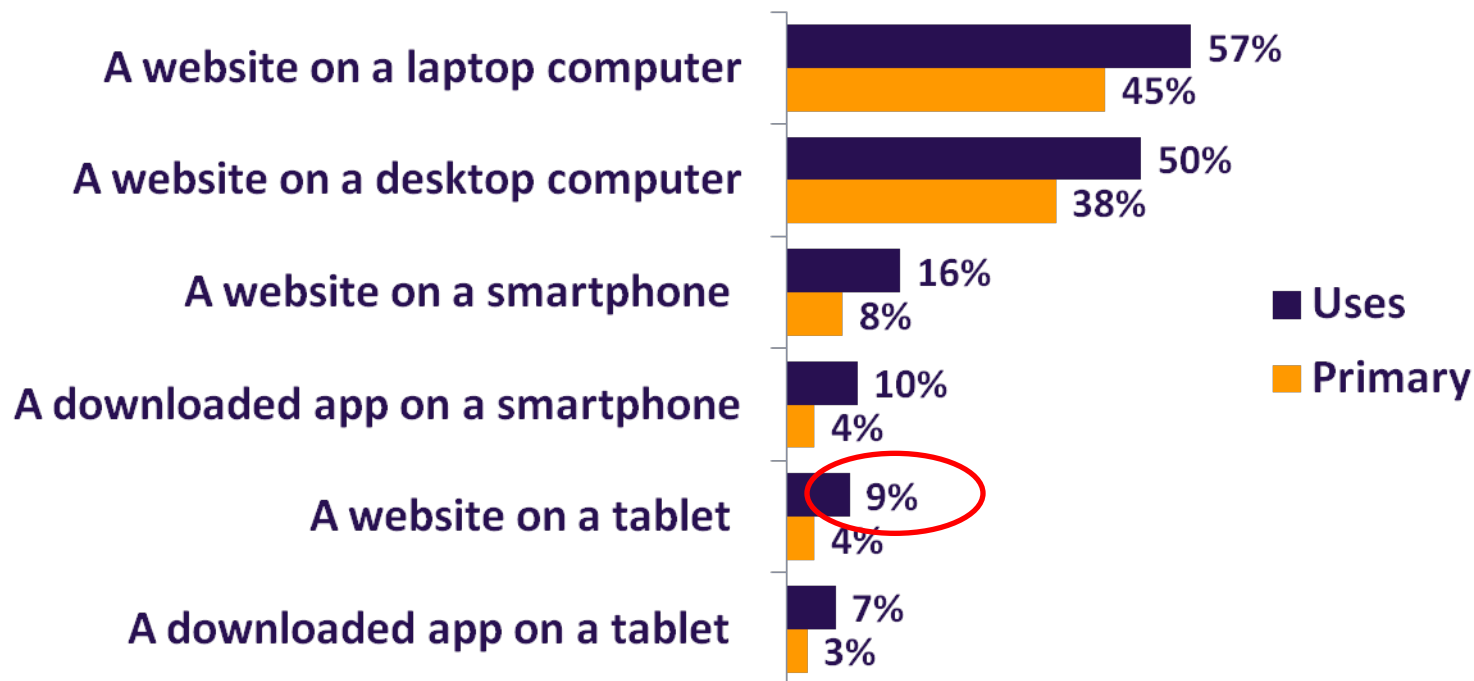
Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Research players n=488

Technology Used to Perform Activity PRE-DRAFT

- 86% of fantasy sports team owners read articles about fantasy sports at least once prior to the draft. **Among this group:**
 - Nearly six in ten (57%) read articles about fantasy sports on a website via a laptop computer and 9% have accessed a fantasy website on a tablet.

Read Articles About Fantasy Sports



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

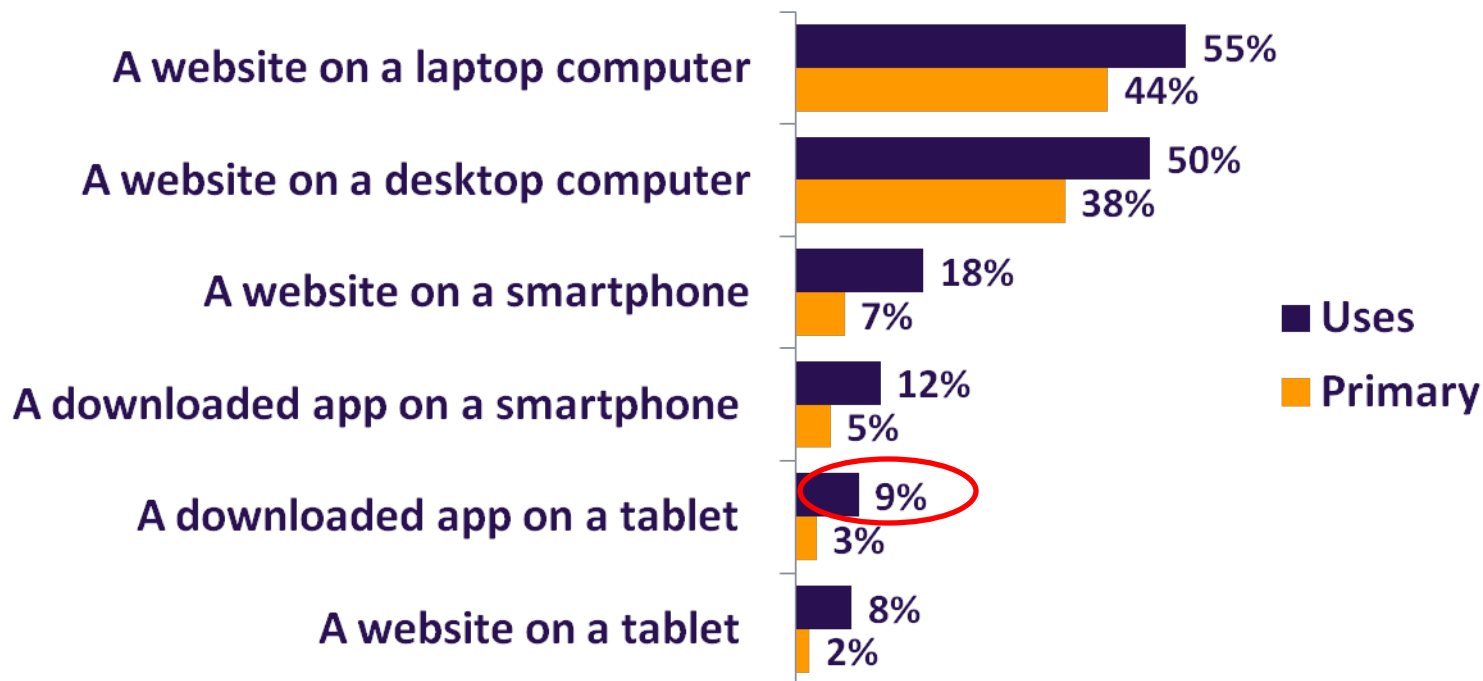
Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Read articles about fantasy sports n=450

Technology Used to Perform Activity PRE-DRAFT

- 75% of fantasy sports team owners view live draft results to gauge where players are being drafted. **Among this group**, websites through laptops and desktops also most common means for viewing live draft results.
 - While still a very small segment of the population, viewing live draft results on a downloaded app on a tablet is a task tried by 9% among this group.

View Live Draft Results To Gauge Where Players Are Being Drafted



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

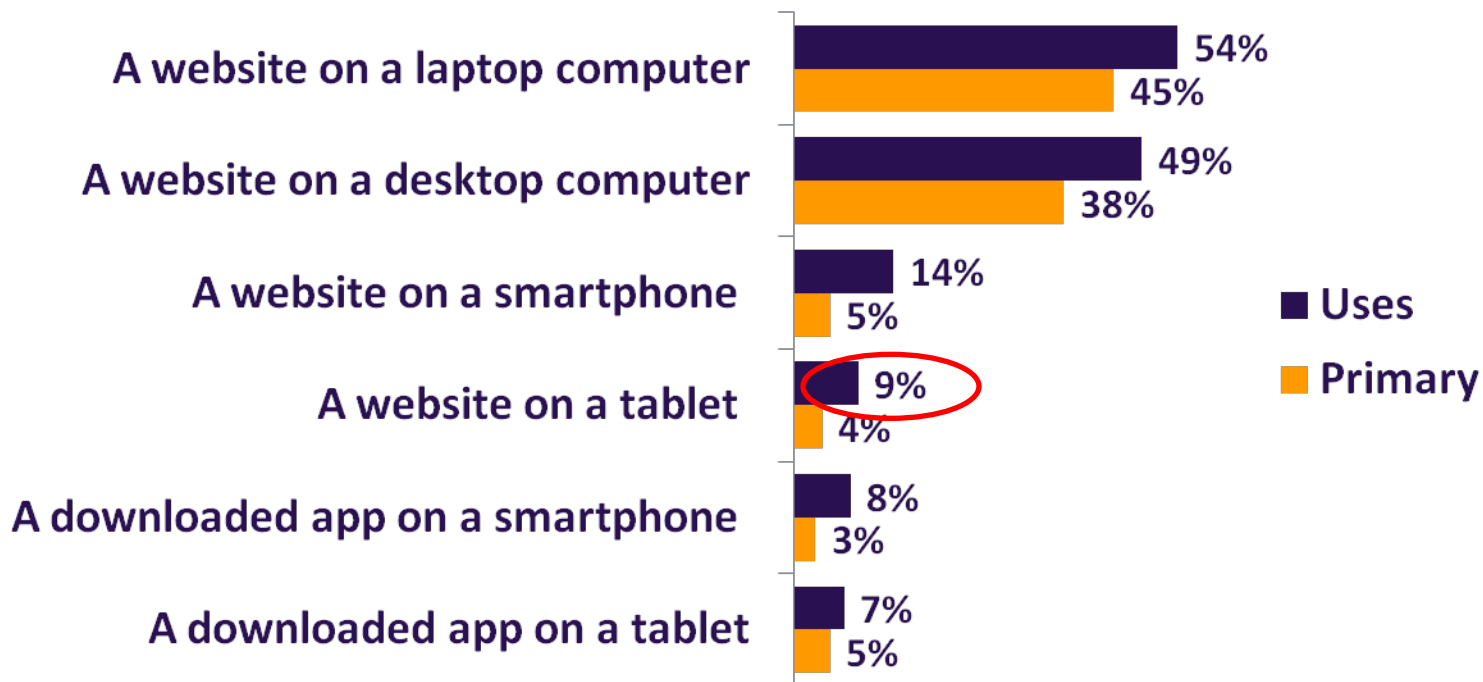
Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to View live draft results to gauge where players are being drafted. n=397

Technology Used to Perform Activity PRE-DRAFT

- 75% of fantasy sports team owners offer or evaluate trades prior to the draft. **Among this group:**
 - About half evaluate trades through websites on laptops or desktops.
 - One in ten (9%) have done so via a website on a tablet.

Offer Or Evaluate Trades



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

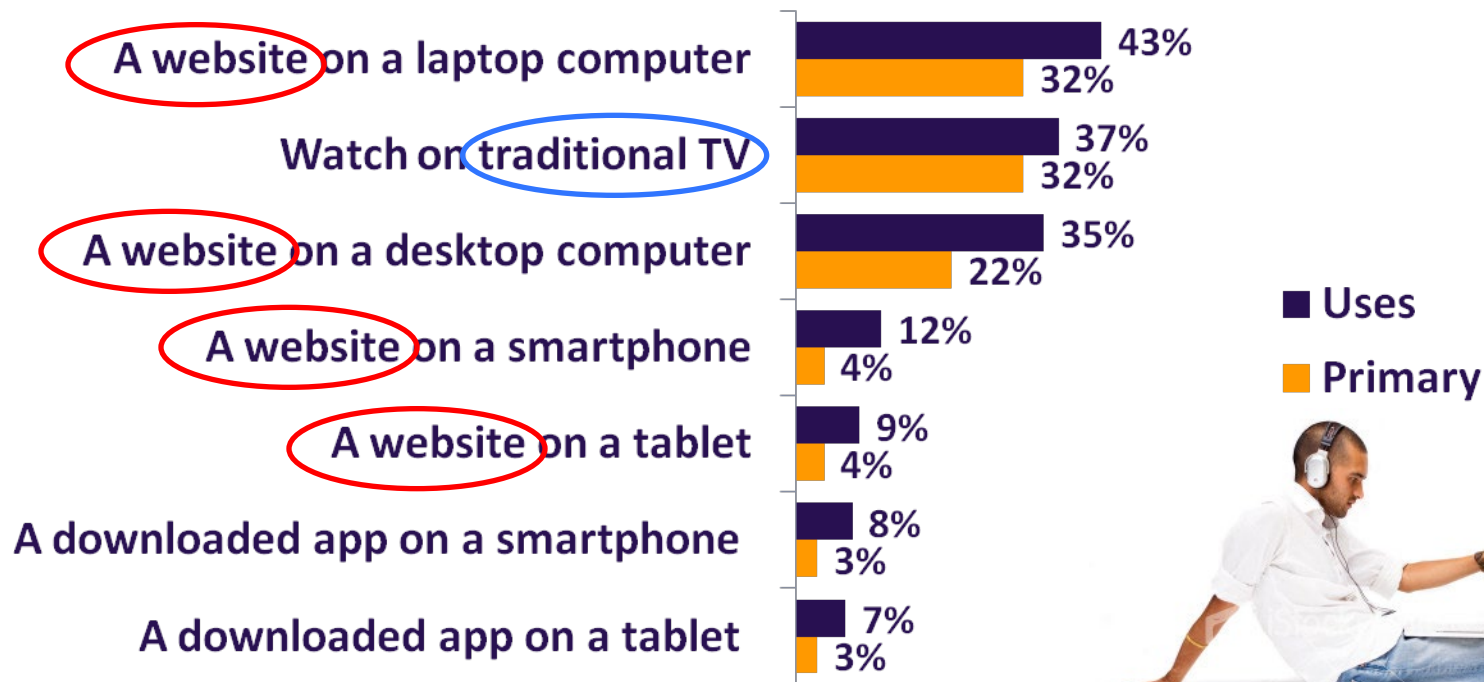
Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Offer or evaluate trades (of keepers in a keeper league or draft picks) n=394

Technology Used to Perform Activity PRE-DRAFT

- 74% of fantasy sports team owners watch fantasy sports TV or videos. **Among this group:**
 - Fantasy players are more diverse in how they get at this content. Six in ten (64%) primarily watch these videos on a website vs. 32% on a traditional TV.

Watch Fantasy Sports TV Or Videos (Either Live Or On Demand)



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

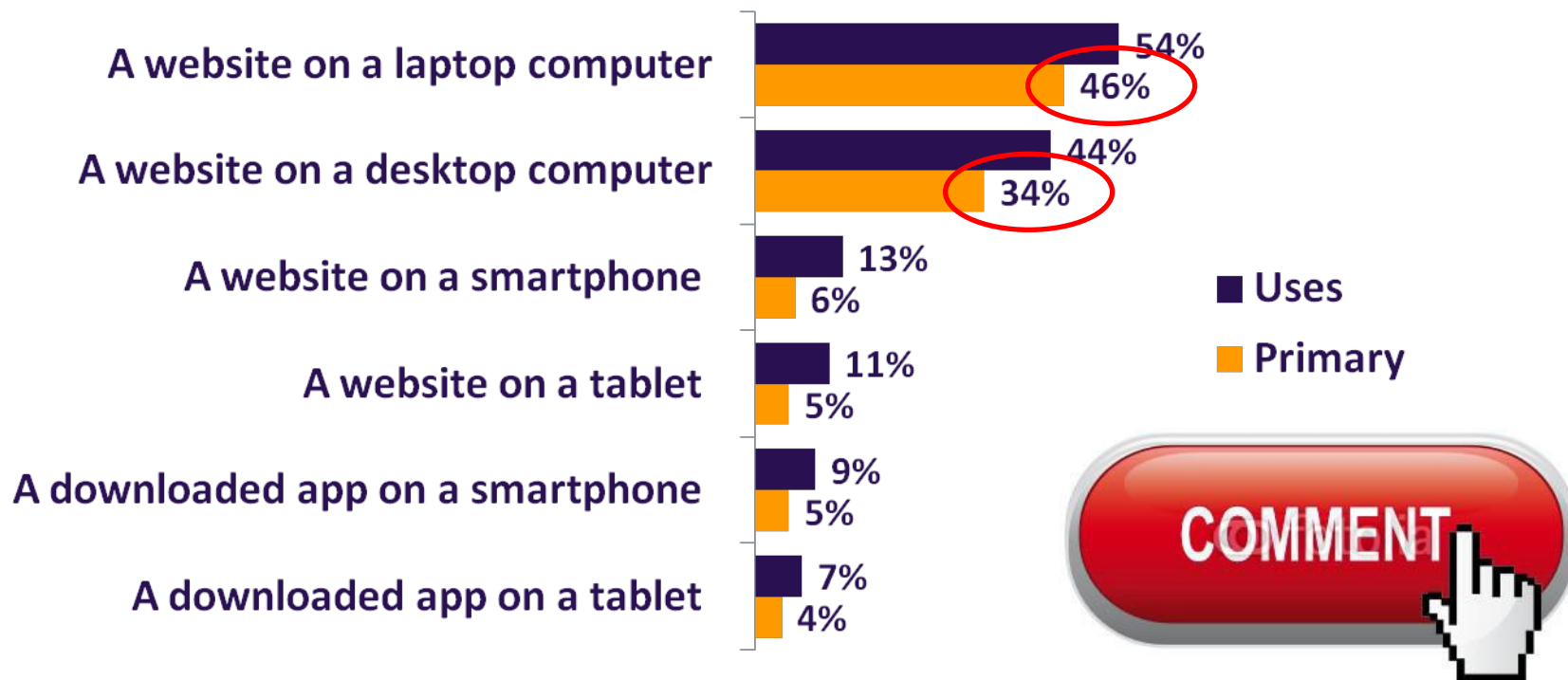
Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Watch fantasy sports TV or videos either live or on demand n=390

Technology Used to Perform Activity PRE-DRAFT

- 70% of fantasy sports team owners post comments or trash talk to other owners before the draft. **Among this group:**
 - 78% primarily use their laptop or desktop computer to do so.

Post Comments Or 'Trash Talk' To Other Owners



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Post comments or 'trash talk' to other owners n=370

- Also measured the following (shown in the appendix):
 - Conduct mock drafts
 - Download draft sheets
 - Download draft analyzer software
 - Listen to fantasy podcasts

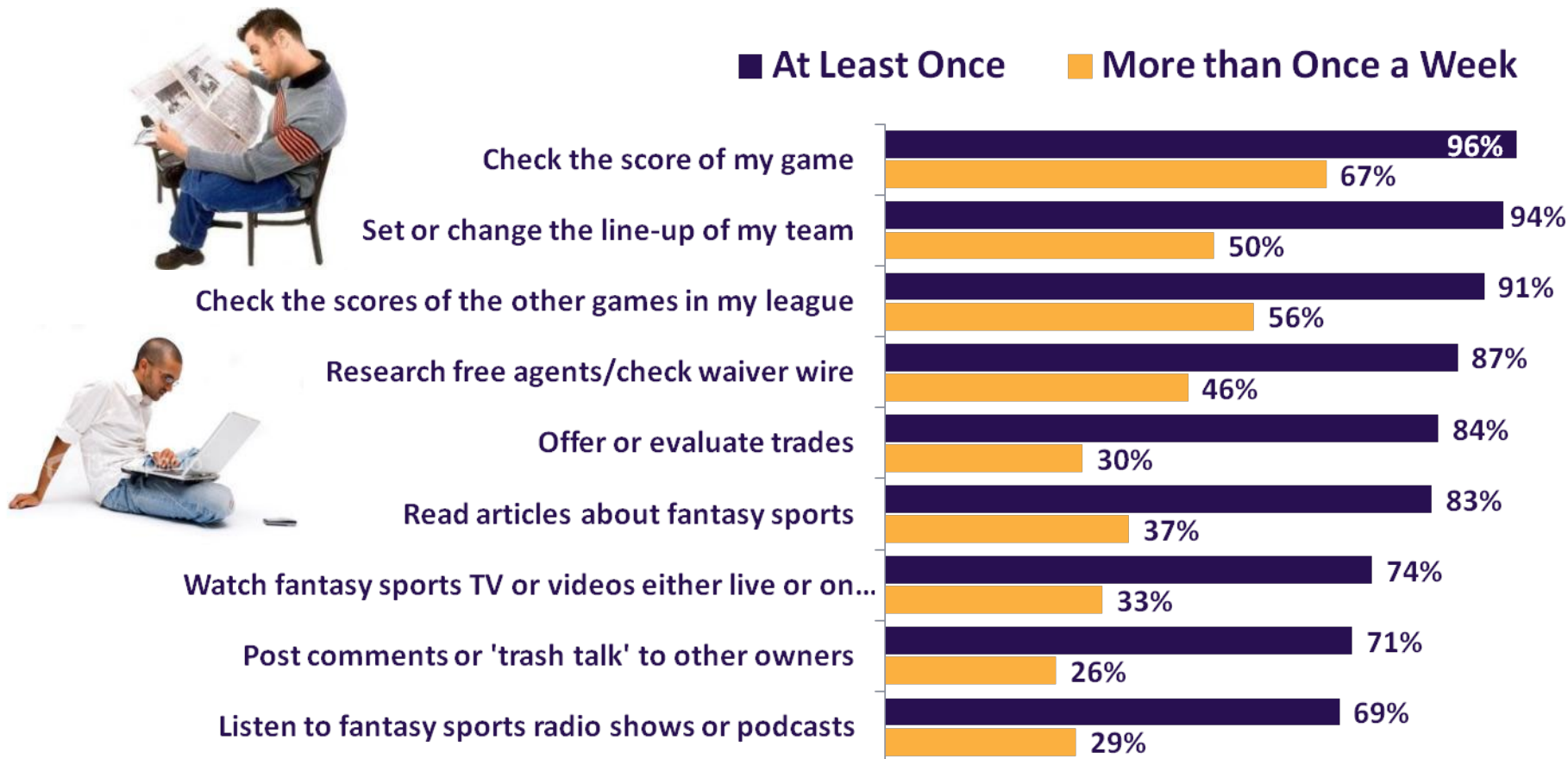


Frequency of Fantasy Sports Activities **DURING SEASON**



Frequency of Fantasy Sports Activities DURING SEASON

- Once the season begins, the work seems to heat up. Of the nine activities measured, six were completed at least once by more than 80% of the fantasy owners.



Q7a. [SUMMARY - AT LEAST ONCE] During your team's fantasy season, how often do you perform each of the following activities?

Q7a. [SUMMARY - MORE THAN ONCE A WEEK] During your team's fantasy season, how often do you perform each of the following activities?

Base: All Respondents n=526

Frequency of Fantasy Sports Activity – DURING Season Among Segments (More Than Once a Week)

- Not surprisingly, hard core fantasy players are more active in their fantasy activities than engaged or casual players.
- Hard Core players are more than three times more likely than casual players (69% vs. 19%) to research free agents or check the waiver wire.



Q7a. [SUMMARY - MORE THAN ONCE A WEEK] During your team's fantasy season, how often do you perform each of the following activities?

Base: Hard Core n=190; Engaged n=168; Casual n=168

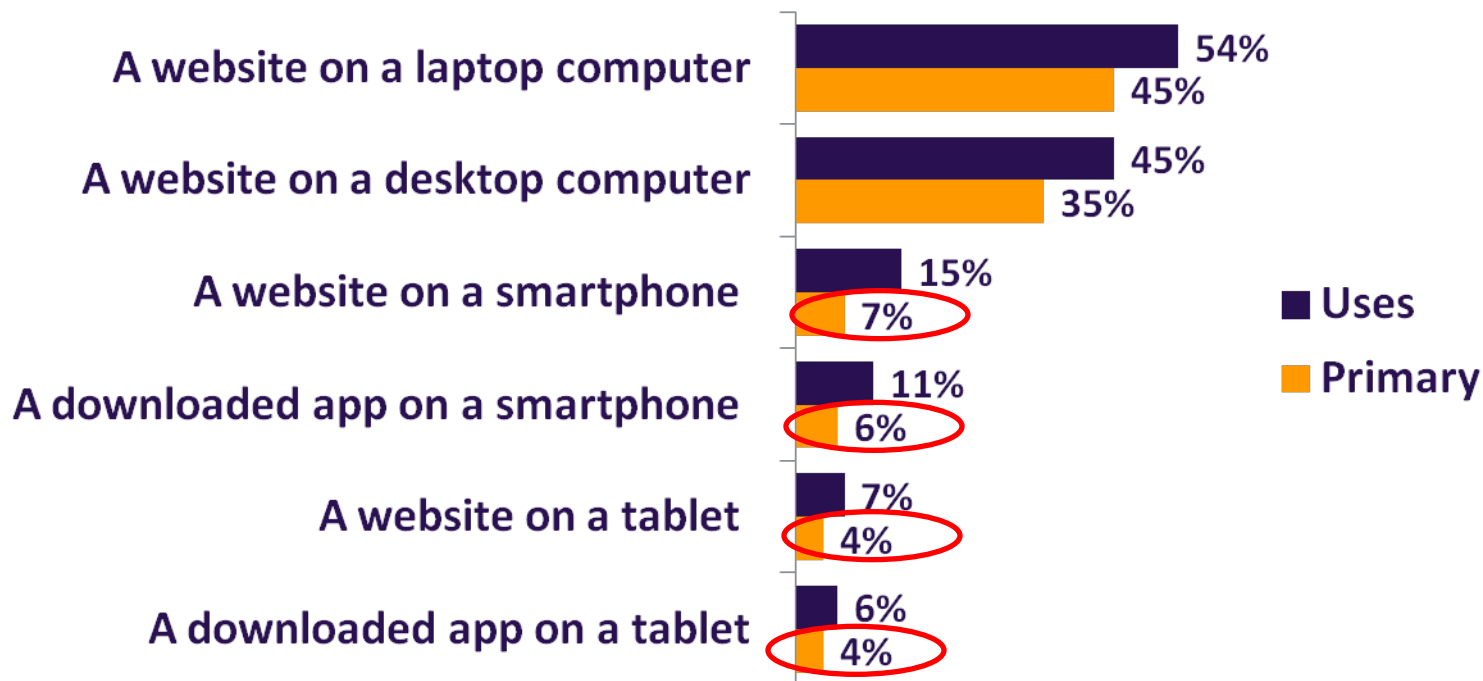
Technology Used for Fantasy Related Activities – DURING SEASON



Technology Used to Perform Activity DURING SEASON

- 96% of fantasy owners check the score of their games at least once during the season. **Among this group:**
 - More than half check the score of their games via a website on a laptop (54%).
 - One in five (21%) use a tablet or a smartphone as their primary source for checking game scores.

Check the score of my game



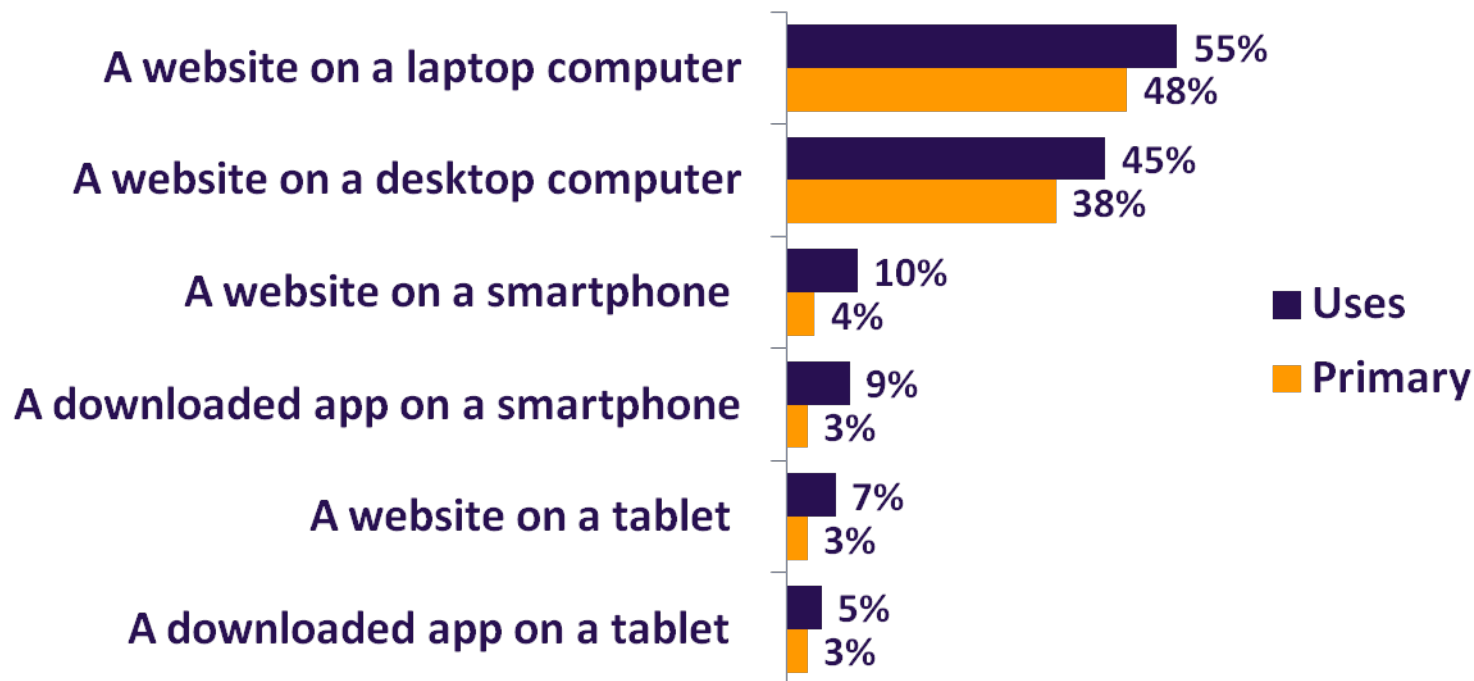
Q7b_01. [Check the score of my game] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.
 Q7c_01. [Check the score of my game] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Check the score of my game n= 504

Technology Used to Perform Activity DURING SEASON

- 94% of fantasy owners set or change the line-up of their teams at least once during the season. **Among this group:**
 - 55% of fantasy players say they use a website on a laptop computer to set their line-up.

Set or change the line-up of my team



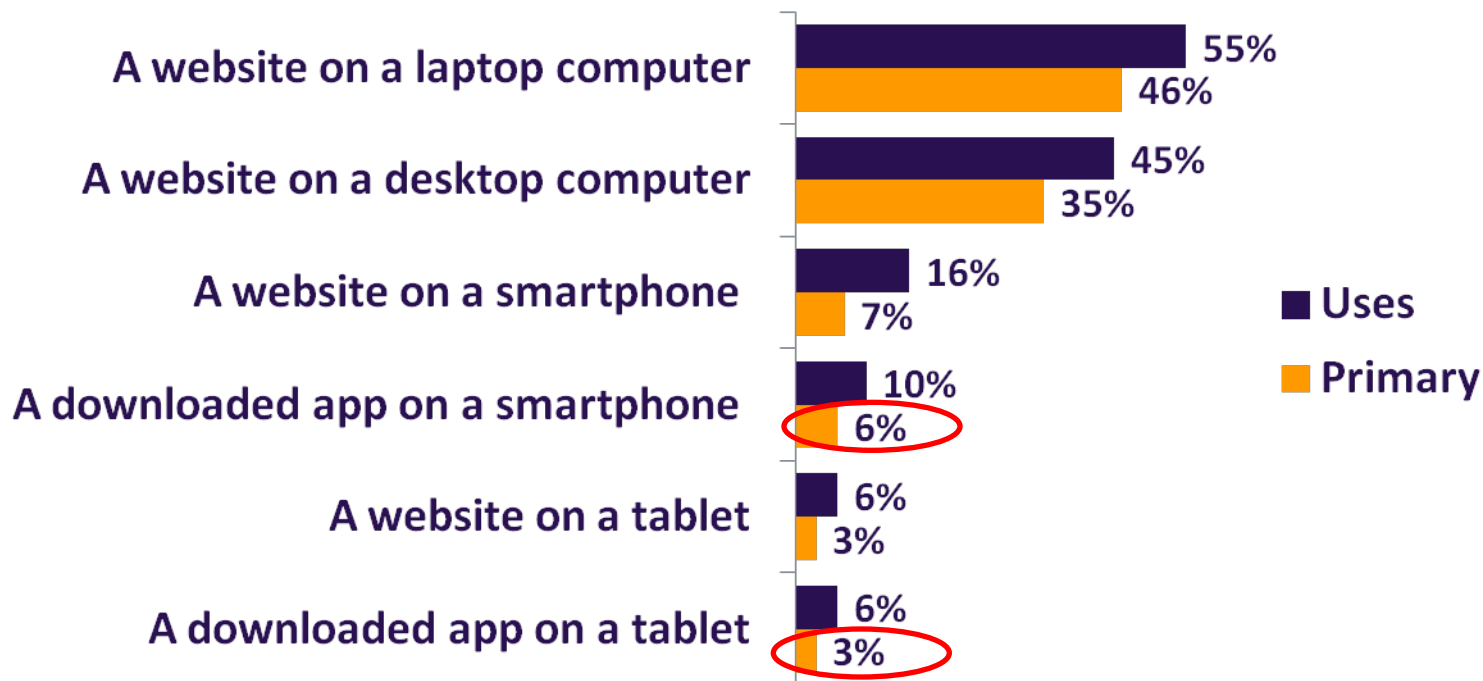
Q7b_03. [Set or change the line-up of my team] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you .. during your fantasy season.
 Q7c_03. [Set or change the line-up of my team] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Set or change the line-up of my team n=492

Technology Used to Perform Activity DURING SEASON

- 91% of fantasy owners check the score of the other games in their league at least once during the season. **Among this group:**
 - A website on a laptop is the most common means for checking the scores of other games in the league.
 - However, 9% are primarily checking apps on a tablet or smartphone.

Check the scores of the other games in my league



Q7b_05. [Check the scores of the other games in my league] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.

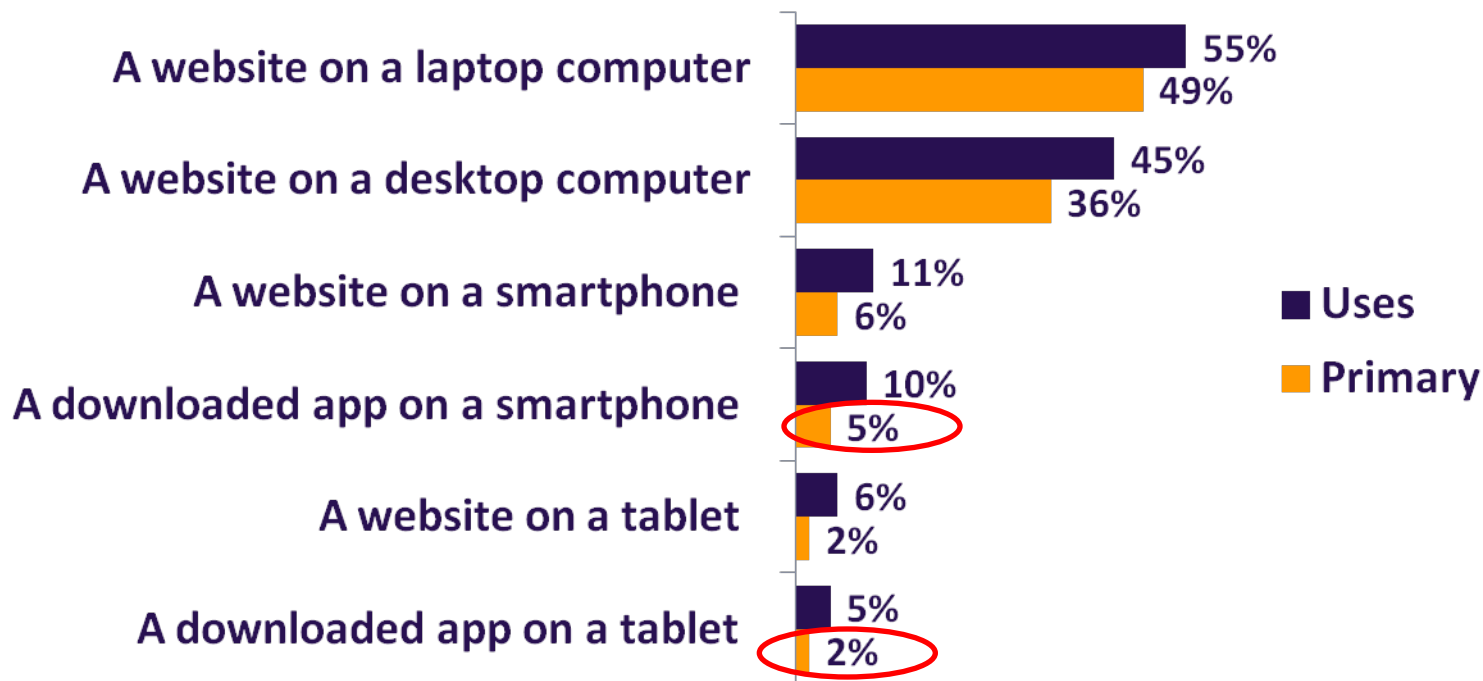
Q7c_05. [Check the scores of the other games in my league] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Check the scores of the other games in my league n=481

Technology Used to Perform Activity DURING SEASON

- 87% of fantasy owners research free agents or check the waiver wire at least once during the season. **Among this group:**
 - 7% primarily use a downloaded app on a smartphone or tablet to research free agents during the season.

Research free agents or check waiver wire



Q7b_04. [Research free agents or check waiver wire] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.
 Q7c_04. [Research free agents or check waiver wire] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Research free agents or check waiver wire n=456

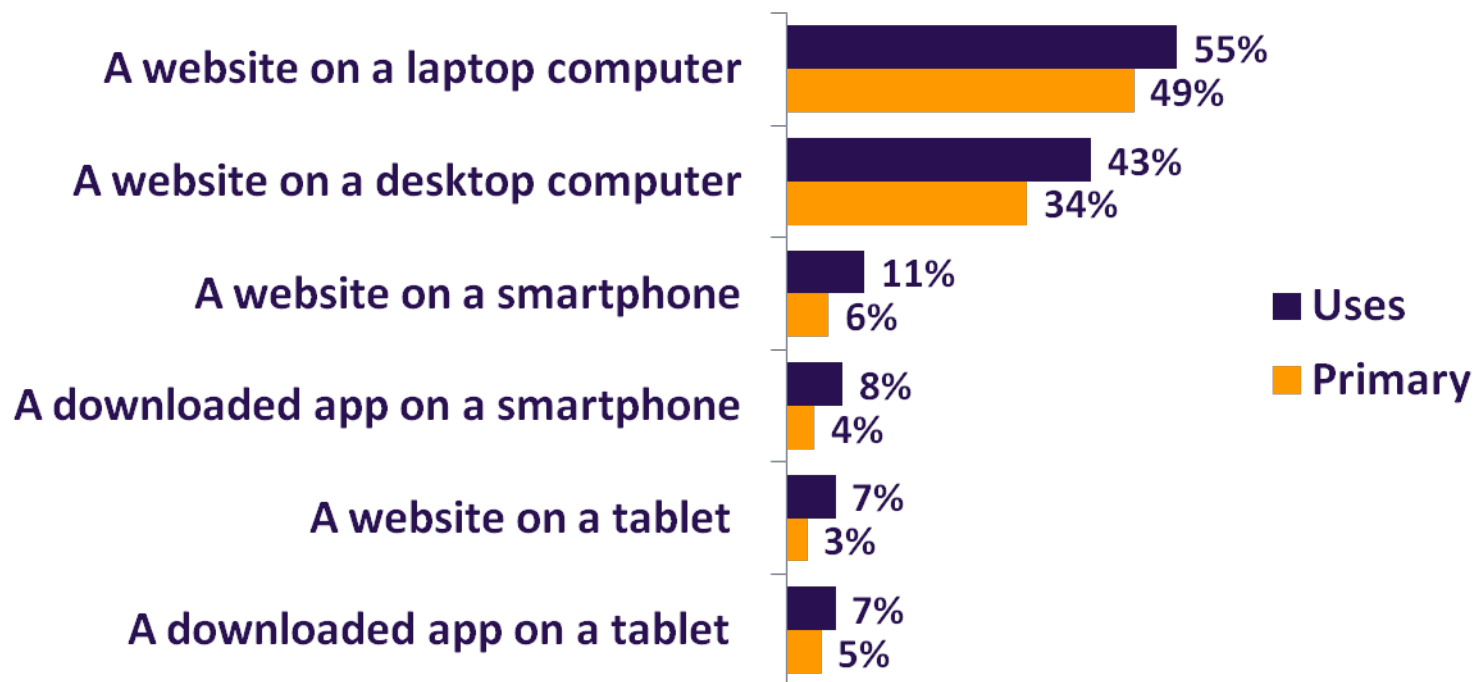
Technology Used to Perform Activity DURING SEASON

- 84% of fantasy owners offer or evaluate trades at least once during the season.

Among this group:

- Websites through laptops and desktops are by far the most common means for offering or evaluating trades during the season. However, one in ten (11%) also perform this task on a website on a smartphone.

Offer or evaluate trades



Q7b_06. [Offer or evaluate trades] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.
 Q7c_06. [Offer or evaluate trades] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Offer or evaluate trades n=444

- Also measured the following (shown in the appendix):
 - Read articles about fantasy research
 - Listen to podcasts
 - Post comments or trash talk
 - Watch fantasy sports TV

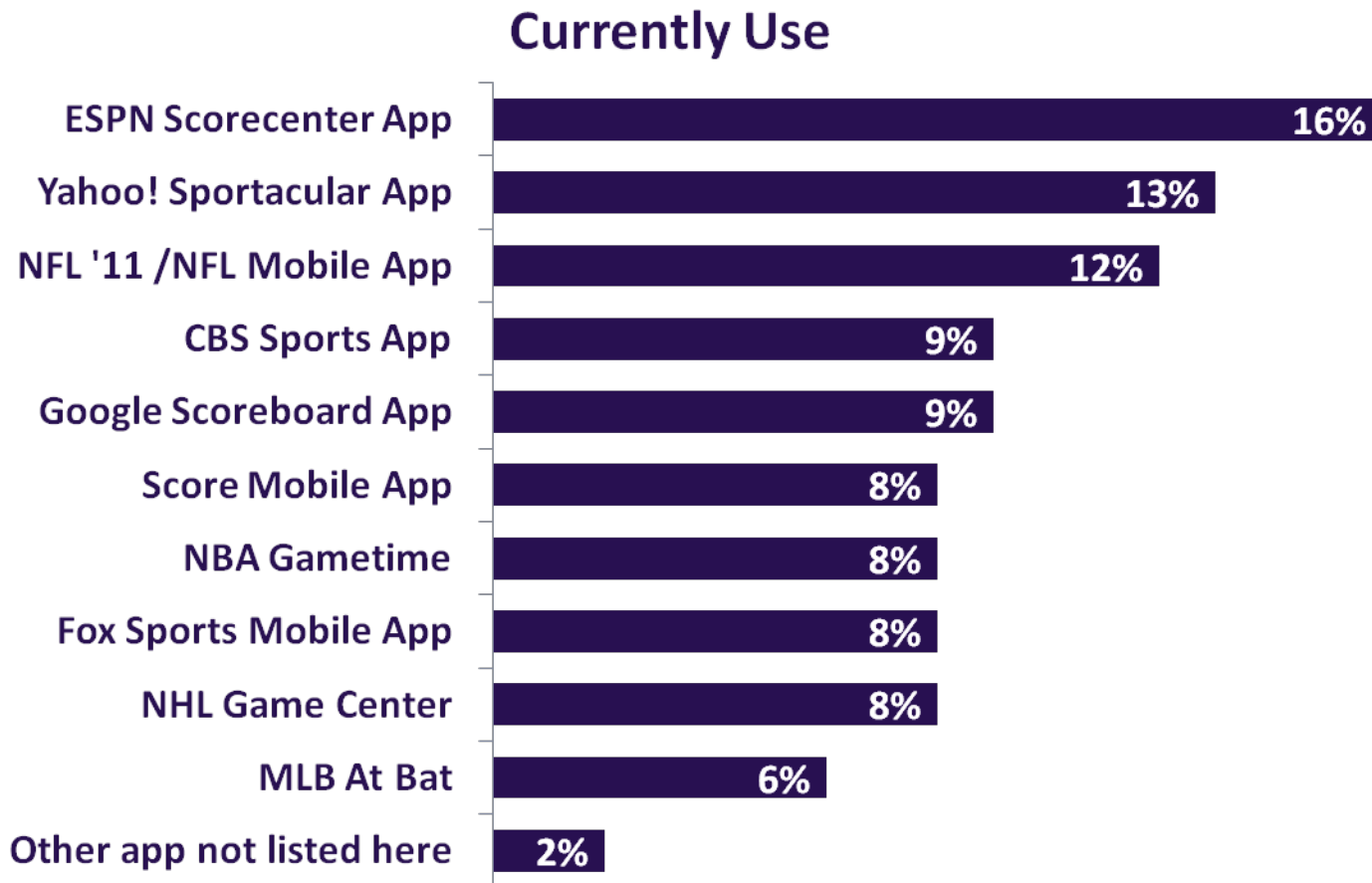


App Use for Fantasy Sports



Use of SCORING APPS Among All Fantasy Players

- Among all fantasy players surveyed, 16% currently use ESPN's Scorecenter App.
- Yahoo! Sportacular and NFL '11 are currently used by 13% and 12%, respectively.

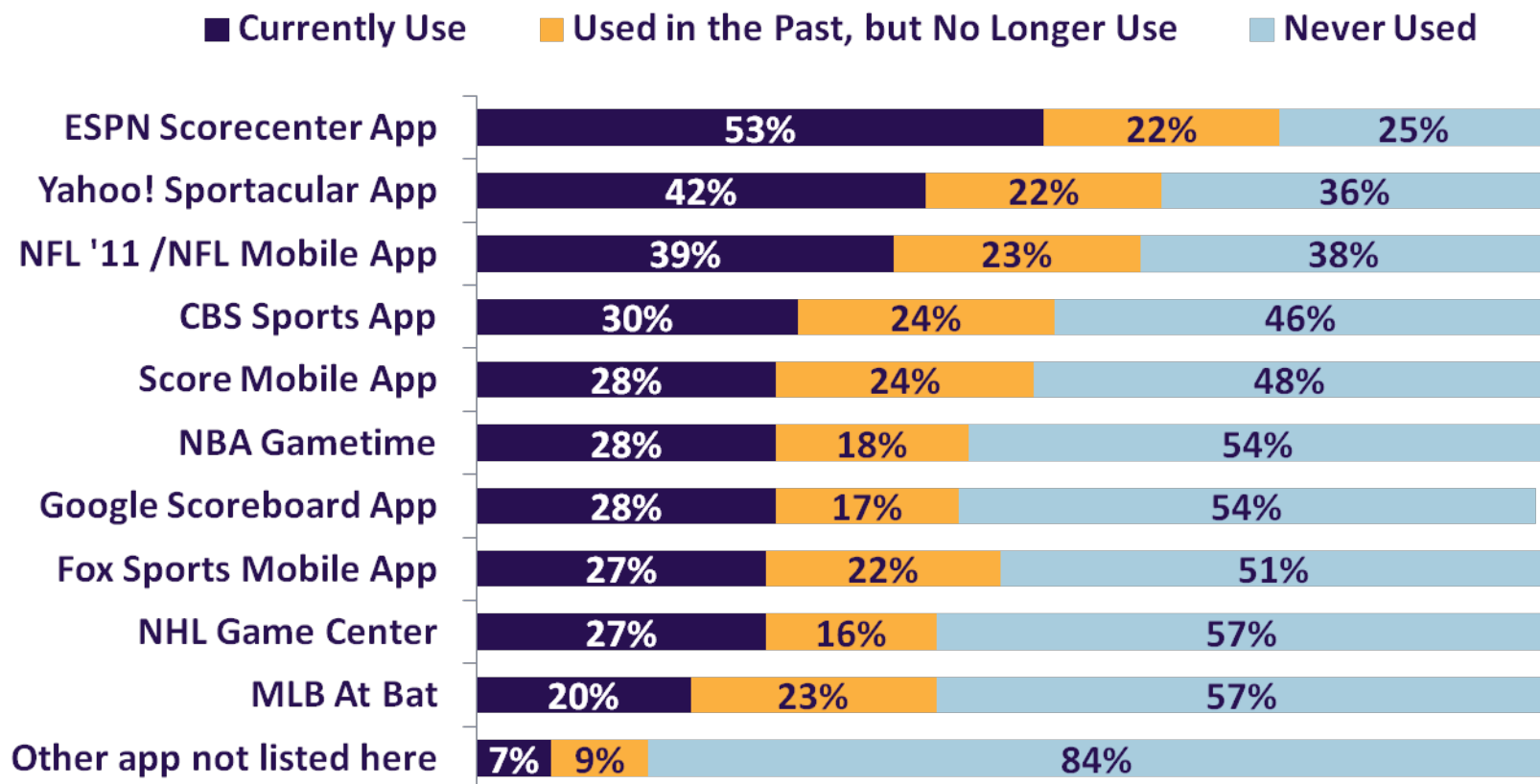


Q9x. [SUMMARY - CURRENTLY USE] Please indicate which of the fantasy sports scoring apps you currently use, have used in the past but no longer use, or have never used. **Base: All Respondents n=526**

Use of SCORING APPS

- Be careful reading this slide. **Remember, 70% of fantasy sports players have not downloaded a fantasy sports app.**
- Among the three in ten fantasy sports players who have downloaded fantasy apps:
 - More than half are currently using the ESPN Scorecenter scoring app, while 22% used it in the past but no longer do.

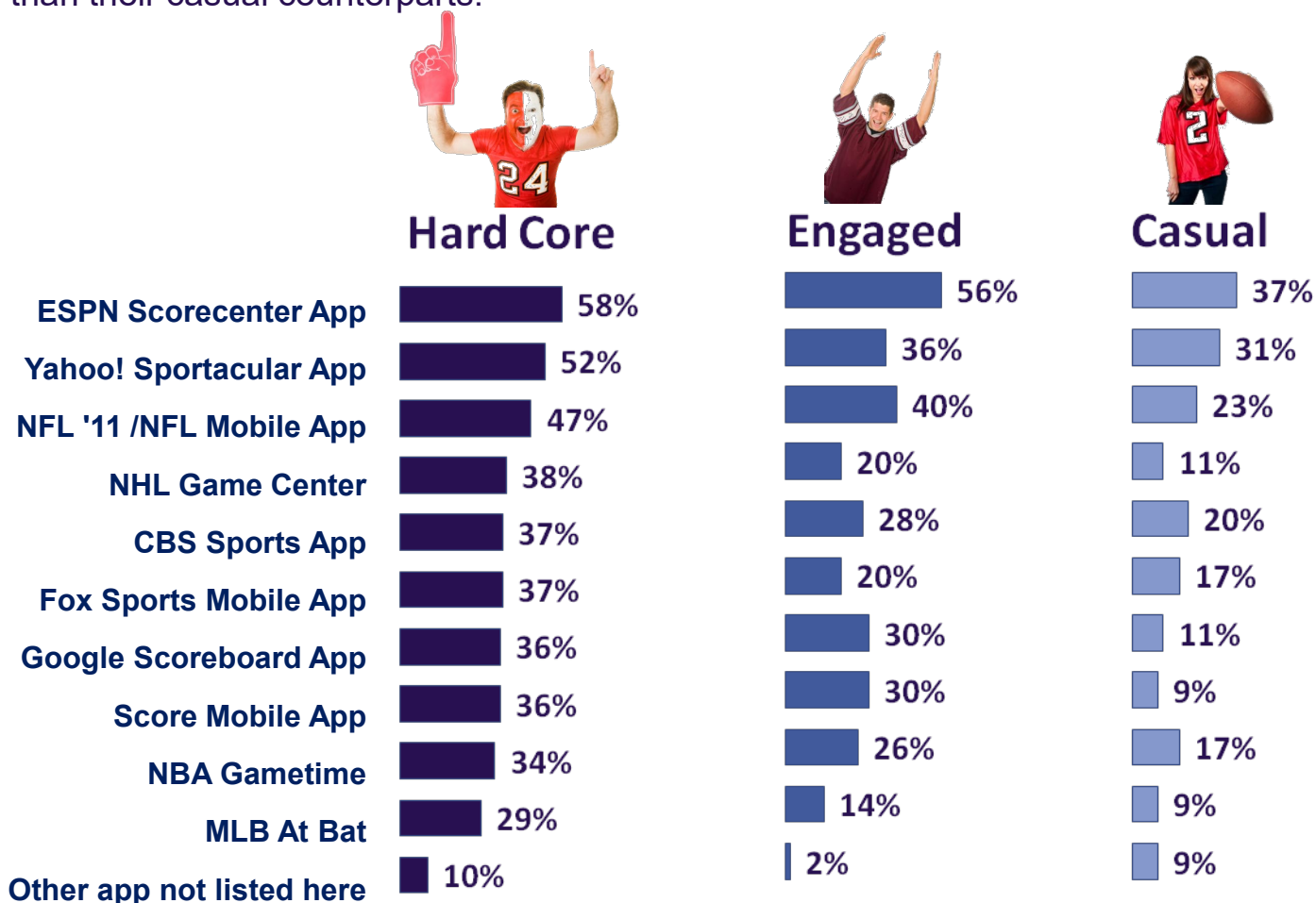
Total



Q9. [SUMMARY - CURRENTLY USE] Please indicate which of the fantasy sports scoring apps you currently use, have used in the past but no longer use, or have never used. **Base: Have Downloaded Apps n=158**

Use of SCORING APPS Among Segments

- Because so few have downloaded apps, **base sizes are low so view these results as more qualitative than quantitative.**
 - Still, hard core players are often two to three times more likely to download fantasy scoring apps than their casual counterparts.

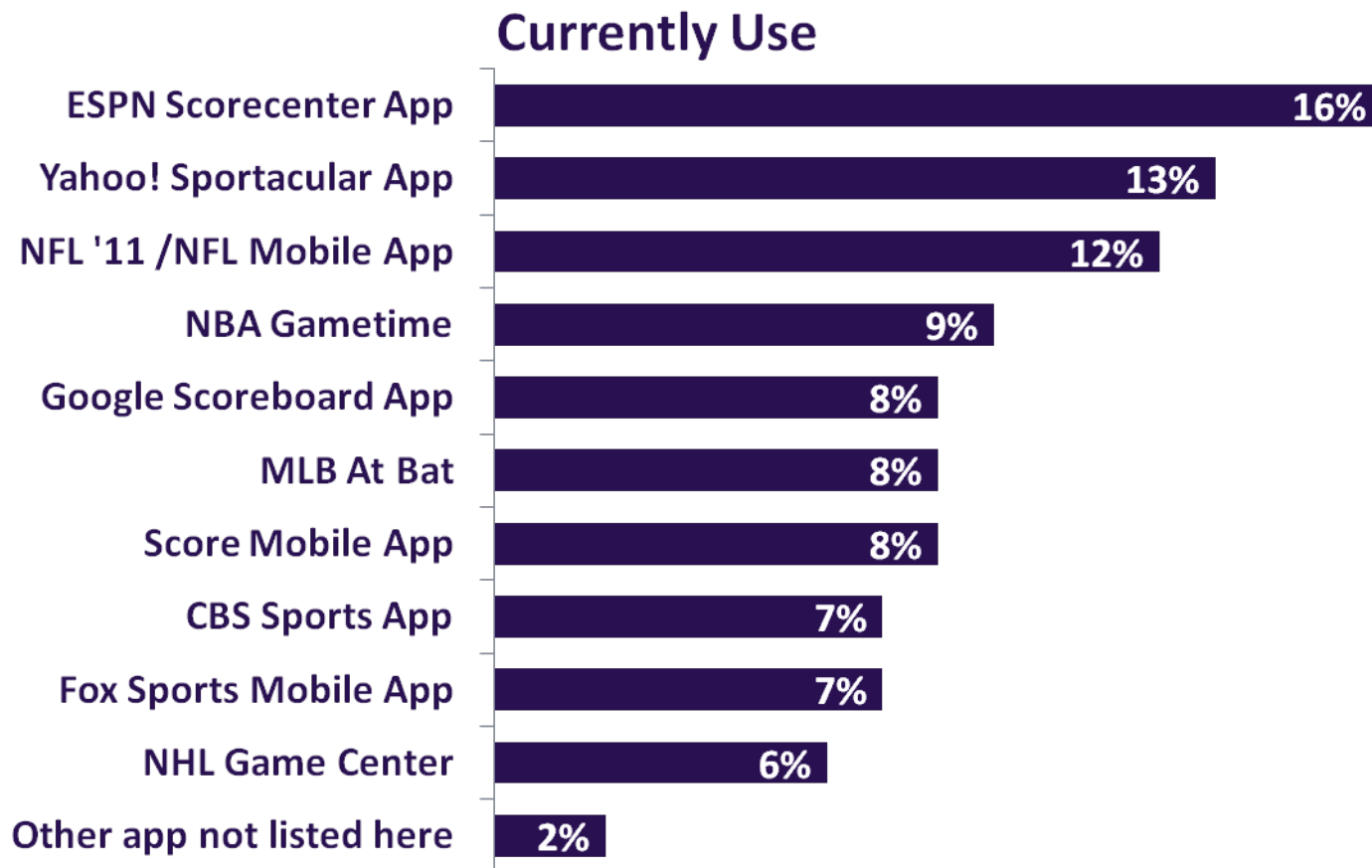


Q9. Please indicate which of the fantasy sports scoring apps you currently use, have used in the past but no longer use, or have never used.

Base: Hard Core n=73*; Engaged n=50*; Casual n=35* (*small base)

Use of NEWS APPS Among All Fantasy Players

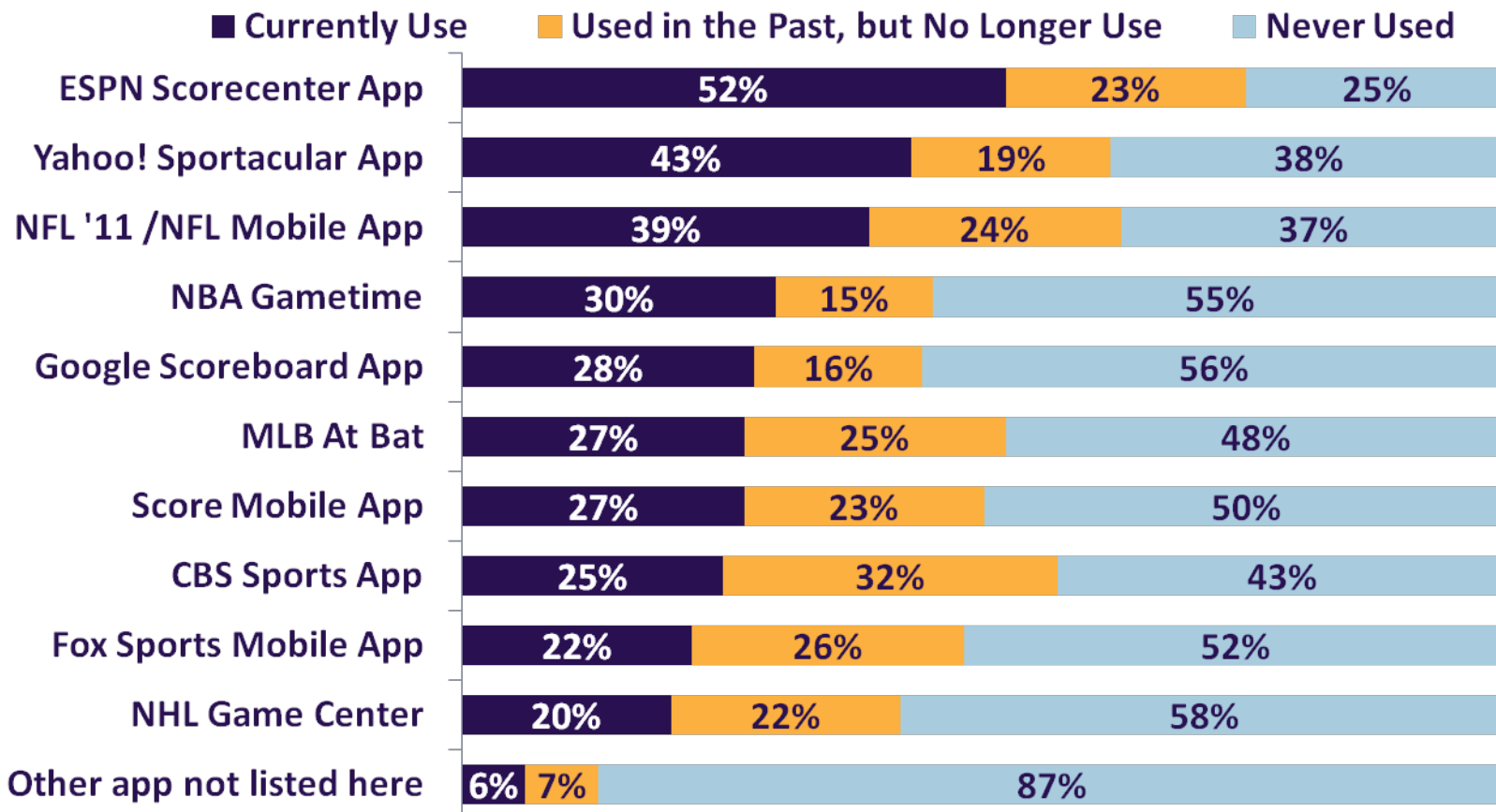
- For news apps, among all fantasy players surveyed 16% currently use ESPN's Scorecenter App.
- Yahoo! Sportacular and NFL '11 are currently used by 13% and 12% of fantasy players.



Q10x. [SUMMARY - CURRENTLY USE] Please indicate which of the fantasy sports new apps you currently use, have used in the past but no longer use, or have never used. **Base: All Respondents n=526**

Use of NEWS APPS

- Be careful reading this slide. **Remember, 70% of fantasy sports players have not downloaded a fantasy sports app.**
- Among the three in ten fantasy sports players who have downloaded fantasy apps:
 - 52% are currently using ESPN's Scorecenter news app.

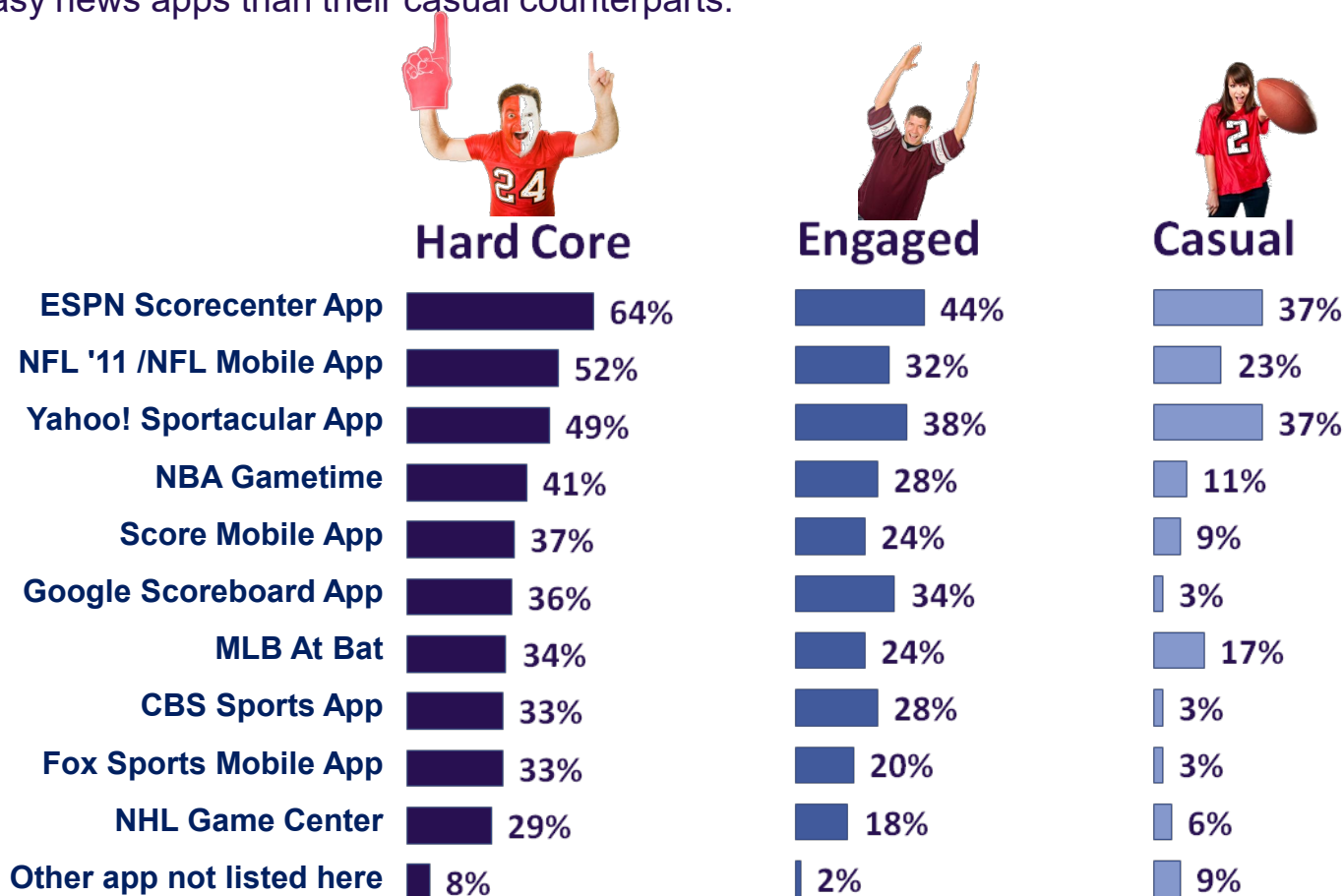


Q10. Please indicate which of the fantasy sports news apps you currently use, have used in the past but no longer use, or have never used.

Base: **Have Downloaded Apps** n=158

Use of NEWS APPS Among Segments

- Because so few have downloaded apps, **base sizes are low so view these results as more qualitative than quantitative.**
 - Like with scoring apps, hard core players are often two to three times more likely to download fantasy news apps than their casual counterparts.

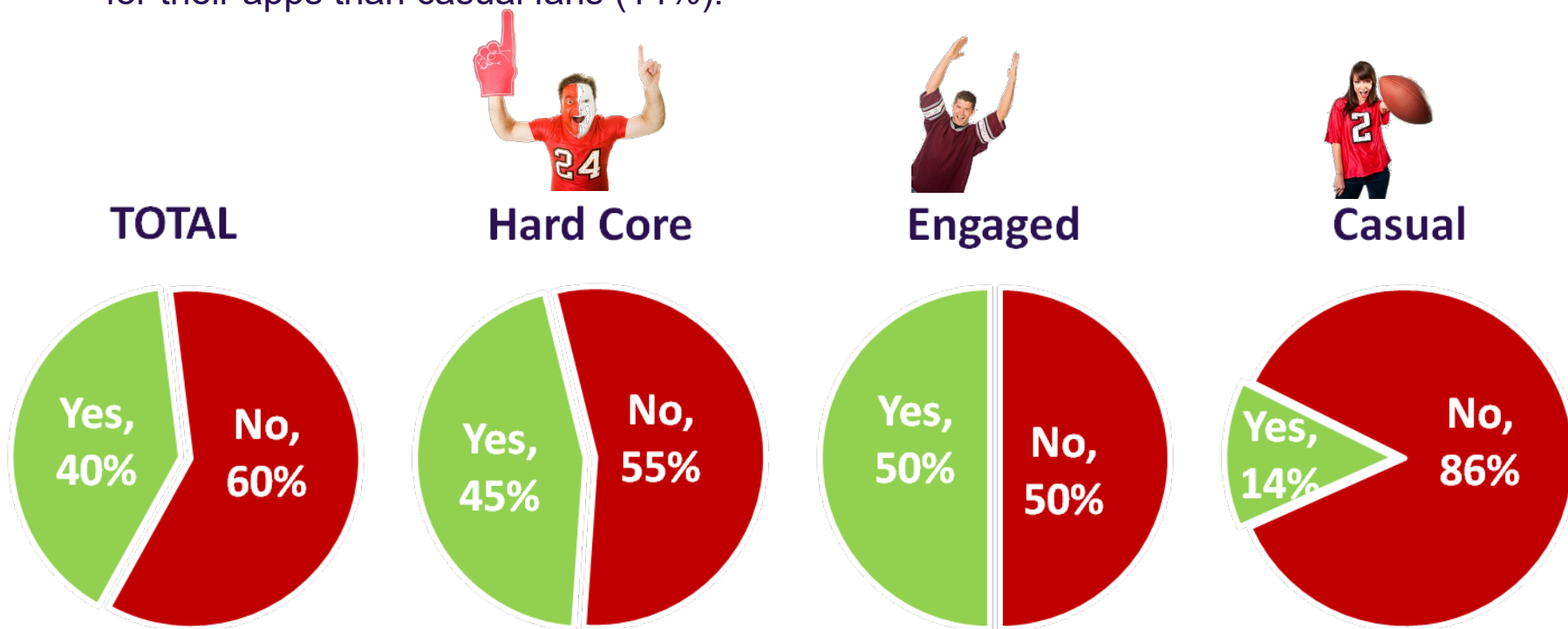


Q10. [SUMMARY - CURRENTLY USE] Please indicate which of the fantasy sports new apps you currently use, have used in the past but no longer use, or have never used.

Base: Hard Core n=73*; Engaged n=50*; Casual n=35* (*small base)

Paid for Fantasy Sports Apps

- Among the small group of fantasy players downloading apps for fantasy sports, only 40% have paid for the apps.
- Hard Core (45%) and Engaged (50%) fantasy players are far more likely to have paid for their apps than casual fans (14%).

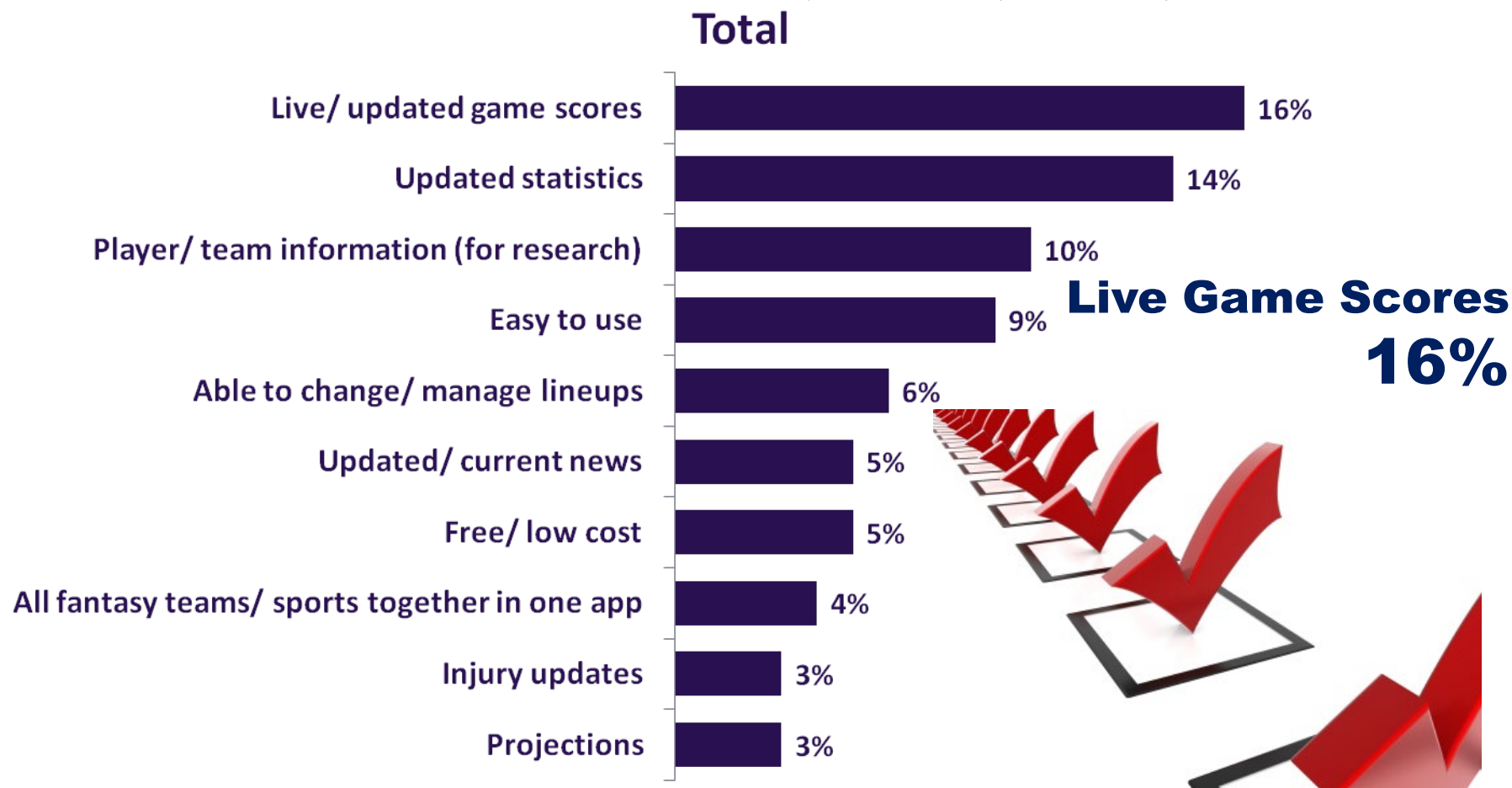


Q11. You mentioned you have used apps to play or follow your fantasy sports team or read fantasy sports news. Did you pay for any of these apps?

Base: **Base: Have Downloaded Apps Total n=158; Hard Core n=73*; Engaged n=50*; Casual n=35* (*small base)**

Desired Features of Fantasy Sports App

- We asked an open ended question among fantasy sports players to understand what the “perfect app” would be. Below are some of the themes.
 - We also created a word cloud based on the player feedback (in appendix).



Q12. If you could use **just a few words (50 characters or less)** to describe the perfect fantasy sports app, what would it include? Please type in your response in the space provided below, being as specific as possible. **Base: All Respondents n=526**

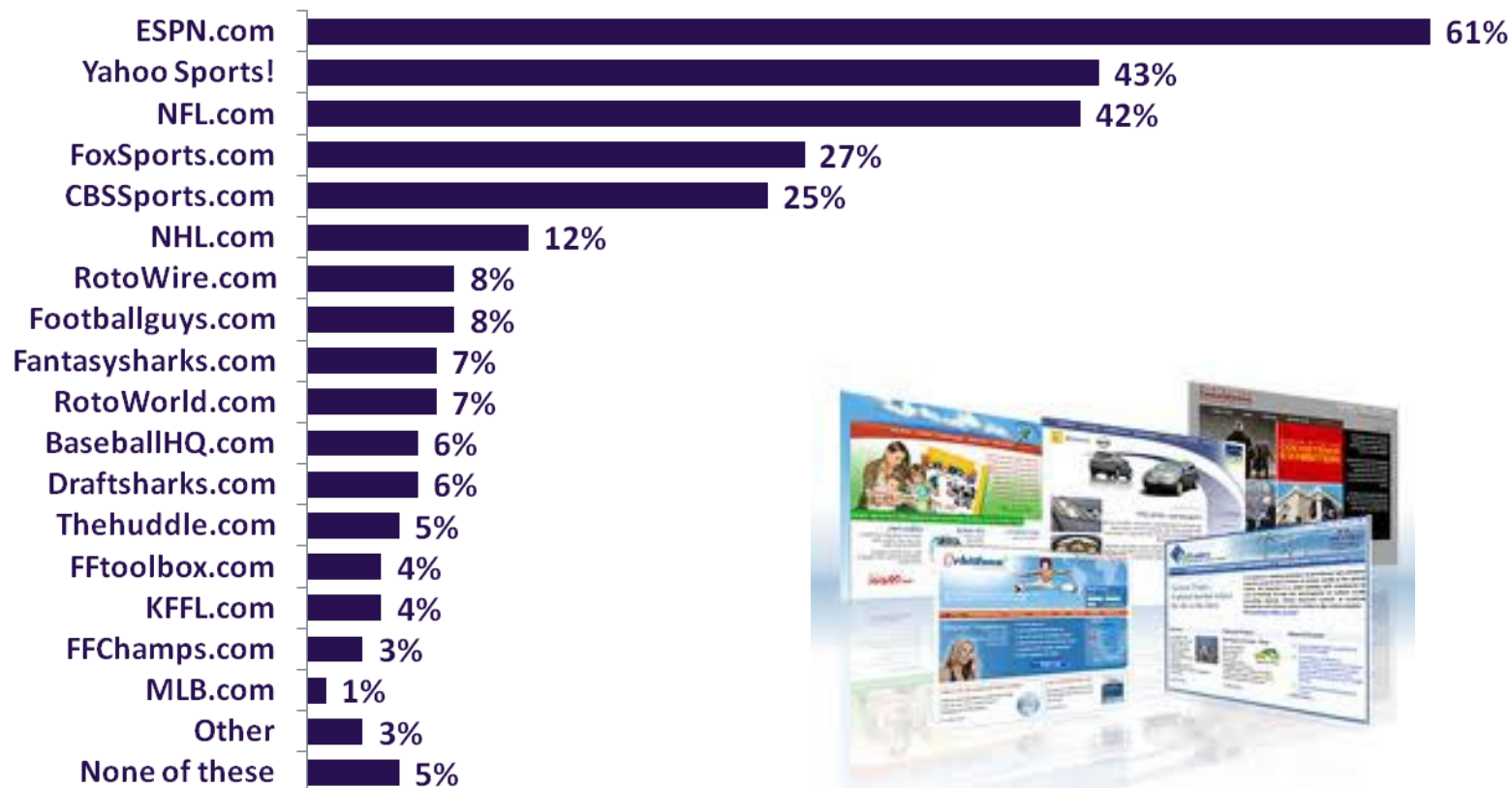
Website Use for Fantasy Sports



Website Use – Fantasy Draft Preparation

- More than 60% of all fantasy players surveyed visited ESPN.com in preparation for their draft.

Total

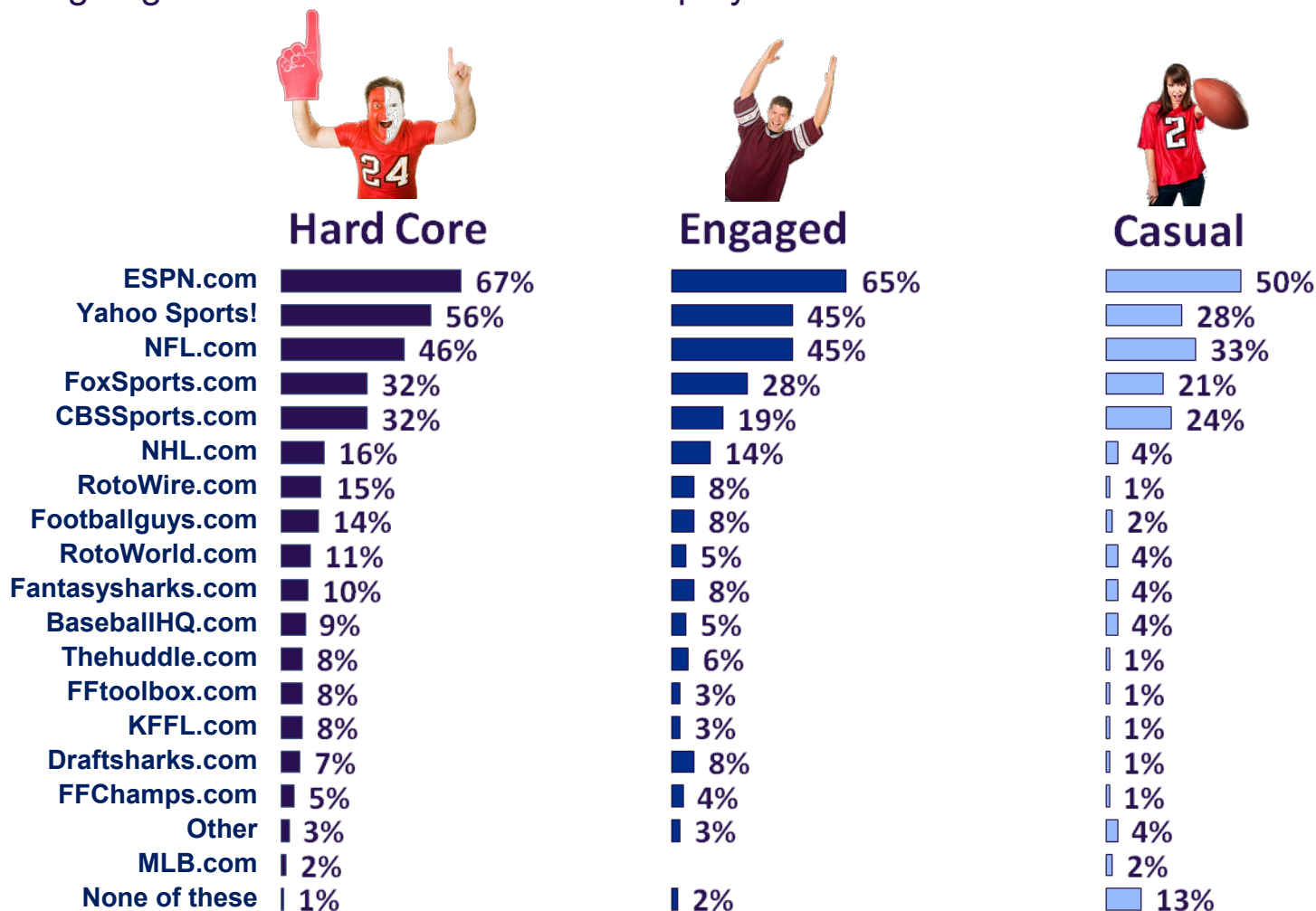


Q13. Thinking of the month leading up to your fantasy draft, which of the following websites do you visit to prepare for your upcoming fantasy draft?

Base: All Respondents n=526

Website Use – Fantasy Draft Preparation

- The three segments are going to the same sites. However, hardcore and engaged players are going to more sites than the casual player.

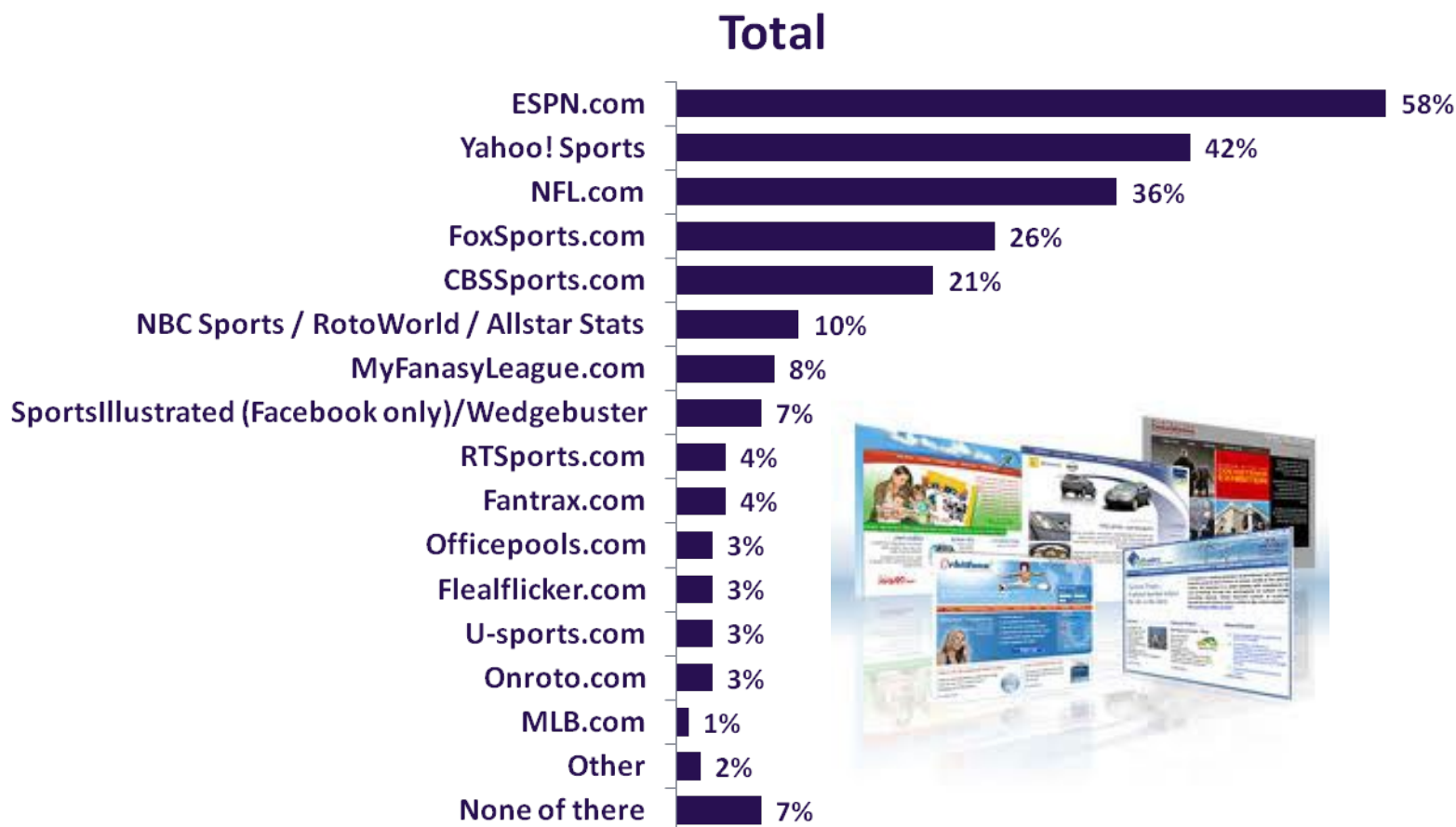


Q13. Thinking of the month leading up to your fantasy draft, which of the following websites do you visit to prepare for your upcoming fantasy draft?

Base: Hard Core n=190; Engaged n=168; Casual n=168

Website Use – During Fantasy Sports Season

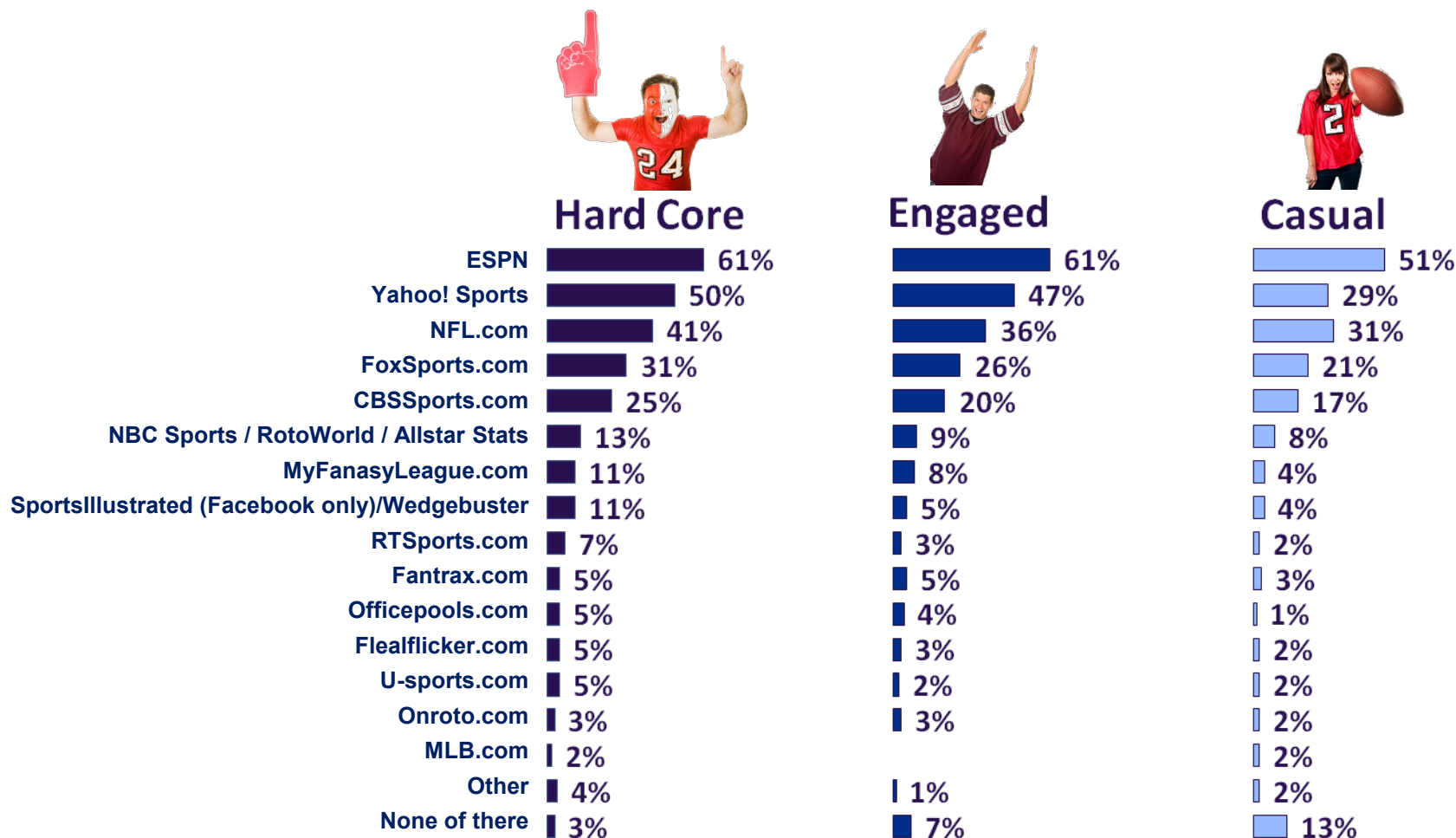
- 58% of all fantasy players surveyed visited ESPN.com for fantasy purposes during their season.



Q14. Now thinking exclusively **of your fantasy sports season after the draft is over**, which of the following websites do you visit during your fantasy sports season? (Select all that apply.) . **Base: All Respondents n=526**

Website Use – During Fantasy Sports Season

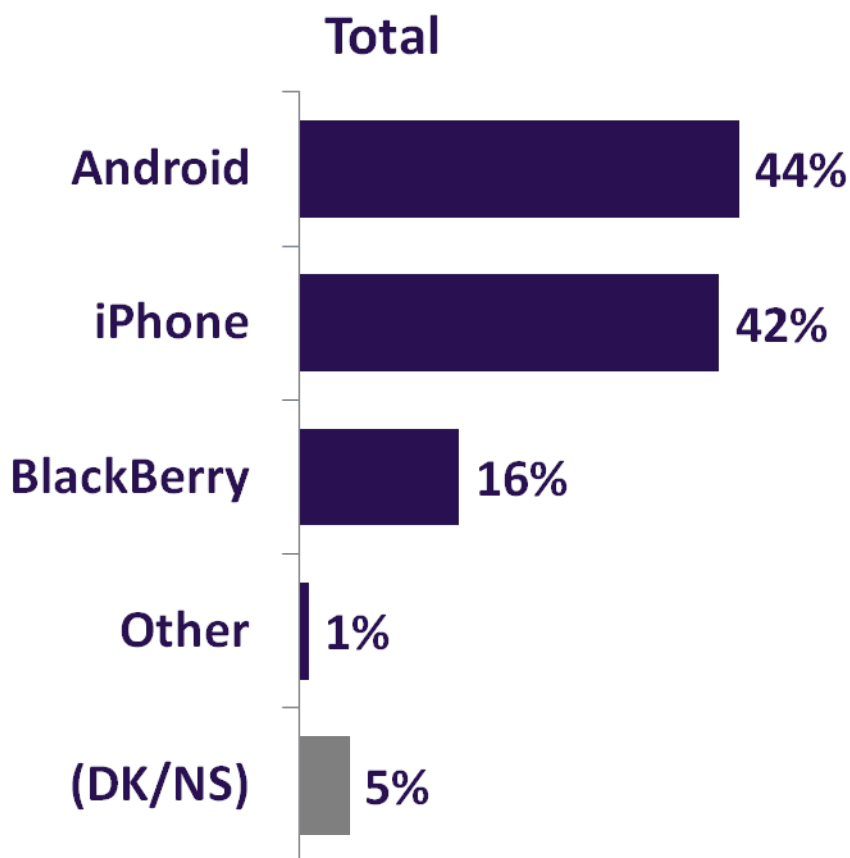
- Similar to before the draft, the same sites are being used, just more often by hard core and engaged players.



Q14. Now thinking exclusively of your fantasy sports season after the draft is over, which of the following websites do you visit during your fantasy sports season? (Select all that apply.) . **Base: Hard Core n=190; Engaged n=168; Casual n=168**

Smartphone Platform for Fantasy Sports

- Among fantasy players using smartphones for fantasy play, Androids (44%) and iPhones (42%) are far more commonly used than BlackBerrys.



Q8. Which of the following is closest to describing the type of smartphone you use for playing fantasy sports? Please select all that apply.

Base: Uses Smartphone n=224

Final Thoughts

- The majority of fantasy players are using websites through desktops and laptops to perform their fantasy sports activities.
- However, a small, but not insignificant portion of players are using smartphones and tablets for their fantasy sports activities, including as their primary devices.
- For some activities, such as checking game scores, 21% use a tablet or smartphone as their primary device.
- Less than a third (30%) of fantasy players surveyed have downloaded a fantasy sports app.
- Of those, only 40% have paid for a fantasy sports app (meaning only 12% of all fantasy players have paid for a fantasy app.)



Questions?

John McMurray

john.mcmurray@ipsos.com

425-586-5553

Aaron Amic

aaron.amic@ipsos.com

612-205-4733



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 OR John McMurray at Ipsos Public Affairs (aaron.amic@ipsos.com; john.mcmurray@ipsos.com)



Appendix

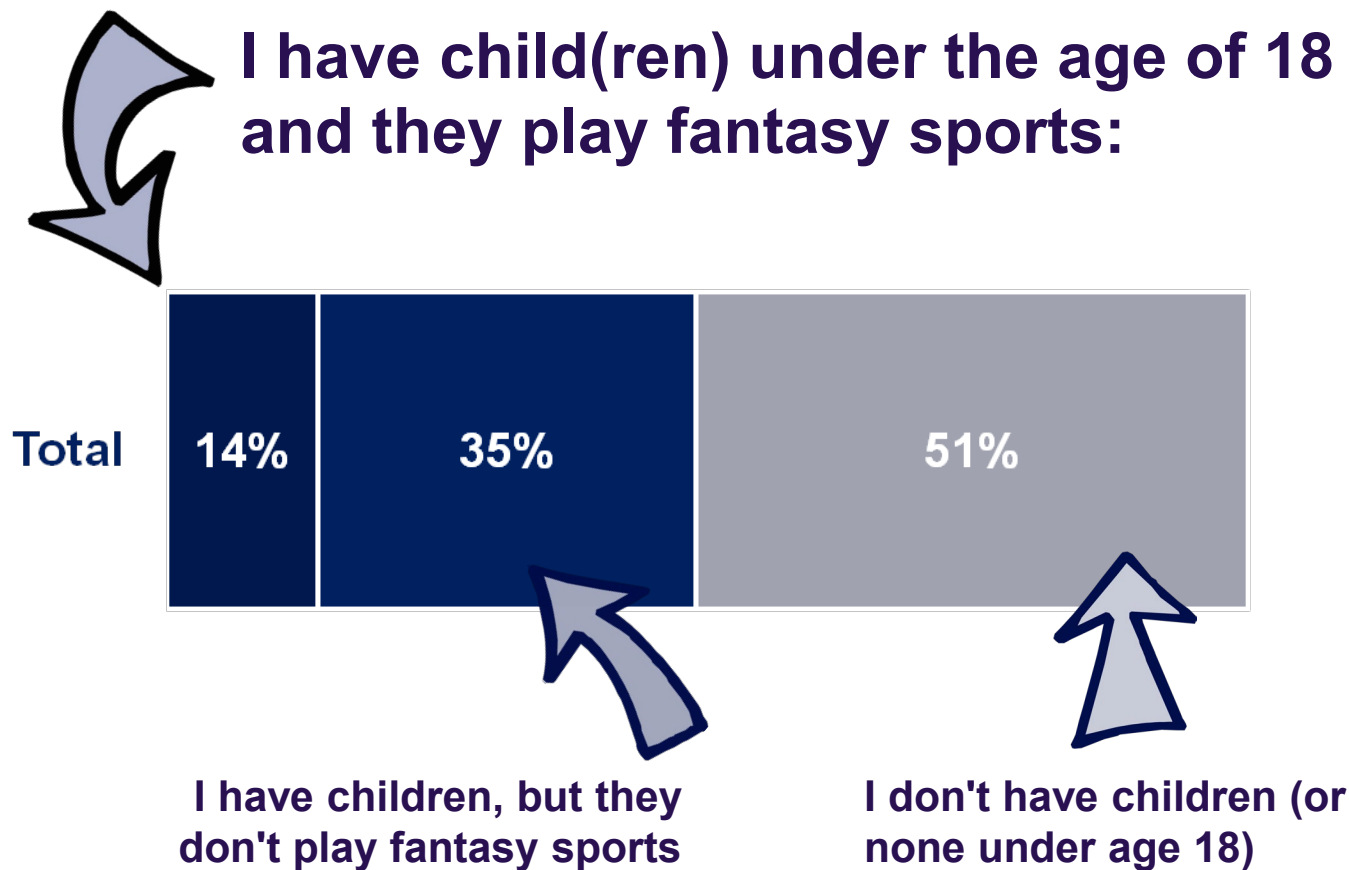


Fantasy Sports Play by Children of Fantasy Sports Players **(APPENDIX SLIDES)**



Children in Household Who Play Fantasy Sports

- With a similar number of kids playing fantasy sports as their adult counterparts (this is confirmed by some of our teen research), it is a good bet that fantasy sports will continue to have a market in the United States similar to its current size moving forward.

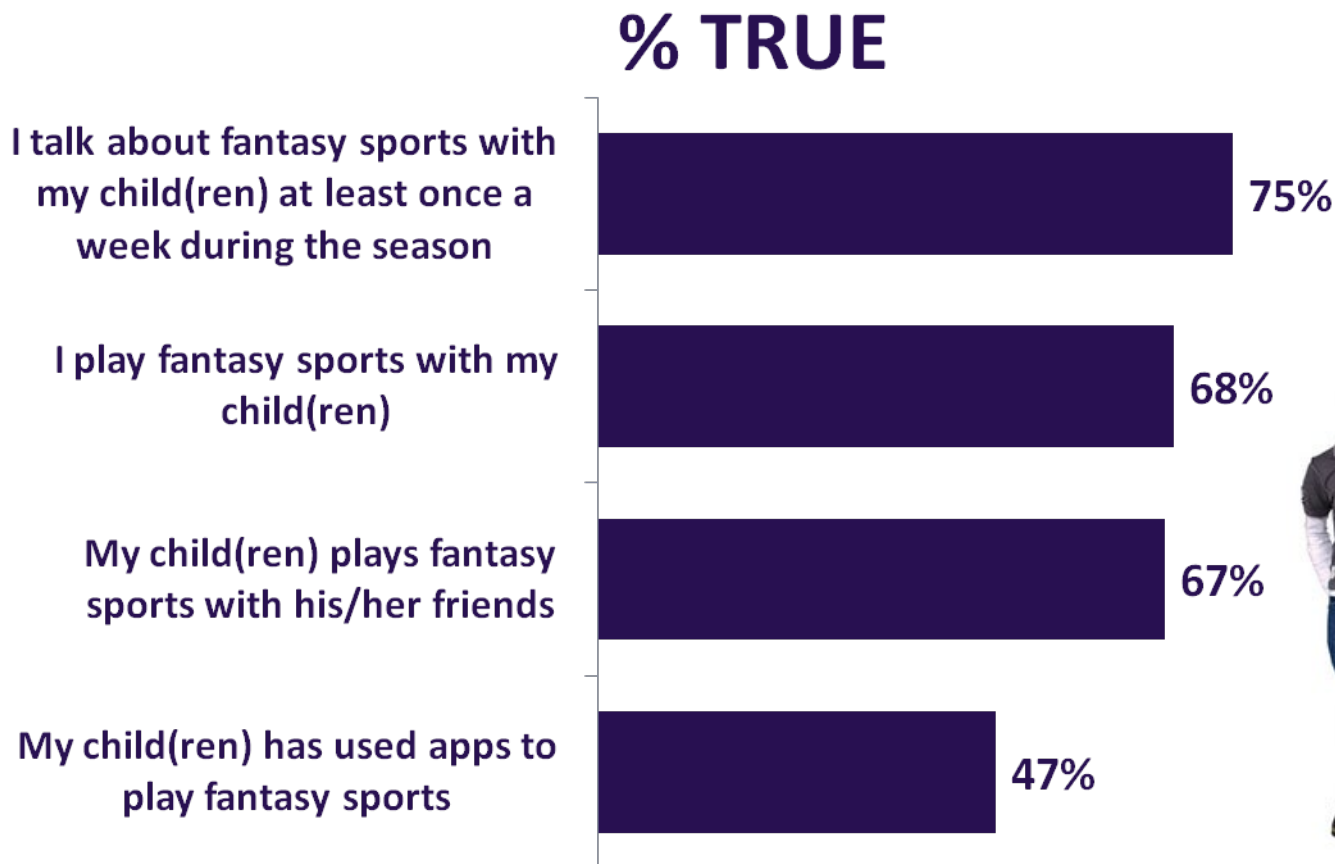


Q15. Please read the following list of statements about fantasy sports and select the one that best describes you. Please select one.

Base: All Respondents n=526

Fantasy Sports and Children

- Among parents who have kids who play fantasy sports, it appears to be a good way for them to “connect” with their kids.

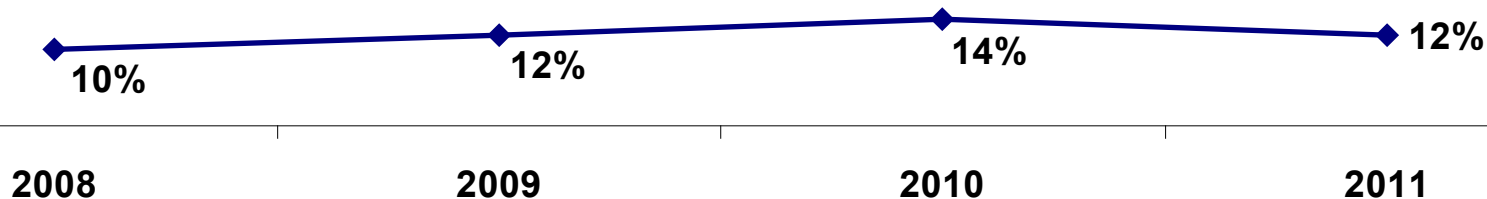
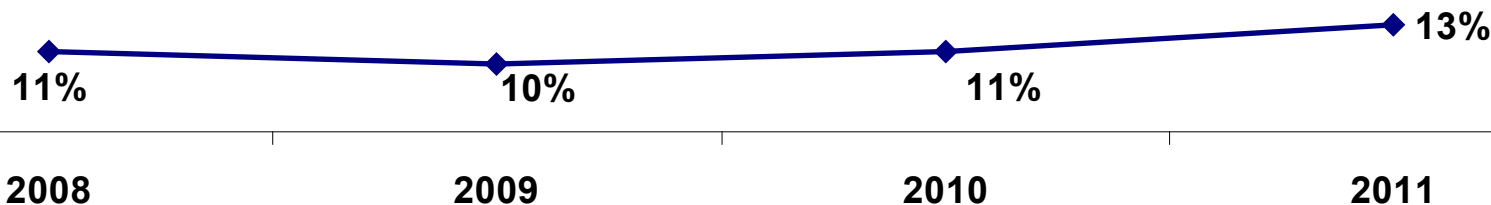


Q16. [SUMMARY - TRUE] You indicated that you have children under age 18 that play fantasy sports. To the best of your knowledge, please indicate if each of the following statements are true or false. **Base: Have child(ren) under the age of 18 and they play fantasy sports n=76* (*small base)**

Phase One: Incidence of Fantasy Sports Participation **(APPENDIX SLIDES)**



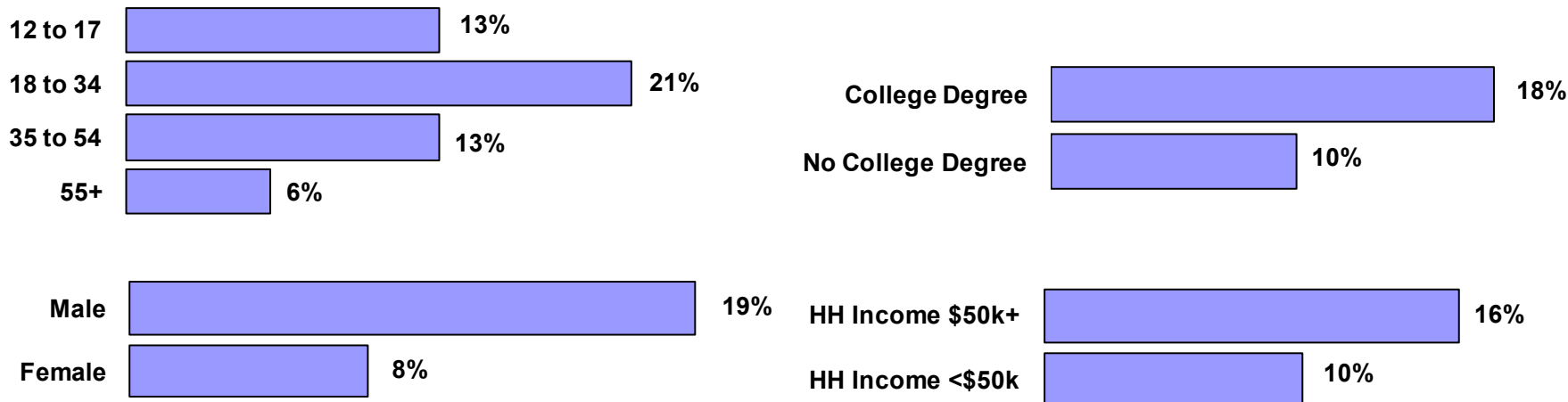
Trended Participation of Fantasy Sports (2008-2011)



- 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%.

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)

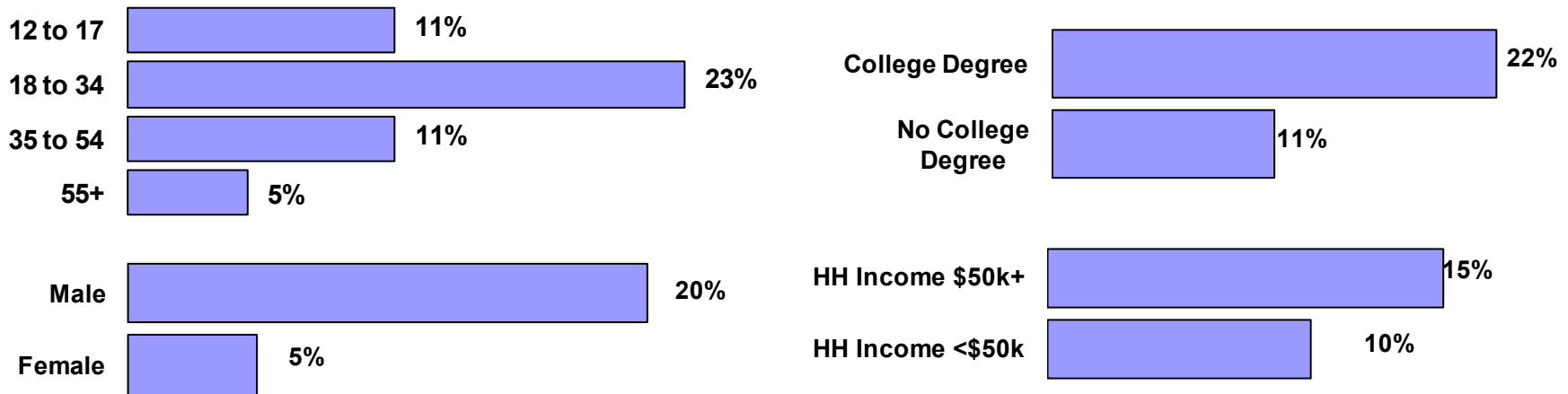
• The correct way to read these is to add the word “among” before reading. Example: “Among 12-17 year olds, 13% are playing fantasy sports” or “among the college educated 18% are playing fantasy sports”.

• 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.

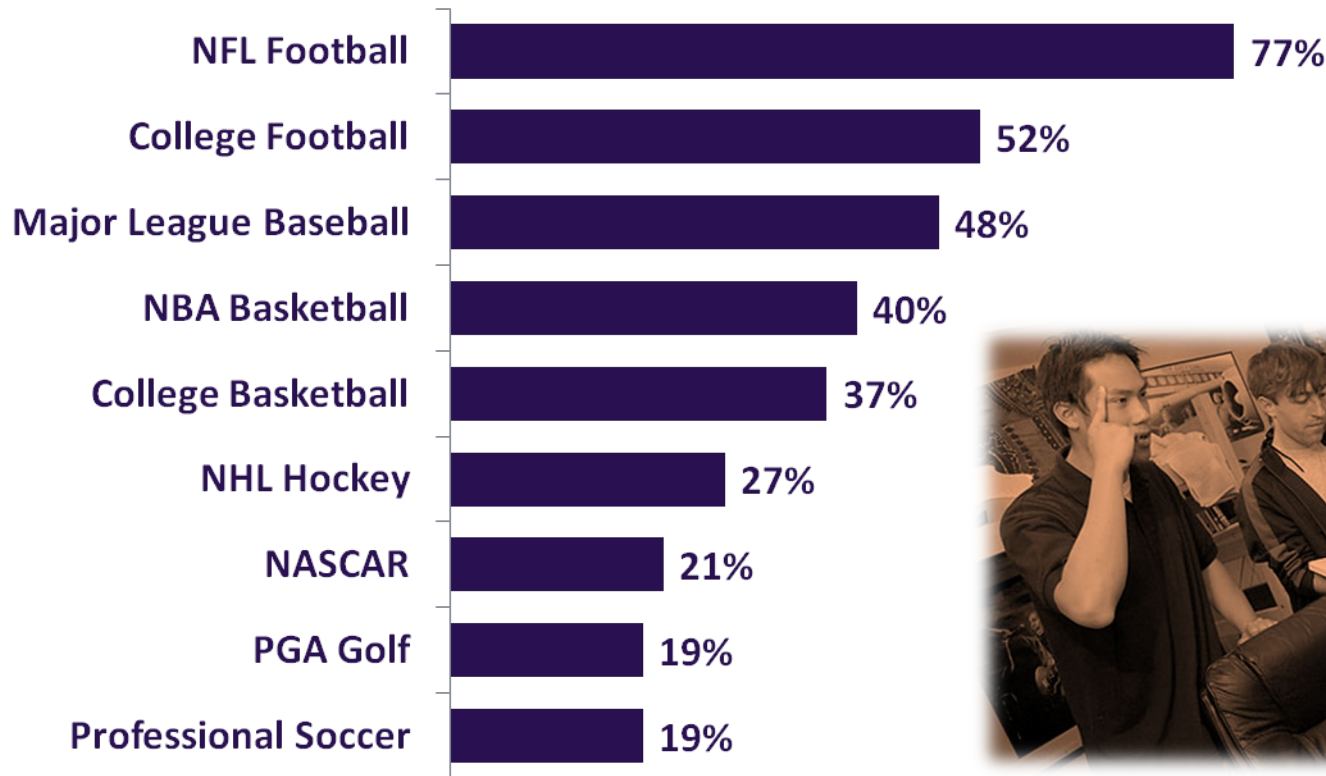
(APPENDIX SLIDES)



Level of Interest in Sports overall (Not Fantasy)

- Fantasy sports players are most interested in NFL football. The second most popular sport is college football.
 - This suggests that perhaps college fantasy football may have some future growth potential.

Total – Top 2 Summary

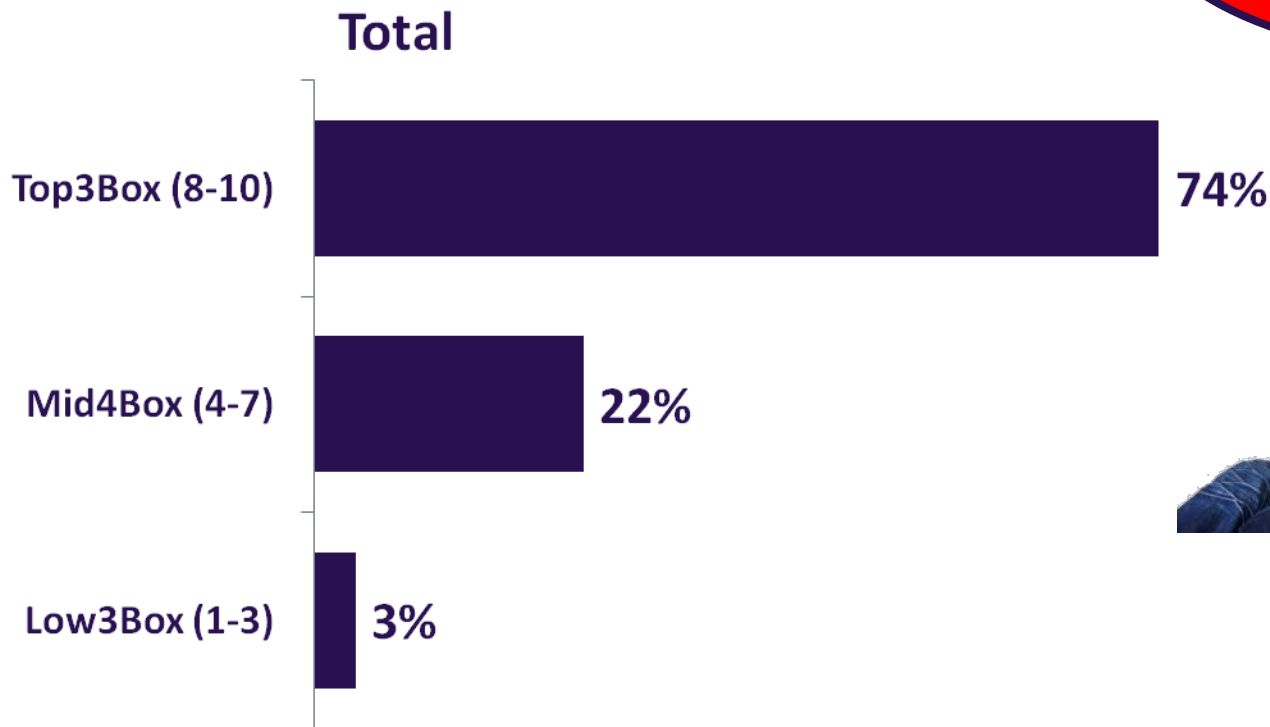


Q1A. [SUMMARY - TOP2BOX (6-7)] Now, thinking about your interest in sports as a general fan. For each of the following sports, please rate how interested you are in these sports using a scale from 1 to 7 with 1 meaning you are not at all interested and 7 meaning you are extremely interested in these sports.

Base: All Respondents n=526

Enjoyment Level of Fantasy Sports

- It can be easily said that fantasy sports are played because people like them.
 - They are rated from 8-10 74% of the time.



34%
Like Fantasy Sports
Very Much
(Give a score of 10 out of 10)



Q5. When you play fantasy sports, how much do you enjoy it? On a scale of 1 to 10, where 1 is "do not like fantasy sports at all" and 10 is "like it very much", how much do you like fantasy sports? (Select one)

Base: All Respondents n=563

App Use for Fantasy Sports (APPENDIX SLIDE)



-
- A word cloud of sports-related terms in red and blue. The words are arranged in a circular pattern, with 'Updated' and 'Players' being the largest. Other prominent words include 'Information', 'Statistics', 'Projections', 'News', 'Full-Access', 'Injury-Updates', 'Free-Agents', 'Automatic-Alerts', 'Research', 'Manage', 'Team', 'Free-Low-Cost', 'Detailed', 'Live', 'Site', 'Available', 'Scores', 'Lineups', 'Standings', 'Notifications', 'Recommendations', 'Latest', 'All-Fantasy-Teams', 'All-Features', 'Together', 'Sports', 'Accurate', 'Game', 'Player', 'Everything', 'One-APP', 'Change', 'Hints', 'Current', 'Advice', and 'Free'. The colors red and blue are used to distinguish different groups of words.

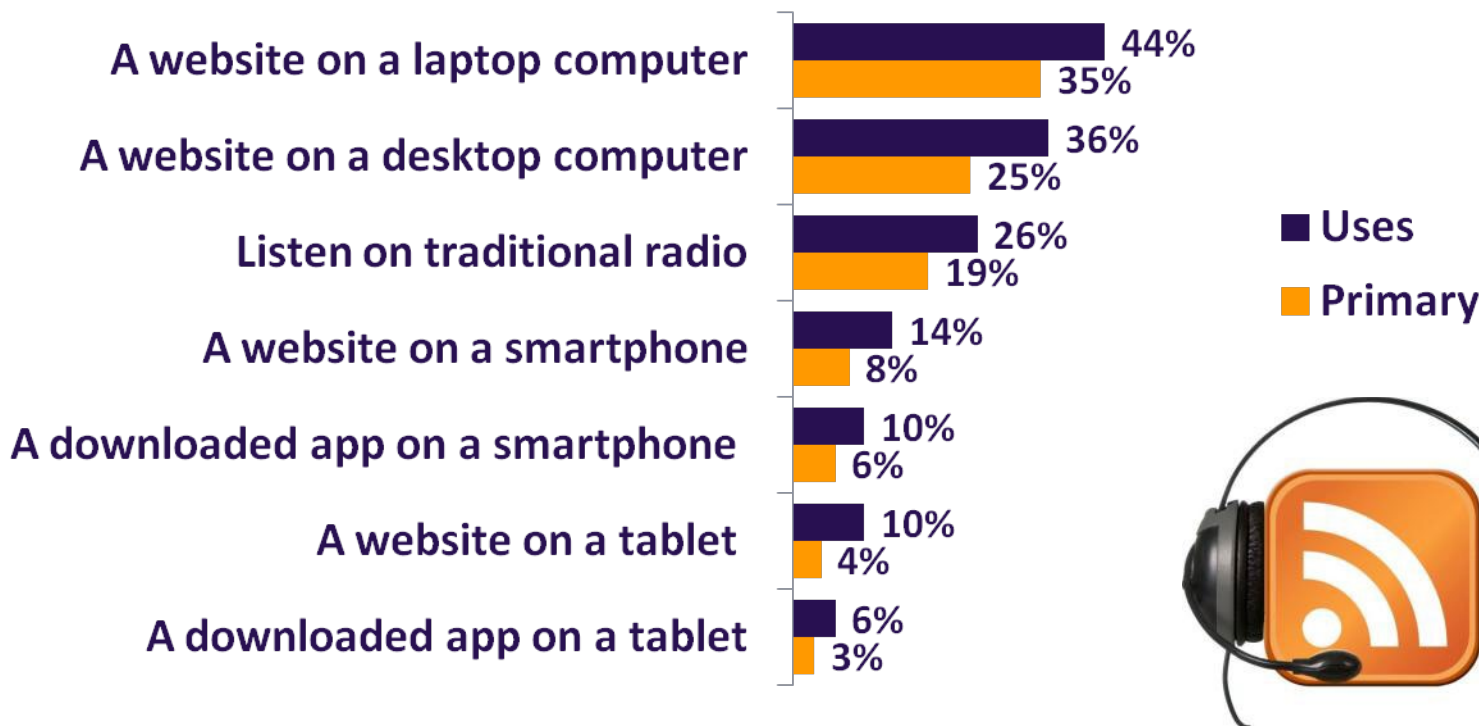
© 2012 Inso

Technology Used for Fantasy Related Activities – BEFORE DRAFT (APPENDIX SLIDES)



- Fantasy players listening to fantasy radio or podcasts before the draft tend to do so through websites on laptops and desktops, as well as by traditional radio.

Listen To Fantasy Sports Radio Shows Or Podcasts

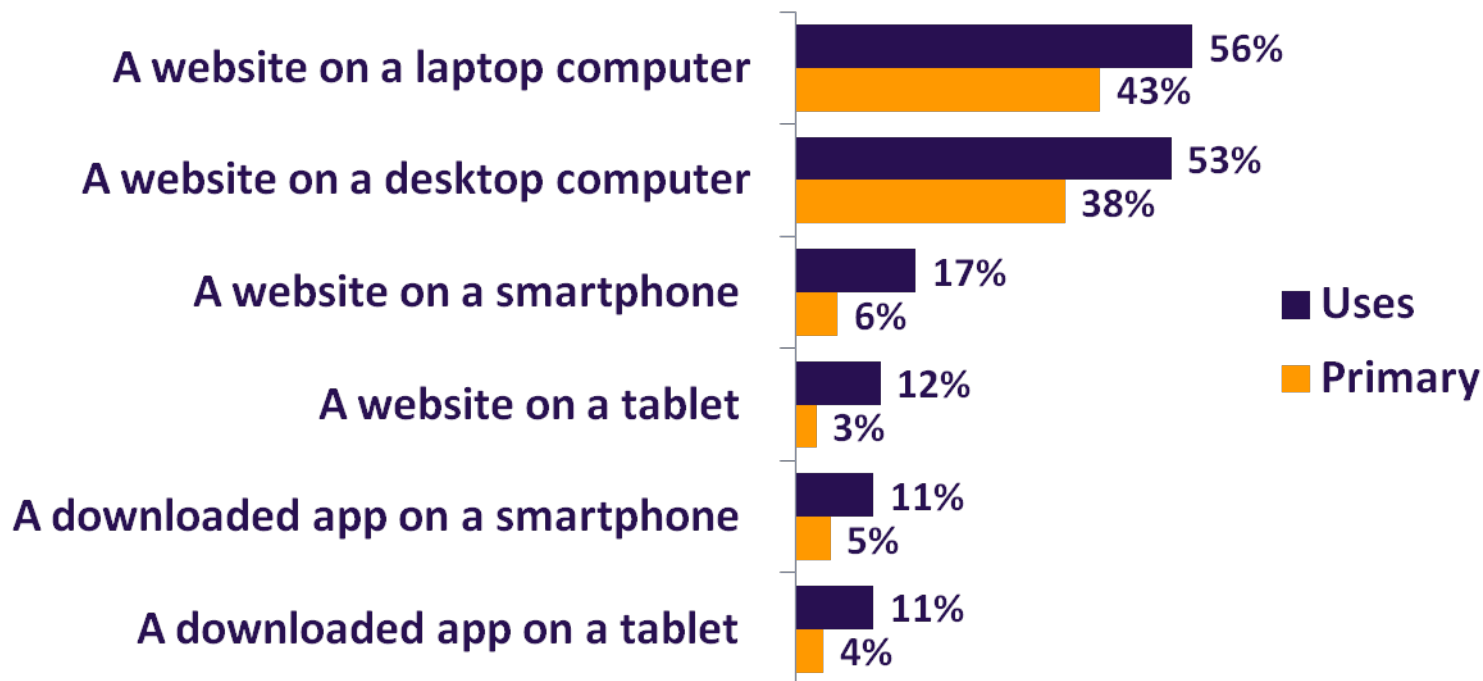


Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft. **Base: Performed to Listen to fantasy sports radio shows or podcasts n=356**

- The majority of fantasy players conduct mock drafts from websites using their laptop or desktop computers.

Conduct Mock Drafts



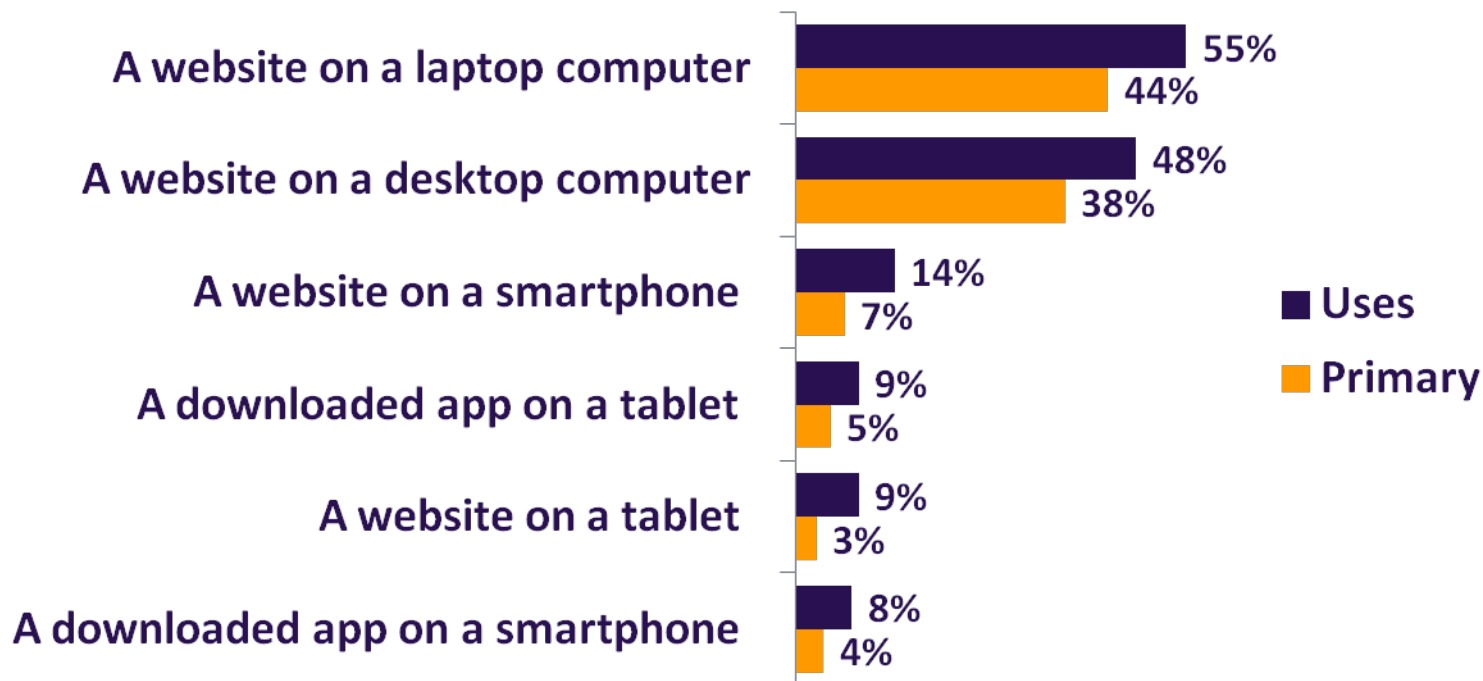
Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Conduct mock drafts n=349

- Of fantasy players downloading draft cheat sheets, about half use websites from their laptops and desktops.
- 14% of players downloading draft cheat sheets use a website through their smartphone.

Download Draft Cheat Sheets



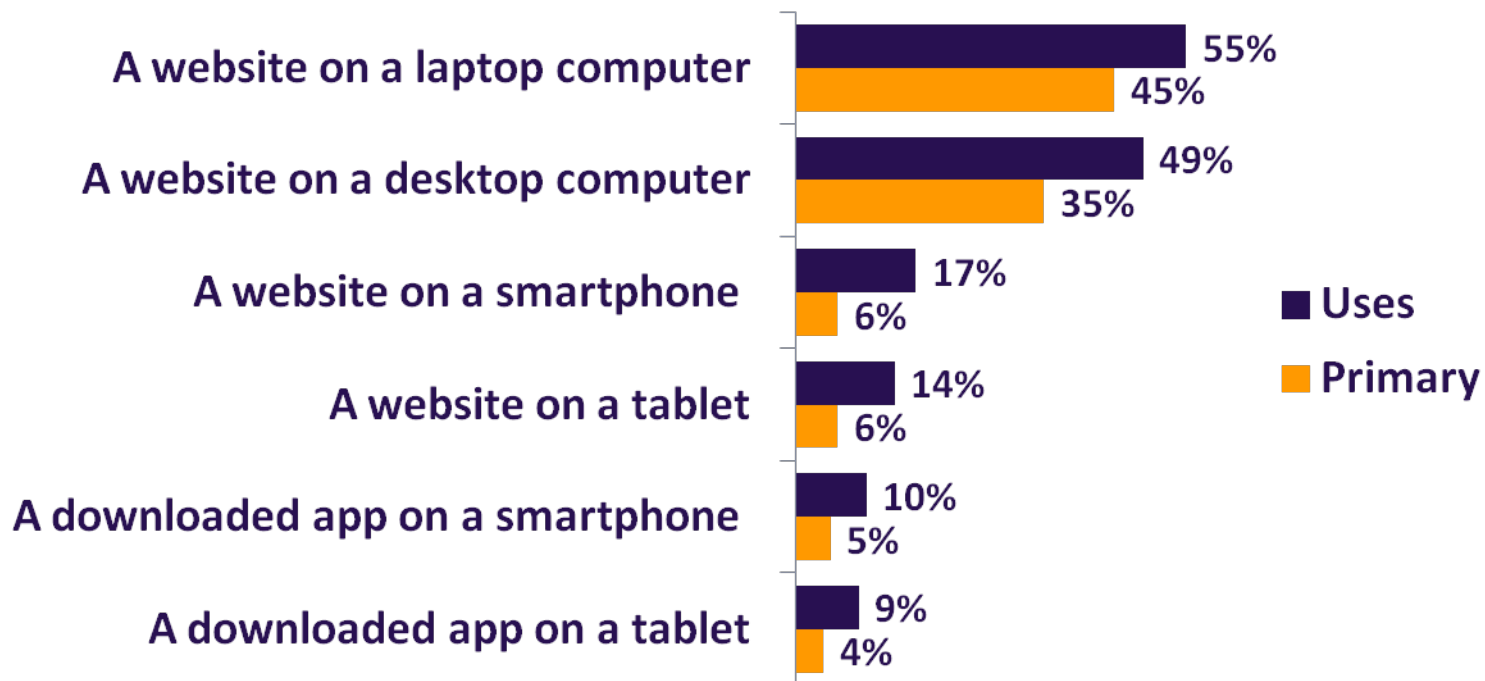
Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Download draft cheat sheets n=333

- Of fantasy players downloading draft analyzer software before the draft, 55% do so through a website on a laptop, 49% by a website on a desktop, and 17% from a website on a smartphone.

Download Draft Analyzer Software



Q6c. Which means do you primarily use to ... in the month leading up to your fantasy season?

Q6b_01. [Conduct mock drafts] You indicated you ... in the month leading up to your draft. Now, please indicate through which of the following means you ... in the month leading up to your draft.

Base: Performed to Download draft analyzer software n=247

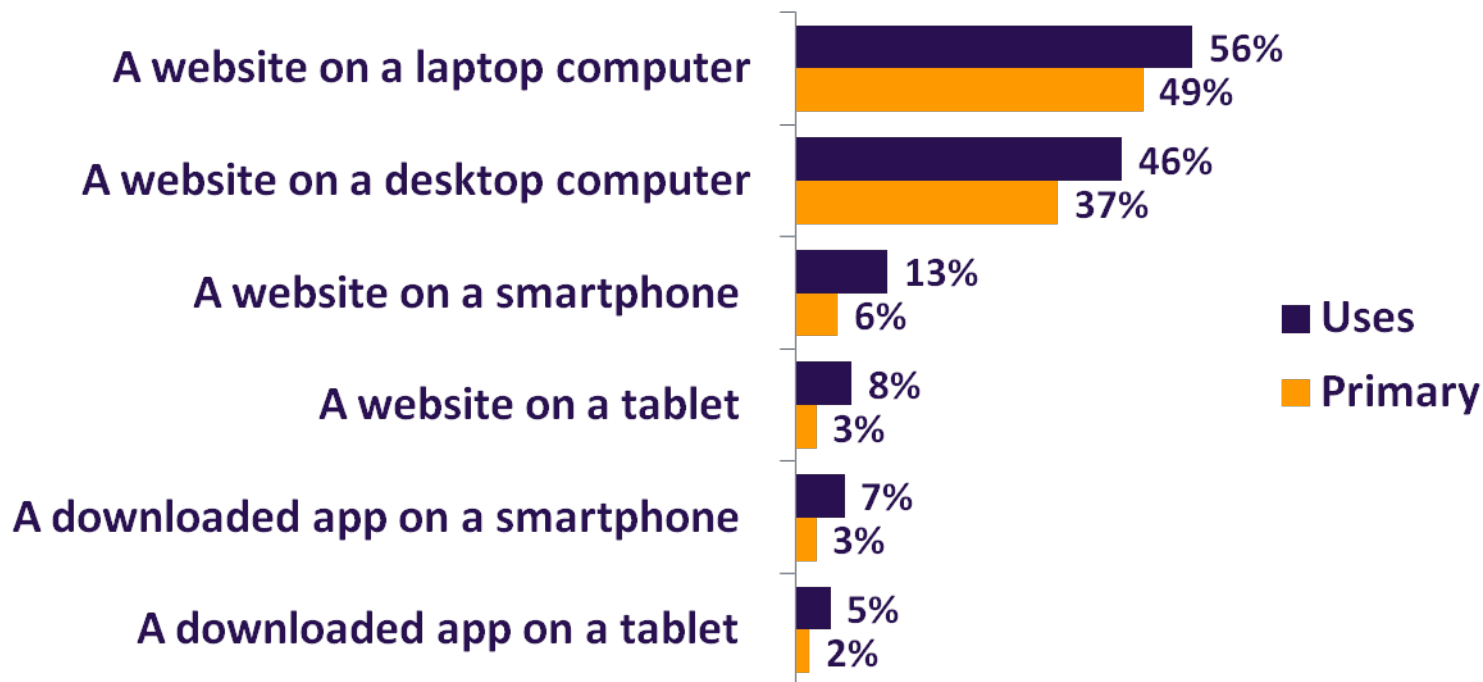
Technology Used for Fantasy Related Activities – DURING SEASON (APPENDIX SLIDES)



Technology Used to Perform Activity DURING Season

- During the season, fantasy players read articles about fantasy sports via numerous technologies, but most commonly through websites on laptops, desktops, and to a lesser degree, smartphones.

Read articles about fantasy sports



Q7b_02. [Read articles about fantasy sports] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.

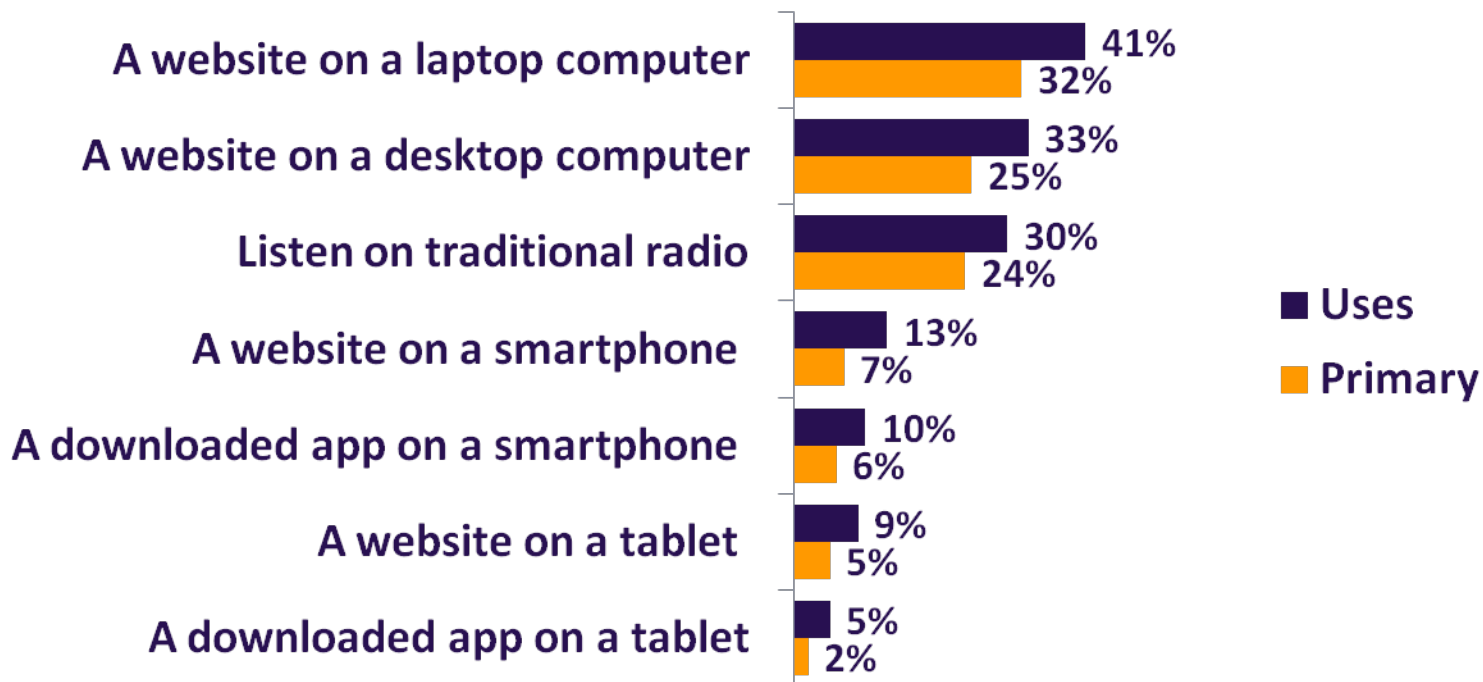
Q7c_02. [Read articles about fantasy sports] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Read articles about fantasy sports n=439

Technology Used to Perform Activity DURING Season

- Websites on laptops and desktops, as well as traditional radio, are the main technologies fantasy players employ to listen to fantasy sports radio shows or podcasts during the season.

Listen to fantasy sports radio shows or podcasts



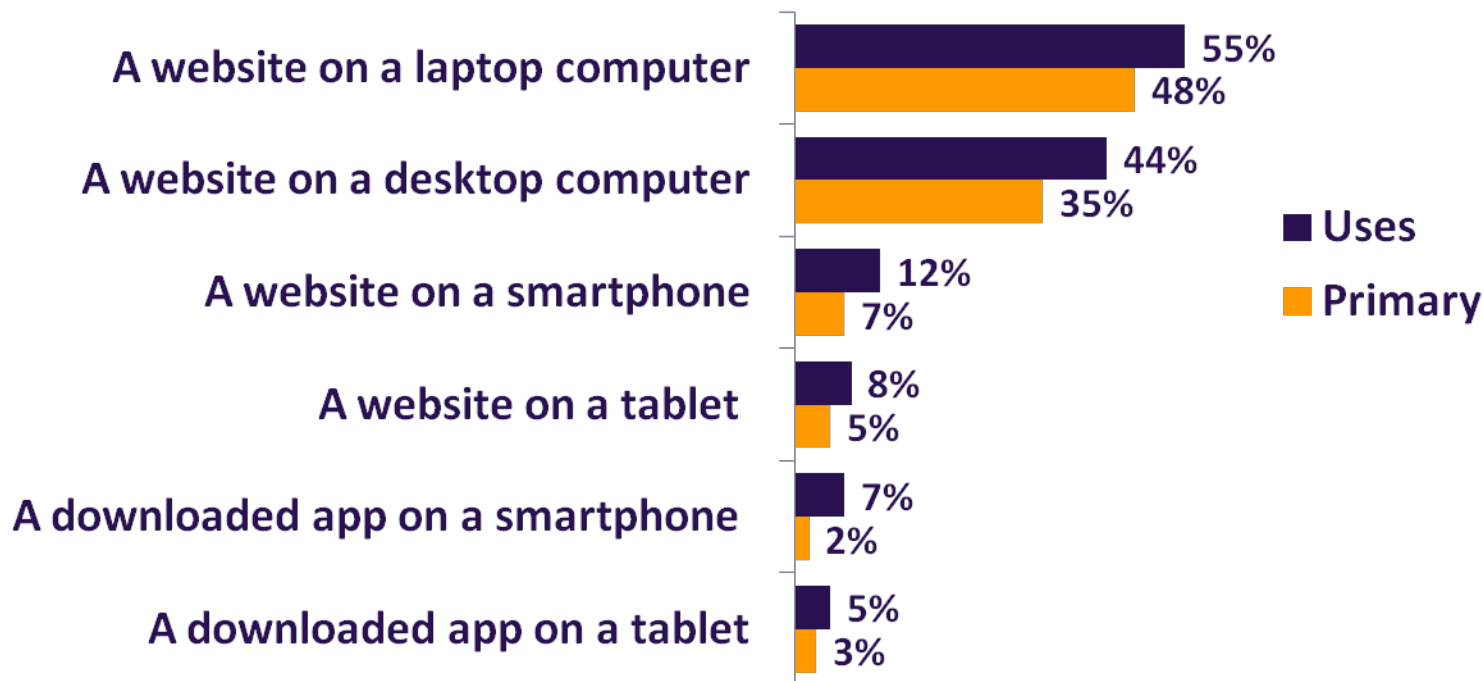
Q7b_07. [Listen to fantasy sports radio shows or podcasts] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.

Q7c_07. [Listen to fantasy sports radio shows or podcasts] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Listen to fantasy sports radio shows or podcasts n=362

- Fantasy sports players most commonly post “trash talk” during the season to other owners via websites on laptops or desktops.

Post Comments or “Trash Talk” to Other Owners



Q7b_09. [Post comments or 'trash talk' to other owners] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.

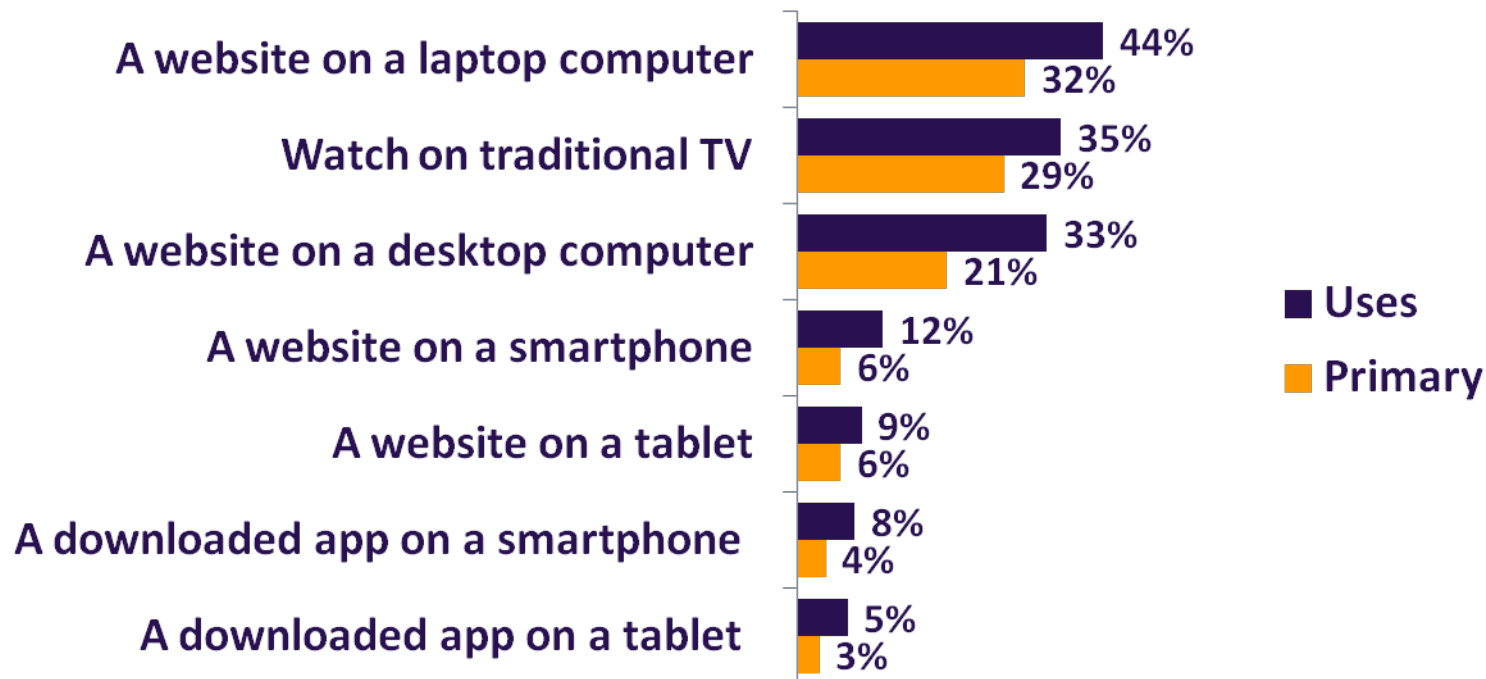
Q7c_09. [Post comments or 'trash talk' to other owners] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Post comments or trash talk n=375

Technology Used to Perform Activity DURING Season

- During the season, fantasy players most often watch fantasy sports shows or videos through websites on their laptops or desktops, or on their regular television sets.

Watch fantasy sports TV or videos (live or on demand)



Q7b_08. [Watch fantasy sports TV or videos either live or on demand] You indicated you ... during your fantasy season. Now, please indicate through which of the following means you ... during your fantasy season.

Q7c_08. [Watch fantasy sports TV or videos either live or on demand] Which means do you primarily use to ... in the month leading up to your fantasy season?

Base: Performed to Watch fantasy sports TV or videos either live or on demand n=390

© 2012 Ipsos. All rights reserved.

This document constitutes the sole and exclusive property of Ipsos. Ipsos retains all copyrights and other rights over, without limitation, Ipsos' trademarks, technologies, methodologies, analyses and know how included or arising out of this document. The addressee of this document undertakes to maintain it confidential and not to disclose all or part of its content to any third party without the prior written consent of Ipsos. The addressee undertakes to use this document solely for its own needs (and the needs of its affiliated companies as the case may be), only for the purpose of evaluating the document for services of Ipsos. No other use is permitted.