

Presentation

Incidence of Fantasy Sports & Sports Betting Participation

June 2021



Leger



KEY OBJECTIVES



Determine the incidence of Fantasy Sports and Sports Betting participation in the U.S., the degree of crossover between the two markets, and any key shifts from 2019.



Explore league participation among Fantasy Players and Sports Bettors, and how that compares to 2019.



Update the key market demographics of a Fantasy Player and Sports Bettor, and how these compare to the general population.

METHODOLOGY



WHERE

United States



TARGET

General
Population
(18+)



**SAMPLE
SIZE**

n=2,005



HOW

Online Survey

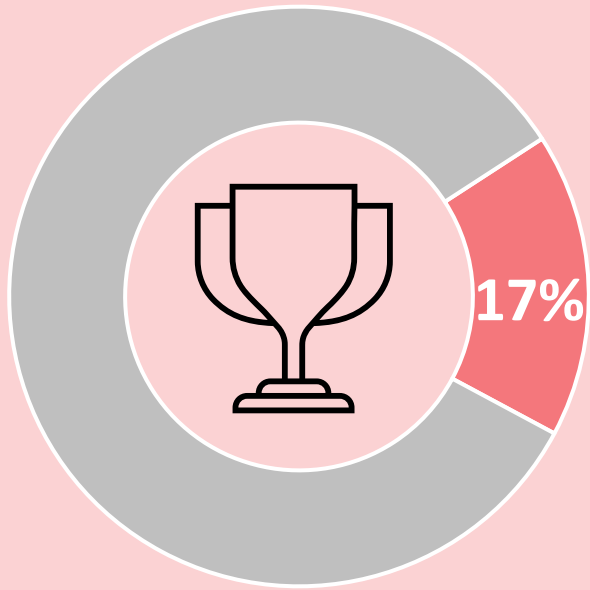


**FIELD
DATES**

May 7 – 16,
2021

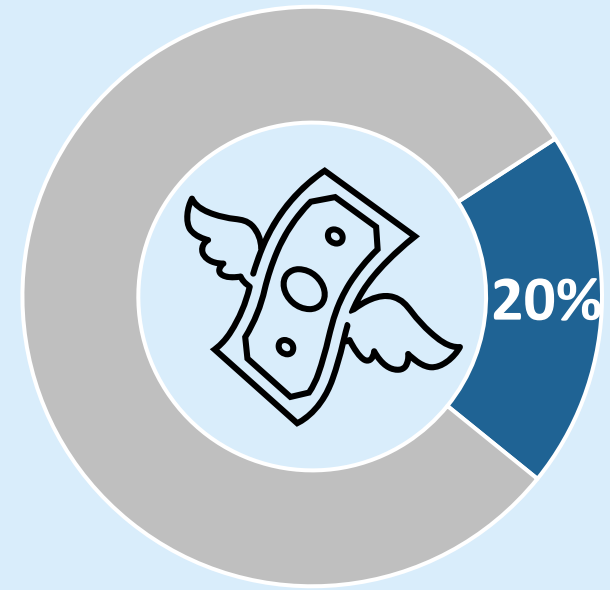
The overall incidence of both Fantasy Sports and Sports Betting remained consistent in the past year, with approximately one-in-five Americans participating in each respective activity.

% Played Fantasy Sports



2019: 19%

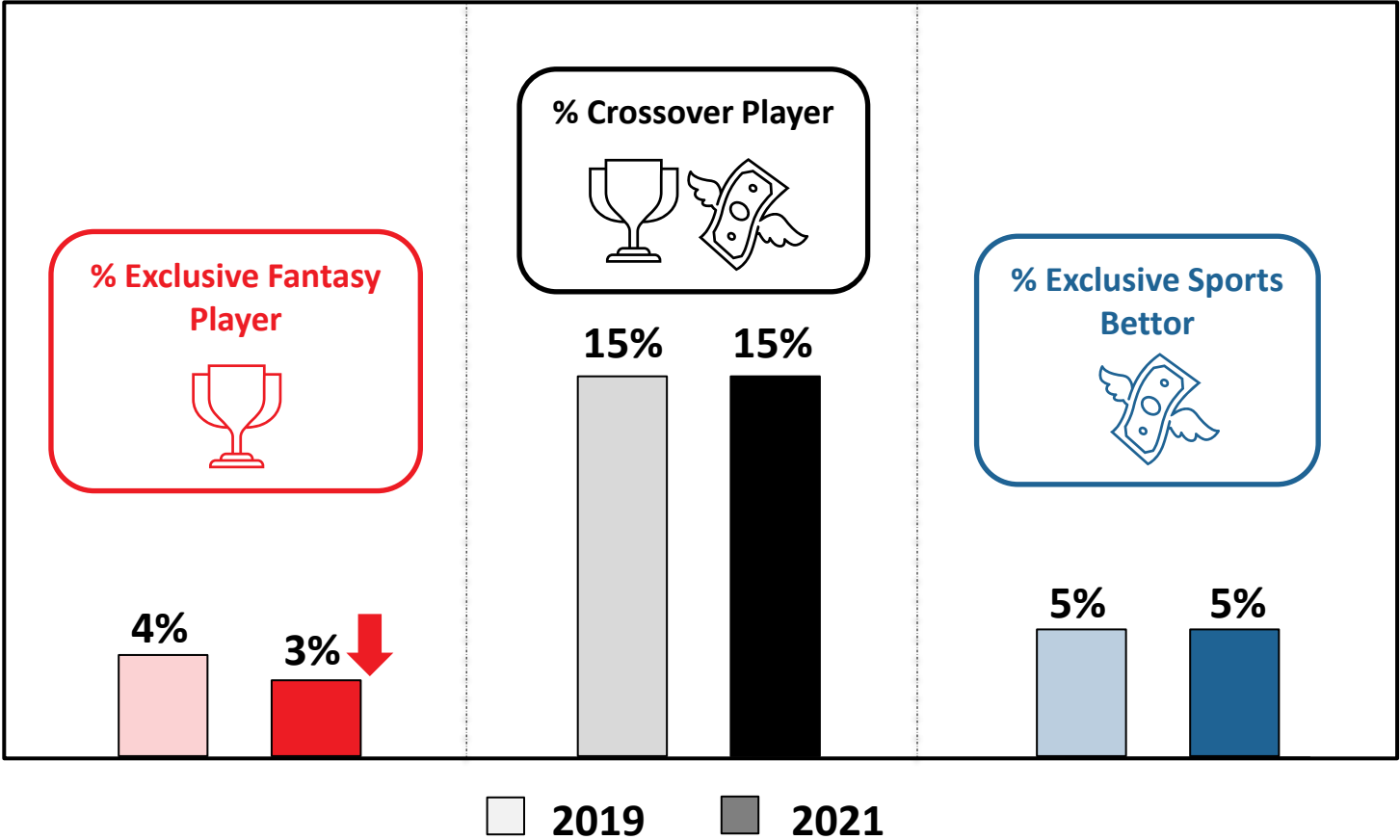
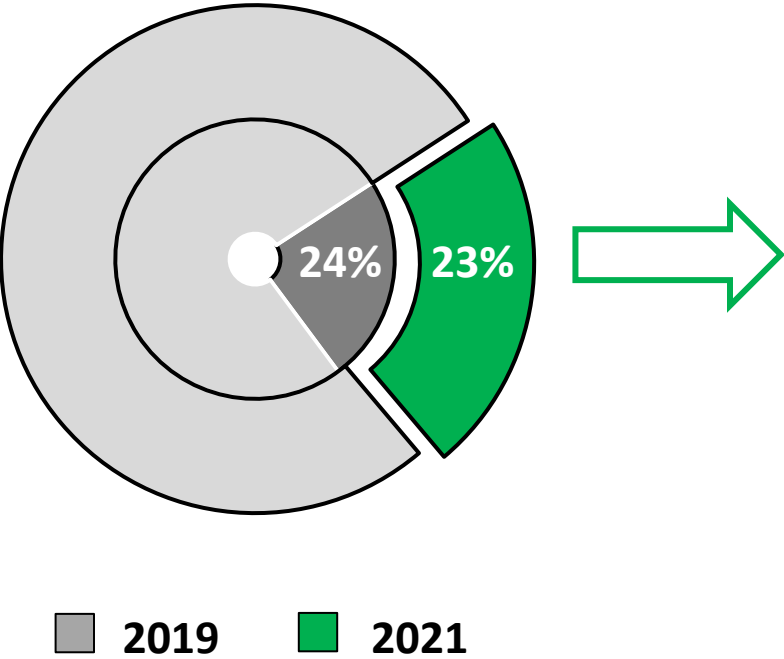
% Bet on Sports



2019: 19%

While overall incidence was consistent for Fantasy, the proportion of Americans who are Exclusive Fantasy Players has declined since 2019.

% Either a Sports Bettor or Fantasy Player

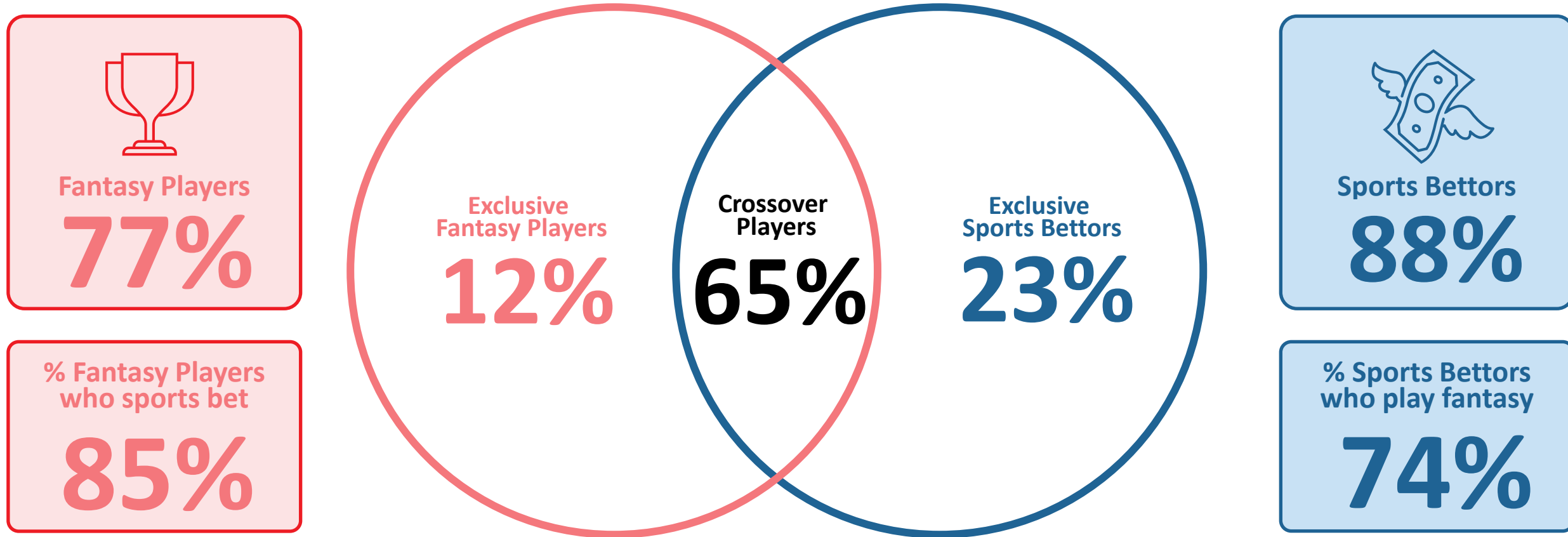


Base: General Population (18+) (n=2,005)

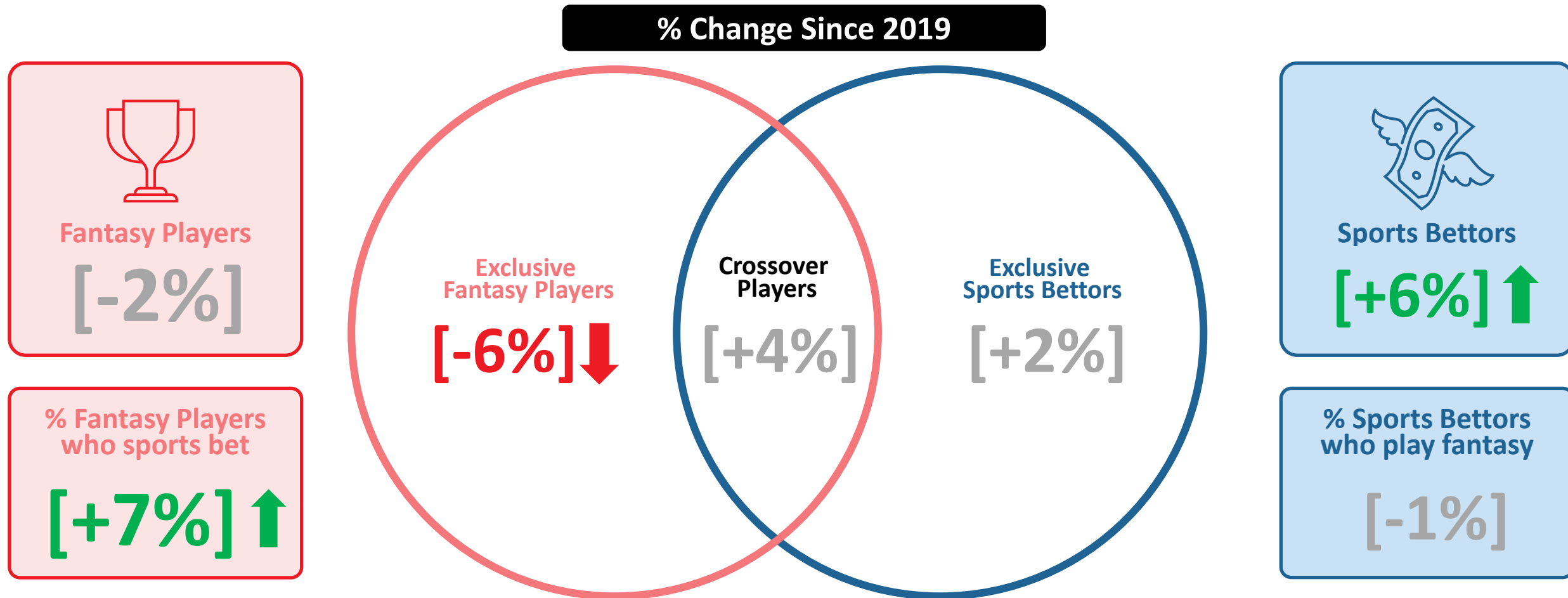
↑↓ Significantly higher/lower than the 2019 result.

Among the Fantasy/Sports Betting market participators, the majority (65%) participated in both Sports Betting and Fantasy Sports this past year.

% of Fantasy Sports or Sports Bettors who are...



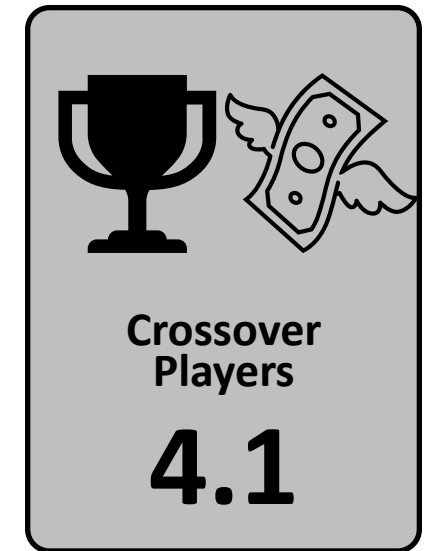
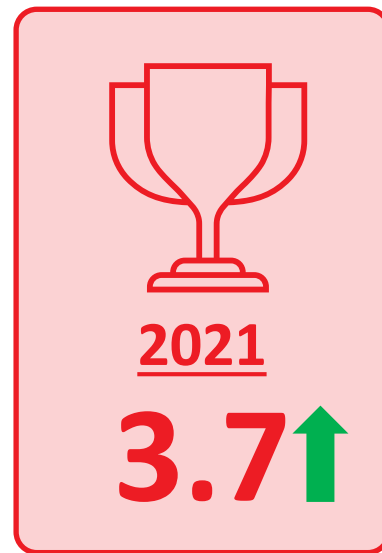
The decrease in the Exclusive Fantasy Players segment has driven up the representative proportion of Fantasy Players who bet, and the share of Sports Bettors within the Fantasy/Sports Betting market.



Compared to 2019, Fantasy Players on average participated in Fantasy across more sports/sports leagues this past year.

AVERAGE # OF FANTASY SPORTS/SPORTS LEAGUES PARTICIPATED IN

All Fantasy Players



Exclusive Fantasy Players continued to exhibit relatively “casual” involvement in Fantasy in 2020, with several only participating in one sport.

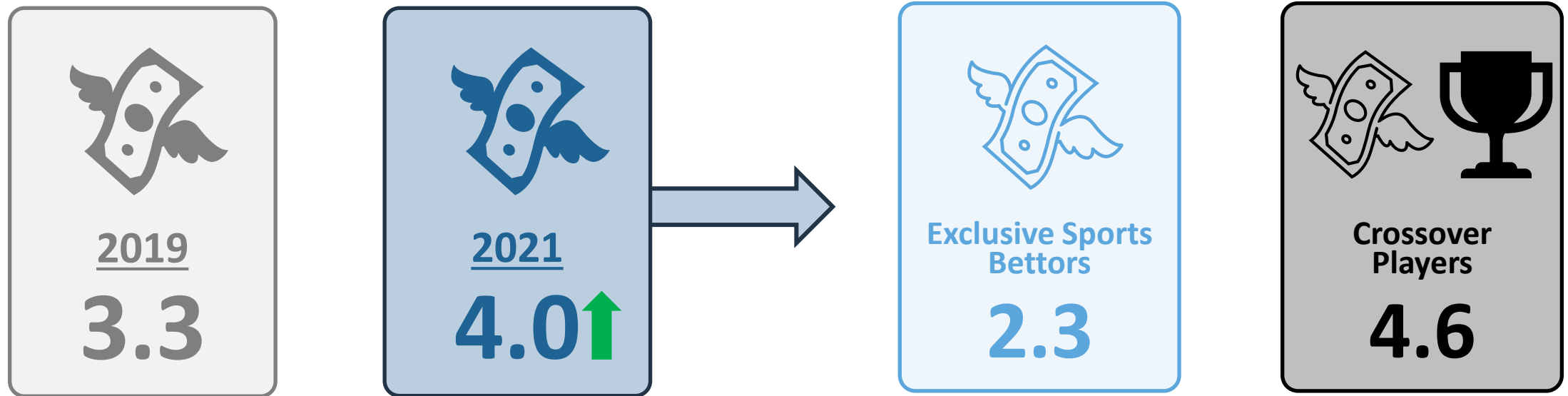


Significantly higher/lower than the 2019 result. Note for this metric, comparisons to 2019 Exclusive Fantasy and Crossover Players results were not available.

Similar to Fantasy, Sports Bettors on average also increased their participation spread across different sports/leagues throughout the past year.

AVERAGE # OF SPORTS/SPORTS LEAGUES BET ON

All Sports Bettors



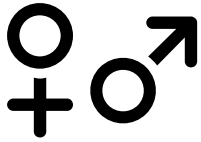
Base: Sports Bettors (n=399)



Significantly higher/lower than the 2019 result. Note for this metric, comparisons to 2019 Exclusive Bettors and Crossover Players results were not available.

The Fantasy Sports/Betting market continues to skew towards the younger, higher income, well-educated, full-time employed male segments of America.

GENDER

		Gen Pop	Sports Bettors	Fantasy Players
	Male	48%	72%	80%
	Female	52%	28%	20%

AGE

		Gen Pop	Sports Bettors	Fantasy Players
	Average age	46.7	39.5	38.8
	18 to 39	39%	67%	71%
	40 to 64	44%	28%	24%
	65+	17%	6%	6%

EDUCATION

		Gen Pop	Sports Bettors	Fantasy Players
	HS or less	38%	27%	24%
	College +	61%	73%	76%

HH INCOME

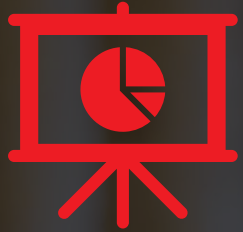
		Gen Pop	Sports Bettors	Fantasy Players
	<\$50K	47%	34%	33%
	\$50K to <\$100K	32%	42%	43%
	\$100K+	15%	24%	23%

EMPLOYMENT

		Gen Pop	Sports Bettors	Fantasy Players
	Full-time	42%	70%	70%
	Part-time	12%	10%	9%
	Retired/ homemaker	22%	8%	6%
	Student	3%	3%	2%
	Unemployed	20%	9%	10%

 Significantly higher/lower than the general population.

KEY TAKEAWAYS



Overall, the size of the Fantasy Sports and Sports Betting markets have remained consistent between now and 2019, with nearly one-in-four Americans participating in at least one of the activities.



The past year saw a decline in the Exclusive Fantasy Players segment, in turn driving up the proportion of Fantasy Players who are Sports Bettors, and the cross-market share of Sports Bettors.



Among those who continued participating, Fantasy Players and Sports Bettors alike increased the spread of sports/sports leagues they participated in within their respective activity.



Both Fantasy Players and Sports Bettors continue to skew towards the younger, higher-income, higher-employment, higher-education, male demographics of the U.S.

QUESTIONS?

